

MUSIC BUSINESS SUPPORT PROGRAMME EVALUATION – FINAL



1st June 2017

MUSIC BUSINESS SUPPORT PROGRAMME

EVALUATION – FINAL

CONTENTS

	Page
EXECUTIVE SUMMARY	i
1. INTRODUCTION AND BACKGROUND.....	1
1.1 Introduction	1
1.2 The Northern Ireland Music Industry Strategy.....	1
1.3 The Music Business Support Programme (MBSP)	2
1.4 MBSP Extension Period (July 2016 to March 2017)	5
1.5 Evaluation Methodology	6
2. STRATEGIC CONTEXT, MARKET CONTEXT & RATIONALE.....	8
2.1 Introduction	8
2.2 Original Rationale and Strategic Context.....	8
2.3 Market Context.....	8
3. PROGRAMME MANAGEMENT & DELIVERY	10
3.1 Introduction	10
3.2 Management and Governance	10
3.3 Marketing and Promotion.....	11
3.4 Programme Activity: July 2013 to June 2016	11
3.5 MBSP Extension Period (July 2016-March 2017)	16
3.6 Other Aspects of Programme Delivery	19
3.7 Summary Conclusions.....	21
4. PARTICIPANTS' PROFILE, SATISFACTION WITH, & VIEWS OF, THE MBSP	22
4.1 Introduction	22
4.2 Participants' Recollection of the MBSP Support	22
4.3 Participant Profile.....	22
4.4 Participant Satisfaction.....	26
4.5 Participants' Recommendations	27
5. MBSP's IMPACT	28
5.1 Introduction	28
5.2 Influence on Undertaking Activities (Activity Deadweight).....	28
5.3 Nature and Extent of Market Failure.....	30
5.4 Assessment of Business Outcomes	30
5.5 Calculation of Net Additional Impacts.....	38
5.6 Anticipated Impacts	40
5.7 Reasons for No Actual or Anticipated Tangible Impacts	42
5.8 Non-Monetary Benefits	43
5.9 Duplication	47
5.10 Summary Conclusions	48

6. STAKEHOLDER FEEDBACK	49
6.1 Introduction	49
6.2 Need for the MBSP	49
6.3 Management and Delivery of the Programme.....	50
6.4 Operational Fit and Complementarity	50
6.5 Programme Impacts.....	51
6.6 Recommendations for Future Support.....	51
6.7 Summary Conclusions.....	51
7. PROGRAMME FINANCE.....	52
7.1 Introduction	52
7.2 GVA Return-on-Investment	53
8. ACHIEVEMENT OF OBJECTIVES.....	54
8.1 Activity and Outcome Objectives	54
8.2 Social and Educational Objectives	56
9. BENCHMARKING	57
9.1 Introduction	57
9.2 Summary Conclusions.....	58
10. CONCLUSIONS & RECOMMENDATIONS.....	59
10.1 Conclusions	59
10.2 Recommendations	62
11. A POTENTIAL FUTURE DIRECTION?	64

APPENDICES

I Evaluation Requirements
II Detailed Survey and Reliability Analysis
III Strategic Context
IV Music Industry Market Overview
V MBSP Marketing and Promotion
VI Detailed Description of Programme Initiatives
VII Partnership Working
VIII Participant Satisfaction –3-Year MBSP (July 2013 – June 2016)
IX Participant Satisfaction – 9-Month Extension MBSP (July 2016 – March 2017)
X Monetary Impact Analysis Methodology
XI Impact Analysis
XII Nature and Extent of Market Failure
XIII Benchmarking Analysis

This report has been prepared for, and only for the Department for Communities and Invest NI and for no other purpose. Cogent Management Consulting LLP does not accept or assume any liability or duty of care for any other purpose or to any other person to whom this report is shown or into whose hands it may come save where expressly agreed by our prior consent in writing.

Glossary of Abbreviations and Terms

Abbreviation	Definition
AIM	Association of Music Producers
Amateur	Individuals who engage in the music industry on an unpaid basis.
A&R	Artist and Repertoire
Arts Council NI	Arts Council of Northern Ireland
Aspirant	Individuals who are not yet actively engaging in the music industry, but wish to do so in future.
AVA	Audio-Visual Arts
BCC	Belfast City Council
BPI	British Phonographic Institute
CIF	Creative Industry Finance
DCAL	Department of Culture, Arts and Leisure
DCMS	Department for Culture, Media and Sport
DEL	Department for Employment and Learning
DfC	Department for Communities
DfE	Department for the Economy
DIY	Do-It-Yourself
EA	Economic Appraisal
EDM	Electronic Dance Music
EDO	External Delivery Organisation
FE	Further Education
FTE	Full-time Equivalent
GVA	Gross Value Added
HE	Higher Education
IFPI	International Federation of the Phonographic Industry
IMRO	Irish Music Rights Organisation
Invest NI	Invest Northern Ireland
IP	Intellectual Property
JTD	Joining the Dots
MBSP	Music Business Support Programme
MFP	Music Futures Programme
MIDEM	Marché International du Disque et de l'Edition Musicale
MU	The Musicians' Union
NEET	Individuals Not in Education, Employment or Training
NI	Northern Ireland
NITB	Northern Ireland Tourism Board
ONS	Office for National Statistics
PfG	Programme for Government
PR	Public Relations
Professional	Individuals who earn all of their income from the music industry.
PRS for Music	Performing Right Society for Music
QUB	Queen's University Belfast
RoI	The Republic of Ireland
ROI	Return-on-Investment
Semi-Professional	Individuals who earn at least part of their income from the music industry.
SMART	Specific, Measurable, Achievable, Realistic and Time-bound
SIC	Standard Industrial Classification
SXSW	South by Southwest
ToR	Terms of Reference
UK	United Kingdom
UKTI	UK Trade and Investment
US	United States

EXECUTIVE SUMMARY

Introduction

The Department for Communities (DfC) (formerly the Department of Culture, Arts and Leisure (DCAL)) and Invest Northern Ireland (Invest NI) developed a Strategy for the Northern Ireland (NI) Music Industry¹ ('the Strategy') in 2011.

At the centre of the Strategy, was a Music Business Support Programme (MBSP or 'the Programme') which sought to provide a range of support activities contributing to the development of a more creative and vibrant music industry. It was envisaged that the MBSP would build effective partnerships and collaborations across the private and public sectors to extend the reach of available support, particularly around events, marketing, business support and skills development.

The rationale for the MBSP was primarily predicated on the basis of the strategic importance of the music sector to the NI economy and wider society and the need for government intervention to provide continuity of support to the development of the sector.

DfC and Invest NI have commissioned Cogent Management Consulting LLP ('Cogent' or the Evaluation Team) to undertake an independent evaluation of the MBSP, covering both the 3-year and 9-month extension periods.

Programme Implementation and Delivery

An Economic Appraisal (EA) was undertaken of the MBSP in 2012² and, a preferred option identified. The preferred option over the initial 3-year period identified total anticipated costs of £739,800 (inclusive of VAT). Subsequently, following an open procurement process, Generator NI was appointed as the external delivery organisation ('the EDO' or 'the delivery agent') for the development and delivery of the Programme.

In June 2016 CPD approved a 9-month extension to the contract awarded to the EDO, which results in an increase in the original programme budget of £160,000 to cover the extension period. Invest NI and DfC have each provided 50% of the total budget, including for the extension period.

Over the initial 3-year period (July 2013- June 2016) and an additional 9-month extension period (July 2016 to March 2017), the MBSP comprised of four key and distinct strands of support, as follows:

Activity Strand	Summary of Key Objectives and Progress against Targets
Seminars and Events	<p>The aim of this strand was to promote networking and industry development, through the development and delivery of a series of Seminars and Events that covered a range of subjects pertinent to the music industry such as IP protection, music management, songwriting and digital marketing.</p> <p>Activity included one-off events, as well as large-scale music conferences comprising multiple seminars (in particular, the Output Conferences). Where possible, the EDO invited industry-leading experts to present. Seminars and Events were attended by music businesses, artists, academics, music industry representatives and businesses from the convergent sectors (such as screen, digital content and gaming).</p> <p>Across both the initial 3-year period and the additional 9-month extension period, the EDO has recorded that there were 3,723 attendances at 87 Seminars/Events, against a cumulative target of 3,000 attendances at 28 Seminars/Events.</p>

¹ Music Industry Strategy for Northern Ireland (Ekos and Grant Thornton, September 2011)

² KPMG (2012) 'Economic Appraisal of the Music Business Support Programme on behalf of Invest NI and DCAL'

Mentoring	<p>The Mentoring strand provided mentoring, support, advice and signposting for aspiring and established artists and businesses on a range of industry matters as required (e.g. opportunities in specific areas such as marketing and PR, licensing, digital distribution, touring and international trade fairs).</p> <p>During the initial 3-year period the Mentoring support was delivered on both a 1-1 and on a group basis, whereas only 1-1 mentoring support was delivered during the 9-month extension.</p> <p>Across both evaluation periods, the EDO delivered 1,028 mentoring sessions to 381 individuals/businesses, against a cumulative target of 750 mentoring sessions and 226 individuals/ businesses.</p>
Market Development	<p>This strand provided beneficiaries with the opportunity to network with influential representatives from the local and international music industry through attendance at a wide range of local, national and international trade and showcasing events. The EDO provided both financial and non-financial support to assist NI music businesses to both attend the events and to avail of the appropriate platforms to raise their profile, which ultimately is key to achieving sales growth.</p> <p>Market development events that were attended included:</p> <ul style="list-style-type: none"> • Amsterdam Dance Event (Netherlands) • NH7 Weekenders/ Horizons (India) • Canada Music Week (Canada) • Reeperbahn (Germany) • Liverpool Sound City (GB) • SXSW (Texas, USA) • Hard Working Class Heroes (RoI) • WOMEX (throughout Europe) <p>Across both evaluation periods, 146 individuals/businesses attended a total of 35 events, against a cumulative target of 79 individuals/businesses and 26 events.</p>
Talent Development	<p>The Talent Development strand targeted creative talents who were ‘tipped for success’ by influential stakeholders and provided a range of 1-1 and group mentoring support, as well as a range of tailored individual development interventions such as support to record a piece of work or to set up a tour. The strand aimed to develop the creative and business skills of the selected talents.</p> <p>In total, 26 artists/businesses received Talent Development support against a cumulative target of 19 artists/businesses.</p>

As reflected in the table above, the EDO was involved in the delivery of an extensive array of activity through the MBSP. In total, over 1,500 unique individuals received support through one or more of the four strands during the initial 3-year period and over 500 unique individuals during the 9-month extension. Almost without exception, the EDO exceeded the activity targets that were established.

In addition to the four key programme strands, the EDO also delivered a range of other social and educational focused activities through the MBSP such as the provision of work placements to young people classified as being NEET and the delivery of a music education symposium and a subsequent music education conference. Whilst such activity was not reflected in the targets that were established for the programme, it reflected a desire to contribute to cross-departmental goals, such as activity that DCAL had been involved in with the Department for Employment and Learning (DEL) (now the Department for the Economy (DfE)).

A further key aspect of the programme’s delivery was the extent to which much of it was delivered through collaborative partnerships with other organisations such as local authorities, the Nerve Centre, Armstrong Learning, Honeycomb Creative Works and PRS for Music. Feedback from strategic stakeholders and many of the individuals involved in these collaborative partnerships indicates that the EDO’s role and contribution added considerable value to their own activities, ensuring a high quality of delivery and facilitating a joined-up approach that might otherwise not have been possible.

A key development in the programme’s evolution came with the induction of the 9-month extension period. Whilst it comprised of the same four strands as the initial 3-year period, it placed a greater focus on creating economic returns by targeting the more intensive forms of support (i.e. Mentoring, Market Development and Talent Development) towards those businesses that the EDO identified as having the greatest potential for growth.

In addition, following the review of the initial 3-year period, it was recognised that there were areas of programme management that could be improved. The EDO subsequently proactively implemented changes to the approach taken to the Mentoring strand to provide greater structure for the participants and to improve its monitoring processes during the 9-month extension period.

Key Conclusions

Key conclusions arising from the Evaluation of the MBSP include the following:

Overarching Conclusion

The evaluation provides strong evidence that across both operational periods the Programme has been successful in helping to achieve its overarching aim of contributing to the development of a more creative and vibrant music industry, through:

- The provision of a wide range of support initiatives which included activities targeted at participants at different stages of involvement (e.g. aspiring musicians through to established musicians), and in different roles within the indigenous music industry (e.g. songwriters, artists managers etc.);
- Energising the indigenous sector and integrating the sector more fully with other convergent sectors such as screen and digital industries, thereby aligning with the strategic and policy agenda for the creative industries;
- Building effective and symbiotic partnerships with a wide range of organisations with a role in the economic and cultural development of the creative industries and adding value to the initiatives delivered by these organisations by leveraging the EDO's sectoral expertise and extensive contact base.

However, whilst adaptations were made to the Programme during the 9-month extension period in an effort to help realise greater economic impact, over the entire programme period, the extent of economic returns has been modest. Albeit, it is important to note that several stakeholders were of the view that the music sector is particularly amorphous, difficult to define and so, in turn, difficult to target and provide support to. Such complications make it difficult for mainstream government programmes to support the sector without availing of industry expertise and networks.

Programme Management and Delivery

Across the periods under review, it is evident that the EDO has:

- Brought considerable sectoral knowledge and experience to the delivery of each support strand (and particularly the Mentoring and Talent Development);
- Leveraged its network of local, national and international contacts to recruit high-calibre speakers and presenters to its events; and
- Developed productive and effective collaborative partnerships where possible to add considerable value to the activities of music business support initiatives and to maximise the impact of support for music businesses.

Programme Activity

Extensive activity was delivered through the MBSP across a range of support strands, and all but one of the activity targets associated with the Programme were exceeded across the two operational phases, albeit:

- Some participants may have had relatively minimal engagement with the Programme (such as those who attended Seminars and Events, or Group Mentoring sessions), thereby limiting the likelihood of the MBSP having a substantive impact on their business development.
- Much of the activity during the 3-year MBSP focused on the development of individuals/artists, rather than on businesses providing services to support the wider music business infrastructure within NI such as artist management, publishing and music distribution, despite the NI Music Strategy recognising that NI had relative weaknesses in the provision of these supporting services.

However, during the 9-month extension period, the EDO employed a broader based approach and ensured that participants represented a more balanced range of creative and supporting infrastructure sub-sectors. In addition, the extension period placed a greater focus on those businesses that the EDO considered had the greatest potential for growth.

Notwithstanding the points above, there was clearly a high level of demand for the MBSP support, and the Programme (particularly during the first-phase) encouraged music businesses to undertake development activities that they would not have done in the absence of the support, such as showcasing at market development events, developing collaborative creative content etc.

Participants' Profile and Satisfaction with the MBSP

Across all four strands of the MBSP and across both operational phases, participants expressed high levels of satisfaction with the support that they received. In particular, participants that availed of the various strands of support indicated that they were satisfied with:

- **Seminars and Events** – The level of music business knowledge possessed by the expert and the relevance of the topics covered to their business' needs.
- **Mentoring** – The mentor's ability to tailor the advice offered to meet their needs and the relevance of sources of support or contacts that they were signposted to.
- **Market Development** - The advice and guidance received prior to, during and following attendance at a Market Development event and the appropriateness of the event as a platform for their music business growth potential and/or their creative talent.
- **Talent Development** – The amount of time and/or financial assistance dedicated to accelerating their business and the extent to which the EDO introduced them to music industry contacts.

MBSP's Impact

Reflecting the fact many of the participants had limited engagement with the MBSP (and particularly during the 3-year MBSP), the turnover, GVA and employment impacts achieved by music industry businesses as a result of the support received through the MBSP were relatively modest (as shown below), and were largely driven by a small number of significant outliers.

Impact		3-year MBSP	9-month MBSP	Combined Total
Gross	Turnover	£1,889,607	£637,566	£2,527,173
	GVA	£913,638	£308,268	£1,221,906
	FTE Jobs Created	0	9.75	9.75
	FTE Jobs Safeguarded	0	16	16
Net Additional	Turnover	£1,317,454	£292,252	£1,609,706
	GVA	£636,989	£141,304	£778,293
	FTE Jobs Created	0	4.4	4.4
	FTE Jobs Safeguarded	0	7.3	7.3

However, and encouragingly, it should be noted that the EDO's strategy to focus its efforts (during the 9-month extension) on those businesses which were considered to have the greatest potential achieve growth appears to have been successful, with participant businesses achieving (proportionately) greater levels of sales (including exports) and employment impacts than were achieved under the previous 3-year phase.

Notwithstanding this, the Programme was highly effective in delivering a range of other benefits including (but not limited to):

- The promotion of networking (both within the indigenous industry, and between indigenous businesses and contacts in national/international markets);
- Building collaborative partnerships for the creation of creative IP and/or business development;
- Developing the skills base of the NI music industry including better understanding of the creative and business processes required to develop a sustainable and competitive music business;
- Recognising that the music industry represents a global industry, identifying emerging trends and supporting businesses to apply sectoral best practice within their businesses;
- Reputational impacts for individual businesses and for the NI industry on a national /international stage;
- Delivering a range of indicators for success in international markets such as increased confidence, enhanced profile and a broader range of industry contacts (both within and outside NI).

Achievement of Objectives

As noted above, encouragingly, all but one of the activity targets across each year of the MBSP were achieved or exceeded.

However, the outcome targets relating to business and job creation and GVA were largely not achieved during the two operational phases under review. Such as position has potentially been created as a result of a series of converging factors including: issues relating to the context within which the original targets were set (i.e. the size and structure of the market was considered to be much larger than that estimated only a few years later in a separate sector baseline report), difficulties relating to how the sector is measured when using only SIC codes; the potential longitudinal nature of when benefits might ultimately be realised; in many cases the ad hoc nature of the support provided; the transient nature of participants, many of the potential beneficiaries being characterised as being amongst a hard to reach group etc.

Value for Money

Reflecting the modest levels of turnover and employment growth evidenced by many businesses, the net additional GVA return on the direct costs (i.e. the return-on-investment) is £0.89: £1.00.

However, in isolation, this indicator does not reflect the additional wider non-monetary benefits of the Programme (as discussed above). On balance, and taking all of the different benefits into account, the Evaluation Team considers that the MBSP has represented value for money.

MBSP's Strategic and Market Position

As detailed above, the programme only partially achieved many of its outcome focused objectives. In relation to those, a key question that could be asked is whether they were appropriate and/or achievable in the first instance. We note that there is considerable ambiguity in relation to the size and economic contribution of the NI music industry within NI. For example, the Programme was established within the context of the NI Music Industry Strategy (2011), which featured one interpretation of the size and contribution of the music sector, whilst a later (2014) baseline study report indicated a substantially different scale of activity. Therefore, there

is potential that the targets included within the NI Music Strategy (which informed the outcome targets for the MBSP) were not fully achievable.

In addition, it is noted that a thorough understanding of the music industry sector within NI (e.g. key players, their activities, markets served, gaps in the sectors that would inhibit growth, a profile of participation - aspiring, established, growth, part-time, full-time etc. has not yet been reported upon. The absence of such market information creates the potential for some of the MBSP activity not being as effectively targeted as it could potentially otherwise have been.

Recommendations

Whilst it is anticipated that the specific direction for the future provision of support to the NI music sector would be subject to the findings of a Sectoral Agenda/Policy, the following strategic and operational recommendations have been made based on the Evaluation Team's research:

1. There is an ongoing need for government intervention to support the music industry NI in order to enhance the sustainability and credibility of the sector. However, any future support should be taken forward within a fully-informed strategic and market context.
2. Recognising that the music industry is a global business, and it is not possible for NI to operate in isolation, any future support should ensure to facilitate linkages between the supply chain within NI, and further afield, to enable businesses to turn their creative content into viable commercial opportunities where possible.
3. Going forward, the music industry and local and central government representatives should continue to work cohesively and in collaboration to ensure that there is a continuum of support, to maximise the industry's contribution and to mitigate against duplication.
4. Specifically, whilst recognising the importance of Belfast as the cultural capital of NI, any future support should ensure to either deliver on a regional basis or to work in liaison with regional delivery bodies such as local authorities to ensure that there is the adequate geographical spread of support.
5. In the event that an economically-focused music business support programme is delivered in future, based on the lessons learned from the MBSP it is recommended that:
 - Targets should take into account the likely constraints on available resources within EDO, to ensure that the EDO can place sufficient and appropriate focus on the achievement of both activity and outcome targets.
 - Where activities are delivered collaboratively, there should be coherent and consistent branding and communications to reduce confusion in the marketplace, and any delivery agent should routinely monitor the nature and extent of resources leveraged from other organisations to facilitate the determination of the full economic cost of support.
 - Upon initial contact, any future delivery agent should ensure to consistently gather profiling/baselining information on each participant, such as:
 - Whether they are a business owner, employed by a music business or aspiring to work in the industry;
 - For business owners, the size of the business (in terms of employee numbers and annual turnover) and whether they are VAT-registered;
 - For employees, whether they are employed on a full-time, part-time or freelance basis;
 - The nature of their involvement (e.g. artist, artist manager, music producer etc.);
 - Their aspirations/objectives for development and growth of their music business etc.

- When implementing one-to-many interventions, any delivery agent should enable that records are maintained of both registrations to attend the event and actual attendance at each event. This should include the name of each unique individual, and unique business attending, and their contact details. Where possible, this information should be collated for each unique session within a combined large-scale event (e.g. Output Conferences).
- One-to-many interventions should ensure to build-in an appropriate amount of time for networking.
- Recognising that there were reduced levels of additionality in the 9-month extension phase (vis-à-vis the previous 3-year MBSP), any future EDO should be encouraged to apply challenge to potential applications as to what activities would occur in the absence of Programme support.

1. INTRODUCTION AND BACKGROUND

1.1 Introduction

In April 2016, the Department for Communities (DfC) (formerly the Department of Culture, Arts and Leisure (DCAL)) and Invest Northern Ireland (Invest NI) commissioned Cogent Management Consulting LLP ('Cogent' or the Evaluation Team) to undertake an independent evaluation of the Music Business Support Programme ('MBSP'), covering the period July 2013 to June 2016.

Subsequently, in June 2016, the DfC and Invest NI jointly sought approval from CPD for a 9-month extension to the MBSP (covering the period from July 2016 to March 2017), and Cogent was commissioned to independently evaluate the 9-month extension period. This report incorporates the findings of both research phases.

The evaluation has been undertaken in line with national and regional requirements and is compliant with Central Government guidance including:

- The Green Book: Appraisal and Evaluation in Central Government, HM Treasury;
- The Northern Ireland Guide to Expenditure Appraisal and Evaluation (NIGEAE), Department of Finance;
- The Magenta Book: Guidance for Evaluation; and
- Invest NI Economic Appraisal Methodology (EAM) guidance.

1.2 The Northern Ireland Music Industry Strategy

During 2011, DCAL and Invest NI developed a Strategy for the Northern Ireland (NI) Music Industry³ ('the Strategy'). The stated aim of the Strategy was to develop:

"A creative and vibrant music sector that achieves consistent and sustainable economic growth contributing to wealth creation and to a positive image of NI on the world stage".

