

SOUND DIPLOMACY

Katowice Music Strategy

An Action Plan To Develop a Vibrant, Sustainable and Economically Prosperous Music Industry in Katowice, Poland

FINAL REPORT

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1. Executive Summary

From acapella miners songs in the 1950s to blues music in the 1970s, hip-hop in the 1990s and modern electronic music today, Katowice has always been at the forefront of developing new music in Poland. With its rich history as a key manufacturing base and its modern make-up as City of Music, it is time for Katowice to emerge as a national leader in music making and music business. To do so will fully capitalise on the talent that is being incubated within its inner and outer borders.

The production of this study and the denomination of Katowice as a UNESCO City of Music and entrance into UNESCO's network is the first step of many to professionalise, develop and ultimately better communicate what has been developing in Katowice for many years. With its world class music colleges and universities and musical heritage across blues to hip-hop, metal to a-capella, Katowice has always been a music city. Now, with this strategy as its guide, Katowice can also be a music business city and capture market advantage not only in Silesia, but throughout Poland.

Over eight months of extensive research, it was discovered that while Katowice is exploding at the seams with music, events and festivals, it lacks a number of requirements that are needed to develop and sustain a healthy music and music business ecology. While musicianship is high across its educational institutions, very little business skills are being taught alongside; its festivals and open-air concerts are world class, but it lacks grassroots music venues; and while there is a significant amount of support available to develop new content, little is provided strategically to market and export that content.

As stated in the strategy, the purpose of Katowice's music strategy is sixfold:

1. Identify and map the music ecosystem in Katowice.
2. Refine public sector tools that support music and music making in Katowice.
3. Develop clear strategies to encourage more music business infrastructure in Katowice.
4. Ensure that Katowice's local policies are music- and musician-friendly.
5. Create more economically-prosperous artists and businesses in Katowice.
6. Develop the most forward-thinking music business ecosystem in Poland

In doing so, it was found that the formal business skills and ecosystem to support them did not match the level of talent in Katowice. In addition, the structure of the city - how it interacts with music makers, business people and creatives - was not fully realised. Mapping the pathways for musicians and emerging entrepreneurs to settle and prosper in Katowice lacked specificity. Finally, international networks that can benefit Katowice's constituents needed improvement, especially across music industry networks and frameworks. As a result, 50 recommendations have been posed across a number of themes, including artist and talent development, governance and international networking to benefit the work in Katowice.

It is recommended that these recommendations be introduced steadily alongside the development of the Music HUB, a commitment of the UNESCO designation. We have outlined the roles and responsibilities of the Music HUB in reference to the recommendations, as well as outlined a timeline of actions and a budget framework to carry them forward.

Lastly, and most importantly, is the role of Katowice's artists and business people in the study. A comprehensive survey and interview process revealed a number of opinions,

strengths and challenges, all of which are contained in this report. It is them that we must listen to and act for, across genre, discipline and career stage. This is who the recommendations are for and who they will benefit.

In five years time, Katowice will not only be Poland's most innovative music city, it will be a model across Europe and the UNESCO network in how to develop music and music business simultaneously through civic engagement, activism and collaboration.

The following key recommendations will be referred to throughout the study:

1. Katowice needs more grassroots music venues.
2. Katowice needs a music business education framework.
3. Katowice needs to analyse its festivals in a more supportive manner.
4. Katowice needs a world class music hub, complete with a music governance structure, monthly meet-ups, training and a program of music business development with international content.
5. Katowice needs to provide better access to rehearsal spaces and studios and support them better.
6. Katowice needs to better promote its music tourism offer.
7. Katowice needs to promote more industry harmonisation, trust between practitioners and more openness across its communication platforms.
8. Katowice needs to translate its offerings in town more effectively (museums, festivals, signage).
9. Katowice needs a transparent funding structure and system.
10. Katowice artists need better international contacts and promotion.
11. Katowice needs more international music business.

1.1. Theoretical Framework

Katowice is a modern, post-industrial city in Southwestern Poland with a population of 301,834. It is the capital of Upper Silesia, a region with over 2.2m people. It is the central hub of a number of smaller cities and towns in Upper Silesia, serviced by three international airports, as well as national rail and road links. It is one in an advantageous geographic location in Europe, sitting in between both Eastern and Western economies, traditions and history. For many years, Katowice has had a robust, talented music community, from world-class classical and jazz music education institutions to some of Europe's most storied pop and rock festivals. It is a young, educated city, boasting five major national universities, two of Europe's most exciting new festivals and a world-class concert hall, NOSPR. The creative arts sector is developing as well, from video game development to filmmakers, graphic design and textiles.

In this groundbreaking study, Katowice commissioned Sound Diplomacy to develop a music map and analysis of the city's extensive, talented music ecosystem. While it is a city of emerging creatives, it lacks cohesive, structure to introduce music cities policies to further galvanise and support its musicians and those working with music across multiple disciplines. While there are many opportunities for artists to perform, there are infrastructural and regulatory restrictions to expanding Katowice further into a prosperous music city. These restrictions are affecting the city's talent, industry development, festivals and economic growth of its practitioners.