The primary purpose of the Strategy was to increase the economic contribution of the music industry in NI, with the following targets projected to be achieved by 2016:

- Increase the GVA of the NI music industry by 25% (£17.5m);
- Increase average GVA per employee by 14% (from £22,400 to £25,547);
- Increase employment in the music industry in NI by 25% (780 jobs);
- Increase the number of music businesses in NI by 10% (128 new businesses);
- Increase the numbers of music businesses with turnover in excess of £1,000,000 by 20% (two businesses); and
- Increase the value of music exports from NI.

In order to achieve these targets, the Strategy suggested that action was required in six complementary priority areas, grouped under two headings, as follows:

Growing successful music businesses:	1. Business skills and entrepreneurship 2. Innovation 3. Access to finance 4. Internationalisation
Developing a vibrant music community and infrastructure	5. Talent/product development 6. Infrastructure development.

³ Music Industry Strategy for Northern Ireland (Ekos and Grant Thornton, September 2011)

The Strategy noted that effective delivery against all of the six priorities identified previously would require a co-ordinated partnership approach across the main public agencies including Invest NI, DCAL, local authorities and the Arts Council of Northern Ireland (Arts Council NI).

The Strategy established that the following key strategic issues needed to be addressed within the music industry in NI:

- Build **greater scale** in the industry, both in terms of the numbers of sustainable businesses and the number of businesses with the scale and ambition to compete in the UK and international markets;
- Develop a stronger base of **labels and publishers** to retain talent and Intellectual Property (IP) in the NI economy;
- Improve **business skills** and entrepreneurial and management talent;
- Embrace the opportunities in **digital distribution** and the **cross-platform exploitation** of music IP (synchronisation);
- Improve **access to finance** for music businesses; and
- **Internationalise** the sector.

1.3 The Music Business Support Programme (MBSP)

1.3.1 Overview

The Terms of Reference (ToR) for this Evaluation stated that, at the centre of the Strategy, was a Music Business Support Programme (MBSP) which sought to provide a range of support activities contributing to the development of a more creative and vibrant music industry.

It was envisaged that the MBSP would build effective partnerships and collaborations across the private and public sectors to extend the reach of available support, particularly around events, marketing, business support and skills development.

An Economic Appraisal (EA) was undertaken of the MBSP in 2012⁴ and was approved for funding by Invest NI's Executive Casework Committee in November 2012⁵. The two funders (i.e. DCAL and Invest NI) jointly implemented an open procurement process to appoint an external delivery organisation for the development and delivery of the three-year MBSP and ultimately awarded the contract to Generator NI ('the EDO' or 'the delivery agent')⁶.

The EA identified that, following widespread music industry consultation, DCAL and Invest NI developed an outline brief for the MBSP, which consisted of four distinct strands of support:

- i. Seminars and Events;
- ii. Mentoring;
- iii. Market Development; and
- iv. Talent Development.

Each of the strands of support is discussed in the following sub-sections.

⁴ KPMG (2012) 'Economic Appraisal of the Music Business Support Programme on behalf of Invest NI and DCAL'

⁵ NB - This process constituted the funding approval process on behalf of both DCAL and Invest NI. There was no Invest NI Letter of Offer issued as the contract represented a technical transfer of funding to DCAL (subsequently DfC) which was responsible for releasing the funding to the EDO.

⁶ NB – The contract was awarded to Mr. Ross Graham (trading as FastForward at the time of award). The EDO utilised its contacts within Generator UK in order to leverage the brand identity of 'Generator' and subsequently rebranded the organisation as 'Generator NI'.

1.3.2 Seminars and Events

At the time of the EA, it was envisaged that eight UK and International Seminars and Events⁷ would be supported per annum through the MBSP. It was anticipated that the Seminars and Events would promote networking and industry development, and would cover a range of subjects pertinent to the music industry, including:

- | | |
|--|--|
| <ul style="list-style-type: none"> • IP development/ exploitation/ protection/ copyright • Music management • Music marketing and sales • Press events • Production | <ul style="list-style-type: none"> • Mastering • Product development issues • Music business law and contractual issues • Other skills |
|--|--|

It was envisaged that the Seminars and Events would be attended by music businesses, artists, digital media/ content businesses and academics, as well as local legal and financial professionals. Attendees were anticipated to include prospective new entrants to the industry, as well as existing artists who already possessed some knowledge and expertise, but might wish to strengthen and further develop their skills and capabilities. The EA proposed that a seminar would have up to 100 attendees, and an event would potentially have up to 150 attendees⁸.

It was anticipated that the Seminars and Events would be designed and delivered in close collaboration with key stakeholders, including:

- | | |
|---|---|
| <ul style="list-style-type: none"> • Performing Right Society (PRS) for Music • Irish Music Rights Organisation (IMRO) • The Musicians' Union (MU) | <ul style="list-style-type: none"> • UK Trade and Investment (UKTI) • South by Southwest (SXSW) the UK and Ireland • Music Producers Guild |
|---|---|

1.3.3 Mentoring

It was envisaged at the time of the EA, that through a Mentoring strand, the MBSP would provide mentoring, support and advice for artists and businesses involved in the local music industry, with participants ranging from pre-starts to established businesses across various genres. It was anticipated that there would be a minimum of 200 sessions per annum and that participants would be able to avail of multiple sessions over the programme period if this was considered necessary⁹.

The EA anticipated that the Mentoring strand would involve industry experts (i.e. the appointed service provider and selected experts) meeting with new and established businesses and artists to advise on a range of industry matters as required (e.g. opportunities in specific areas such as marketing and PR, licensing, digital distribution, touring and international trade fairs).

It was envisaged that the experts would make themselves available at selected times and locations to receive pre-booked appointments with music clients.

Following the EA, the EDO proposed¹⁰ that its Mentoring support would be managed and delivered in partnership with Armstrong Learning NI¹¹ and The Nerve Centre, and would enable participants to progress towards, or develop further, a successful career in the music industry.

⁷ NB the EA does not define what was meant by 'UK and International Seminars and Events'.

⁸ NB the EA does not define the minimum number of attendees to constitute a Seminar or Event.

⁹ NB the EA proposed that a minimum of 181 unique businesses would receive Mentoring support (equating to an average of 3.3 sessions per business).

¹⁰ Within its tender methodology for the MBSP delivery contract.

¹¹ At the outset of the MBSP (i.e. 2013) Armstrong Learning provided specialist training and education, mentoring and employability support for disadvantaged people in the creative industries across the UK.

The EDO proposed that the following methodology would be adopted in the delivery of Mentoring support:

Step 1: Bespoke beneficiary journeys	The EDO proposed to undertake a diagnostic assessment for each beneficiary and to prescribe a ‘unique client journey’ by drawing on the relevant expertise and specialisms from the mentor pool. This stage was anticipated to result in a full assessment of beneficiary need and a resulting mentoring plan. It was proposed that this stage would enable the EDO to signpost participants to relevant support provision (either within, and/or external to the MBSP).
Step 2: Mentoring and Support	<p>It was proposed that the Mentoring strand would seek to provide high-quality support for beneficiaries at all levels across the music-industry including those:</p> <ol style="list-style-type: none"> 1. Aspiring to engage with the music industry, including individuals not in employment, education or training ('NEETs'); 2. Those involved in the industry on an amateur/semi-professional¹² basis; and 3. Those working professionally in the music industry.
Step 3: Evaluation and signposting	The EDO proposed to complete each mentoring intervention with a full review and evaluation of the journey undertaken. It was proposed that this stage would also provide an opportunity to signpost participants to follow-on support provision.

1.3.4 Market Development

The Market Development strand was anticipated (as per the EA) to provide practical and focused support to assist music-based businesses operating out of NI to develop their skills in key business areas and reach new markets through a focused delivery of showcasing activities at important events.

It was envisaged that participants would be supported to attend 6 UK and international trade/showcasing events per annum, as well as brokering to other sources of support (e.g. advice, financial assistance). Whilst it was anticipated that the support would be provided on an ‘on demand’ basis, the EA proposed that the following would represent the ‘primary events’:

1. SXSW, Austin, Texas	4. Popcom, Berlin, Germany
2. MIDEM ¹³ , Cannes, France	5. Sync, Los Angeles, California
3. Sound City, Liverpool, England	

It was anticipated that the Market Development activities would be designed and delivered in close collaboration with key stakeholders, including:

- British Phonographic Institute (BPI) (US Music Sync Mission);
- Association of Music Producers (AIM) (MIDEM and SXSW);
- The British Music Embassy at SXSW; and
- UKTI London and Los Angeles/ US offices at MIDEM, SXSW and the US sync mission.

It was envisaged that the Market Development events selected would be largely dependent on the requirements of the participants and that typically an application form would be completed and those that presented the best business case/argument would go forward. The MBSP was also anticipated to signpost businesses to relevant programmes providing financial assistance, where necessary.

The ToR for the MBSP delivery contract noted that the Market Development activity was anticipated to be distinct from, and additional to, the more general support available through Invest NI’s Trade Team,

¹² It should be noted that the EDO divided its participant basis into aspirants, amateurs, semi-professionals and professionals. ‘Aspirants’ were defined as those individuals who were not yet actively engaging in the music industry (paid or unpaid), but wished to do so in future, ‘Amateurs’ as those individuals who were engaging in the music industry unpaid; ‘Semi-professionals’ were those individuals who were earning at least part of their income from the music industry, ‘Professionals’ were those individuals who earned all of their income from the music industry.

¹³ Marché International du Disque et de l'Édition Musicale

with the main difference being that the Trade Team would adopt a supporting, rather than a lead role, alongside any music businesses attending key trade/showcasing events.

The EDO's proposal stated that its role would involve identifying, enabling, delivering and promoting national and international market development opportunities. It was proposed that the financial support to businesses and artists would be structured and specific, and would provide businesses with a contribution towards travel, accommodation and event delegation costs. Specifically, the EDO proposed that the following steps would be taken following the identification of a Market Development opportunity:

1. Financial support would be agreed with the two funders;
2. The opportunity would be promoted to the NI music industry to elicit expressions of interest;
3. Expressions of interest would be assessed in collaboration with the two funding bodies, and decisions made.

1.3.5 Talent Development

At the time of the EA, it was envisaged that Talent Development, via the provision of training and education programmes (including music business management courses), would focus on the creative and business skills element of music industry artists, bands and businesses¹⁴.

Whilst it was anticipated that the Talent Development strand would involve cross-fertilisation with other elements of the MBSP; it was envisaged that it would apply specific focus on developing the creative strengths of a business/artist, as well as business management, development and growth skills.

The Talent Development strand was envisaged to target the best of NI's talent, and to assist them to develop with a number of intensive training courses, as well as bespoke support such as assistance with setting up a tour, or recording and distributing a piece of work. It was anticipated that an average of five unique participants/groups would be supported per annum, depending on the level and type of intervention required.

1.4 MBSP Extension Period (July 2016 to March 2017)

In early June 2016, CPD approved an extension to the contract awarded to the EDO, comprising a 9-month extension to 31st March 2017, and an increase to the original programme budget of £160k (i.e. £80k each from DfC and Invest NI) to cover the extension period¹⁵.

However, following the completion of the evaluation of the MBSP for the period to June 2016, it was recognised that the economic outcomes that were anticipated at the outset of the 3-year MBSP period were unlikely to be fully achieved as a result of the programme activities (see Section 5 for details). As such, Invest NI and DfC agreed that the approach taken by the EDO during the programme extension should place a greater focus on contributing to the following key objectives¹⁶:

¹⁴ NB the EA of the Programme did not provide specific examples of how the creative skills of music industry businesses were proposed to be supported through the MBSP.

¹⁵ Source: Invest NI

¹⁶ Source: Invest NI

New job creation	<p>It was envisaged that the 9-month programme extension would see the EDO working closely with 40 individuals who identified as being self-employed within the sector, as well as with 20 existing businesses, helping them ‘towards strategic business consolidation and business development’ (through the provision of mentoring services, market development and skills development activities).</p> <p>In addition, it was proposed that the Talent Development strand would involve close working with a number of exceptional creative talents to accelerate and secure their business development and the business development of associated local management and IP exploitation partners.</p> <p>It was anticipated that the combination of these activities would offer the potential to generate new jobs within the NI music industry.</p>
Sales/ exports	<p>It was proposed that the programme extension period would focus on the achievement of increased sales (and particularly export sales) amongst NI music businesses through the provision of support for:</p> <ul style="list-style-type: none"> • Attendance at key industry trade and showcasing events (through the Market Development strand); • Skills development programmes focused on sector-specific best practice in business development and IP exploitation; • Creation of networking opportunities so that emerging businesses could interface with national and international associates to help maximise partnership growth opportunities; and • Convergence with the music, screen and/or digital industries.
Businesses created/ attracted	<p>It was anticipated that the 9-month programme would provide a strong focus on business creation/attraction and best practice¹⁷.</p>

1.5 Evaluation Methodology

DfC and Invest NI require an Evaluation of the MBSP covering the period July 2013 to March 2017 (comprising the original period from July 2013 to June 2016, as well as the 9-month extension period up until March 2017). Full details of the specific requirements are detailed in Appendix I.

In addressing those requirements, the Evaluation Team’s methodology included:

- A robust desk-based analysis of pertinent materials relating to the MBSP for the period July 2013 to March 2017.
- In-depth telephone and face-to-face consultations with:

<ul style="list-style-type: none"> • The MBSP Steering Group • UKTI • Arts Council NI • Creative and Cultural Skills • Arts and Business • NI Screen • Belfast City Council • Armagh City, Banbridge and Craigavon Council • Belfast Metropolitan College • North West Regional College 	<ul style="list-style-type: none"> • SXSW UK and Ireland • Honeycomb Creative Works • Tourism Ireland • Nerve Centre • Oh Yeah Centre • AmmA Centre • PPL • PRS for Music. • Sonic Arts Research Centre at Queen’s University Belfast (QUB)
---	--

¹⁷ NB – The approval documentation for the extension period provided no detail on how the extended programme was anticipated to focus on attracting businesses to NI.

- Telephone and online surveys¹⁸ with recipients of the various strands of the MBSP support. A summary of the survey samples and reliability is provided below with further specific details provided in Appendix II.

Table 1.1: MBSP Survey Samples and Reliability

	3-Year MBSP (July 2013 - June 2016)				9-month Extension MBSP (July 2016 – March 2017)			
	Unique Population	Sample Surveyed	% of Unique Pop.	Confidence interval at 95% confidence level	Unique Population	Sample Surveyed	% of Unique Pop.	Confidence interval at 95% confidence level
Seminars & Events	1,106	113	10%	+/- 8.74%	516	78	15%	+/- 10.23%
Mentoring	471	114	24%	+/- 8%	61	34	56%	+/- 11.27%
Market Development	62	40	65%	+/- 9.31%	36	26	72%	+/- 10.27%
Talent Development	20	15	75%	+/- 12.98%	6	6	100%	+/- 0%
Unique Individuals¹⁹	1,501	243	16%	+/- 5.76%	545	90	17%	+/- 9.45%

¹⁸ NB 109 surveys were completed via telephone (including 15 Talent Development, 40 Market Development and 93 Mentoring participants) and 134 surveys were completed online (including 21 Mentoring participants and 113 Seminars and Events attendees) as part of the Evaluation of the 3-year MBSP.

A further 41 surveys were completed via telephone (including 6 Talent Development, 26 Market Development, 34 Mentoring participants and 29 attendees of Seminars and Events) and 49 online surveys (all relating to attendees of Seminars and Events) as part of the Evaluation of the 9-month extension.

¹⁹ The unique individuals figure ‘nets-off’ individuals who received support through multiple strands i.e. 158 of the 1,659 individuals receiving the four strands of support, received multiple strands of support, resulting in 1,501 unique individuals across the 3-year MBSP. Likewise, 74 of the 619 interventions delivered across the 9-month MBSP were delivered to individuals who availed of more than one strand of support, resulting in 545 unique individuals across the extension period.

2. STRATEGIC CONTEXT, MARKET CONTEXT & RATIONALE

2.1 Introduction

Section 2 provides a high-level summary of the original rationale for and strategic fit of, the MBSP at the time of approval, as well as an overview of the music industry market context²⁰.

2.2 Original Rationale and Strategic Context

A number of factors combined to provide a strong rationale for Government intervention²¹, including:

- The NI music industry was underperforming relative to other regions within the UK, which was demonstrated by low levels of productivity, and low wages.
- A number of market failures (including asymmetric information, coordination failures, risk aversion and under-provision of merit goods) were considered to be inhibiting the growth of the music sector in NI and therefore necessitating the need for intervention.
- There was clear alignment between the aims and objectives of the MBSP and the strategic imperatives of the UK and NI Government.

The rationale for the 9-month programme extension²² was based upon the following:

- The ongoing strategic importance of the music sector to the NI economy and a need to provide continuity of support and to prevent a hiatus in sectoral development.
- The anticipation of further economic impacts that might be achieved if an extension was granted.
- As a means of providing sufficient time for Invest NI and other stakeholders to consider the findings of the evaluation as part of forward-planning to support the growth of the music sector.

2.3 Market Context

This section provides a summary review of the global, UK and NI music industries²³, to provide context for the review of MBSP activities (Section 3).

- The global music industry is highly competitive and characterised by continual change and evolution. Successfully operating within the intensified global marketplace requires complex international connectivity. However, due to advancements in communications and digitalisation, regional music industry development and sustainability is becoming more realistic.
- The professional music industry primarily comprises recorded and live music industries and music within the media. Within these segments, there are many interrelated roles, and a complex flow of creative content, licensing and revenues. A fully sustainable music industry requires the development of creative and business talent to fulfil each role, which in turn potentially serves to maximise the industry's economic and cultural contribution.
- The UK has a well-established history of musical success, both in terms of recording artists and live music events, and is one of only 3 net exporters of music globally. The music industry is an important contributor to the UK economy with £4.14bn of GVA being generated by the UK industry in 2015. Almost half (48%) of the GVA was generated by Musicians, Composers, Songwriters and Lyricists.

²⁰ NB – Further details are attached as Appendices III and IV.

²¹ Sources: Economic Appraisal of the MBSP (KPMG, August 2012) and Invest NI.

²² Source: Invest NI

²³ Sources: ‘Output Publication’ (Generator NI, February 2016); Keynotes (2015) ‘Music Industry: Market Report 2015; CBI (2014) ‘The Creative Nation: A Growth Strategy for the UK’s Creative Nations’; UK Music ‘Measuring Music: 2015 Report’; Music Industry Strategy for Northern Ireland (Ekos and Grant Thornton, September 2011).

- The UK music industry is also an important employer, supporting 119,020 full-time employees in 2015. Between 2012 and 2015, the UK music industry increased in terms of overall GVA (+17%), GVA derived from exports (+11%) and employment (+11%).
- Looking specifically at NI, the Music Industry Strategy recognised that NI had strengths (relative to its size) in creative musical talent (including composition and performance), but relative weaknesses in supporting infrastructures (e.g. publishing and cross-platform integration services).
- In 2014, an independent economic baseline study of the NI music industry²⁴ concluded that:
 - 1,895 individuals were employed in 640 music businesses, averaging 2.96 employees per business²⁵.
 - These businesses were estimated to have generated a turnover of £160m and GVA of £62m in 2013.
 - This equated to GVA per employee of £32,717 or GVA per business of £96,875.
 - Three-fifths of businesses (58%, N=640) operated within the ‘core’ element of the music industry²⁶, with the remainder (42%, N=640) operating within the ‘peripheral’ element of the industry²⁷.

The Evaluation Team notes that the findings of the 2014 economic baseline study for the NI music industry were significantly different than the baseline figures referenced within the 2011 Strategy (as per Section 1.2). For instance:

- The Strategy indicated that there were 1,280 music businesses in NI; whereas the economic baseline study reported there were 640 music industry businesses (i.e. 50%, of the total as per the Strategy) including just 371 within the ‘core’ element of the industry; and
- The Strategy indicated that there were 3,050 jobs within the NI music industry, whereas the baseline study reported that there 1,895 individuals involved (i.e. 62% of the Strategy total).

The differences between the two profiles are indicative of the challenges faced in developing a robust methodology to measuring the creative industries in NI. Specifically:

- The NI Music Strategy stated that “robust data on the scale of the music industry in NI is extremely difficult to source. Official economic data greatly underestimates the scale of the sector due to the limitations of working within SIC²⁸ codes, which provide only poor coverage of music”. As a result, the study primarily relied on input from the industry gained through 1-to-1 discussions and a survey.
- The baseline study also highlighted methodological challenges, stating that: “Currently it is simply not possible to define the music industry using SICs in any meaningful way, as the system lacks the necessary detail on business activity to effectively segment the industry and reflect the supply chain...Many of the key UK datasets also have insufficient sample size to deliver a robust assessment of activity in Northern Ireland”. As such, the baseline study presented data from the TBR Observatory Trends Central Resource²⁹, which was a dataset which sought to measure the activity of micro businesses.

Whilst it is not possible for the Evaluation Team to comprehensively determine which report more closely reflected the true size and economic contribution of the NI music industry, the disparity between the two profiles is reflective of the fact that the music industry is particularly amorphous and difficult to define and so, in turn, difficult to target and provide support to. Such complications make it difficult for mainstream government programmes to support the sector without availing of industry expertise and networks.

²⁴ TBR Research (2014) on behalf of Generator NI, DCAL and Invest NI (2014) ‘Economic Baseline Study for the Music Industry in Northern Ireland’

²⁵ NB The study did not confirm whether these jobs equated to Full-Time Equivalents (FTEs).

²⁶ Defined as “activities focusing on content or IP creation, as well as live music”, including artists, composers, managers, record companies, recording services, music publishing, collection societies, merchandising, live music & licensing.

²⁷ Defined as “other aspects of the music sector in NI that are supplemental to the core element”, including visual services, lawyers, business management, distributors, retail, media, marketing services, music instrument manufacture, retail & repair, music education, wholesale & retail of audio equipment and manufacture of lighting & stage equipment.

²⁸ Standard Industrial Classifications

²⁹ Whilst this was originally sourced at <http://www.tbr.co.uk/pages/tbr-observatory/data-at-tbr.php>, TBR is no longer in operation so the data cannot be cross-referenced at this time.

3. PROGRAMME MANAGEMENT & DELIVERY

3.1 Introduction

Section 3 provides a summary of the activity that was implemented through the MBSP between July 2013 and March 2017, and how it was managed.

3.2 Management and Governance

In order to ensure appropriate governance of the MBSP, a Project Steering Group (consisting of representation from the two funding bodies and the EDO) met on a regular basis (quarterly until June 2016 and every six weeks during the 9-month extension period) to:

- Monitor the progress of the MBSP against activity targets;
- Monitor adherence to the budget costs and social returns; and
- Take strategic decisions for the ongoing decisions of the Programme.

The Steering Group provided the funders and the EDO with an opportunity to share feedback on performance and to ensure that sufficient and appropriate information for audit purposes had been prepared.

The EDO prepared a monitoring report (including both a narrative report and a quantitative summary of activity against targets – as per Table 3.2) in advance of each Project Steering Group meeting. These reports were prepared by the EDO to a format which was agreed with the funders at the outset of the contract.

The table below summarises the roles and responsibilities of the personnel that were employed by the EDO to manage and deliver the Programme between July 2013 and March 2017:

Table 3.1: EDO Staff Roles	
Role	Responsibilities
3-year MBSP and 9-month extension MBSP (i.e. July 2013 – March 2017)	
Programme Director	<ul style="list-style-type: none"> • Key funder relations and monthly reporting to the Steering Group; • Key partner liaison and relationship manager; • Overseeing programme development and administration; and • Co-delivery of MBSP support strands.
Programme Development Manager	<ul style="list-style-type: none"> • Programme content development; • Co-delivery of MBSP support strands; and • Overseeing programme communications, marketing and promotion.
Programme Administrator	<ul style="list-style-type: none"> • Financial administration; and • Seminar, Talent Development and Market Development Programme administration.
Communications and General Admin	<ul style="list-style-type: none"> • Maintenance of website and regular social media updates; • Supporting programme communications, marketing and promotion; and • Supporting programme communications, marketing and promotion.
9-month extension only (i.e. July 2016 – March 2017)	
Monitoring and Evaluation Manager	<ul style="list-style-type: none"> • Design and populate a range of client monitoring documentation in order to address weaknesses which were identified by the Evaluation Team in July 2016; and • Implement structured processes for the benefit the EDO, its client businesses and its funders. <p>The EDO proposed that the addition of this post would enable greater monitoring of the breadth of programme interventions delivered during the extension period.</p>

3.3 Marketing and Promotion

The Evaluation Team's review of monitoring and marketing materials provided, as well as discussion with the EDO, indicates that the EDO actively promoted the MBSP during both the 3-year period and throughout the 9-month extension. Marketing and promotional activities included the following³⁰:

- The MBSP was launched in the Nerve Centre in Derry-Londonderry on 12th September 2013. The launch coincided with the CultureTech Festival and Belfast Media Festival, which increased attendance from the key convergent creative sectors such as screen and digital.
- The website was launched in September 2013 and operated with full functionality by October 2013.
- The EDO has emphasised that the use of social media was essential to enable it to interface with the music industry throughout NI. Throughout the 45-month period, the EDO's Communications Officer maintained social media profiles (Facebook and Twitter) for Generator NI and provided regular content updates as new initiatives arose. During the programme extension period, the EDO sought to utilise its social media platforms to signpost the sector to relevant convergent events.
- A range of printed marketing materials (e.g. flyers and posters) referencing events and opportunities supported through the MBSP, was prepared by the EDO.
- The MBSP created a YouTube channel which was regularly populated with updated content.
- In February 2016 (to coincide with the Output 2016 Conference), the EDO launched a report detailing an overview of the NI music industry ('Output – Defining and Developing the Music Sector in NI').
- A regular newsletter called 'The Agenda' was issued to a list of subscribers. As at April 2017, 950 individuals had subscribed to the newsletter and 14 issues had been circulated.

3.4 Programme Activity: July 2013 to June 2016

3.4.1 Overview

The table overleaf (Table 3.2) provides an overview of the MBSP activity across the three-year period from July 2013 to June 2016, as per the June 2016 Quarterly Report, with a detailed description of activity supported under each strand provided in the sub-sections thereafter. Key points to note in relation to the following analysis include:

- The EDO's monitoring reports indicate that encouragingly, all activity targets across each year of the 3-year were exceeded. Indeed, a number of targets were exceeded by a considerable margin such as the number of Seminars/ Events (87 delivered across the 3-years versus a target of 24).
- However, it was not possible for the Evaluation Team to fully validate the activity delivered under a number of the support strands due to weaknesses in the EDO's monitoring of individual attendances at events, group mentoring sessions etc. Specifically:
 - There was inconsistency in the approach to monitoring attendances at Seminars and Events. For instance, on occasion, the EDO monitored the number of individuals who registered to attend a Seminar or Event, rather than collating lists of contact details for those individuals who attended the Seminar or Event. As such, the Evaluation Team was able to validate just 1,210 actual attendances (rather than registrations) across the period.
 - Where multiple Seminars were delivered within one larger Event (e.g. Output Conferences), the EDO estimated the number of individual Seminars attended by each delegate and applied a multiple accordingly (thereby reducing the reliability of the numbers of attendances).
 - The EDO's contact databases did not provide details on the number of unique businesses (as opposed to individuals) that were supported through the Mentoring strand. Furthermore, the EDO's database of Mentoring sessions included details of 763 sessions (across one-to-one and Group Mentoring) as compared with 867 sessions as reported in the quarterly reports.

³⁰ A detailed breakdown is attached as Appendix V.

Table 3.2: Overview of MBSP Activity (July 2013 to June 2016) as per the EDO's Monitoring Reports

		Seminars/ Events		Mentoring		Market Development		Talent Development	
		No. of seminars	No. of delegates attending	No. of sessions	No. of unique businesses	No. of events	No. of businesses	No. of groups	No. of participants
Year 1 (July 2013 to June 2014)	Jul-Sep 13	0	0	0	0	1	9	0	0
	Oct-Dec 13	8	443	74	24	4	7	0	0
	Jan-Mar 14	6	404	105	36	2	5	6	13
	Apr-Jun 14	6	149	131	38	2	24	0	0
	Total Output for Year	20	996	310	98	9	45	6	13
	Target for Year	8	800	200	60	6	18	5	5
	Variance	+12	+196	+110	+38	+3	+27	+1	+8
Year 2 (July 2014 to June 2015)	Jul-Sep 14	4	142	85	57	1	4	0	0
	Oct-Dec 14	15	420	85	30	2	7	0	0
	Jan-Mar 15	6	104	68	27	2	9	8	20
	Apr-Jun 15	7	415	59	15	3	14	0	0
	Total Output for Year	32	1,081	297	129	8	34	8	20
	Target for Year	8	800	200	60	6	18	5	5
	Variance	+24	+281	+97	+69	+2	+16	+3	+15
Year 3 (July 2015 to June 2016)	Jul-Sep 15	4	405	63	17	2	6	0	0
	Oct-Dec 15	1	20	26	11	2	5	0	0
	Jan-Mar 16	23	385	110	38	2	9	0	0
	Apr-Jun 16	7	320	61	27	4	11	6	18
	Total Output for Year	35	1,130	260	93	10	31	6	18
	Target for Year	8	800	200	61	6	18	5	5
	Variance	+27	+330	+60	+32	+4	+13	+1	+13
Total (July 2013 to June 2016)	Total Output Reported by EDO	87	3,207	867	320	27	110	20	51
	Total Target	24	2,400	600	181	18	54	15	15
	Variance vs Target	+63	+807	+267	+139	+9	+56	+5	+36
Total output validated by the Evaluation Team		49³¹	1,210	763	471 individuals³²	27	110	20	Unknown³³
Variance between the total output reported and the output validated		(38)	(1,997)	(104)	N/A	0	0	0	N/A

³¹ Including 18 seminars delivered as part of Creative Belfast presents Output 2014 and 22 seminars delivered as part of the Output Belfast 2016 Conference.

³² The contact databases provided by the EDO included individuals' names/contact details, but did not specify which businesses the individuals were involved with. It has therefore not been possible for the Evaluation Team to validate the 320 unique businesses as per the EDO's monitoring reports.

³³ The contact databases provided by the EDO included a contact for each talent supported. However, where the talents were groups or businesses comprising multiple individuals, the number of individuals supported was not included. Notwithstanding this, it is noted that the EDO's targets related solely to unique participants/groups, rather than individuals.

3.4.2 Seminars and Events

The EDO's monitoring reports indicate that 87 Seminars/ Events were delivered throughout NI (against a target of 24) during the 3-year MBSP, including a number developed and/or delivered in collaboration with other organisations such as Honeycomb Creative Works, Belfast City Council and the Nerve Centre. In total, the EDO's monitoring reports indicate that there were 3,207 attendances across these Seminars/Events which equated to an average of 37 delegates at each Seminar. However, as per Section 3.4.1, it was not possible for the Evaluation Team to fully validate the number of Seminars/ Events, the number or attendances or the number of unique attendees during the 3-year MBSP due to weaknesses in the EDO's monitoring processes.

The table below provides an overview of the Seminars and Events, along with the main skills areas which were addressed within the specific Seminar/ Event. Further details are attached in Appendix VI.

It should be noted that the number of Seminars/Events within the table does not equate to 87 (as per the total delivered) on the basis that a number of the Events (e.g. the Output Conferences, AVA Festival etc.) consisted of multiple separate seminars. It was the view of the EDO that offering a wide selection of seminars within one shared event provided greater cost efficiencies, as well as enhanced opportunities for networking, relationship-building and knowledge sharing within the NI music industry.

Seminar/ Event	Table 3.3: Overview of 3-Year MBSP Seminars and Events									
	Key Skills Areas Addressed									
	IP Protection ³⁴	Music Management	Live Music	Music Marketing	Music Publishing	Artist Development	Production	Sync ³⁵	Song-writing	Music Journalism
Output Regional Events	✓	✓	✓		✓	✓		✓		✓
Output Conferences 2014 and 2016	✓	✓	✓	✓		✓	✓	✓	✓	✓
AVA Festival	✓	✓		✓		✓	✓			
48-Hour Creative Bootcamp at CultureTech	✓	✓		✓			✓		✓	
Music Hothouse Song writing Seminar	✓				✓	✓			✓	
Export Briefing Events			✓			✓				
MTV Academy				✓			✓			
Live Music Summit			✓							
Sound and Vision	✓				✓			✓		
Resonate Futures					✓		✓		✓	

³⁴ Including the development, exploitation, protection and copyrighting of IP. In some cases this also included music business law and contracting.

³⁵ Synchronisation/convergence with film, television, gaming, mobile applications etc.

3.4.3 Mentoring

The EDO's monitoring reports indicate that 867 Mentoring sessions were delivered during the 3-year MBSP (against a target of 600) to 320 unique businesses (against a target of 181), equating to an average of 2.7 Mentoring sessions for each business.

The Mentoring strands sought to work with all areas of the NI music industry, including aspiring and established businesses. During the 3-year MBSP mentoring was delivered on a two-tiered basis (as below), and participants were able to avail of multiple mentoring sessions across either a single or both tiers.

1. **One-to-One Mentoring support** comprised one-to-one discussions with industry experts from either Armstrong Learning or the EDO, as follows:

Table 3.4: One-to-One Mentoring Activity (3-year MBSP)		
Delivery Body	Description	No. of Sessions
Armstrong Learning	Between July 2013 and May 2014, Armstrong Learning delivered one-to-one mentoring to entry-level participants. Many of these participants engaged with the service as a direct response to an outreach programme to NEETs delivered by Armstrong Learning. The entry-level one-to-one mentoring provided high-level advice and guidance, as well as signposting to other MBSP supports.	116
Generator NI	In addition, the EDO staff also delivered in-house one-to-one mentoring sessions for more established artists and businesses.	256
Total		372

In total 372 one-to-one mentoring sessions were delivered through the MBSP between July 2013 and June 2016.

It is understood that many of the participants who received one-to-one Mentoring sessions delivered by Armstrong Learning engaged with the service as a direct response to an outreach programme to NEETs delivered by Armstrong Learning.

Whilst it is positive that the MBSP complemented cross-departmental goals (including those of DCAL) to provide support to NEETs, the EDO's monitoring materials did not provide clarity on the positioning of the MBSP alongside any initiatives; the extent of funding leveraged from other sources (such as DCAL or other government agencies) and/or the value which the Programme added to other initiatives. Therefore it is recognised that there is a risk that duplication of some activity may have occurred.

2. **Group Mentoring support** comprised attendance at scheduled group mentoring sessions. The sessions were delivered either using the EDO's team, or specialists in the specific topic area, selected by the EDO based on its sectoral experience, or requests from its client base. The group mentoring sessions typically involved smaller groups than the Seminars and Events (circa 12 people per session). In total, the EDO provided details on 391 Group Mentoring sessions (with each attendance at each Group Mentoring event being recorded as a session).³⁶

It should be noted that the Group Mentoring comprised mentoring delivered on a one-to-many, rather than a one-to-one basis, and therefore was not fully in keeping with the methodology included within the EDO's proposal for the delivery contract (e.g. including diagnostics, intensive mentoring and evaluation and signposting stages reflecting a 'bespoke beneficiary journey').

³⁶ As previously noted, the total of one-to-one and one-to-many mentoring sessions as per the EDO's database (N=763) did not equate to the 867 sessions as reported in the quarterly reports.

However, the EDO has indicated that the Group Mentoring approach reflected lessons learned by its partner Generate UK, and sought to maximise efficiencies by enabling multiple individuals/businesses to avail of the expertise of specialists within a constrained time period (e.g. 2 days). This was considered to be particularly key where the expert was visiting NI to deliver the Group Mentoring sessions.

Furthermore, it was suggested by the EDO that the Group Mentoring approach enabled attendees to undertake more intensive skills development and to facilitate greater network-building (both between the attendees and the mentors and within the attendees). Details on the specific group mentoring events delivered through the 3-year MBSP are attached as Appendix VI.

Notwithstanding this, the EDO subsequently recognised that the Mentoring activities could be enhanced through the implementation of a more structured approach (and one which was more in-keeping with the methodology proposed at the outset) and proactively applied greater structure in the delivery of the Mentoring strand during the 9-month extension MBSP (as per Section 3.5).

3.4.4 Market Development

The MBSP supported the attendance of NI artists and businesses at a wide range of local, national and international trade and showcasing events. Discussions with the EDO have indicated that the initiatives sought to provide the selected businesses with opportunities to:

- Network with influential representatives from the local and international music industry;
- Develop individual opportunities for commercial success; and
- Enhance NI's reputation in global markets.

In total, 110 businesses were supported to attend 27 Market Development events (as compared with targets of 54 businesses attending 18 events) throughout the 3-year MBSP³⁷. The events supported through the Market Development strand are summarised below, with further details on each intervention attached as Appendix VI.³⁸

Table 3.5: Events Supported through the Market Development Strand during the 3-year MBSP

<ul style="list-style-type: none"> • Amsterdam Dance Event (ADE) - Key conference and showcasing event for the EDM genre. • Canada Music Week - Industry conference and music festival held over ten days in Toronto. • Eurosonic - Key exchange and networking platform for European music attended by over 3,200 international music industry and media delegates annually. • Folk Alliance - Important showcase and marketplace for the business of folk music. • NH7 Weekenders/Horizons India – High-profile tour of Indian pop music festivals attended by music artists/businesses and their management. • Hard Working Class Heroes - Irish music festival and conference event. • Liverpool Sound City – A UK showcasing and networking conference. • MIDEM - International music event gathering key players from the music ecosystem to forge business connections and explore current music trends. • Norwich Sound and Vision - Creative Convergence conference. • Reeperbahn - Music festival held in Hamburg, Germany over four days at the end of September. • SXSW - Internationally-recognised showcasing and networking conference and festival, which represents a key development opportunity for both creative artists and businesses working in the increasingly convergent music, film and interactive/digital industries³⁹. • The Great Escape- Premier new music showcase and networking event in the UK music industry calendar. • WOMEX - A world music conference and trade fair. • XpoNorth - Scotland's leading creative industries festival hosted annually in Inverness.
--

³⁷ It should be noted that the monitoring data provided to the Evaluation Team for the Market Development strand fully aligned with the activity outputs as per the EDO's monitoring report.

³⁸ NB support was provided for multiple years of a number of these events. As such, the total number of events included in this table is less than the total of 27 Market Development events as per the EDO's monitoring reports.

³⁹ NB - Invest NI provided £48,319 of financial support to 52 businesses to attend SXSW in 2014, 2015 and 2016. This included a total of £5,048 provided to 6 businesses which were also supported through the MBSP to attend the events.

3.4.5 Talent Development

The Talent Development activities across the 3-year MBSP exceeded the baseline targets, both in terms of the number of groups supported (20 versus 15) and individual participants (51 versus 15). It is understood that the Talent Development strand incorporated the following stages:

- To identify the selected talents for the Talent Development initiative, the EDO established the Tipping Point NI initiative, which replicated a similar initiative delivered by Generator UK.
- The Tipping Point NI initiative involved the EDO inviting 40 knowledgeable and influential stakeholders from the local music industry to join a panel.
- Each member of the panel recommended three exceptional NI talents each year.
- A short-list was collated by the EDO, and Talent Development opportunities were offered to those talents who were most commonly recommended by the panel.
- The EDO hosted an initial meeting with each participant to determine what bespoke support would be required to accelerate their growth.
- Following this initial meeting, each participant was provided one-to-one Mentoring, as well as opportunities to attend group Mentoring masterclasses.
- Furthermore, each participant received a range of tailored individual development interventions (details on the support provided to each participant are attached as Appendix VI).

3.5 MBSP Extension Period (July 2016–March 2017)

The following table provides an overview of the MBSP activity across the 9-month extension period from July 2016 to March 2017, as per the most recent Monitoring Report⁴⁰.

Table 3.6: Overview of MBSP Activity (July 2016 to March 2017)				
Strand	Metric (No. of)	Target Output	Actual Output	Variance
Seminars and Events	Events	4	5	+1
	Delegates	600	516	-84
Mentoring	Sessions	150	161	+11
	Businesses	45	61	+17
Market Development	Events	8	8	0
	Businesses	25	36	+11
Talent Development	Groups	4	6	+2
	Participants	Not stipulated	14	N/A

Key points to note in relation to Table 3.6 include⁴¹:

- All but one of the activity targets established for the four strands of support during the MBSP extension were achieved or exceeded within the 9-month period.

- **Seminars and Events** - Five Seminars/Events were delivered comprising:

- A Creative Export Roadshow delivered in collaboration with the Department for International Trade;
- A Royalty Collection for the Electronic Sector Seminar delivered in partnership with PRS for Music;
- A Digital Media Masterclass;
- A Production Masterclass; and most notably
- The Output Belfast conference delivered in February 2017.

The total number of delegates attending the Seminars/Events (N=516) was lower than the target of 600 and was largely driven by attendance by approximately 450 delegates at Output Belfast⁴².

⁴⁰ Source: ‘Generator NI extension programme fourth 6 weekly report’.

⁴¹ Further details on each initiative are attached in Appendix VI.

⁴² It should be noted that whilst the EDO provided the Evaluation Team with contact details for 314 unique attendees at Output Belfast (based upon sign-in attendance sheets available), the EDO has indicated that a number of sign-in sheets were mislaid at the event and the actual number of delegates attending was considered to be closer to 450. This estimate was based upon a number of factors including: 450 delegate bags being collected during the Conference; full capacity of

- **Mentoring** – During the MBSP extension, the EDO applied a structured methodology to Mentoring, whereby recipients initially completed a registration form to gather baseline information, and then had an initial one-to-one consultation with the Mentor to assess their needs and to develop an action plan examining the short-term and long-term objectives of each business. Subsequently, the EDO followed-up with the participant via additional mentoring sessions, emails and/or telephone calls as required to provide advice and guidance. At the end of the 9-month period, the EDO evaluated the progress made by the participants towards their agreed action plan.

In total, 161 mentoring sessions were delivered with 61 unique businesses (including initial assessment meetings and follow-up correspondence), which was in excess of the target of 150 sessions and 45 businesses. Unlike the 3-year MBSP, no Group Mentoring activities were delivered during the extension period.

- **Market Development** – 36 unique businesses received support to attend one or more of eight local, national and international trade and showcasing events to raise their profile (and the profile of the NI music industry more broadly) and to network with influential music industry delegates. The events supported included the Association of Independent Festivals (AIF) Congress, ADE, the DIT Nashville Creative Trade Mission, Eurosonic, Hard Working Class Heroes, Other Voices, WOMEX and SXSW.
- Six creative businesses (comprising 14 individuals) considered to be at the ‘tipping-point’ of achieving commercial success were selected for the **Talent Development strand** of support during the 9-month extension. Each participant received one-to-one mentoring support as well as a range of bespoke individual development interventions (described further in Appendix VI).

Within the targets for the Talent Development strand, it was noted that each participant would attend 2 x two-day intensive skills events during the 9-month period. The EDO has indicated that the Production Masterclass and the Digital Media Masterclass represented the two intensive skills events delivered during the period. However, the EDO determined that each event would be delivered more effectively as a one-day event.

It should be noted that the EDO proactively implemented improvements to its monitoring processes (e.g. monitoring of individuals attendances at events, mentoring sessions and unique businesses) during the 9-month period.

3.5.1 Proposed Modifications and Specific Requirements

Whilst it was anticipated that the four programme strands (discussed above) would continue to be delivered during the 9-month extension period, the programme funders (Invest NI and DCAL) stipulated a small number of modifications/ specific requirements for the extension period (July 2016 – March 2017).

350 attending the opening keynote address with an estimated further 100 delegates arriving during the 2-hour slot; and an estimate of 100 delegates networking in the MAC’s communal spaces on the ground floor and mezzanine areas during the closing keynote address (which was also reported to be at full capacity of 350).

Table 3.7: Delivery of Programme Modifications and Specific Requirements

Proposed Modification/ Specific Requirements	Commentary on Delivery
<p>Seminars and Events</p> <p>It was anticipated that specific elements of the MBSP would be designed to enhance cross-sectoral opportunities, networks and connections including supporting music IP-owners to showcase and network at the key international film, digital and gaming events.</p> <p>It was suggested that this approach would maximise existing stakeholder initiatives, e.g. NI Screen-led events; digital convergence, etc.</p>	<p>The EDO has indicated that it has placed a strong focus on convergence, cross-sectoral opportunities, and the music industries role within the wider creative industries throughout the 9-month extension period. Specifically, it was noted that the Output Conference 2017 incorporated four music and image events, as follows:</p> <ol style="list-style-type: none"> 1. An introduction to placing music in film, television, advertising and gaming (delivered by a Music Publisher); 2. Presentations by the Heads of Music for both Adidas and Jagermeister in relation to the placement of music within advertising for the brands; 3. Composers and sound designers for Sony Playstation tracking the journey of working in gaming; and 4. National television composers providing details on the employment opportunities. <p>Other convergence initiatives included:</p> <ul style="list-style-type: none"> • Signposting to the Belfast Media Festival, and in particular to network with a national film music supervisor. • Supporting the AVA Festival team to attend the ADE Conference as part of the Market Development and encouraging networking with national/ international media partners. • Commissioning an audio-visual business to provide a series of films for one of the Talent Development artists to accompany their showcase at SXSW 2017.
<p>Market Development</p> <p>It was anticipated that the Output Showcase would continue.</p> <p>During the 3-year MBSP, a partnership between BCC and UKTI was piloted, targeted at increasing engagement in the Indian music industry. It was proposed that this model would continue in the extension period.</p>	<p>The Output Conference 2017 was delivered in February 2017 and as a collaborative initiative between Generator NI (through the MBSP) and Belfast City Council.</p>
	<p>During the 3-year MBSP, the EDO leveraged funding for the pilot initiative from BCC and the Music Is Great initiative (as part of the Government's broader GREAT Britain campaign). However, the EDO has advised that BCC subsequently determined that further investment for a follow-up initiative did not represent a budgetary priority and the pilot scheme was no longer supported during the 9-month extension.</p>
<p>Skills Development</p> <p>Development of audio-visual assets encapsulating key skills which would be available after the programme ends in order to support engagement with schools and further and higher education.</p> <p>Furthermore, it was suggested that a number of tailored educational events would be delivered in response to the feedback from educational stakeholders who took part in the MusED 2015 music education symposium.</p>	<p>The EDO confirmed that these initiatives were not fully delivered due to being "<i>beyond its resources in the short extension programme</i>". Notwithstanding this, the EDO has collated a variety of online content (such as YouTube videos) which are utilised by schools and educational institutions.</p> <p>Whilst the EDO lacked the resources to develop and deliver a full programme of tailored educational events, it has advised that in order to foster linkages with the further education and higher education sector throughout NI, the Output Conference 2017 was promoted to a large number of students and academic staff (including UU, QUB, and the FE Colleges) and included the following educationally-focused components:</p> <ul style="list-style-type: none"> • The UU Art College hosted a talk for animation and design students by a graphic designer for musicians. • The closing keynote session was sponsored by Ulster University. <p>Furthermore, the EDO delivered a session to Year 10-12 pupils at the Belfast South West Partnership Board Digital Youth Event, relating to careers in the music industry and the skills required.</p> <p>Each of these activities sought to address the feedback arising from the MusED 2015 symposium.</p>
<p>Market Development Events</p> <p>It was anticipated that there would be cross-border engagement with industry through the high-profile 'Other Voices' festival, in order to facilitate and foster the development of cross-border creative IP collaborations.</p>	<p>Eight artists were supported to attend the Other Voices conference and showcasing event. The MBSP monitoring materials indicated that the feedback from the attendees was positive with anticipated outcomes including festival bookings for 2017 as well as media coverage and broadcast offers.</p>

3.6 Other Aspects of Programme Delivery

3.6.1 Partnership Working

A fundamental aspect of the MBSP was the establishment and development of collaborative partnerships with key stakeholder organisations across the creative industries. Review of the EDO's monitoring materials, as well as stakeholder consultations, has indicated that much of the MBSP activity was developed and delivered in partnership and that the EDO developed productive and effective collaborative relationships with the following organisations through the delivery of the MBSP⁴³.