*The Mastering of a Music City*¹ is the first report to index a series of agonistic Actions that any city can explore to develop music- and musician-friendly policies to improve economic development, city growth, retention of talent, tourism, and branding. They are:

1 <http://www.ifpi.org/downloads/The-Mastering-of-a-Music-City.pdf>

1. Music and Musician-friendly Policies
2. A Music Officer
3. A Music Advisory Board
4. Access to Spaces and Places
5. Engaging the Broader Music Community
6. Audience Development
7. Music Tourism².

This study takes these seven pillars into consideration in its research on the music community in Katowice. *The Mastering of a Music City* also noted five essential elements every city must have to engender music city initiatives. They are:

1. Artists and musicians;
2. A thriving music scene;
3. Access to spaces and places;
4. A receptive and engaged audience; and
5. Record labels and other music-related businesses.

Furthermore, two factors overarch Sound Diplomacy's report:

1. Community Cohesion;
2. Policy Understanding and Engagement.

Katowice benefits from having the five essential requirements of a music city in bounties. It boasts internationally-recognised spaces and places and a receptive audience, as noted through the 1.7m attendees, annually, to its local festivals. However, there are many avenues through which these variables can be improved - as exemplified through our interviews and surveys with Katowice's musicians and music professionals - which inform the actions positioned.

However, Katowice's strengths are more in presentation of talent than incubation of talent. Its capital expenditure, from a city level, on music is focused on festivals, rather than venues, studios or rehearsal spaces. There are very few places musicians and music businesses can meet to network and very little guidance or mentorship on one's development in music, other than classical or jazz training. As a result, Katowice is famous in Poland for training some of the country's most talented musicians across all genres, however its contribution to the country's label, management and business ecosystem is not as significant. Yet, the city is at the crossroads of Poland and in prime position to incubate and create Poland's next great record label, tour promoter or festival.

There is a now a need to look at how Katowice is educating its next generation of musicians and encouraging those interested to pursue music as a career. With world-class musical understanding, this report maps the strengths of Katowice's musical ecosystem while unearthing and explaining the challenges the city faces, and how it can tackle each of these challenges. This report is genre neutral and agnostic, and is not concerned with any specific festival, program or initiative. Nor is it meant to deprioritise the value and importance of the other artforms active in Katowice's cultural community, all of whom share experiences with music. However, these Actions are geared towards; music business infrastructure, sector mapping and economic impact analysis, tracking and support provisions geared towards business development, regardless of the path each constituent and stakeholder wishes to pursue.

2 *ibid.*

This landmark study - the first in Poland - attempts to provide tangible, cost-effective strategies that, when implemented, transform the locality into a more communicative, friendly and collaborative place for musicians, business owners, politicians and consumers to experience and develop the music ecosystem.

1.2 Key Issues Include

- A. Make-up of music industry and amount of managers, labels and other industry professionals, compared to the amount of artists present in Katowice.
- B. Music industry education and skills development among musicians.
- C. Industry trust and collaboration experience.
- D. Relationship between the public and private sectors in the promotion, dissemination and support of music and music industries.
- E. Emergence of Poland as a primary music market and the role of Katowice in the national sector.
- F. Availability of suitable music venues for emerging artists.
- G. Performance opportunities for local artists at recognised festivals.
- H. Networking opportunities for and capabilities of the local music industry.

1.3 UNESCO Bid

In July 2015, Katowice City Council and The City of Gardens Cultural Institution, applied to be a UNESCO City of Music. This application is founded on the city's transformation from a city of heavy industry to a city of creative industries, led by music. As a result, it became apparent that a research framework was required to understand the music industry in Katowice: the industry's history, relationship with the infrastructure of the city and the general health of the music sector in Katowice. For Katowice to become a City of Music, it must support music from start to finish; music education, availability and ease of space such as studios and rehearsal spaces, a robust venue infrastructure, healthy music industry organisations and a robust, modern music economy and ecosystem.

Katowice was awarded the UNESCO City of Music on 11 December 2015, further validating the importance of music to the municipality.

1.4 Acronyms

Here are a list of the acronyms used in this report:

IKKMO – City of Gardens - Instytucja Kultury Katowice - The City of Gardens Cultural Institution

NOSPR – Narodowa Orkiestra Symfoniczna Polskiego Radia

IPIUM – Instytucja Promocji i Upowszechniania Muzyki

1.5 Katowice – Census Information

Katowice has an urban population of 301,834. Of this, 192,198 are of working age. It is a very young city, with 8% of its population under the age of 14 and 35% of its population under the age of 35. Its GDP, per capita in 2012, shows the average earnings per working-age citizen was €13,000, showcasing a city with a low cost of living. While Katowice is a middle-income city in Poland, it has emerged over the last 15 years from a manufacturing and heavy industry focus to a more creative industries and soft power focus. It hosts many of Poland's most extensive cultural institutions.