<ul style="list-style-type: none">• Belfast City Council;• Derry City Council;• Invest NI;• Generator UK;• NI Screen;• Honeycomb Creative Works;	<ul style="list-style-type: none">• PRS for Music;• The Nerve Centre;• British Council;• Tourism Ireland; and• Other National Bodies (e.g. UK Music, UKTI, BPI, AIM and PPL).
---	---

Indeed, consultation with representatives from the partnership organisations indicated that collaboration with the EDO had added considerable value to the development of the NI music industry and enhanced the activities of other initiatives that have focused on providing support to the NI music industry (as per Section 6.4). Therefore the partnership working ensured a high-quality of delivery and facilitated a joined-up approach that might otherwise not have been possible.

3.6.2 Social and Educational Focused Activities

In addition to the core aspects of the delivery of its four supports strands, and in line with the ToR for the delivery of the MBSP, the EDO also delivered a range of social and educational initiatives, which sought to support equality of opportunity, reduce inequalities and foster a sustainable music industry⁴⁴. These included:

- Provision of two work-placements per annum (each 26-weeks in duration) throughout the 3-year MBSP to individuals classified as being NEET. The placements provided the individuals with a range of experience aimed at enhancing their future employability. The EDO has advised that two of these placements were signposted from Armstrong Learning as part of the DEL-funded Steps to Work Programme.
- A further work placement was provided to one individual classified as being NEET during the 9-month extension period.
- The EDO implemented outreach promotional activities to support equality of opportunity for those from disadvantaged communities. For example, the EDO planned and promoted a skills and networking event as part of Creativity month at the Spectrum Centre on the Shankill Road in Belfast.
- The EDO developed partnership arrangements with the education sector to help to encourage new entrants into the music industry. Specifically, the following educational initiatives were delivered:

⁴³ Further details are attached as Appendix VII.

⁴⁴ These were articulated in the EDO's 'Social Returns and Educational Outputs Overview'.

Managing a Music Business Enterprise (MMBE)	<ul style="list-style-type: none"> The EDO worked in collaboration with Generator UK, DEL, the Nerve Centre, Derry City Council and the National Skills Academy, towards the delivery of ‘Managing a Music Business Enterprise’ (MMBE) Programme. MMBE was a three-month accredited training course for the music sector in the North West region of NI. The Programme commenced in September 2014 and engaged with 16 music businesses from the North West region over a 13-week period. MMBE provided a qualification (HND Level 3) related to the skills and knowledge required to run a successful music business, including digital media and marketing strategies, revenue streams, business models and digital platforms. Each element of the course contributed towards a live business plan that could be implemented upon completion of the MMBE. All forms of music business were eligible to participate in the course including artist managers, promoters, booking agents, record labels, publishers, songwriters and DIY artists.
Music Education Symposium	<ul style="list-style-type: none"> As part of the 2014 Output Conference, the EDO facilitated a music education symposium. This event included representatives from all of the Further and Higher education colleges in the sector and a wide range of other key sector stakeholders. This initiative was a partnership with Belfast City Council, Honeycomb Creative and the Ulster University and was held in UU’s Belfast Campus. The symposium was designed to help define and develop best practice in music education in order to maximise the economic and cultural contribution to NI.
MusED Conference	<ul style="list-style-type: none"> Following the music symposium, the EDO collaborated with DCAL and the Nerve Centre to plan and deliver a music education conference (the ‘MusED Conference’) as part of DCAL’s Creativity Month initiative. Attendees included representatives from a range of Primary, Secondary, Further and Higher education colleges in the music sector, as well as a wide range of other key sector stakeholders including representatives from Government Departments and relating to Curriculum Development. The conference explored how policy and practice could be developed to improve music education and training to enhance creativity. The main considerations related to the music education curriculum in schools, and how this could help to develop the music industries within NI.

3.6.3 Equality Considerations

Section 75 of the NI Act 1998 requires that DCAL/Invest NI shall, “*in carrying out its function relating to NI, have due regard to the need to promote equality of opportunity*” between the following groups:

- Persons of different religious belief, political opinion, racial group, age, marital status or sexual orientation;
- Men and women generally;
- Persons with a disability and persons without; and
- Persons with dependants and persons without.

In addition and without prejudice to these obligations, in carrying out its functions, DCAL and Invest NI are also committed to promoting good relations between persons of different religious belief, political opinion or racial group.

The Evaluation Team’s review of the MBSP activity, monitoring information provided during the evaluation process and our discussions with the EDO has suggested that whilst the MBSP was not specifically targeted at any specific Section 75 categories (albeit it did actively seek to promote equality of opportunity for those from disadvantaged communities, as per Section 3.6.2), it does not appear to have had an adverse impact on any Section 75 group.

3.7 Summary Conclusions

Key conclusions relating to the preceding analysis include:

- The EDO was involved in the delivery of an extensive array of activity through the MBSP, which included activities targeted at participants at different stages of involvement (e.g. aspiring musicians through to established musicians), and in different roles within the indigenous music industry (e.g. songwriters, artists managers etc.).
- In addition to the four key programme strands, the EDO also delivered a range of other social and educational focused activities through the MBSP as well as establishing and developing collaborative partnerships with key stakeholder organisations across the creative industries. Indeed, stakeholders indicated that often the involvement of the EDO had enhanced the activities of other initiatives by leveraging the EDO's sectoral expertise and contact base.
- Whilst it is positive that the MBSP complemented cross-departmental goals (including those of DCAL) by working in collaboration where possible, the EDO's monitoring materials did not provide clarity on the positioning of the MBSP alongside any initiatives; the extent of funding leveraged from other sources (such as DCAL or other government agencies) and/or the value which the Programme added to other initiatives. Therefore it is recognised that there is a risk that duplication of some activity may have occurred.
- Some participants may have had relatively minimal engagement with the Programme (such as those who attended Seminars and Events, or Group Mentoring sessions), thereby limiting the likelihood of the MBSP having a substantive impact on their business development.
- Furthermore, much of the activity during the 3-year MBSP focused on the development of individuals/artists, rather on businesses providing services to support the wider music business infrastructure within NI such as artist management, publishing and music distribution, despite the NI Music Strategy recognising that NI had relative weaknesses in the provision of these supporting services.
- It is however recognised that during the 9-month extension period, the EDO employed a broader based approach and ensured that participants represented a more balanced range of creative and supporting infrastructure sub-sectors.
- Furthermore, whilst it was not possible for the Evaluation Team to fully validate the activity delivered under a number of the support strands during the 3-year MBSP due to weaknesses in the EDO's monitoring, the EDO proactively implemented improvements to its processes (e.g. monitoring of individuals attendances at events, mentoring sessions and unique businesses) during the 9-month period.

4. PARTICIPANTS' PROFILE, SATISFACTION WITH, & VIEWS OF, THE MBSP

4.1 Introduction

Section 4 provides a summary analysis of the key findings emerging from the primary research with those individuals and businesses in receipt of support under the 3-year and/or the 9-month extension MBSP phases, in terms of the profile of participants and their satisfaction with, and views of, the Programme. Detailed analysis is attached as Appendices VIII and IX.

4.2 Participants' Recollection of the MBSP Support

For each phase of the MBSP, over one in ten participants surveyed (17% for the 3-year MBSP (N=243) and 13% for the 9-month extension (N=90)) indicated that they could not recall receiving any support through the MBSP (despite using all available prompts to ‘jog memories’), potentially reflecting that:

- Some participants had relatively minimal engagement with the Programme. This is supported by the fact that almost one quarter (24%) of those respondents who solely attended Seminars/ Events indicated that they could not recall receiving support⁴⁵ whereas all (100%) of the respondents who had received Talent Development support (i.e. designed to be the most intensive support strand) under each phase recalled the support and recognised that it had been provided by Generator NI through the MBSP⁴⁶.
- There was a degree of confusion amongst respondents as to which programme they had participated on, and/or from which organisations they had received support, given that much of the activities were delivered in partnership with other organisations. Therefore, despite prompts, they may not have recognised the MBSP or Generator NI’s brands.

4.3 Participant Profile

4.3.1 Engagement with, or Involvement in, the Music Industry

Table 4.1 below compares the respondents’ engagement with or involvement in the NI music industry at the time of their participation on the MBSP vis-à-vis at the time of surveying.

	Table 4.1: Respondents' Engagement with, or Involvement in, the Music Industry				
	3-year MBSP (N=177) ⁴⁷	At the time of participation	9-month MBSP Extension (N=70) ⁴⁸	At the time of surveying (June 2016)	
Established	62%	70%	84%	82%	
Aspiring	38%	26%	12%	11%	
Both Aspiring and Established ⁴⁹	-	-	4%	6%	
No longer involved	N/A	4%	N/A	1%	

⁴⁵ N=113 for the 3-year MBSP and N=49 for the 9-month extension.

⁴⁶ N=15 for the 3-year MBSP and N=6 for the 9-month extension.

⁴⁷ 19 respondents (1 Mentoring and 18 Seminars and Events) did not answer this question for either time period. A further five online respondents (all Seminars and Events) provided an indication of their involvement in the industry at the time of participation (2 = Aspiring and 3= Established) but did not provide an indication of their involvement at the time of surveying. For comparability, these individuals have been excluded from the above analysis.

Of the 201 respondents, 19 (1 Mentoring and 18 Seminar and Events recipients) did not answer this question.

⁴⁸ Of the 90 respondents, 20 (all Seminars and Events recipients) did not answer this question.

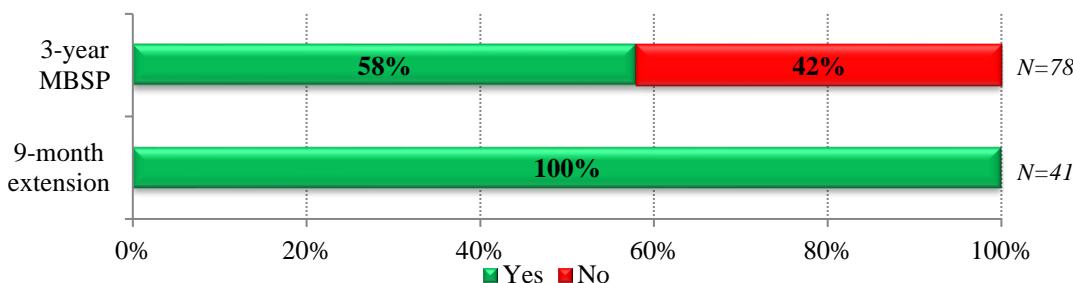
⁴⁹ It should be noted that four respondents indicated that they were ‘aspiring’ in certain aspects of the NI music industry but ‘established’ in others.

Key points to note in relation to the preceding analysis include:

- The proportion of 3-year MBSP respondents that indicated that they were established within the NI music industry increased from 62% at the time of their participation on the MBSP to 70% (both N=177) at the time of surveying.
- Whilst it is not possible to confirm the extent to which the Programme directly contributed, encouragingly, this indicates that there was a progression in the industry across the period with a greater proportion of individuals indicating their involvement in the industry as ‘established’.
- Perhaps unsurprisingly given the short duration of the 9-month extension, there was little change in respondents’ involvement in the NI music industry across the period, with over four-fifths of respondents indicating that they were ‘established’ both at the time of their participation (84%, N=70) and at the time of surveying (82%, N=70).

As can be seen from Figure 4.1 below, whilst over two-fifths (42%, N=78) of those respondents who received Talent Development, Market Development and/or Mentoring support during the 3-year MBSP indicated that their role in the music industry did not represent their main occupation, all (100%, N=41) of those who received these more intensive strands of support during the 9-month extension indicated that the music industry was their main occupation.

Figure 4.1: Does your role in the music industry represent your main occupation? ⁵⁰



This profile may be reflective of the focus taken during the extension phase (i.e. on those businesses which were considered to offer the potential to generate the greatest level of economic outcomes) and/or the fact that 78% of participants/businesses that received support during the extension period also received support during the initial 3-year period (and therefore may already have become more established within the industry).

Whilst participants represented a wide range of sub-sectors and services within the music industry, in line with the Evaluation Team’s review of the monitoring materials (Section 3.7), the survey analysis indicates that much of the activity delivered through the 3-year MBSP focused on the development of individuals/artists, rather than businesses providing services to support the wider music business infrastructure within NI.

As can be seen from Table 4.2, over half (57%, N=182) of 3-year MBSP respondents and over one-quarter (27%, N=70) of 9-month extension respondents indicated that they were ‘artists/performers’ within the industry at the time they participated, with another creative role (‘songwriting/ composing’) representing the second most common role within the sector during each phase.

However, during the 9-month extension period, the EDO employed a broader based approach and ensured that participants represented a more balanced range of creative and supporting infrastructure sub-sectors.

⁵⁰ It should be noted that this question was only asked to telephone survey respondents for each phase. The question was added to the survey during the 3-year MBSP Evaluation process as a result of emerging indications that music did not represent the main occupation for a number of respondents. Therefore only 78 of the 96 telephone respondents who could recall receiving MBSP support answered this question.

Table 4.2: Breakdown of Participants by Sub-Sector		
	3-year MBSP (N=182)	9-month Extension MBSP (N=70)
Artist/ Performer	57%	27%
Songwriter/ Composer	39%	18%
Music Production	14%	8%
Artist Management	13%	9%
Festival/ Event Organiser	9%	9%
Music Marketing and Promotion	9%	8%
Record Label	6%	6%
Music Publishing	5%	5%
Music Teacher	4%	2%
Live Music Venue	3%	4%
Other ⁵¹	5%	9%

4.3.2 Music Business Turnover and Employment

Table 4.3 provides a breakdown of the annual turnover of respondents' before they participated on the MBSP and at the time of surveying⁵²:

Turnover	Table 4.3: Breakdown of Participant Business' Turnover			
	3-year MBSP	9-month Extension		
	Before (N=72)	At the time of surveying (N=76)	Before (N=33)	At the time of surveying (N=34)
£0	18%	17%	6%	3%
£1 - £10,000	49%	42%	28%	24%
£10,001 - £20,000	8%	13%	22%	12%
£21,001 - £30,000	11%	7%	6%	9%
£31,000 - £100,000	10%	14%	25%	35%
£100,001 +	4%	7%	13%	18%
Average (incl. outliers)	£212,012	£258,321	£411,469	£521,609
No. of outliers	8	7	1	4
Value of outliers	£14,695,000	£18,700,000	£12,000,000	£15,500,000
Average (excl. outliers)	£8,904	£13,513	£37,645	£40,783

Key points to note include:

- The data indicates that the sector is dominated by micro-businesses with a small number of large businesses (representing statistical outliers when included in the overall analysis) largely driving the industry turnover, thereby resulting in a significant disparity between the average turnover of the majority of businesses (ranging from £8,904 to £40,783 across the different points in time) and the average turnover when these large businesses are included (ranging from £212k to £521k).
- Whilst the average turnover figures reported by the 3-year MBSP respondents appear very low, these are perhaps unsurprising when considered in the context that these businesses employed an average of just 1 employee (Table 4.4), and the music industry business may not have represented the full-time occupation for many of these individuals (as per Figure 4.1).
- Positively, for both the 3-year and 9-month extension MBSP, the average turnover of business respondents' was higher at the time of surveying than it had been before they participated. Whilst this does not determine the extent to which the MBSP directly contributed to increased turnover, it

⁵¹ Other occupations included music video production, animation production, music consultancy, instrument manufacturing, music photography, vocal coaching, music education, tour management, audio technician, music consultant, sound engineering, music trade body representative.

⁵² It should be noted that sample sizes are relatively low on the basis that many businesses from both cohorts were either unable or unwilling to quantify their turnover.

can be seen that participating music businesses were progressing and growing across the period under review.

- Furthermore, the average turnover of businesses supported through the extension phase was significantly higher than for those supported during the previous phase, potentially indicating that the businesses focused upon were those with the greatest economic potential.

The table below provides a breakdown of the employment profile of respondent businesses:

Turnover	3-year MBSP (N=118)		9-month Extension	
	Before	At the time of surveying	Before (N=40)	At the time of surveying (N=38)
Less than 1 FTE	10%	12%	3%	0%
1	55%	53%	52%	47%
2 – 5	31%	31%	40%	45%
6 - 10	1%	1%	0%	0%
More than 10	3%	3%	5%	8%
	100%	100%	100%	100%
Average (incl. outliers)	3	3	5	7
Average (excl. outliers)	1	1	2	2

- Almost all (96% of 3-year MBSP respondents (N=118) and 92% of 9-month extension respondents (N=38)) were micro-businesses at the time of surveying, with less than 10 employees, with approximately half having 1 or fewer FTEs⁵³.
- Excluding a small number of outlying businesses with more than 10 employees, the average number of employees was 1 for the 3-year MBSP respondents and 2 for the 9-month extension respondents. Whilst this is lower than the average of 2.96 employees per business indicated in the economic baseline study, it is recognised that the economic baseline study may have included outlying businesses when estimating the average employee numbers.

⁵³ Where the total level of employment did not constitute a full-time post.

4.4 Participant Satisfaction

Across all four strands of MBSP activity (both during the 3-year MBSP and the 9-month extension MBSP), participants expressed high levels of satisfaction with the support they received. In particular, participants were satisfied with:

Marketing and promotion	<ul style="list-style-type: none"> Over four-fifths, (88%, N=96) of 3-year MBSP and almost three-quarters (72%, N=18) of 9-month extension MBSP participants indicated that the marketing and promotion of the support that was available did not need to be improved.
Seminars and Events⁵⁴	<ul style="list-style-type: none"> The relevance of the topics covered to their business' needs; and The level of music business knowledge possessed by the expert. Whilst over three-quarters (77%⁵⁵) of Seminar/ Event attendees expressed high levels of satisfaction with the amount of time dedicated to networking activities, the fact that 23% expressed dissatisfaction is note-worthy given “<i>building contacts with other people in the music industry</i>” was the factor that was most commonly cited as providing a motivation to attend a Seminar/ Event⁵⁶.
Mentoring⁵⁷	<ul style="list-style-type: none"> The mentor's understanding of their business' needs and their ability to tailor the advice offered to meet those needs; The relevance of sources of support or contacts that they were referred to.
Market Development	<ul style="list-style-type: none"> The advice and guidance received prior to, during and following attendance at a Market Development event (with a satisfaction rating of at least 98% in each case)⁵⁸; and The appropriateness of the Market Development event as a platform for their music business growth potential and/or for their creative talents⁵⁹. All 3-year respondents and 87% of 9-month respondents expressed satisfaction with the level of financial assistance provided. Those few respondents that cited any dissatisfaction with this aspect of the support suggested that the financial assistance provided only a small contribution towards their total expenses associated with the event.⁶⁰
Talent Development⁶¹	<ul style="list-style-type: none"> The specific sectoral knowledge of the EDO, the EDO's understanding of their business' needs and its ability to tailor the advice and support offered to meet those needs; The amount of time and/or financial assistance dedicated to accelerating their business; and The extent to which the EDO introduced them to music industry contacts.

On an overall level and encouragingly, almost all (92% (N=176) of 3-year MBSP and 91% (N=70) of 9-month MBSP) of the respondents (across all four strands of activity) suggested that they were ‘satisfied’ or ‘very satisfied’ with the music business development support and advice that they received throughout the MBSP.

⁵⁴ Satisfaction with relevance of the topics equated to 95% (N=84) of 3-year and 95% (N=63) of 9-month respondents and with the expert's knowledge equated to 93% (N=83) of 3 year and 98% (N=63) of 9-month respondents.

⁵⁵ N=79 for 3-year respondents and N=62 for 9-month respondents.

⁵⁶ 74% (N=80) of 3-year respondents and 80% (N=60) of 9-month respondents.

⁵⁷ Satisfaction with the mentor's understanding equated to 94% of 3-year and 90% of 9-month respondents, the mentor's ability to tailor equated to 96% of 3-year and 90% of 9-month respondents and the relevance of signposting equated to 90% of 3-year and 90% of 9-month respondents. N=55 for 3-year and N=31 for 9-month respondents.

⁵⁸ N=37 for 3-year respondents and varied across aspects for the 9-month respondents with N=25 for ‘prior’, N=23 for ‘during’ and N=18 for ‘following’ the event.

⁵⁹ Satisfaction with the event as a business platform equated to 100% (N=37) of 3-year and 92% (N=27) of 9-month respondents and as a creative platform equated to 100% (N=22) of 3-year and 89% (N=19) of 9-month respondents.

⁶⁰ N=37 for 3-year and N=16 for 9-month MBSP respondents.

⁶¹ All (100%, N=6) of the 9-month respondents were satisfied with all aspects. For the 3-year respondents (N=15) the levels of satisfaction equated to 100% for both sectoral knowledge and the EDO's understanding of their needs, 93% for the EDO's ability to tailor support, 87% for the amount of time and 93% for both the level of financial assistance and the extent to which they were introduced to contacts.

4.5 Participants' Recommendations

All survey respondents⁶² were asked whether they had any recommendations on the types of support which are required in order to grow the NI music industry and to make it more sustainable. Common recommendations from those who provided a response included:

- Provision of more financial support for music businesses;
- Practical tools and guidance (e.g. contract law, taxation and digital marketing);
- Advice on how to reach export markets;
- Support made available for music businesses throughout the entire supply chain (i.e. more broadly than just for performers/artists); and
- The development of greater linkages with the education sector.

Comments made by respondents to the survey processes included:

"There is a lack of promoters and venues in the local music scene. There needs to be a better network of live events to ensure that the industry continues to grow. We also need to encourage more businesses to export".

"There needs to be better advertising and publicity for events, and showcase events need to be made more attractive to encourage people to attend when they are limited in their financial and time resources".

"The sector needs support and advice on how to utilise the internet and social media to grow their business and audience base. Support for setting up distribution channels and how to song-writing would also be beneficial".

"Industry-related topics like marketing, PR and artist development need to be better understood and valued".

"Music businesses (rather than solely artists/ performers) need to be supported to grow and develop. For instance, businesses would benefit from guidance on taxation, human resources and financial management. These businesses are often too small to reach these types of support elsewhere".

"Work experience opportunities need to be offered to young musicians to build their confidence".

"NI needs more visible connections with the GB music scene through greater engagement of national industry influencers within NI. Also, more support should be provided throughout NI, and not just focused in Belfast".

"Artists need in-depth career development and funding for websites, recording, production and equipment".

"Awareness needs to be raised that support is available. There should also be a central hub where all sources of funding and support are presented in one place".

"There needs to be more financial support for touring and recording. There also needs to be more showcasing opportunities and more chances to get radio play".

"An approach to music education that develops cohesive creative music practices from early years, through to primary and posts primary education would greatly benefit the talent development and creative potential in NI."

"Additional mentoring support is needed in rural communities, as well as more music education in schools".

"Work placements are excellent for providing first-hand understanding of what is really involved and needed to get to where you want to be in an industry".

"NI music needs a dedicated mainstream media outlet either online, radio, print or TV (or a combination)".

"The MBSP is currently focused on the development of 5-6 artists per year, whereas there needs to be more focus on the commercial aspects of the industry such as publishing and copyright".

"The support provided should be more responsive to one-off needs e.g. support towards tour costs, especially for less established businesses/artists".

3-Year and/or 9-Month Extension MBSP Participants

⁶² Both those that could recall receiving support through the MBSP, and those that could not. Actual respondents equated to N=138 for the 3-year and N=69 for the 9-month extension MBSP.

5. MBSP'S IMPACT

5.1 Introduction

Section 5 considers the impact that the receipt of music business development support had on participant businesses throughout the 3-year MBSP and/or the 9-month extension MBSP.

It should be noted that many (78%, N=63) of the businesses receiving the more intensive forms of support (i.e. Talent Development, Market Development and Mentoring support) throughout the 9-month extension period would also have received one or more strands of support during the 3-year MBSP. As such (and where relevant), the survey process sought to identify the *incremental* impacts achieved as a result of the 9-month extension over and above those achieved as a result of the previous activities.

5.2 Influence on Undertaking Activities (Activity Deadweight)

The net impact (i.e. it's additionality) of the MBSP relating to businesses' decision to engage in music business development activities, or where relevant, to undertake those activities to a similar scale and/or within a similar timescale, can only be measured after making allowances for what would have happened in the absence of the support from the MBSP. That is, an allowance must be made for deadweight. 'Deadweight' refers to activity that would have occurred without the intervention i.e. the support provided through the MBSP.

Appendix X provides a detailed overview of the Evaluation Team's deadweight/ additionality calculations. However, in summary, the levels of activity deadweight have been calculated using a 'participant self-assessment' methodology. The methodology utilises a series of questions⁶³ within the participant survey and assigns weightings (agreed with the DfE's Economist Team) to the individual responses.

The questions sought to ascertain respondents' views on the impact that the receipt of support provided through the MBSP had on their decision to take forward the music business development activities. Options included:

- Whether they would have taken forward the activities at all;
- Whether they would have taken forward the activities but on a reduced scale;
- Whether they would have taken forward the activities, but at a later date;
- Whether they would have taken forward the activities but on a reduced scale and at a later date; and
- Whether they would have taken forward the activities at the same scale and within the timescale regardless of the MBSP.

Depending on the response provided, a level of additionality/deadweight was applied. For example, a respondent who indicated that they definitely would not have taken forward the music business development activities in the absence of the MBSP would have been assigned a level of 100% additionality (i.e. full additionality). Conversely, a respondent who indicated that they definitely would have taken forward the activities within the same timescale regardless of the support provided through the MBSP would have been assigned a level of 100% deadweight (i.e. no additionality). Other responses were given a weighting somewhere between these two extremes (i.e. a level of partial additionality/deadweight).

⁶³ In line with DfE guidance, these questions focused on identifying the likelihood that business would have engaged in music business development activities, what scale of activities would have been undertaken in the absence of support (if relevant) and how much later the activities would have been undertaken (if relevant).

The outcomes of the analysis are provided below:

Table 5.1: Activity Additionality/Deadweight⁶⁴			
3-Year MBSP (N=96)		9-Month Extension MBSP (N=41)	
Deadweight	Additionality	Deadweight	Additionality
29%	71%	47%	53%

The analysis indicates that the level of additionality associated with the activity undertaken through the 3-year MBSP support was 71%, which the Evaluation Team considers is reasonable, and perhaps not unexpected given the relatively niche nature of the music industry and the support offered through the programme. Indeed, many of the respondents indicated that the EDO (and the MBSP) was the only source of dedicated support for music businesses that they were aware of.

However, the level of additionality associated with the activity undertaken through the 9-month MBSP extension support is lower at 53%. The Evaluation Team considers that this lower level of additionality may have been influenced by the focus taken during the extension phase (i.e. on those businesses which were considered to offer the potential to generate the greatest level of economic outcomes) and also on the fact that 78% of participants/businesses that received support during the extension period also received support during the initial 3-year period. For instance, those businesses which the EDO identified as having high growth potential may also have represented the businesses within the marketplace, which would have had the greatest awareness. That is, there was greater likelihood that these more ambitious businesses (having previously received advice, guidance and signposting) would be more proactive and knowledgeable as to how to progress their business' fortunes in the absence of additional support. The challenge therefore for any provider working for any such businesses is to continually refresh the support offered so as to help the business move forward in a manner that they would not otherwise do so in the absence of the support.

Comments from respondents relating to the level of additionality of their music business support activities include:

3-Year MBSP Participants	<p><i>"I could not have afforded to attend the showcasing event without the financial support".</i></p> <p><i>"Generator NI kept me updated about up and coming events which I attended".</i></p> <p><i>"I had no idea as to what support was out there".</i></p> <p><i>"In the absence of the Programme, I would just have kept doing what I was already doing".</i></p> <p><i>"There is nothing else out there like the MBSP".</i></p> <p><i>"We would not have had any idea what the next steps should be without support".</i></p> <p><i>"We would not have had the confidence to take the activities forward".</i></p>
9-Month Extension Participants	<p><i>"Similar events are not provided elsewhere in NI, and I would have had the time to travel to GB to attend something similar if the event had not been provided through the Programme".</i></p> <p><i>"I wouldn't have been able to afford to attend the event or even have known that I could perform at it".</i></p> <p><i>"Whilst I would probably have tried to undertake some of the activities myself, I would not have known about the contacts I made without Generator directing me to them".</i></p> <p><i>"We maybe would have performed at ADE in a couple of years anyway, but we only managed to do it this year because the delivery agent helped us to approach the right people".</i></p> <p><i>"Whilst we got a little Mentoring support, we were largely doing the activities anyway".</i></p> <p><i>"I would have gone to the Market Development events anyway".</i></p>

⁶⁴ This question was only asked to those who completed the telephone survey during the primary research phases.

5.3 Nature and Extent of Market Failure

Appendix XI provides a detailed analysis of the factors that would have prevented businesses from undertaking the music business development activities or undertaking them in the same manner (i.e. at the same scale or in the same timescale) independent of the support provided through the MBSP. The results of this analysis are presented in the table below:

Table 5.2: Nature and Extent of Market Failure		
	% of respondents	
	3-year MBSP (N=96)	9-month Extension MBSP (N=41)
No Market Failure	47%	39%
Partial Market Failure	12%	15%
Full Market Failure	41%	46%
Total	100%	100%

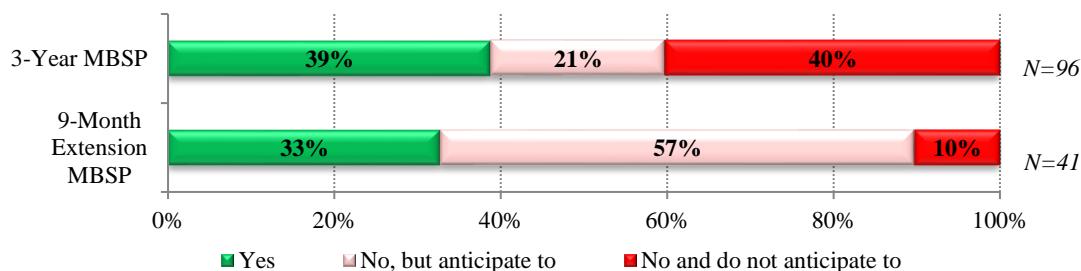
Over half of the businesses that participated on the 3-year MBSP (53%, N=96) and the 9-month extension (61%, N=41) would not have engaged in music business development activities (or would have taken the activities forward at a different scale and/or timescale) due to full or partial market failure factors. Such factors included a lack of knowledge or access to information that would be required to take forward the activities and/or a lack of knowledge of the potential benefits that such activities could derive.

5.4 Assessment of Business Outcomes

5.4.1 Introduction

Almost two fifths (39%, N=96) of the 3-year MBSP participants surveyed that received the more intensive forms of support (i.e. excluding seminar participants) indicated that they had achieved turnover impacts as a result of the support, and a further 21% stated that they anticipated that such impacts would be achieved in the future.

Figure 5.1 Actual and Anticipated Turnover Impacts⁶⁵



Whilst most (90%, N=41) of the extension period participants indicate that they had either achieved (33%) or anticipated achieving (57%) turnover impacts as a result of the support received, the following may have influenced this finding:

- Many (78%) of the businesses that received support during the 9-month extension period also received one or more strands of support during the 3-year MBSP. For these businesses, it may have been difficult to separate the impact of the support received from one time to the other (particularly if it formed a continuum)⁶⁶;
- Many of the businesses that participated in the extension period were specifically selected by the EDO on the basis that they were considered to have had the greatest potential to achieve turnover or employment growth.

⁶⁵ NB This question was only asked to telephone respondents.

⁶⁶ Albeit, the survey process sought to identify the *incremental* impacts achieved as a result of the 9-month extension over and above those achieved as a result of any previous support received.

The following subsection analyses the actual and anticipated impacts arising as a result of the 3-year MBSP and the 9-month extension period. The methodology utilised by the Evaluation Team in arriving at these impacts is detailed in full within Appendix XII.

5.4.2 Gross Turnover

The table overleaf summarises the gross turnover impacts derived by businesses supported through the MBSP during the periods under review for each strand of activity. Points to note in relation to the succeeding analysis include:

- Most (87%, N=15) respondents who had received Talent Development support during the 3-year MBSP indicated that they had achieved turnover impacts as a result of their participation, but smaller proportions of Market Development (55%, N=31), Mentoring (14%, N=74) and Seminar and Events (33%, N=18) participants during the 3-year period suggested the same.
- Whilst only half (50%) of businesses that received Talent Development support during the 9-month extension MBSP achieved turnover impacts, this appears to have been largely as a result of the short timeframes since receipt of the intensive support, with all 6 businesses indicating that they anticipated that turnover impacts would be achieved going forward (Section 5.6).
- The total gross turnover generated by MBSP participants was £2.5m comprising:
 - £1.9m of gross turnover generated by participants of the 3-year MBSP, including a gross turnover contribution of £0.76m from one significant outlier. It should be noted that this respondent reported that participation in the Market Development Programme, and the contacts provided by the EDO during this initiative, had enabled them to sign some major live music contracts. The respondent was of a view that these contracts would not have been secured in the absence of the MBSP support.
 - £0.6m of gross turnover generated by participants of the 9-month extension MBSP, including a gross turnover contribution of £0.25m from one significant outlier⁶⁷.

NB The outlier in both periods was the same business/respondent.

- Encouragingly, the average turnover impacts were larger for the more intensive support strands delivered in each phase (such as Market Development and Talent Development support).

⁶⁷ The Evaluation Team sought clarity from this respondent to better understand the correlation between the support received through the MBSP and the achievement of the turnover impacts but the consultee was unable to provide further details.

Table 5.3: Gross Turnover Impacts⁶⁸

	3-Year MBSP (July 2013 - June 2016)						9-month Extension MBSP (July 2016 – March 2017)					Combined total (45 months)	
	Seminars/ Events	Mentoring	Market	Talent	3-year Total		Seminars/ Events	Mentorin g	Market	Talent	9-month Total		
No of unique participants	999	428	54	20	1,501		476	24	30	6	536		
No. of unique respondents surveyed	63 ⁶⁹	84	31	15	193		37	15	19	6	90		
No. of respondents surveyed regarding impacts	18	74	31	15	138		13	15	19	6	54		
% of respondents surveyed regarding impacts	29%	88%	100%	100%	72%		35%	100%			60%		
Of the Survey Sample...													
No. of respondents with no turnover impacts	12	64	14	2	92		12	10	7	3	32		
No. of respondents with turnover impacts	6	10	17	13	46		1	5	12	3	21		
% of respondents with turnover impacts	33%	14%	55%	87%	33%		8%	33%	63%	50%	39%		
No. able to quantify turnover impacts	3	7	9	4	23		0	2	10	1	13		
Total quantified turnover impacts (excl. outliers)	£10,105	£11,700	£124,000	£53,000	£198,805		£0	£18,500	£116,200	£30,000	£164,700	£363,505	
Value of outliers	£0	£20,000	£760,000	£0	£780,000		£0	£0	£250,000	£0	£250,000	£1,030,000	
Total quantified turnover impacts (incl. outliers)	£10,105	£31,700	£884,000	£53,000	£978,805		£0	£18,500	£366,200	£30,000	£414,700	£1,393,505	
No. of outliers	0	1	1	0	2		0	0	1	0	1		
Average turnover impacts (excl. outliers)	£3,368	£1,950	£15,500	£13,250	£9,467		£0	£9,250	£12,911	£30,000	£13,725		
Total Population													
Total pop. with potential for turnover impacts	290	428	54	20	792		167	24	29	6	226		
Total pop. with turnover impacts	97	58	30	17	202		13	8	18	3	42		
Total Turnover Impacts (exc. outliers)	£325,606	£110,834	£443,500	£229,667	£1,109,607		£0	£74,000	£223,566	£90,000	£387,566	£1,497,173	
Value of outliers	£0	£20,000	£760,000	£0	£780,000		£0	£0	£250,000	£0	£250,000	£1,030,000	
Total Turnover Impacts (Inc. outliers)	£325,606	£130,834	£1,203,500	£229,667	£1,889,607		£0	£74,000	£473,566	£90,000	£637,566	£2,527,173	

⁶⁸ Please note that there are some minor differences within the analysis due to rounding.

⁶⁹ Whilst 113 unique respondents commenced the online skills survey, 50 did not proceed through the survey to the impact section. Over one quarter (29%, N=63) of those that responded to the survey were business owners, and were surveyed regarding their impacts.

Respondents who indicated that MBSP participation had positively impacted their business' turnover were asked to provide a breakdown of the sub-sectors in which their turnover was derived:

Table 5.4: Turnover Impacts by Key Sales Channel/ Sub-Sector					
Key Sales Channels/ Sub-Sectors		3-Year MBSP⁷⁰		9-month Extension MBSP⁷¹	
		£	%	£	%
Live Music	Live performance ticket sales	£820,000	89%	£270,125	65%
	Live performance fees	£3,800	<1%	£65,650	16%
	Sub-total	£823,800	89%	£335,775	81%
Supporting Infrastructure Services ⁷²	Music marketing fees	£40,000	4%	£0	0%
	Music production	£15,000	2%	£0	0%
	Management fees	£5,000	1%	£24,000	6%
	Music publishing	£6,000	1%	£0	0%
	Synchronisation	£4,000	<1%	£0	0%
	Video production	£1,000	<1%	£0	0%
	Music production	£0	0%	£12,725	3%
	Sales of digital media software	£0	0%	£12,500	3%
	Sub-total	£71,000	8%	£49,225	12%
Sales of Creative IP	Royalties and license fees	£24,900	3%	£8,625	2%
	Sales of recorded music in digital format	£2,800	<1%	£20,650	5%
	Sales of recorded music in physical format	£1,200	<1%	£425	<1%
	Sub-total	£28,900	3%	£29,700	7%
Total		£923,700	100%	£414,700	100%

Key points to note in relation to the previous analysis include:

- Over four-fifths of turnover impacts derived related to live music, with live performance ticket sales equating to 89% of the turnover impacts derived from the 3-year MBSP and 65% of the turnover impacts derived from the 9-month extension MBSP. However, almost all of these impacts were reported by one outlying business (equating to £760k of turnover as a result of the 3-year MBSP and £250k as a result of the 9-month extension MBSP). Nonetheless, the results indicate that live performances represent a key driver for the indigenous music industry, and an incentive to attract the establishment of supporting business infrastructure.
- With the exception of this one business, the turnover impacts were relatively modest and spread across a wide range of creative and supporting sub-sectors. This highlights the complex and interrelated nature of the many segments within the music industry and the need to develop each role and segment in order to achieve a fully sustainable music industry.

⁷⁰ 37 telephone respondents suggested that the MBSP had resulted in turnover impacts for their business. Of these, 7 were unable to provide a breakdown of impacts by music sector, equating to a total of £45,000 of quantified impacts.

⁷¹ 20 telephone respondents suggested that the MBSP had resulted in turnover impacts for their business. Of these, 1 was unable to neither quantify the value of their impacts; nor provide a breakdown by sales channel/ sub-sector.

⁷² A number of 'other' streams were suggested during consultation such as music marketing and sales of digital media software. However, further details on the precise nature of these strands and how they relate to the support received through the MBSP were not available.

Respondents were also asked to provide a breakdown of the geographical markets in which the turnover impacts were achieved:

Geographic Market	Table 5.5: Breakdown of Gross Turnover by Geographic Market					
	3-Year MBSP		9-month Extension MBSP			Total Pop.
	Survey Sample (N=24) ⁷³	%	Survey Sample (N=19) ⁷⁴	%		
Domestic Market (i.e. NI)	£797,900	91%	£1,719,542	£308,425	74%	£471,799
Export Markets (i.e. Outside the UK)	£42,500	5%	£94,480	£74,200	18%	£114,762
External Markets (i.e. GB)	£39,600	4%	£75,584	£32,075	8%	£51,005
Total	£880,000	100%	£1,889,606	£414,700	100%	£637,566

Key points to note in relation to the preceding analysis include:

- Almost all (91%) of the turnover impacts quantified by 3-year MBSP respondents were derived in the NI market, which was largely driven by turnover impacts of £760,000 from one business.
- When these proportions are applied to the gross turnover impacts, it is estimated that the total unique population of 3-year MBSP participants generated sales of £95k in export markets, with a further £76k in external markets and £1.72m in the NI domestic market.
- Positively, participants of the 9-month extension MBSP reported export sales which were greater both in value (i.e. £74k vis-à-vis £43k) and in the proportion (i.e. 18% vis-à-vis 5%) of total sales impacts, than were reported by 3-year MBSP participants. As a result, the total gross sales which are estimated to have been derived in export markets as a result of the 9-month MBSP activities (£115k) are higher than those generated as a result of the 3-year MBSP activities (£95k).
- This indicates that the EDO's approach to focusing on those businesses which were considered to offer the potential to generate the greatest level of economic outcomes during the extension period appears to have had a degree of success.

Comments provided by respondents who achieved turnover impacts as a result of the MBSP included:

3-Year MBSP Participants	<p><i>"The Programme helped my business to secure more live performance jobs".</i></p> <p><i>"We realised how important events like The Great Escape are to the music industry, through our participation in the Market Development Programme".</i></p> <p><i>"The MBSP definitely helped to increase my earnings, but I cannot quantify by how much".</i></p> <p><i>"My business secured new clients and contacts through our engagement".</i></p> <p><i>"I got more support elsewhere, but the MBSP did help me to release a single".</i></p>
9-Month Extension Participants	<p><i>"Generator NI recommended my services and I secured production contracts".</i></p> <p><i>"I was put in contact with a booking agent for festivals and large shows, and have managed to sell-out my gigs since. The success meant that I have been able to quit my job and perform full-time. I was also given contacts in ROI which has increased my radio play in that market".</i></p> <p><i>"Our attendance at the ADE event enabled us to make new EU contacts and to secure European acts for our events which have increased our ticket sales".</i></p> <p><i>"The support to attend the event allowed us to showcase our talent and we have secured additional live events as a result of the networking and platform the support gave us".</i></p>

⁷³ 37 telephone respondents suggested that the MBSP had resulted in turnover impacts. Of these, 13 were unable to provide a breakdown of impacts by geographic market, equating to a total of £98,805 of quantified impacts.

⁷⁴ 20 telephone respondents suggested that the MBSP had resulted in turnover impacts for their business. Of these, 1 was unable to neither quantify the value of their impacts; nor provide a breakdown by geographic market.

5.4.3 Gross GVA Impacts

In order to estimate the gross GVA impacts associated with the MBSP, the Evaluation Team has taken an average of the GVA conversion ratios for the ‘sound recording and publishing activities’ and ‘performing arts’ SIC codes for 2013, 2014 and 2015⁷⁵. Utilising this conversion ratio, it is estimated that the 45-month MBSP has generated £1,221,906 of gross GVA comprising £913,638 of gross GVA resulting from the 3-year MBSP and £308,268 of gross GVA resulting from the 9-month extension:

Table 5.6: Gross GVA Impacts			
	3-Year MBSP	9-month MBSP	Combined Total
Seminars and Events	£325,606	£0	£325,606
Mentoring	£130,834	£74,000	£204,834
Market Development	£1,203,500	£473,566	£1,677,066
Talent Development	£229,667	£90,000	£319,667
Total Turnover	£1,889,607	£637,566	£2,527,173
GVA Conversion %		48.4%	
Gross GVA	£913,638	£308,268	£1,221,906

5.4.4 Gross Employment Impacts

3-Year MBSP

None of the respondents across any of the strands of support stated that there had been an impact on jobs created or safeguarded within their businesses as a result of their participation on the 3-year MBSP.

This is perhaps unsurprising, given the intrinsic link between turnover and employment. That is, per Table 5.3, two-thirds (67%, N=138) of respondents surveyed regarding their business-related impacts indicated that there was no impact on their turnover as a result of the MBSP. Furthermore, for those participants who did report that they had achieved turnover impacts, the annual impacts were modest, with the average cumulative turnover impact derived across the duration since participation on the MBSP (up to 3 years) equating to just £9,467. Therefore, the majority of businesses would be unlikely to have sufficient turnover increases to support full-time self-employment, and less still the employment of additional staff.

Notwithstanding this, it is recognised that there was progression in the NI music industry across the 3-year MBSP period with a greater proportion (70%, N=177) of individuals identifying their involvement in the music industry as ‘established’ at the time of surveying than at the time of participation on the 3-year MBSP (62%, N=177).

As can be seen from Table 5.7, if the proportions are grossed up across the total unique population of participants, an additional 100 individual may potentially have identified their involvement in the industry as ‘established’ following their participation in the Programme. Whilst this is a positive indicator for the progression of the industry, the following points should be noted:

- There are many possible inferences of being ‘established’, particularly within the context of the music industry where (and recognising that 57% of 3-year participants were artists/performers) establishment could be interpreted as, for instance, securing regular music sessions.
- Therefore, identifying involvement in the industry as established cannot be directly aligned to employment (either self-employment or the employment of others). Allied to this it is recognised that at the time of surveying 42% (N=78) of respondents indicated that their role in the music industry did not represent their main occupation, which indicates that some of those individuals who identified their involvement as established at the time of surveying continued to be employed in other occupations.