1.6 Defining Katowice's Music Ecology

Katowice is a city built on its musical heritage. From its coal mining history of choirs and folk songs to the blues explosion of the 1960s and 1970s, rock and metal in the 1980s and hip-hop and electronic today, Katowice is a city that expels music, from its festivals to public squares. It boasts some of the largest and most successful festivals in Poland, from OFF to Rawa and Tauron. It is a young city, with 19% of the population under 29³, 100,000 students in the city and 180,000 in the province⁴ and a rising GDP, increasing by 3.3% since 2005. It is now a UNESCO City of Music and has led one of the most expansive music regeneration projects in Europe, regenerating a former coal mine with a state-of-the-art concert hall, conference centre and festival space. Katowice has an aging population, with the percentage of 18-29 year olds declining since 2002, according to official government statistics. As a result, there is a need to develop increased entrepreneurial, business-minded cultural policies and initiatives, and with the breadth of music already evident in Katowice and greater Silesia, this study is very timely.

The cultural sector in Katowice is significant and its music industry is one of the sector leaders. In 2014 the city contributed up to €45 million in grants for culture. Additionally, €37,275,000 was directly invested in infrastructure, including the renovations of cultural spaces. €2 million went to programs run by Camerata Silesia, Ipium Silesia and NOSPR, and €48,000 was shared between amateur choirs, orchestras & the Philharmonic.

In Katowice's music survey in 2014, an estimated 6,154 musicians and professionals currently live and work in Katowice. The majority of them also have secondary employment, both inside and outside the music sector. Of those employed full-time in the music sector, 70% in Katowice are supported through public sector grants and programs; including cultural organisations, properties owned and operated by Katowice and music-focused academic institutions.

In addition, Katowice has 24 concert halls, 30 grassroots music venues, 7 local record labels, 12 recording studios and between 5 and 10 music managers. A total of 27 festivals dot the city. In total, the Katowice City of Gardens Cultural Institution contributes €3.7m of support for music-related activities, focused mainly on its festivals and music education strands.

As stated in the Katowice's UNESCO application, "music plays a significant role in Katowice's rich history. It is underground and subversive, framed on a long tradition of amateur choirs and orchestras, skillful, contemporary composers, conductors and musicians, including Kilar, Górecki, Knapik, Zimmerman, Szalonek and Fitelberg. It is also home to an active blues music community in the 1980s led by Rawa Blues Festival, a culture of hip-hop and urban music in the 1990s and electronic and dance in the 2000s. It is currently home to some of Poland's most successful alternative bands including The Dumplings, Achimira and Coals, as well as two of Poland's largest contemporary music festivals, OFF and Tauron".

Furthermore, "Katowice has some of the oldest, most prestigious music education institutions; enduring organ, violin, brass and mandolin traditions; and a variety of music awards and competitions, like the Fitelberg International Competition for Conductors (World Federation of Music Competitions member since 1982). Katowice boasts internationally-recognized chamber music ensembles like the Silesian Quartet and orchestras including Polish National Radio Symphony Orchestra (NOSPR)".

3 <http://stat.gov.pl/spisy-powszechne/nsp-2011/nsp-2011-wyniki/ludnosc-i-gospodarstwowomowe-stan-i-struktura-spoleczno-ekonomiczna-czesc-i-ludnosc-nsp-2011,11,1.html>

4 <http://urbact.eu/katowice>

1.7 Polish Context

It is important for Katowice to understand where it sits in the Polish context, as well as the international context. These are not mutually exclusive. The music ecosystem in Katowice and Silesia does not operate in a vacuum. Its economic generation is based both on local, national and international artists performing at its festivals and venues, as well as being listened to in the headphones of its inhabitants. There can never be a case to separate internal music industry growth from the externalities that influence it. Externalities being, but not limited to, usage of mediums for streaming and downloading, to the interconnected live music infrastructure that supports the mid- to large-scale concerts and festivals in the region. In Poland, Katowice is smaller than Warsaw and Krakow, the two largest cities and centres for the collective Polish music industry. Competing with these cities is not possible nor is it recommended. Katowice offers different strengths, both of which can be augmented and fashioned to support the greater music ecosystem in Poland. In addition, Katowice is the 5th largest touring market for international acts in Poland (behind Warsaw, Krakow, Poznan and Gdansk). It must understand its place within this circuit and how it can better influence and support an increase in international tours across Poland and Eastern Europe in general. However, Katowice, like its sister cities in Poland, responds to the same challenges and industry factors differently.

1.8 International Context

It is evident that there are strengths in certain aspects of Katowice's music ecology, its summer festival offering, for example. However, if weaknesses in other industry areas are not understood and approached, they have the potential to adversely impact the aforementioned strengths. The strengths and weaknesses of the international, hybridised music industry impact those performing and working with music in Katowice, as it does everywhere else. The knowledge base required for practitioners is growing as revenue streams diversify and reporting procedures become increasingly complex. As a result, analysis of Katowice's music ecosystem is also an analysis of the city's, and its policies' place within the global music industry.

1.9 Principles Underpinning This Report

The principles that are listed below form the backbone of the Actions that follow in this report and are reflected and influenced by the interviews and surveys that were carried out. Without these simple, integral strategies, it will be difficult to implement any of the Actions and further develop Katowice as a global leading, modern and vibrant music city.

1. SIMPLE, COHESIVE AND COMMUNICATIVE POLITICAL LEADERSHIP

Katowice's policymakers and city officials must speak with one united voice in relation to music and the creative economy, both at home to its citizens and abroad to its partners.

2. DEVELOP AND MAINTAIN TRUST TO FOSTER NEW LASTING PUBLIC / PRIVATE SECTOR PARTNERSHIPS

The music industry in Katowice, across all its nodes and crevices, must foster a collaborative, friendly and supportive relationship internally, to maximise resources across all its avenues.

3. SUPPORT THE NEW AND EMERGING

Katowice must ensure it has intensive, structured support infrastructure for its developing musicians. Grassroots music venues, start-ups as well as entrepreneurs and students will support the professionals of the future.

4. ANALYSE, AUDIT AND REFINE

All activity in the city should be tracked to recognise and understand its impact on the

local economy, the environment, secondary and tertiary industries. Katowice must place robust, structured analysis at the heart of all its initiatives.

5. FOSTER AND SUSTAIN PUBLIC / PRIVATE PARTNERSHIPS

The weight of public support in Katowice outweighs and often stifles the private sector development in music. This must be balanced to support entrepreneurialism over state support.

6. BRAG AND NAG

The City of Gardens Cultural Institution must communicate the value of its assets locally, nationally and internationally, while consistently offering its voice to larger issues facing the Polish music industry. It must be a thought leader in the sector - across its collective ecosystem.

2. Introduction

2.1 Methodological Framework

The findings in this study have been developed with extensive consultation of Katowice's local music community across its ecosystem.

Sound Diplomacy undertook a series of primary and secondary research methods to collect reliable data. These methods include desk research along with analysing data provided by The City of Gardens Cultural Institution, this information derived from its UNESCO City of Music application in 2015. We also studied the financial records of The City of Gardens Cultural Institution in addition to visiting Katowice five times (August, September, October, November 2015 and February 2016), attending festivals, film screenings and local venues.

ONLINE SURVEY

The online survey acted as a source of data collection, fundamental to developing a general overview of Katowice's music scene and its challenges. An exhaustive effort was made to gain responses from the music community. The survey was promoted by The City of Gardens Cultural Institution and leading music organisations and related industry bodies, marketed across social media channels and supported by individual email follow-ups.

SURVEY

The survey, in English and Polish, was comprised of 48 questions, specifically suited to establish the following benchmarks:

- Types of music roles fulfilled in the market (artist, label, promoter, etc.)
- Longevity of music businesses in Katowice
- Effect of transport accessibility on business activity
- Employment rates and trends specific to music in Katowice
- Funding availability
- Costs of conducting business
- Availability of professional representation (label, booking agent etc)
- Legal restrictions to venues
- Festival capacity and attendance
- Networking opportunities such as conferences, meeting points, etc.

PURPOSE OF SURVEY

The purpose of this study is sixfold:

1. Identify and map the music ecosystem in Katowice.
2. Refine public sector tools that support music and music making in Katowice.
3. Develop clear strategies to encourage more music business infrastructure in Katowice.
4. Ensure that Katowice's local policies are music- and musician-friendly.
5. Create more economically-prosperous artists and businesses in Katowice.
6. Develop the most forward-thinking music business ecosystem in Poland.

GENERAL

The survey has been completed by 86 creatives and company leaders of the following industry sectors:

- Artists
- Labels
- Festivals
- Managers
- PR/Media
- Educational and private institutions

Responding businesses, primarily companies of less than 5 people, began operations as early as 1974, though the vast majority began between 2010 and 2015, reporting a turnover from 2,000zł into the millions.

2.2. Industry Interview

The authors visited Katowice five times to conduct in-person interviews. The industry interviews acted as an integral source of context for the analysis of the online survey. The interviews also helped to inform and contribute to the industry profile, economic snapshot, case studies and recommendations. The City of Gardens Cultural Institution helped to identify a diverse range of artists and industry stakeholders to participate in interviews. These interviews were conducted in-person and over telephone through September 15 and February 2016. Tamara Kaminska, vice-director of The City of Gardens Cultural Institution, was present in the interviews. The 13 interviewees were:

- Agnieszka Młynarczyk, Silesian Philharmonic Orchestra
- Andrzej Kalinowski, local promoter and musician
- Alan Wykpiś, musician
- Irek Dudek, Rawa Blues Festival
- Jakub and Iga Fedak, musicians
- Katarzyna Pryc, Kino Teatr Rialto
- Krzysztof and Stanisław Lason, musicians
- Łukasz Adamczewski, label
- Maciej Garbowski, musician
- Martyna Markowska, JazzArt Festival
- Przemysław Borowiecki, musician
- Tomek Szabelski, creative and cultural produce
- Wojciech Brzoska, musician/poet

Plus 4 Case Studies (see below) with:

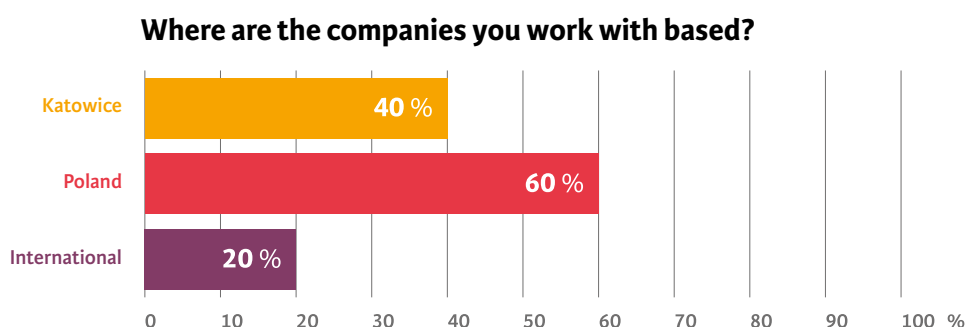
- Miuosh – artist
- Aleksandra Rudzka – IPIUM
- Artur Rojek – OFF FESTIVAL
- Arkadiusz Zyber – Katofonia (venue)