⁷⁵ONS Annual Business Survey (2016) NB Whilst the MBSP was delivered between 2013 and 2017, the most recent data available relates to the 2015 year.

- Furthermore, even those individuals who recognised that their involvement in the industry had become more established across the period did not indicate that the MBSP had directly resulted in any on their employment or the employment of their business.

	Table 5.7: Progression of those Established within the NI Music Industry					
	Talent, Market and Mentoring		Total unique participant s (N=502)	Seminars/ Events		Total unique participant s (N=999)
	Survey Sample (N=114)	N= %		Survey Sample (N=63)	N= %	
Established at the time they participated	70	61%	306	39	62%	619
Established at the time of surveying	81	71%	356	42	67%	669
Additional Established	11	10%	50	3	5%	50

9-Month MBSP

Converse to the previous phase, a number of businesses which received support through the 9-month MBSP indicated that FTE jobs were created and/or safeguarded within the NI music industry (shown in detail in Table 5.8 overleaf). Specifically:

- A small proportion (7 businesses or 13%, N=54) of businesses surveyed regarding their business-related impacts⁷⁶ indicated that they had increased their employment by 6.5 FTEs⁷⁷ as a result of the support received through the 9-month extension MBSP.
- In addition, almost one-fifth (9 businesses, 17%, N=54) of businesses indicated that the support resulted in the safeguarding of 9 FTE jobs.
- The Evaluation Team's grossing up analysis⁷⁸ indicates that the support provided through the 9-month extension MBSP may have resulted in the creation of 9.75 FTEs jobs and safeguarding of 16 FTE jobs.

The employment impacts achieved through the 9-month MBSP are potentially reflective of the focus taken during the extension phase (i.e. on those businesses which were considered to offer the potential to generate the greatest level of economic outcomes), and also on the fact that 78% of participants/businesses that received support during the extension period also received support during the initial 3-year period. As previously noted, for these businesses it may have been difficult to separate the impact of the support received from one time to the other (particularly if it formed a continuum)⁷⁹

⁷⁶ This included all telephone respondents and 13 of the online Seminar/ Events attendees (i.e. those which indicated that they owned a business at the time that they participated or have subsequently created a business).

⁷⁷ NB Only one respondent could quantify the salary of this new post, which was below the NI private sector median salary of £20,394.

⁷⁸ Further details on the methodology adopted in 'grossing-up' the employment impacts are attached in Appendix XII.

⁷⁹ Albeit the survey process sought to identify the incremental employment impacts achieved as a result of the 9-month extension activities over and above those achieved as a result of any previous support received.

Table 5.8: Employment Created as a result of the 9-month MBSP (N=54)

			Seminars/ Events	Mentoring	Market	Talent	9-month Total
FTE Jobs Created	Of the survey sample	No. of respondents surveyed regarding employment impacts	14	15	19	6	54
		No. with jobs created	4	1	2	0	7
		% with jobs created	29%	7%	11%	0%	13%
		No. able to quantify jobs safeguarded	1	1	2	0	4
		Total quantified new jobs	2	2	2.5	0	6.5
		No. of outliers	1	0	0	0	1
		Average jobs created (excl. outliers)	0	2	1.25	0	1.5
	Total Population	Total pop. with potential for jobs created	4	24	29	6	63
		Total pop. with jobs created	4	2	3	0	9
	Gross FTE jobs created (excl. outlier)		0	4	3.75	0	7.75
	Outlier		2	0	0	0	2
	Total FTE jobs created (incl. outlier)		2	4	3.75	0	9.75
FTE Jobs Safeguarded	Of the survey sample	No. of respondents surveyed regarding employment impacts	14	15	19	6	54
		No. with jobs safeguarded	1	3	5	0	9
		% with jobs safeguarded	7%	20%	26%	0%	17%
		No. able to quantify jobs safeguarded	0	3	4	0	7
		Total quantified safeguarded jobs	0	3	6	0	9
		No. of outliers	0	0	0	0	0
		Average jobs safeguarded (excl. outliers)	0	1	1.5	0	1.3
	Total Population	Total pop. with potential for jobs created	1	24	29	6	60
		Total pop. with jobs safeguarded	1	4.8	7.5	0	13.3
	Gross FTE jobs safeguarded		0	4.8	11.3	0	16.1

5.5 Calculation of Net Additional Impacts

5.5.1 Impact Additionality/ Deadweight

The net impact of the MBSP (i.e. its additionality) on participating businesses' sales and employment can only be measured after making allowances for what would have happened in the absence of the intervention. That is, the impact must allow for deadweight. 'Deadweight' refers to outcomes that would have occurred without the intervention.

Please note that given that most evaluations are undertaken sometime after an activity is implemented, the Evaluation Team does not consider it appropriate to apply 'activity additionality' to impact measures. The reason is that in the intervening period any variety of factors (and support interventions) may have had an impact on a business. Therefore, an impact additionality measure was used to ascertain the level of deadweight/additionality relating to business outturns.

The analysis of individual survey responses and application of the same 'participant self-assessment' methodology used to assess 'activity additionality', results in the following levels of 'impact deadweight and additionality' for the 3-year MBSP and the 9-month extension MBSP.

Table 5.9: Impact Additionality/Deadweight⁸⁰			
3-Year MBSP (N=56)		9-month Extension MBSP (N=34)	
Deadweight	Additionality	Deadweight	Additionality
17%	83%	47%	53%

Perhaps unsurprisingly given the intrinsic linkages between activity additionality and impact additionality, the levels of impact additionality associated with the 3-year MBSP (83%) are higher than for the 9-month extension MBSP (53%).

Positively, the Evaluation Team's benchmarking analysis (Table 5.10) indicates that the level of impact additionality of the 3-year MBSP (83%) was significantly higher than the average across all interventions and each of the relevant themes and subthemes (such as business development and competitiveness, individual enterprise support and support for internationalisation of businesses).

Whilst the impact additionality of the 9-month MBSP is clearly lower, it was broadly in line with the levels of impact additionality of other interventions across the UK (for example, the additionality was 0.3 percentage points higher than the impact additionality for all individual enterprise supports).

Table 5.10: Benchmarking of impact additionality/deadweight⁸¹			
Location	Nature of interventions	Mean Additionality	Mean Deadweight
UK Regional	All interventions	57.0%	43.0%
	Programme interventions only	56.2%	43.8%
	Theme: Business development and competitiveness	54.5%	45.5%
	Subtheme: Individual enterprise support	52.7%	47.3%
	Subtheme: Sector/ cluster support	54.5%	45.5%
	Subtheme: Support for internationalisation of businesses	73.5%	26.5%
NI	3-year MBSP	83%	17%
	9-month MBSP	53%	47%

⁸⁰ The Evaluation Team sought to gather this information from telephone respondent who could recall support through the MBSP (N=96 for the 3-year MBSP and N=41 for the 9-month extension MBSO). However, 40 of the 3-year MBSP respondents and 7 of the 9-month extension MBSP respondents stated that they had achieved no impacts through their participation on the Programme, and were therefore not asked this question.

This question was only asked to those who completed the telephone survey; 40 respondents did not have any impacts and were therefore not asked this question.

⁸¹ Source: Research to Improve the Assessment of Additionality (BIS, 2009).

Comments from respondents relating to the additionality of their impacts achieved included:

3-Year MBSP Participants	<p><i>"I would not have become involved with synchronisation without the input from the MBSP".</i></p> <p><i>"In the absence of the Programme, I would not have been able to access the same advice anywhere else, and therefore would not have had that experience on my CV".</i></p> <p><i>"The Programme gave me the confidence to take advantage of opportunities".</i></p> <p><i>"We needed that support and direction to get onto the right track".</i></p> <p><i>"Music is my passion, so I would have kept on trying, but it might have taken longer".</i></p> <p><i>"There are always opportunities to meet new contacts and build relationships, even without the Programme".</i></p>
9-Month Extension Participants	<p><i>"There is not a chance that I would have achieved these impacts without their support over the last 9-months. I am very reliant on them and the contacts and opportunities that they have given me".</i></p> <p><i>"I could not have afforded to attend the event and therefore would not have achieved the benefits as a result".</i></p> <p><i>"It would have taken me a lot longer to make the contacts and secure the clients without the networking opportunities coming out of Output 2017".</i></p> <p><i>"We wouldn't have performed at ADE so would not have made these contacts as quickly as we did without their support".</i></p> <p><i>"I have been running my business for a long time, so the impacts probably would have been achieved even without Generator's help".</i></p>

5.5.2 Displacement

The Evaluation Team has also considered the potential displacement that might be created by the MBSP. To assess this, a series of questions have again been utilised⁸², the answers to which are assigned a ‘displacement factor’ in the NI market and the Great Britain market.

Displacement has been calculated based on two factors:

1. The proportions of the businesses that participants compete with that are based in NI/GB/Outside UK, keeping in mind the markets which their company sells into; and
2. Whether, in the participants’ area of business, market conditions have improved over the period since receiving support.

On an overall level, the Evaluation Team’s analysis suggests that the displacement factor at the NI level was 16%, whilst at the Great Britain level it was 20% for the 3-year MBSP. The displacement factors were slightly lower for the 9-month MBSP at 14% at the NI level and 15% at the GB level.

Table 5.11: Displacement Factor⁸³

3-Year MBSP (N=56)		9-month Extension MBSP (N=41)	
NI Displacement	GB Displacement	NI Displacement	GB Displacement
16%	20%	14%	15%

⁸² Developed in conjunction with the Department for the Economy’s Economists.

⁸³ During the Evaluation of the 3-year MBSP this question was only asked to those businesses which reported impacts. However, during the evaluation of the 9-month MBSP all telephone respondents (N=41) were asked to comment on their competitors and the market conditions, which informed the displacement calculations.

5.5.3 Net Additional GVA Impacts

The application of the calculated levels of impact additionality and displacement to the previous gross business outcomes suggests that the MBSP has directly:

- Contributed £0.78m in net additional GVA to the NI economy comprising £0.64m as a result of the 3-year MBSP and a further £0.14m as a result of the 9-month extension MSBP.
- Created 4.4 FTE jobs and safeguarded 7.3 FTE jobs (solely resulting from the 9-month extension MBSP).

Table 5.12: Summary of the Gross and Net Additional Impacts⁸⁴

Metric	3-Year MBSP			9-month Extension MBSP		
	GVA (£)	FTE Jobs Created	FTE Jobs Safeguarded	GVA (£)	FTE Jobs Created	FTE Jobs Safeguarded
Gross impact	£913,638	0	0	£308,268	9.75	16
Deadweight %		17%			47%	
Less Deadweight	£155,318	0	0	£143,961	4.6	7.5
Displacement %		16%			14%	
Less Displacement	£121,331	0	0	£23,003	0.7	1.2
Net Additional	£636,989	0	0	£141,304	4.4	7.3

5.6 Anticipated Impacts

In addition to the actual outcomes achieved to date, businesses that received MBSP support during the 3-year and/or 9-month extension MBSP also provided an indication of the aggregate turnover and employment impacts that they anticipate occurring as a result of the MBSP support provided.

Table 5.13: Anticipated Impacts as a Result of the MBSP

Turnover	3-Year MBSP (N=59)	9-month Extension MBSP (N=41)
Businesses anticipating increase in turnover	20 (34%)	33 (80%)
Businesses able to quantify increase in turnover	1	13
Total increase in turnover of those that could quantify (excl. outliers N=2 for 9-month MBSP)	£30,000	£531,750
Total increase in turnover of those that could quantify (including outliers)	£30,000	£2,551,750
Increase in employment (FTE)		
Businesses anticipating an increase in employment	1 (1%)	9 (22%)
Businesses able to quantify increase in employment	1	6
Total number of FTE jobs anticipated to be created by those businesses that could quantify	1	10
Safeguarded employment (FTE)		
Businesses anticipating that jobs would be safeguarded	0 (0%)	11 (27%)
Businesses able to quantify safeguarded jobs anticipated	0	6
Total FTE jobs anticipated to be safeguarded by those businesses that could quantify	0	7

⁸⁴ Figures only relate to actual outcomes derived to date i.e. excludes outturns anticipated to be derived by businesses in the future.

Key points to note in relation to the previous analysis include:

- Whilst 20 businesses which received support through the 3-year MBSP anticipated that turnover impacts would be achieved as a result of the support, only one business was able to quantify the anticipated impacts (i.e. £30,000). It was anticipated that this turnover would result from sales of video production services for the music industry, of which 90% would be derived in the GB market. Similarly, only one participant of the 3-year MBSP anticipated that there would be employment impacts arising from the support (equating to 1 FTE job created).
- As previously noted, participants of the 9-month extension MBSP more commonly reported anticipated impacts than actual impacts achieved, which is perhaps unsurprising given the short duration between the commencement of the extension period and the time of surveying. Specifically:

- Over four-fifths, (80%, N=41) of respondents anticipated that turnover impacts would be generated as a result of the support they received during the 9-month period.
- The 13 businesses that were able to quantify their anticipated increased turnover, estimated that £2.5m of turnover impacts would be generated as a result of the support (with time periods across which the average annual impacts would be achieved ranging from 1 year to 7.5 years).
- It should be noted that two businesses (which are within the same group structure) represented statistical outliers and indicated that their businesses would achieve a combined increase in turnover of £2.02m as a result of the support received through the 9-month MBSP extension. The Evaluation Team sought clarity from these respondents to better understand the correlation between the support received through the MBSP Extension and the anticipated turnover impacts, but the consultees were unable to provide further details.
- It was anticipated that 44% (£1.1m) of turnover would be generated in the domestic NI market, 21% (£0.5m) in external markets (i.e. GB) and 36% (£0.9m) in export markets, and that the turnover would predominantly relate to live performance fees (22%), live performance ticket sales (17%), sales of music in digital format (15%) and royalties and license fees (15%).

Whilst caution should be taken in terms of placing reliance on the above figures (given their speculative nature⁸⁵), any positive changes in the above metrics will reflect positively on the return-on-investment and associated VFM provided by the MBSP.

Comments provided by respondents who anticipated impacts as a result of participating on the MBSP included the following:

3-Year MBSP Participants	<p><i>"There should be impacts in the future from the contacts I made, but I don't know how much".</i></p> <p><i>"We only attended the event a few months ago so there are likely to be impacts in the future, but it is hard to say how much impact it will have".</i></p>
9-Month Extension Participants	<p><i>"The support will help us to achieve more in the future, but it is hard to say how much".</i></p> <p><i>"I have written songs with new contacts made through the songwriting event, so there will hopefully be impacts down the line from that new material".</i></p>

⁸⁵ Given the speculative nature of the forecasts, the anticipated impacts have not been grossed up to the total population.

5.7 Reasons for No Actual or Anticipated Tangible Impacts

Key reasons why businesses indicated that they had not achieved tangible impacts and did not anticipate doing so in the future included:

- That the extent of engagement was too minimal to achieve tangible benefits;
- A lack of motivation and/or change of direction on the part of the participant; and
- Challenges faced in generating monetary benefits within the music industry.

The following comments were provided by respondents as to why the business had achieved no tangible impacts, and they did not anticipate that it would do so in future:

3-Year MBSP Participants	<p><i>"I received good advice, and there were some helpful points made, but I have not really used the advice for anything in particular, or made any money from it".</i></p> <p><i>"I am now focused on music tutoring. The Programme has had no impact on that aspect of my work".</i></p> <p><i>"The advice did not inspire me enough to go out and continue pursuing music, so I have left the industry".</i></p> <p><i>"We did not have enough engagement with the Programme to achieve any benefit from it".</i></p> <p><i>"To be honest, I barely remember the support I received".</i></p> <p><i>"Whilst the advice was good, it is really difficult to break through in this industry and make money".</i></p> <p><i>"The Programme broadened my contact list, but nothing has come out of those contacts yet".</i></p> <p><i>"I perform because I enjoy it, so I do not keep a track of how much money I am making".</i></p>
9-Month Extension Participants	<p><i>"I did not feel that I got much guidance or support that would have impacted on turnover or employment".</i></p> <p><i>"Nothing really came of the support we got to attend the event".</i></p> <p><i>"Whilst we have a better understanding of the industry, and my staff is likely to be doing a better job as a result, I don't anticipate that there will be any impact on my sales or staff numbers".</i></p>

5.8 Non-Monetary Benefits

5.8.1 Introduction

The MBSP sought to provide a range of activities contributing to the development of a more creative and vibrant music industry including through the development of effective partnerships and collaborations. The following sub-sections provide an assessment of the impacts which have been achieved by music industry businesses as a result of their participation on the MBSP across the two phases under review⁸⁶.

5.8.2 Networking

The MBSP sought to promote networking and industry development through the provision of one-to-many activities, support for businesses to attend national or international events and form new contacts; and/or drawing upon the EDO's network of contacts to signpost individuals/ businesses towards music industry representatives who were considered to have the potential to be beneficial for their business development.

The survey analysis indicates that the Programme was effective in facilitating networking and the development of a more interconnected music industry with participants across the four strands indicating that, as a result of their participation, they had achieved a range of networking impacts, including:

- Building contacts with other people in the local, national and/or international music industry to form business and/or creative partnerships;
- Meeting the key players in the industry;
- Establishing a business network or adding to an existing network around their creative talent; and/or
- Securing additional clients.

Table 5.14: Networking Impacts Derived			
Impact/Outcome	Key Strand	3-year MBSP	9-month MBSP
Building contacts with other people in the industry	Seminars and Events	74%	92%
Meeting the key players in the industry		63%	80%
Adding to the business network which existed around their creative talent		41%	68%
Identified a client base for their business		19%	0%
Securing additional clients		19%	16%
Establishing a business network around their creative talent		11%	12%
Building contacts with other individuals in the industry to form business partnerships	Mentoring	41%	55%
Building contacts with other individuals in the industry to form creative partnerships		18%	35%
Building contacts within the local, national and/or international music industry to form <i>business</i> partnerships	Talent Development	40%	50%
Building contacts within the local, national and/or international music industry to form <i>creative</i> partnerships		13%	83%

⁸⁶ NB for each of the following subsections the number of respondents were as follows:

- Seminars and Events (N=80 for 3-year and N=60 for 9-month MBSP participants);
- Mentoring (N=37 for 3-year and N=25 for 9-month MBSP participants);
- Market Development (N=101 for 3-year and N=31 for 9-month MBSP participants); and
- Talent Development (N=15 for 3-year and N=6 for 9-month MBSP participants).

5.8.3 Skills Development

The support provided through the four strands of the MBSP enhanced and improved the creative and business skills of participants, in line with the overall objectives of the Programme, and indeed of the wider NI Music Strategy. Specifically, participants indicated that, as a result of their participation, they had developed a range of skills; including enhancing their:

- Understanding of how to develop and grow their music industry business; and
- Business and/or creative skills to better compete in the music industry.

Table 5.15: Skills Development Impacts

Impact/Outcome	Key Strand	3-year MBSP	9-month MBSP
Enhanced understanding of how to develop and grow their music business	Seminars and Events	63%	78%
	Talent Development	47%	100%
	Mentoring	46%	87%
Enhanced business skills to better compete in the music industry	Seminars and Events	44%	57%
	Mentoring	44%	26%
	Talent Development	13%	50%
Enhanced creative skills to better compete in the music industry	Seminars and Events	35%	37%
	Mentoring	25%	29%
	Talent Development	7%	50%

5.8.4 Identification of Emerging Trends and Application of Sectoral Best Practice

Recognising that the music industry represents a global industry, the MBSP sought to educate the industry about the structures, key players, emerging trends and best practice models within the music industry, and to support music businesses to identify emerging trends and to embed best practice models within their businesses. As a result of their participation on the MBSP, participants indicated that they had:

- A better understanding of the structures and key players within the NI music industry; and
- Identified best practice/emerging trends in an aspect of the music industry and the methods to apply them to their business.

Table 5.16: Identification of Emerging Trends and Application of Sectoral Best Practice

Impact/Outcome	Key Strand	3-year MBSP	9-month MBSP
Better understanding of the structures and key players within the NI music industry	Mentoring	46%	35%
	Talent Development	27%	17%
	Market Development	14%	4%
Identified best practice/ emerging trends in an aspect of the music industry and the methods to apply them to their business	Mentoring	38%	19%
	Market Development	19%	15%
	Talent Development	7%	17%

5.8.5 Reputational Impacts

MBSP participants indicated that their participation in the Programme had resulted in reputational impacts for their business including in some instances raising their national/international profile, which in turn, would have contributed to a positive image of the NI music industry on the world stage. Specifically, participants indicated that they achieved the following reputational impacts:

Table 5.17: Reputational Impacts

Impact/Outcome	Key Strand	3-year MBSP	9-month MBSP
Secured their business' attendance/participation in other national/ international music business events	Market Development	59%	48%
Raised their business' profile on a national/ international stage		51%	84%
Build their business' brand and reputation	Seminars and Events	0%	13%

5.8.6 Further Impacts Derived

Participants reported receiving a wide range of further impacts as a result of their participation on the MBSP (Table 5.18), including most commonly:

- Securing a performance at one-off live music events (e.g. festivals);
- Leveraging funding from funding/finance providers; and
- An increase in the number of their clients.

Table 5.18: Further Impacts Derived as a Result of Participation⁸⁷

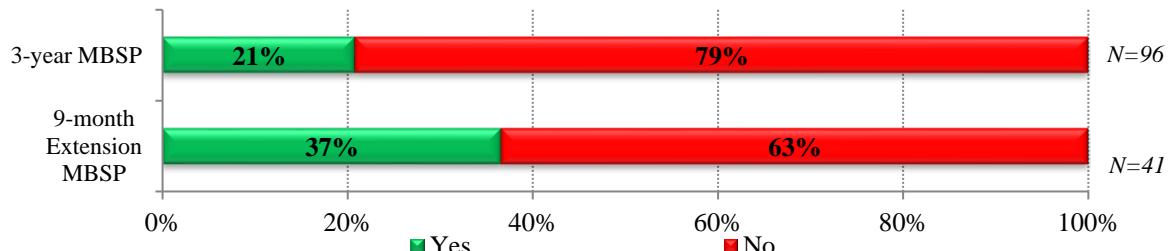
Impact/Outcome	3-year MBSP (N=125)	9-month MBSP (N=53)
Secured one-off live music event(s)	26%	4%
Increased funding leveraged from finance providers	17%	2%
Increased number of clients	14%	7%
Increased confidence	12%	0%
Introduced new methods or knowledge into your <i>creative</i> processes	10%	9%
Development of new products or services	10%	6%
Introduced new methods or knowledge into your <i>business</i> processes	10%	6%
Secured contract(s) for regular live music performances/ tours	10%	0%
Signed management contract(s)	8%	2%
Improved knowledge of the industry	8%	0%
Impact on your competitiveness and sustainability	7%	7%
Entry into new geographic markets	6%	4%
Secured record contract(s) with a major or independent label	4%	0%
Secured music publishing deal(s)	3%	2%
Improved employability prospects	2%	4%
Established a new business	1%	0%
Made new contacts	1%	0%
Secured contract for recording projects	1%	2%
Securing copyright license(s)	0%	2%

⁸⁷ This question was asked to telephone respondents who recalled support (N=96 for the 3-year MBSP and 41 for the 9-month extension MBSP), and online respondents that indicated that they owned a music business (N=29 for the 3-year MBSP and 13 for the 9-month extension MBSP). However, one 9-month extension online respondent represented a local authority and the benefits derived were primarily for the wider economy (such as night-time expenditure as a result of increased live events, and therefore have been stripped out of the analysis). Please note that respondents could select all responses that applied, so percentages will not add to 100%.

5.8.7 Unexpected Impacts/ Benefits

Over one-fifth, (21%, N=96) of the 3-year and almost two fifths (37%, N=41) of 9-month MBSP respondents⁸⁸ suggested that the receipt of the MBSP advice and support had led to some unexpected impacts and/or benefits.

Figure 5.2: Did the support lead to any unexpected benefits or impacts?



Key examples cited by the participants of benefits which they had achieved unexpectedly included:

- Increases in their confidence;
- Improved general knowledge of the NI music industry;
- Enhanced profile within the marketplace; and
- A broader range of industry contacts.

Comments provided by respondents who indicated that they had achieved unexpected impacts/ benefits included:

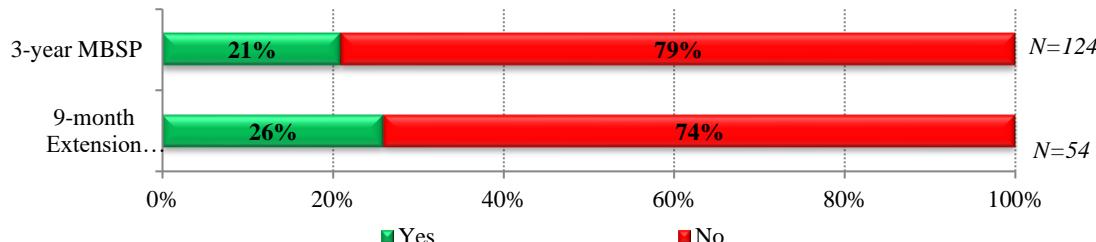
3-Year MBSP Participants	<p><i>"I am now more motivated to succeed in the music industry and my profile has been raised".</i></p> <p><i>"I now have a better understanding of the supports and opportunities that are available".</i></p> <p><i>"The programme enabled me to see a full-time career in music management as a realistic end goal, and opened my eyes to the international market opportunities that are available".</i></p> <p><i>"The programme increased my confidence in my own ability, and I do not have to rely on my band mates anymore to do all the 'band related admin'".</i></p> <p><i>"The MBSP encouraged us to concentrate on writing new material and developing an album".</i></p> <p><i>"We were able to raise the profile of our business on an international level, and we now have contacts in India which have a rapidly growing music industry".</i></p>
9-Month Extension Participants	<p><i>"The Programme has helped to build my confidence and to make me more aware of what else is happening in the sector".</i></p> <p><i>"We have gained brand recognition through our attendance at the event".</i></p> <p><i>"There has been a general increase in awareness of our band because of our associations with Generator NI".</i></p> <p><i>"The delivery agent has shared pictures of me and other songwriters on social media which has been a great promotional opportunity".</i></p> <p><i>"We have much better insight into the local industry now".</i></p>

⁸⁸ This question was asked to telephone respondents who recalled support (N=96 for the 3-year MBSP and 41 for the 9-month extension MBSP)

5.8.8 Other Support Received

One fifth of businesses surveyed (21% of 3-year MBSP respondents (N=124) and 26% of 9-month extension MBSP respondents (N=54)) indicated that since receiving support through the MBSP, they had received other support to help them grow their music business.

Figure 5.3: Other Support Received since the MBSP⁸⁹



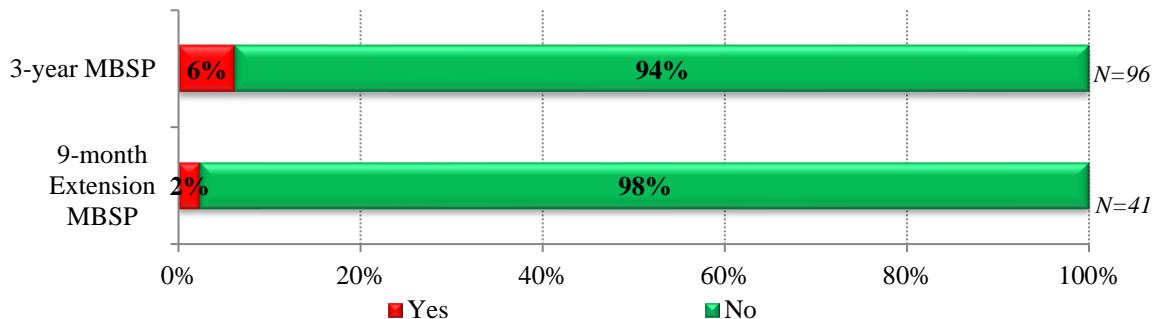
Sources of support received by the respondents included:

- Arts Council NI
- Oh Yeah Talent Development Programme
- Help Musicians UK
- Invest NI's Trade Team
- PRS Foundation
- Moving on Music
- Invest NI Marketing Support
- Help Musicians NI
- Artist-in-Residence at the Mac Theatre
- Belfast Nashville Festival
- Commercial brand support (for a festival)
- Advice from industry professionals
- Belfast City Council
- Attended YouBloom Summit and Festival
- Tourism NI

5.9 Duplication

Encouragingly, only a small proportion (6% of 3-year MBSP respondents (N=96) and 2% of 9-month extension MBSP respondents (N=41) of businesses suggested that in the absence of the MBSP they would have been able to get the same, or similar support elsewhere.

Figure 5.4: Availability of similar support elsewhere⁹⁰



The respondents who indicated that they would have been able to receive similar support suggested sources such as the Arts Council, the Oh Yeah Centre and personal contacts.

⁸⁹ This question was asked to telephone survey respondents and online respondents that own a music business. One online 3-year Seminars respondent did not answer this question.

⁹⁰ This question was only asked to those that completed the telephone survey.

5.10 Summary Conclusions

The preceding analysis suggests that:

- Reflecting the fact that many of the participants had limited engagement with the MBSP (and particularly during the 3-year MBSP), the turnover, GVA and employment impacts achieved by music industry businesses as a result of the support received through the MBSP were relatively modest and were largely driven by a small number of significant outliers.
- However, and encouragingly, it should be noted that the EDO's strategy to focus its efforts (during the 9-month extension period) on those businesses which were considered to have the greatest potential achieve growth appears to have been successful, with participant businesses achieving (proportionately) greater levels of sales (including exports) and employment impacts than were achieved under the previous 3-year phase.
- Notwithstanding this, the Programme was highly effective in delivering a range of other benefits including (but not limited to):
 - The promotion of networking (both within the indigenous industry, and between indigenous businesses and contacts in national/international markets);
 - Building collaborative partnerships for the creation of creative IP and/or business development;
 - Developing the skills base of the NI music industry including better understanding of the creative and business processes required to develop a sustainable and competitive music business;
 - Recognising that the music industry represents a global industry, identifying emerging trends and supporting businesses to apply sectoral best practice within their businesses;
 - Reputational impacts for individual businesses and for the NI industry on a national /international stage; and
 - Delivering a range of indicators for success in international markets such as increased confidence, enhanced profile and a broader range of industry contacts (both within and outside NI).

6. STAKEHOLDER FEEDBACK

6.1 Introduction

Section 6 provides a summary of the feedback received from a wide range of stakeholders in relation to the effectiveness of the MBSP, and views on the need for ongoing support for the music industry in NI.

6.2 Need for the MBSP

In general, the stakeholders were in agreement that there was (and remains) a need to support the NI music industry to encourage its growth and sustainability. In particular, the following areas of need were emphasised:

Lack of infrastructure	<ul style="list-style-type: none"> The consultees were positive about the quality of NI's musical creative talents, and in particular in relation to performing and songwriting, but felt that these 'creative content creators' need support and guidance to achieve their creative and export growth potential. It was commonly considered that individual musicians and music businesses encounter a 'glass ceiling' within NI whereby they cannot always access adequate infrastructure (especially music managers, labels and producers) and business support to enable them to grow and develop. Upon 'hitting the glass ceiling,' it was suggested that many NI music businesses either cease operating (e.g. artists stop performing) or (a small proportion) move to larger music centres such as Dublin or London, where there is a greater critical mass of music business infrastructure. Consultees, therefore, suggested that there is a need to provide sufficient support and infrastructure to enable an artist to stay in NI, whilst having a global reach.
Education and Skills Gaps	<ul style="list-style-type: none"> A small number of consultees suggested that, given the rapid digitalisation of the global music industry, established music businesses continue to need support to implement changes to their business to enable them to compete in the technical arena. Consultees were in agreement that deficiencies remain in relation to music business skills (as opposed to creative skills) within the NI music industry, with few people possessing the skills to develop and grow a successful music business. In particular, stakeholders noted that NI lacks skills in artist management, which is leading to more self-managed artists. Encouragingly, many consultees emphasised the unique role that the MBSP has played in terms of enhancing music business skills and encouraging linkages between musicians and contacts within the wider music industry (both within, and outside of, NI). A number of consultees (namely those relating to education), suggested that there is a need for greater cohesion between music education at primary, secondary and tertiary levels, and the music industry. It was suggested that moving forward; any delivery agent for future support should work more proactively with the indigenous education sector to bridge this gap.

6.3 Management and Delivery of the Programme

Consultees were of the broad view that the four strands of support provided through the MBSP were appropriate and that the EDO was effective in delivering the support. More specifically:

Seminars and Events	<ul style="list-style-type: none"> Stakeholders were positive about the Seminars and Events, and particularly the Output Conferences. It was suggested that daytime seminars and showcase evening events provided an opportunity to bring together many of NI's aspiring and established music businesses to network, gain new skills and share learning Consultees emphasised the importance of the networking opportunities in terms of enabling individuals/businesses to make new contacts and form networks.
Mentoring	<ul style="list-style-type: none"> It was suggested that it might be useful to share some of the content of Group Mentoring sessions online (e.g. through webinars), in order to enable greater dissemination of the information and learning. One consultee suggested that the MBSP should draw more on associations such as the Music Managers Forum, Music Publishers Association, and Musicians' Union etc. to deliver mentoring sessions.
Market Development	<ul style="list-style-type: none"> Consultees were particularly supportive of the Market Development strand of activity as a means to raise the international profile of the NI music industry.
Talent Development	<ul style="list-style-type: none"> Whilst consultees were positive about the Talent Development strand of activity, it was suggested that case studies should be publicised more widely to inform the marketplace about the benefits achieved by participants through the MBSP.

Other views expressed in relation to the management and delivery of the Programme included:

- Many of the stakeholders commented upon the EDO's strong contact network within the local, national and international music industry, and its role in linking individual musicians and music businesses to key players within the wider industry.
- However, a number of consultees suggested that the EDO has not been overly proactive in developing collaborative activity (for the benefit and greater good of the wider industry) with other organisations within NI that engage with the creative and/or music industry, and instead has tended to focus on working with a small number of stakeholders on a regular basis.
- Some consultees suggested that the MBSP support had been too Belfast-centric and that a greater sub-regional focus was needed going forward to ensure that individual musicians and businesses throughout NI were aware of, and could access, the support available.

6.4 Operational Fit and Complementarity

Key findings relating to the operational fit of the MBSP included:

- Encouragingly, on an overall basis, almost all of the consultees were very positive about both the EDO and the MBSP, suggesting that it had added considerable value to the development of the NI music industry, and specifically had enhanced the activities of other initiatives that have focused on providing support to the NI music industry.
- A number of consultees suggested that going forward any Programme should be even more collaborative in nature in order to maximise efficiencies and returns for the sector. For example, consultees emphasised the increasing importance of convergence between music and other creative sectors such as digital media.
- It was suggested by a small number of consultees that there is potential for duplication between the MBSP Market Development strand, and the Belfast Nashville Festival. Therefore, it was suggested that the unique role of the MBSP should be defined when providing support in Nashville to mitigate against this role and ensure value is added.
- A number of consultees emphasised the need to have a transparent mechanism for individual musicians and music businesses to access information relating to the range of support provided for the music industry across NI. For instance, it was suggested that each of the organisations which provide support should collaborate to produce a 'one-stop-shop' guide to the support available throughout the region, which should be available as a link on each of their respective websites. This would streamline the signposting process and would mitigate against duplication of support.

6.5 Programme Impacts

Whilst stakeholders were generally positive about the activities delivered through the Programme during the period under review, there were limited views expressed in terms of tangible impacts arising from this support. However, a number of consultees emphasised the following points:

- It is difficult to reflect the size and nature of the music industry, as so many people within the sector are self-employed sole traders and/or work on a free-lance basis.
- The challenge with the music industry is that it is most likely that very few artists supported through any intervention will progress to have international success, and that it is inevitable that many artists will ultimately leave the industry and move into more consistent employment.
- The music industry in NI remains fragmented, whereby there are pockets of positive activity taking place, but without a coherent agenda which is demonstrable across the region as a whole. Therefore it was suggested that there need to be greater linkages throughout the whole industry in order to maximise economic returns.
- A vibrant music industry (comprising artists as well as supporting infrastructures) has the potential to generate indirect economic benefits such as music tourism, and positive connotations of a region such as NI, which in turn, may generate mainstream tourism activity.

6.6 Recommendations for Future Support

Typically, the stakeholders suggested that a Programme similar to the MBSP in content and focus should be supported going forward, although some consultees suggested that a greater scale of investment was required to maximise impacts.

It was noted that it takes time to build relationships and to raise profile, and so the Programme should be continued/extended to build on the momentum achieved to date.

One consultee suggested it would be useful if the MBSP utilised its industry linkages to create placement opportunities to offer work experience for young people within the music industry. This would enable young people to avail of sustained mentoring and ‘hands-on’ experience of working within the industry.

6.7 Summary Conclusions

Key conclusions arising from our series of consultations with stakeholders include:

- There is considered to be an ongoing need to support the NI music industry to encourage its growth and sustainability, with potential for interventions to focus on addressing the lack of infrastructure and ongoing education and skills gaps. It was suggested that there is a continuing need to exist for the Programme as a whole, as well as for the specific support strands therein.
- The EDO’s management of the Programme was generally highly regarded, with stakeholders suggested that the MBSP had added considerable value to the development of the NI music industry, and had enhanced the activities of other initiatives that focused on providing support to the NI music industry.
- The music industry in NI is particularly amorphous and difficult to define and measure and remains fragmented at present. There is, therefore, a need to develop greater linkages throughout the whole industry in order to maximise returns.

7. PROGRAMME FINANCE

7.1 Introduction

The table below provides a summary comparison of the actual costs incurred during the delivery of the MBSP, against the costs anticipated at the outset⁹¹.

Cost Category	3-year MBSP		9-month Extension MBSP		Combined Total (45-months)			
	Anticipated	Actual	Anticipated	Actual	Anticipated	Actual	Variance (£)	Variance (%)
Delivery Agent Costs	£631,500 ⁹²	£623,698	£159,984	£159,623 ⁹³	£791,484	£783,321	(£8,163)	(1%)
DfC/ Invest NI Costs	£73,117	£70,957	£19,006 ⁹⁴	£19,006	£90,107	£89,963	(£2,160)	(2%)
Direct Cost	£704,617	£694,655	£178,990	£178,629	£883,607	£873,284	(£10,323)	(1%)

The direct cost associated with the delivery of the MBSP (as per the monitoring data) was £873,284 (comprising £694,655 for the 3-year MBSP and £178,629 for the 9-month extension) which was broadly in line (1% lower) than the budget anticipated at the outset of each phase of the Programme.

However, it is recognised that much of the activities which were recorded against the activity targets for the MBSP may also potentially have received funding and/or contributions-in-kind from other bodies. Therefore, it is likely that there were additional costs incurred in the delivery of the MBSP which would need to be incorporated in order to reflect the full economic cost of the Programme. In the absence of the nature and extent of these additional funding sources being routinely monitored, it is not possible to determine to what extent the direct cost above is understated.

⁹¹ NB Sourced from the EA and the EDO's Letter of Offer (3-year MBSP) and Invest NI (9-month extension). All costs are exclusive of VAT.

⁹² Inclusive of a £15,000 additional International Marketing budget during the 3-year MBSP. The ToR for the Delivery Agent's contract stipulated that additional expenses (over and above the core budget) were allowable for international travel and marketing purposes. The EDO has advised that it was agreed at the initial Steering Group meeting that reimbursement and associated processes would add unnecessary administration. As such, an allowance of £5,000 per annum was confirmed as the best way to support delivery agent travel expenses outside of NI. All international marketing initiatives were agreed and ratified with the two funders.

⁹³ NB The final balance for the 9-month extension had not been paid by the funders at the time of writing (May 2017) and there is based on indicative costs as provided by the EDO.

⁹⁴ The 9-month extension approval documentation did not include incorporate staff costs for the two funders within the anticipated costs. However, by way of comparability, the assumption from the EA for Years 1-3 (i.e. 20% of a Grade 7) has been replicated for the extension period. Discussions with the funders indicate that this assumption is also reflective of the actual staff time.

7.2 GVA Return-on-Investment

The table below summarises the GVA return-on-investment (ROI) for the MBSP:

Table 7.2: Return on Investment			
	3-year MBSP	9-month extension	Combined Total (45-months)
Direct Cost	£694,655	£178,629	£873,284
Net Additional GVA	£636,989	£141,304	£778,293
Return-on-Investment	£0.92: £1.00	£0.79: £1.00	£0.89: £1.00

It is estimated that for every £1 of public sector investment in the MBSP, there has been £0.89 of net additional GVA created.

8. ACHIEVEMENT OF OBJECTIVES

8.1 Activity and Outcome Objectives

8.1.1 3-Year MBSP (July 2013 – June 2016)

Table 8.1 provides a comparison of the actual outputs and outcomes delivered through the 3-year MBSP with the targets that were established at the outset⁹⁵.

Table 8.1: Assessment of Achievement of Objectives – 3-year MBSP

Target outputs	Achieved?	Commentary
Deliver 24 music seminars/events with a minimum of 100 delegates attending each, consisting of 8 seminars/events and 800 delegates per annum.	✓	As per Section 3, discussions with the EDO and key stakeholders and review of the quarterly reports indicate that these targets were achieved and exceeded during the period under review. However, given the aforementioned monitoring weaknesses, it is not possible for the Evaluation Team to validate the precise outputs against each indicator (e.g. the number of sessions/ attendances/ unique businesses etc.) for these strands.
Deliver 600 mentoring sessions across NI to a minimum of 181 unique businesses, consisting of 200 sessions to 60 unique businesses per annum (with 61 businesses proposed for Year 3).	✓	
Support 54 NI businesses to attend 18 UK and international trade events, with a minimum of 3 businesses attending each, consisting of 18 businesses attending 6 events per annum.	✓	Across the 3 year period, 110 businesses were supported to attend 27 Market Development events which exceeded the target numbers proposed in the Terms of Reference.
Deliver talent development interventions to a minimum of 15 participants and one-to-one mentoring sessions, consisting of 5 unique participants/ groups supported per annum.	✓	Across the period, Talent Development interventions were delivered to 20 unique participants/ groups, which exceeded the target of 5 unique participants per annum.
Target Outcomes		
72 gross jobs created or protected/safeguarded – 52 created and 20 protected/safeguarded	✗	No new jobs were created or safeguarded within NI music businesses as a result of their participation on the 3-year MBSP, and just one FTE job is anticipated to be created in the future. Furthermore, just two respondents indicated that participation had improved their employability prospects. However, recognising the intrinsic link between turnover and employment, the lack of employment impacts achieved is somewhat unsurprising given that three-fifths of businesses reported that they had achieved no turnover impacts (Figure 5.1).
25 net jobs created or protected/safeguarded – 18 created and 7 protected/safeguarded	✗	
27 businesses created or attracted to the region (e.g. new businesses which were pre-starts when they first engaged with the MBSP and have since started trading as a result of programme support).	✗	The Evaluation research (including extensive consultations with the EDO and strategic stakeholders), has provided no evidence that the MBSP has resulted in businesses from outside NI to be attracted to the region. Furthermore, just two business respondents indicated that they had zero turnover at the time of participation in the 3-year MBSP, but were generating turnover at the time of surveying (equating to £3k and £7k respectively per annum), thereby indicating that the Programme has had a minimal impact on the creation and start-up of trading music businesses within NI.
To deliver a minimum gross GVA contribution of £3,852,909 (this will build up over a 5 year period (estimated to include £2,801,020 of gross GVA generated by the end of Year 3)	Partial	Whilst it is too early for the Evaluation to conclude on the GVA impacts achieved by Year 5, the actual gross GVA achieved by Year 3 of the Programme (£913,638) equated to one-third (33% of the target anticipated at the outset of the period (i.e. £2,801,020), and the net additional GVA achieved (£636,989) was less than two-thirds (64%) of the target anticipated at the outset up to and including Year 3 (£995,348). It should be noted that the actual deadweight (17%) and NI displacement (16%) factors were lower than those anticipated within the EA (47% and 31% respectively) which resulted in the net additional GVA representing a greater proportion of the target (64%) versus the gross GVA (33%).
Deliver a minimum net additional GVA contribution of £1,355,172 across a five year period (estimated to include £995,348 of net additional GVA generated by the end of Year 3)		

⁹⁵ Sources: Economic Appraisal of the MBSP (KPMG, August 2012) and Invest NI.

8.1.2 9-Month Extension MBSP (July 2016 - March 2017)

Table 8.2 provides a comparison of the actual outputs and outcomes delivered through the 9-month MBSP with the targets that were established at the outset⁹⁶.

Table 8.2: Assessment of Achievement of Objectives – 9-month extension MBSP

Target outputs	Achieved?	Commentary
Deliver 4 music seminars/events with a minimum 600 delegates.	Partially	Whilst the total number of seminars/events (N=5) was in excess of the target of 4, the actual number of unique attendees (N=516) was lower than the target of 600. Indeed, attendee numbers were largely driven by approximately 450 attendees at the Output Conference 2017, with the other seminars/events having relatively modest attendee numbers (typically less than 20).
Deliver 150 mentoring sessions with 45 unique businesses.	✓	As per Section 3, review of the EDO's monitoring materials indicate that 161 Mentoring sessions were delivered with 61 unique businesses, and 36 businesses were supported to attend 8 Market Development events during the 9-month extension period. Therefore, these activity targets were fully achieved.
Support 25 NI businesses to attend 8 UK and international trade events.	✓	
At least 4 exceptional Talents to receive tailored individual development inputs across the extension period to include 2x two-day intensive skills events as well as other product and business development inputs decided upon in consultation with each participating Talent.	✓	Six unique businesses were supported through the Talent Development strand during the 9-month extension period, which exceeded the target number of 4. As previously noted, the EDO has indicated a Production Masterclass and a Digital Media Masterclass were delivered as the 'intensive skills events' for Talent Development participants, but that these were 1-day events on the basis that the EDO deemed this would be more effective than the two-day events as per the original target.
Target Outcomes		
18 gross jobs created/safeguarded	✓	Positively, the impact analysis indicates that 9.75 FTE jobs have been created and 16 FTE jobs have been safeguarded as a result of the support provided during the 9-month MBSP (i.e. 25.75 FTE jobs supported). The employment impacts were largely driven by the Market Development (17 jobs supported) and the Mentoring (8.75 jobs supported) strands of support. In total, 11.7 net additional FTE jobs were supported including 4.4 FTE jobs created and 7.3 safeguarded.
6 net jobs created/safeguarded		
7 businesses created or attracted to the region	✗	As per the 3-year MBSP, the Evaluation research has provided no evidence that the MBSP has resulted in businesses from outside NI to be attracted to the region. Furthermore, the survey analysis provided little evidence to suggest that businesses had started up (e.g. a conversion from zero turnover to positive turnover), or that individuals had become established in the industry as a result of their participation on the 9-month MBSP (indicating the creation of owner-manager businesses). Notwithstanding this, it is recognised that there has been a short duration between the commencement of the 9-month MBSP and the time of surveying, so music businesses may potentially be created once the participants have time to embed the lessons learned through their participation.
Gross GVA of £707k and net additional GVA of £242k	✗	The gross GVA achieved to date as a result of the 9-month extension MBSP was £308k (representing 44% of the target) and the net additional GVA was £141k (representing 58% of the target). Therefore these targets have not been achieved. However, it is recognised that whilst caution should be taken in placing reliance on anticipated impacts, if the additional turnover impacts projected by respondents are achieved, this target could potentially be achieved once a greater period of time has passed.