3. Survey Findings

3.1 Preliminary Findings

STRONG LOCAL SCENE, BUT LACK OF INTERNATIONALITY

Domestic artists, both Katowician and from greater Poland, are being well-represented by Polish music companies through record releases and live shows. However, the great support of local artists does not translate to strong international relations and exchanges. This is detrimental to the export industry, preventing artists and businesses from sustainably establishing themselves outside of Poland. Festivals and booking agents are the strongest potential for an international industry, as they bring import acts to Katowice and Poland and develop ties with international business. These connections need to be transposed for the benefit of Polish artists.



STRONG LOCAL TALENT, BUT LACK OF PROFESSIONAL SUPPORT

75% of artists perform a steady stream of shows, anywhere between 11-20 and over 50 shows per year, of which 20% are in Katowice. However, only 14% have a professional representation in the form of a label, agent, or publisher. Despite this, 75% have also released material. Although, more than half have not done so through an accredited source. The remaining cite iTunes, DUX, and Polish radio as their chosen platforms. Genres fall on a wide range, with strong representations in:

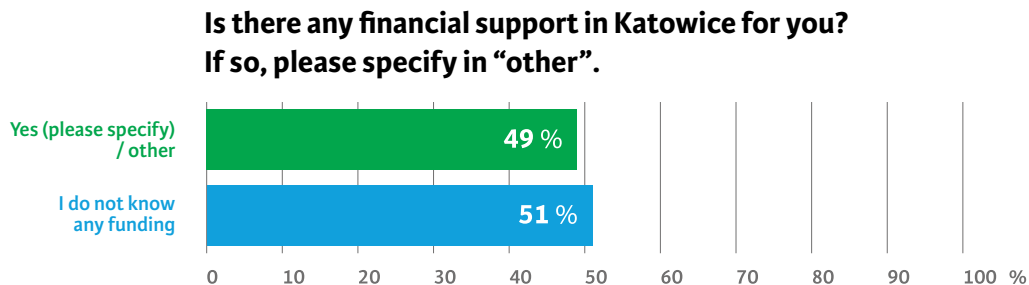
- classical
- jazz
- blues
- world music
- rock
- alternative

Rehearsal spaces are grassroots and many artists practice at home or in makeshift areas. The Academy of Music provides spaces to many, primarily in the form of agreements between the Academy and its employees and students. Those who hire private facilities pay up to 450 zł per month.

No solid performance payment figures could be quoted, although international artists are paid more than local artists in each case; approximately twice as much. Local artists make anywhere from 400 zł to 1,500 zł for a concert, while international make from 1,000 zł to 2,500 zł per show.

FUNDING AVAILABILITY

Over half of respondents are unaware of any funding availabilities, and of those that are, less than half mentioned The City of Gardens Cultural Institution grant scheme. Those that have received grants from The City of Gardens Cultural Institution, which amounted to less than half of respondents, quoted figures in the thousands (zł), all of which go to the costs of concerts, workshops, and showcases. One company has been receiving steady assistance since 2013.



LACK OF PROFESSIONAL MARKETING

Marketing and promotion is a struggling area of industry practice, although local marketing is more common than international.

Local:

- Generally kept under 1,000 zł annually
- A small amount, less than a quarter, spend upwards of 5,000 zł
- Almost half do not spend anything at all

National/International:

- Three quarters do not spend anything at all
- Primarily conducted through outsourced contacts or as online marketing

International marketing is the key to boosting exports, but many companies do not have the available budget for appropriate marketing. There is also a difficulty in targeting the target demographic for the slightly niche genres of ambient, techno and house that are represented, although these barriers are not as prevalent among classical and popular genres.

LACK OF NETWORKING OPPORTUNITIES

Less than half of our respondents were able to list networking opportunities. In fact, most 'opportunities' mentioned have not actually come to fruition. Instead, there is potential in company co-operation or post-show networking among artists.

There is a lack of communication between the private and public sectors, in regards to networking, education, or live event opportunities, whether as performer or attendee.

GREAT LARGE MUSIC VENUES FOR CONTEMPORARY AND CLASSICAL MUSIC, BUT LACK OF SMALL- TO MID-RANGE MUSIC VENUES

Katowice boasts world-class venues such as Spodek and NOSPR, supporting both contemporary and classical music, but there is a lack of small- to mid-range venues for emerging artists. This concern was voiced by many respondents, with one measuring desirable capacities as 250-400 people.

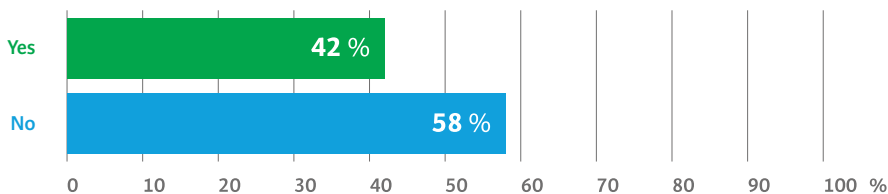
Venues quoted their biggest restrictions, primarily finance-based, as being:

- high security costs
- high rent
- the cost of sound

LACK OF NIGHT-TIME TRANSPORT

Daytime transport is of little to no concern. Over half of the survey respondents do not live in the city center, but 64% still have less than a thirty minute commute, doing so via car. The lack of public transport in and between outlying districts causes activity to suffer late at night. A concern voiced by many has been transport problems. Lack of evening transport prevents potential audience members from surrounding towns from attending shows. Suburban residents cannot get adequate or reliable return transport from the city, which takes a toll on the music industry through a lack of attendees to evening shows.

Do you live in the city centre?



ASSETS AND LIABILITIES

Katowice's best assets to the music industry, as determined by those directly involved, are its classical music venues and history. Both the Music Academy and NOSPR saw several nominations, as well as the city's jazz and festival scenes.

The most prominent problems cited were lack of international promotions or opportunities for international relations, a lack of support for developing or niche artists, and lack of communication between institutes and students in regards to networking, performing, or attendance opportunities and education. Other problems mentioned, but not elaborated on, in the above sections, include:

- Lack of an established, reliable local record label
- No ready PA system available, and shortage of venues with a reliable PA system
- Lack of representative artist organization with educational industry tools, such as a union or musician's association
- Lack of representative figures such as managers and publishers
- Lack of promotion and marketing for artists from the city to build export relations

3.2 Case Studies

We have completed case studies on 4 different practitioners throughout the process, delivered below:

CASE STUDY: MIUOSH – ARTIST

Miouch is a Polish hip-hop artist based out of Katowice. With two platinum and five gold-certified records under his belt, he has been performing since 2001 with groups such as Projector, Perwer Squad, and, more recently, as a solo artist. He runs his own label, Fandango Records, and helped co-found record/distribution/promotion agency MaxFloRec.

Fandango Records generates a healthy income, spending approximately half of its annual turnover on local and national marketing.

Miouch claims that while Katowice is far away from the musical infrastructure of Warsaw, this distance lends to an increase in grassroots creativity among its citizens.

There is a proud culture of Polish, Czech, German, and Jewish heritage that is incorporated into the city. Musicians are more concerned with the creativity of their music than with its profitability. However, he finds a problem in that too many want to be the creators, the artists, and not enough want to attend to the business side in the form of managers. Existing managers trust too easily and do not look out for the best interests of their artists, as creativity is prioritized over business practices.

Mioudus says Katowice, and greater Silesia, has a fear of the small-business and independent sectors, and he finds it difficult to find interns for his company to oversee Youtube activity or simply build contacts. He claims that, unlike Poznan and Warsaw, Katowice has been unable to expand with the times. His own management is in Warsaw, but he offers the example of the existing blues scene as proof that local management is a much more effective strategy.

As someone who began as a curator of events and gigs in local venues, he seeks a better mapping of underground and grassroots locales, a solid music strategy implemented by the city, and an increased appeal of business roles in the industry. He would like an advisory board and steady rehearsal/studio spaces to assist artists in testing their skills in real-life situations

CASE STUDY:

ALEKSANDRA RUDZKA – IPIUM

Aleksandra Rudzka works at Instytucja Promocji i Upowszechniania Muzyki (IPIUM). In our interview, she detailed her experience in Katowice's classical music scene, outlining her own set of recommendations.

As a part of IPIUM, Rudzka helps host classical concerts in Katowice in collaboration with NOSPR, Radio Katowice, and various museums, all free of cost and amounting to 12-15 chamber concerts per month. They also curate two festivals in the city, August Talents for young artists, and another for young classical artists, both of which are again free. These ventures help artists by providing them access to live music, and the program has spawned the likes of the area's most important opera tenor.

One of the main concerns outlined by Rudzka is the lack of education and international connections. IPIUM boasts a clear definition of genre, but with it comes the clarification of barriers, as the organization seeks a classically-oriented music business school to continue their role as a classical music incubator. International partnerships in the educational, private, and commercial sectors would ease the current difficulty in finding contacts with commercial agencies and press. These partnerships could also be manifested in trade missions and workshops. On an even smaller scale, there are issues in focusing solely on Katowice rather than surrounding cities.

Although Katowice is one of the few cities in Poland to subsidize its concerts, most of the work is by musicians performing other people's music. There needs to be a focus on developing young classical composers, but currently IPIUM needs to apply for special money in order to do so. This would also be abated with a university program or music business course.

Rudzka also mentions competitions, which are an important investment as they act as a continuum. Currently, the biggest occurs between the two big symphony orchestras, both of which are managed. Finally, she calls for free or subsidised rehearsal spaces for musicians.

These are all ongoing concerns voiced by many others throughout the study, but it is telling to see that such a prominent organization as IPIUM faces the same issues, especially in the realms of classical music.