⁹⁶ Source: Invest NI

8.1.3 Overall MBSP (45-months July 2013 – March 2017)

Following early indications from the draft Evaluation of the 3-year MBSP that the Programme was unlikely to fully achieve the economic output targets; a revised set of objectives was approved covering the combined 45-month MBSP period. The table below summarises the revised outcome targets and the actual performance of the MBSP across the combined 45-month period against the same.

Table 8.3: Performance against Revised Targets for 45-month MBSP (July 2013 – March 2017)						
MBSP SMART Objectives	Original Approval Documentation (3-year MBSP)	9-month extension MBSP	Total (45-months)	Revised Total (45-months)	Target Achieved?	Actual Performance
Gross Jobs	72 gross jobs created/ safeguarded (52 gross created and 20 gross safeguarded)	18 additional jobs created/ safeguarded	90	60	✗	25.75 gross FTE jobs (9.75 created and 17 safeguarded)
Net Jobs	25 net jobs created/ protected (18 net created and 7 net safeguarded)	6 net	31	20	✗	11.7 net additional jobs (4.4 created and 7.3 safeguarded)
Businesses Created or attracted to the region	27 businesses created/ attracted	7	34	7	✗	No evidence of business attracted and only two businesses reported a movement from zero turnover to generating turnover through their MBSP participation.
Gross GVA	£3.8m over 5 years	£707k additional Gross GVA	£4.5m over 6 years	£1.2m	✓	The sum of the gross GVA achieved through the 3-year and 9-month extension MBSP was £1,221,906, which was in line with the revised target.
Net Additional GVA	£1.3m over 5 years	£242k additional net GVA	£1.54m over 6 years	£933k	✗	The sum of the net additional GVA achieved through the 3-year and 9-month extension MBSP was £778,293, which was below with the revised target.
ROI	2.6:1	unchanged	2.6:1	TBC	✗	The ROI for the 45-month period equated to £0.89:£1.

8.2 Social and Educational Objectives

In addition to the SMART targets shown previously, the ToR for the delivery contract for the MBSP outlined the following social and educational objectives:

- Develop partnership arrangements across the voluntary and community sectors, the education sector, and relevant industry bodies to maximise the impact and reach of social returns from the MBSP;
- Support routes to employment by participating in a work experience/ apprenticeship programme for the long-term unemployed;
- Target and market at least two practical proposals to ensure the services provided by the MBSP support equality of opportunity and reduce social and economic inequalities and structural deprivation;
- Support engagement with the education sector through at least two practical proposals to help foster a sustainable music industry and nurture new entrants in the long-term; and
- Develop a Social Returns Plan to ensure that the MBSP took forward a sustainable economic model alongside a substantive equality agenda.

The Evaluation Team's review of monitoring materials and strategic consultations suggest that the EDO delivered against these social aims through effective partnership working, meaningful work placement opportunities and quality educational programmes.

9. BENCHMARKING

9.1 Introduction

As part of the research process, the Evaluation Team has benchmarked the support provided through the MBSP against other initiatives delivered throughout the UK to support the indigenous music industry (i.e. the Generator UK Music Futures Programme (MFP); the Hub ‘Joining the Dots’ (JTD) Programme, and Creative United Creative Industry Finance (CIF)). This section provides a summary of the MBSP with the benchmark programmes, with a detailed description of each programme attached as Appendix XIII.

Table 9.1: Benchmarking Analysis

Programme	MBSP	MFP	JTD	Creative Industry Finance
Funders	DCAL/DfC and Invest NI	ERDF	Arts Council England, Esmee Fairbairn Foundation, Cultural Institute at King's College London and Musicians' Union	Arts Council England
Delivery Agent	Generator NI	Generator UK	The Hub	Creative United
Established	July 2013	2010	December 2013	May 2012
Region	NI	North East of England	England	England
Support Available	<ul style="list-style-type: none"> • Seminars and Events • One-to-one and Group Mentoring • Market Development support • Talent Development support 	<ul style="list-style-type: none"> • One-to-one start-up advice • Business growth coaching • Digital literacy mentoring • Seminar series • Networking events • Masterclasses • Expert sessions • Elite Programme • Sound connections • VOX • Interim Director Scheme 	<ul style="list-style-type: none"> • Seedcorn funding and support • Live events • Online resources 	<ul style="list-style-type: none"> • Events and training • Business advisory support • Loan finance
Eligibility	Open to all individuals/businesses within the NI music industry.	Open to all individuals/businesses within the North East of England music industry.	Anyone in the music sector with a ‘game-changing’ idea was free to apply.	Businesses based in England which had been trading for at least 18 months.
Funding Available	Small (c. £100) contributions towards costs to attend Market Development events only.	None	£10,000 awarded to each to four successful applicants.	Loans of between £5,000 and £25,000.
Impacts	Net additional GVA of c. £0.8m across the two operational phases.	<ul style="list-style-type: none"> • 125 new jobs created and 90 jobs safeguarded • 46 new SMEs created 	No details on economic impacts available.	<ul style="list-style-type: none"> • 47% (N=18) of participants stated that they had increased their turnover.
Programme cost	£0.9m	£1m	No details on programme cost available.	No details on programme cost available.

9.2 Summary Conclusions

The following conclusions are drawn based on the preceding analysis and Appendix XIII:

- Throughout the UK and RoI, the public sector provides support towards the development of the creative industries, including but not necessarily limited to the music industry. Often, support is focused on the provision of small grant funding awards, similar to those provided by the Arts Council in NI.
- Whilst in some cases (such as PRS for Music's International Showcase Fund) these awards provide financial support towards the costs of attending showcase events, similar to the Market Development strand of the MBSP, often the funding focuses primarily on developing the creative, rather than business, talents of the recipient.
- Notwithstanding this, it is recognised that a number of dedicated programmes have been supported throughout the UK during the period under review which sought to help to enhance the sustainability of the music industry, thereby highlighting the recognition of the economic and cultural contribution that the sector makes to the wider economy.
- Two of the benchmarks (the JTD and the CIF) provided opportunities for funding for music businesses.
 - In the case of the JTD, exceptional ideas were awarded £10,000 on the basis of a competitive application form. There may be potential for a similar initiative to be incorporated into any future initiative in NI to encourage innovative business proposals to be implemented for the benefit of the NI music industry.
 - The CIF provided loan finance (up to £25,000) to established businesses within the sector. A similar loan offering in NI would potentially duplicate with other loan funds (such as the NI Small Business Loan Fund). Nonetheless, a future music business initiative in NI could potentially implement similar processes for ensuring the participants were established businesses (e.g. the requirement for a trading history), to maximise the economic impacts arising from the support.
- The EDO's approach to delivering the MBSP (as per its proposal document) largely drew upon its relationship with, and understanding of, Generator UK's Programme activities. As such, the MBSP and MFP are relatively similar in terms of aspects of their respective content (e.g. provision of Seminars and Events, Mentoring and Talent Development support). However, there were a number of additional components within the MFP such as Sounds Connections, VOX and Interim Director Scheme. These components represented more intensive support than much of the activity undertaken through the MBSP and placed particular focus upon business development, and convergence with other creative industries.
- Whilst it is recognised that Generator UK has achieved more substantial employment impacts to date than the MBSP, this could potentially be as a result of a wide range of contextual factors such as greater maturity of the marketplace, provision of other support initiatives within the North East of England, the methodology applied during evaluation etc. Therefore it is not possible to draw a direct comparison between the employment impacts achieved by Generator UK with those derived through the MBSP.

10. CONCLUSIONS & RECOMMENDATIONS

10.1 Conclusions

10.1.1 Overarching Conclusion

The evaluation provides strong evidence that across both operational periods the Programme has been successful in helping to achieve its overarching aim of contributing to the development of a more creative and vibrant music industry, through:

- The provision of a wide range of support initiatives which included activities targeted at participants at different stages of involvement (e.g. aspiring musicians through to established musicians), and in different roles within the indigenous music industry (e.g. songwriters, artists managers etc.);
- Energising the indigenous sector and integrating the sector more fully with other convergent sectors such as screen and digital industries, thereby aligning with the strategic and policy agenda for the creative industries;
- Building effective and symbiotic partnerships with a wide range of organisations with a role in the economic and cultural development of the creative industries and adding value to the initiatives delivered by these organisations by leveraging the EDO's sectoral expertise and extensive contact base.

However, whilst adaptations were made to the Programme during the 9-month extension period in an effort to help realise greater economic impact, over the entire programme period, the extent of economic returns has been modest. Albeit, it is important to note that several stakeholders were of the view that the music sector is particularly amorphous, difficult to define and so, in turn, difficult to target and provide support to. Such complications make it difficult for mainstream government programmes to support the sector without availing of industry expertise and networks.

10.1.2 Programme Management and Delivery

Across the periods under review, it is evident that the EDO has:

- Brought considerable sectoral knowledge and experience to the delivery of each support strand (and particularly the Mentoring and Talent Development);
- Leveraged its network of local, national and international contacts to recruit high-calibre speakers and presenters to its events; and
- Developed productive and effective collaborative partnerships where possible to add considerable value to the activities of music business support initiatives and to maximise the impact of support for music businesses.

10.1.3 Programme Activity

Extensive activity was delivered through the MBSP across a range of support strands, and all but one of the activity targets associated with the Programme were exceeded across the two operational phases, albeit:

- Some participants may have had relatively minimal engagement with the Programme (such as those who attended Seminars and Events, or Group Mentoring sessions), thereby limiting the likelihood of the MBSP having a substantive impact on their business development.
- Much of the activity during the 3-year MBSP focused on the development of individuals/artists, rather than on businesses providing services to support the wider music business infrastructure

within NI such as artist management, publishing and music distribution, despite the NI Music Strategy recognising that NI had relative weaknesses in the provision of these supporting services.

However, during the 9-month extension period, the EDO employed a broader based approach and ensured that participants represented a more balanced range of creative and supporting infrastructure sub-sectors. In addition, the extension period placed a greater focus on those businesses that the EDO considered had the greatest potential for growth.

Notwithstanding the points above, there was clearly a high level of demand for the MBSP support, and the Programme (particularly during the first-phase) encouraged music businesses to undertake development activities that they would not have done in the absence of the support, such as showcasing at market development events, developing collaborative creative content etc.

10.1.4 Participants' Profile and Satisfaction with the MBSP

Across all four strands of the MBSP and across both operational phases, participants expressed high levels of satisfaction with the support that they received. In particular, participants that availed of the various strands of support indicated that they were satisfied with:

- **Seminars and Events** – The level of music business knowledge possessed by the expert and the relevance of the topics covered to their business' needs.
- **Mentoring** – The mentor's ability to tailor the advice offered to meet their needs and the relevance of sources of support or contacts that they were signposted to.
- **Market Development** - The advice and guidance received prior to, during and following attendance at a Market Development event and the appropriateness of the event as a platform for their music business growth potential and/or their creative talent.
- **Talent Development** – The amount of time and/or financial assistance dedicated to accelerating their business and the extent to which the EDO introduced them to music industry contacts.

10.1.5 Programme Impact

Reflecting the fact many of the participants had limited engagement with the MBSP (and particularly during the 3-year MBSP), the turnover, GVA and employment impacts achieved by music industry businesses as a result of the support received through the MBSP were relatively modest and were largely driven by a small number of significant outliers.

However, and encouragingly, it should be noted that the EDO's strategy to focus its efforts (during the 9-month extension period) on those businesses which were considered to have the greatest potential achieve growth appears to have been successful, with participant businesses achieving (proportionately) greater levels of sales (including exports) and employment impacts than were achieved under the previous 3-year phase.

Notwithstanding this, the Programme was highly effective in delivering a range of other benefits including (but not limited to):

- The promotion of networking (both within the indigenous industry, and between indigenous businesses and contacts in national/international markets);
- Building collaborative partnerships for the creation of creative IP and/or business development;
- Developing the skills base of the NI music industry including better understanding of the creative and business processes required to develop a sustainable and competitive music business;
- Recognising that the music industry represents a global industry, identifying emerging trends and supporting businesses to apply sectoral best practice within their businesses;
- Reputational impacts for individual businesses and for the NI industry on a national /international stage;
- Delivering a range of indicators for success in international markets such as increased confidence, enhanced profile and a broader range of industry contacts (both within and outside NI).

10.1.6 Achievement of Objectives

As noted above, encouragingly, all but one of the activity targets across each year of the MBSP were achieved or exceeded.

However, the outcome targets relating to business and job creation and GVA were largely not achieved during the two operational phases under review. Such a position has potentially been created as a result of a series of converging factors including: issues relating to the context within which the original targets were set (i.e. the size and structure of the market was considered to be much larger than that estimated only a few years later in a separate sector baseline report), difficulties relating to how the sector is measured when using only SIC codes; the potential longitudinal nature of when benefits might ultimately be realised; in many cases the ad hoc nature of the support provided; the transient nature of participants, many of the potential beneficiaries being characterised as being amongst a hard to reach group etc.

10.1.7 Value for Money

Reflecting the modest levels of turnover and employment growth evidenced by many businesses, the net additional GVA return on the direct costs (i.e. the return-on-investment) is £0.89: £1.00.

However, in isolation, this indicator does not reflect the additional wider non-monetary benefits of the Programme (as discussed above). On balance, and taking all of the different benefits into account, the Evaluation Team considers that the MBSP has represented value for money.

10.1.8 MBSP's Strategic and Market Position

As detailed above, the programme only partially achieved many of its outcome-focused objectives. In relation to those, a key question that could be asked is whether they were appropriate and/or achievable in the first instance. We note that there is considerable ambiguity in relation to the size and economic contribution of the NI music industry within NI. For example, the Programme was established within the context of the NI Music Industry Strategy (2011), which featured one interpretation of the size and contribution of the music sector, whilst a later (2014) baseline study report indicated a substantially different scale of activity. Therefore, there is potential that the targets included within the NI Music Strategy (which informed the outcome targets for the MBSP) were not fully achievable.

In addition, it is noted that a thorough understanding of the music industry sector within NI (e.g. key players, their activities, markets served, gaps in the sectors that would inhibit growth, a profile of participation - aspiring, established, growth, part-time, full-time etc. has not yet been reported upon. The absence of such market information creates the potential for some of the MBSP activity not being as effectively targeted as it could potentially otherwise have been.

10.2 Recommendations

Whilst it is anticipated that the specific direction for the future provision of support to the NI music sector would be subject to the findings of a Sectoral Agenda/Policy, the following strategic and operational recommendations have been made based on the Evaluation Team's research:

1. There is an ongoing need for government intervention to support the music industry NI in order to enhance the sustainability and credibility of the sector. However, any future support should be taken forward within a fully-informed strategic and market context (discussed further in 'a potential future direction?').
2. Recognising that the music industry is a global business, and it is not possible for NI to operate in isolation, any future support should ensure to facilitate linkages between the supply chain within NI, and further afield, to enable businesses to turn their creative content into viable commercial opportunities where possible.
3. A mapping exercise of all the support available for the music industry in NI should be completed, to enable a better understanding of the remit of each of the initiatives, as well as their target audiences and levels of activity.
4. Allied to the above, the music industry and local and central government representatives should continue to work cohesively and in collaboration to ensure that there is a continuum of support, to maximise the industry's contribution and to mitigate against duplication.
5. Specifically, whilst recognising the importance of Belfast as the cultural capital of NI, any future support should ensure to either deliver on a regional basis or to work in liaison with regional delivery bodies such as local authorities to ensure that there is the adequate geographical spread of support.
6. In the event that an economically-focused music business support programme is delivered in future, based on the lessons learned from the MBSP it is recommended that:
 - Targets should take into account the likely constraints on available resources within EDO, to ensure that the EDO can place sufficient and appropriate focus on the achievement of both activity and outcome targets.
 - Where activities are delivered collaboratively, there should be coherent and consistent branding and communications to reduce confusion in the marketplace.
 - Any EDO should routinely monitor the nature and extent of resources leveraged from other organisations to facilitate the determination of the full economic cost of support, as well as to enable the resultant impacts to be pro-rated if required.
 - Upon initial contact, any future delivery agent should ensure to consistently gather profiling/baselining information on each participant, such as:
 - Whether they are a business owner, employed by a music business or aspiring to work in the industry;
 - For business owners, the size of the business (in terms of employee numbers and annual turnover) and whether they are VAT-registered;
 - For employees, whether they are employed on a full-time, part-time or freelance basis;
 - The nature of their involvement (e.g. artist, artist manager, music producer etc.);
 - Their aspirations/objectives for development and growth of their music business etc.
 - When implementing one-to-many interventions, any delivery agent should enable that records are maintained of both registrations to attend the event and actual attendance at each event. This should include the name of each unique individual, and unique business attending, and their

contact details. Where possible, this information should be collated for each unique session within a combined large-scale event (e.g. Output Conferences).

- One-to-many interventions should ensure to build-in an appropriate amount of time for networking.
- Recognising the reducing levels of additionality throughout the 9-month extension phase, any future EDO should be encouraged to apply challenge to potential applications as to what activities would occur in the absence of Programme support.

11. A POTENTIAL FUTURE DIRECTION?

The Evaluation Team's research, including consultations with music businesses, individual artists and strategic stakeholders, reflects a consensus view that there is a continuing need for the public sector to support the NI music industry and to encourage its growth, sustainability and credibility. However, it is recognised that any future support should be taken forward within a fully-informed strategic and market context.

Strategic stakeholders consulted indicated that the music industry in NI remains fragmented, whereby there are pockets of positive activity taking place, but without a coherent agenda which is demonstrable across the region as a whole.

However, it was widely recognised that the music industry has the potential to provide a substantial contribution to society including through the achievement of a wide range of potential impacts including (but not necessarily limited to):

- Direct economic benefits such as increased business turnover (particularly relating to sales in export markets), GVA impacts, job creation and safeguarding, business start-up and/or FDI.
- Indirect economic benefits such as the promotion of music-related tourism.
- Cultural and societal benefits such as civic pride, well-being and social cohesion, enhanced creativity, reputational impacts, enhancing the credibility and international standing of NI within the global music industry.
- Training, education and skills development impacts.

Each of the aforementioned benefits are of considerable value to society, however, their individual realisation or the extent to which each might be maximised may potentially require a different focus to be employed and activity implemented, depending on what the programme is primarily seeking to achieve. For example, the focus of support could be placed on any one or combination of encouraging:

- Involvement at a grass-roots level through engagement with the music education sector and community organisations;
- Focus on those music businesses that might be considered to have the greatest potential to trade outside NI or to create employment;
- Maximum cultural and tourism benefits through the facilitation of live music events, festivals and conferences;
- Skills development through the provision of support for creative and music business training and qualifications.

There is, therefore, a need for more joined-up thinking and collaboration between strategic stakeholders with a responsibility for the NI music industry (and/or other convergent creative industries) and music industry representatives to agree a comprehensive and coordinated agenda for the sector, which would form the basis for the prioritisation of any future supports.

This could potentially be formalised through the establishment of an NI Music Industry Taskforce drawing upon relevant government and industry bodies such as:

- | | |
|---|---|
| <ul style="list-style-type: none">• Department for Communities• Department for the Economy• Department of Education• Invest NI• Arts Council NI• Local authorities• Tourism NI• Tourism Ireland• Creative and Cultural Skills | <ul style="list-style-type: none">• NI Screen• FE and HE Colleges• Arts and Business NI• PPL and PRS for Music• Irish Music Rights Organisation• Amma Centre• Nerve Centre• Oh Yeah Centre |
|---|---|

In developing the strategic agenda for the sector, stakeholders should seek to identify and/or agree upon:

- What are Government's overall aspirations for the music industry in NI, and which of these aspirations are deemed to be of greatest strategic importance?
- What are the indicators of a successful industry (e.g. economic, cultural, social, educational impacts)?
- The current size and structure of the industry e.g. number and profile of businesses by type, markets operating in, employment profile etc.
- On the basis of the above, which specific elements of the music industry supply chain should be prioritised for support?
- What are the barriers/challenges faced by each of these elements and how would they be most effectively supported to overcome these barriers/challenges?
- What should the objectives be for each of these different elements?
- Taking all of the above into account, what would be the optimal suite of support initiatives to contribute towards Government's aspirations for the sector, and the likely timeframes for the same?
- Whilst recognising that collaborative working will continue to be key, which bodies would be most appropriate to oversee the delivery of each of the suite of initiatives?

To inform any future strategy, and recognising that there is considerable ambiguity about the size and economic contribution of the NI music industry at present, it is recommended that music industry stakeholders undertake a comprehensive and robust sectoral review of the positioning and profile of the NI music industry including all genres across commercial, cultural and educational spheres, live and recorded music and aspiring and established individuals and businesses. This review would aim to:

- Provide an overview of the 'state of the nation' in terms of the indigenous music industry;
- Inform future priorities for funding;
- Provide the basis for a more strategic approach to funding and support, which may potentially lead to the provision of new or alternative support vis-à-vis what has historically been delivered.
- Ensure that the targets for any future support were challenging, but ultimately achievable, and represented an appropriate mix of measures which would contribute towards addressing the agreed governmental priorities for the music industry.

Recognising the methodological challenges in measuring the NI music industry, it is recommended that an approach should be taken to undertaking the sectoral review which incorporates:

- Review of existing data where possible (drawing upon not only SIC codes given the limitations on this data noted previously, but also any datasets held by the 'gatekeepers' to the NI music industry); supplemented with
- Widespread and detailed consultation with the gatekeepers (such as those included within the NI Music Industry Taskforce) and music business representatives from different networks within the industry.

Specifically, the sectoral review should seek to establish the following baseline information:

- The number of individuals/ businesses involved in the NI music industry, including those within the core industry, as well as those providing ancillary services such as media, specialist music retailers and legal services;
- The role/ nature of individuals/ businesses engagement;
- The location of individuals/ businesses engaged in the industry;
- Whether those engaged are business owners, employees, aspiring to own a business and/or aspiring to become employed;
- For music industry workers, the extent of their involvement (i.e. full-time, part-time, freelance etc.), and their average annual earnings from music and the sources of this income, their qualifications;
- For business owners, the nature and size (in turnover and employment terms) of their business (relating to the music industry), their key geographic markets (indicating export sales), sub-sectors and sales channels;
- Key issues affecting the music industry and convergent sectors (where relevant), and key opportunities for the same;
- The nature and extent of financial and non-financial support which is available for individuals/businesses within the NI music industry and the education sector.