CASE STUDY:

ARTUR ROJEK – OFF FESTIVAL

Artur Rojek began OFF Festival in his hometown of Mysłowice after twelve years as the guitarist and lead singer of the Polish rock outfit Myslovitz. He felt Poland needed a means of bringing together the domestic and international music scenes on a platform that celebrated music, rather than a social festival. The first edition, held in August of 2006, saw an attendance of 11,000. He organised three more, before disputes between the Mysłowice city council and the festival forced him to move to Katowice. There was a challenge in that Katowice is not a resort or holiday hotspot, but rather a post-industrial town.

He currently books artists himself, and he is heavily reliant on the internet or recommendations in music shops. He also visits Rother festivals. Since 2016 he's been working with a three-member staff team, they scour through the lists to narrow down the acts chosen, usually between 70 and 80. When organising OFF, he mainly relies on pre-existing friends and business partners from his years in the industry.

In Rojek's opinion, keeping the industry self-contained will limit its growth and lead to frustration.

He thinks special institutions – export offices should be set up to promote Polish music abroad. Unlike Adam Mickiewicz Institute, they could focus on music precisely, instead of entire Polish culture. They should be a key figure of support for artists expanding and exporting. To see how they work, Rojek suggests focusing on Icelandic and Scandinavian countries.

CASE STUDY:

ARKADIUSZ ZYBER – KATOFONIA (VENUE)

Katofonia is a bar, music venue, and recording studio located in the heart of Katowice. Boasting shows ranging from jazz to blues, funk and rock and roll, the venue hosts six gigs a week, with a jam session every Wednesday.

It cites money as its major barrier to expansion, and wishes it could host more shows. Currently, the venue operates primarily as a bar, which is its main source of income. On gig nights, the bar needs to be closed during sound check, which limits its income on those nights. The venue also faces competition in terms of the amount of venues locally, as well as the proliferation of free festivals. Due to the lack of ticket purchasers, Katofonia finds it difficult to pay artist fees. It operates as an NGO in order to receive funding from the city council, but is a heavy advocate of increasing paid, ticketed events.

The recording studio is a staple of local artist development. From the 400-500 demos it receives per year, the studio hosts approximately 20 artists, each recording 'off the floor' (live). Recording live speeds up the process to a single day for recording and one week for processing and mixing. Although there are 12 studios in the city, Katofonia's generates a profit through its connections with local institutions and its ability to conduct live recordings. It tries to focus on young and emerging bands from the local area who cannot afford the average 1,000zł, including producer and engineer, required to record a song. They also try to work with 4-5 bands on a cost-free basis, but find it extremely difficult due to their existing struggles.

Poland's music industry is very DIY, they claim. There is a sound engineering school in Warsaw (Fryderyk Chopin University of Music), but of the 10 producers Katofonia know, only two have had formal education. This is in keeping with other accounts of Poland's strong, but unsupported, grassroots music scene.

The venue's future plans include a festival in the mountains which will welcome Silesian artists, and organizing a festival-structured competition which will award the

winners equipment (although not studio time). Again, the focus is on young artists with limited budgets, hoping to expand the Polish music scene from the bottom up.

Following the survey, a number of key challenges were flagged by the majority of survey respondents. Each is elaborated on and incorporated into the final Actions. They are:

1. Katowice needs more grassroots music venues.
2. Katowice needs a music business education framework.
3. Katowice needs to analyse its festivals in a more supportive manner.
4. Katowice needs a world class music hub, complete with a music governance structure, monthly meet-
5. ups, training and a program of music business development with international content.
6. Katowice needs to provide better access to rehearsal spaces and studios and support them better.
7. Katowice needs to better promote its music tourism offer.
8. Katowice needs to promote more industry harmonisation, trust between practitioners and more
9. openness across its communication platforms.
10. Katowice needs to translate its offerings in town more effectively (museums, festivals, signage).
11. Katowice needs a transparent funding structure and system.
12. Katowice artists need better international contacts and promotion.
13. Katowice needs more international music business.

4. Actions

4.1 Final Actions

The final actions, after the survey analysis and interviews, are listed below. They are separated into infrastructural headings. In total, we have compiled 50 Actions.

In Katowice, as in all of Poland, the role and importance of cultural institutions in developing and fostering cultural programming is significant. This is increasingly important in the success and legacy of the UNESCO City of Music tagline. In Katowice, it is important that The City of Gardens Cultural Institution understands that it is fostering a music ecology, rather than creating or controlling its music economy. It provides the pathways and opens doors from which private businesses benefit. In order to do so, the UNESCO City of Music program must redefine the relationship between Katowice's public and private music sectors, insomuch as defining and promoting a sea of change between them. This change consists of increased collaboration, equal focus on the financial and the cultural sectors, and understanding that each building block of the musical chain, from education to copyright, performance to promotion, is equally important. It also accepts that time, failure, experimentation and collaboration create sustainable music communities. The programming and coordination to celebrate the UNESCO City of Music programme cannot be top down or bottom up; it must combine the two, and this is done most effectively through structured, neutral and politically agnostic strategies, led through one channel and transmitted to as many stakeholders as possible. Here, it is The City of Gardens Cultural Institution that must communicate while all of Katowice's music practitioners, businesses and enthusiasts must listen. In listening, they not only participate in the dialogue, but also create and recreate it through increased networking, skills development focuses and transparent, trackable governance.

These actions are based on this structure. One agency leads through mediation, communication, and structuring, but it does not control. The control and drive lies with the community's stakeholders - Katowice's musicians, festivals, venues, studios and consumers. We must reduce the bureaucracy and barriers to making and promoting music in Katowice in order to turn the city into a national and global leader with its music ecology. These actions, implemented incrementally, will begin the dialogue to establish this.

UNESCO City of Music, to Katowice, should not only represent common interests (goals and a new way forward in the way public and private institutions work together to develop and support the music ecosystem in Katowice), but should also represent a mindset in how Katowice communicates, internally and externally, to its stakeholders. Every musician, music practitioner and businessperson is a collaborator in this year - and what happens needs to ensure that support systems are examined, reformed and improved in the immediate and interim future. What this report initiates will lead Katowice for the next 10 years.

The Actions are split into three sections, each further divided into several categories, as per the UNESCO City of Music legacy:

- 4.2. Music Hub
 - » Music HUB Structure
 - › Location
 - › Business Plan
 - › Staffing
 - › Facilities

- » Actions
 - › Organisational Actions
 - › Funding & Financing Actions
 - › Marketing & Communication Actions
 - › Policy Actions
 - › International Actions
- 4.3. Policy Actions
 - » Governance
 - » Regulations
 - » Venues
- 4.4. Stakeholder Engagement
 - » Education
 - » Tourism & Branding

4.2 Music HUB

Enacting the business plan of the Music HUB - initiating it, developing its charter, regulations and structure - is paramount in the success of implementing the UNESCO City of Music strategy. This hub needs to serve all of Katowice's creative communities - music, art, film and creative technology - and be a national leader in Poland in terms of how a city and its institutions, support its developing music economy.

The Music HUB needs to be shaped by like-minded partners around the world, including the St. David's Centre in Adelaide, Australia, The Roundhouse in London or Trempolino in Nantes, France for example, all of which offer support to music and music makers while developing a structure that mixes public and private funding, local and independent governance and structured programming.

The following section outlining the Music HUB is structured as such:

- 4.2a Music HUB Structure
- 4.2b Music Venue Structure at Music HUB
- 4.2c Actions at the Music HUB
 - » Organisational
 - » Policy
 - » Funding & financing
 - » Marketing & communication
 - » International

4.2a Music HUB Structure

The City of Gardens Cultural Institution - as a reformed, new structure combining with the Krystyna Bochenek Katowice Cultural Centre - should establish the Music HUB within their new location. It is recommended that it has an initial steering committee that is comprised of the UNESCO advisory committee, municipal employees and private sector workers. This board should consist of odd numbers and be split equally between institutions and private sector.

It is recommended the steering committee/ Unesco advisory committee be:

- 50% female and 50% male
- 10% diversity led, if possible

- No more than 9 people.
- Volunteer, with one year terms.

It is best that the The City of Gardens Cultural Institution consults with its stakeholders and analyzes the Actions on its report to select the staff for the Music HUB.

It is imperative that as many genres as possible are represented on the Unesco board/steering committee. It will be stated in the charter that the roles and requirements of the Music HUB are genre neutral, but the needs of each genre in Katowice is different, as survey respondents commented. These varying needs must be identified in the Music HUB. It is also imperative that those who have held significant positions in the past are not prioritised over more youthful alternatives; this organisation is new, and its views must represent the breadth of Katowice's music community, not just those that have interacted with funding programs in the past.

The initial structure of the Music HUB must ensure that it does not compete with any other cultural institutions and as such, audits and is aware of all other cultural programming and practice in Katowice. The Music HUB should offer a neutral platform for institutions and the private sector to meet and forge new alliances.

In addition to the structure, all music-related support for businesses and artists in Katowice should be funnelled through this new organisation. This will allow not only for the greatest accumulation of funds by removing operational costs of multiple organisations, but will also provide efficiency in funding applications from qualifying bodies. Key activities in the legitimisation of a sustainable funding body include setting up a standardised approval and denial process, a neutral jury, with a strict timeline, for all applications for funding, and ensuring procedures are adhered to.

LOCATION

It is recommended that the Music HUB be housed in upwards of 3000 square feet of office space, to accommodate the following:

- Record Studio
- DJ Booth (s)
- Networking Areas / Breakout Space
- Meeting Space / Small Venue
- Cafe and Bar
- Rehearsal Rooms
- Editing Suite
- Hot Desks - Co-working space

The design of the building should be made public to the Katowice music community for at least 90 days, ensuring that those who wish to comment on what the Music HUB will contain are consulted in advance. This can be coordinated through a page on Katowice's UNESCO website or an online survey. It is integral that the creation and implementation of the Music HUB not be perceived as a 'top-down' affair; it must include musicians and the music community from the onset as proof that the UNESCO City of Music accolade was won to further stakeholder engagement.

BUSINESS PLAN

The first piece of work that the Music HUB should publish is a 5-year strategic plan, which will form the extension of this outline presented as part of the Actions in this report. This business plan will take the initial outline and expand on it, to cost and strategize the implementation of the Music HUB. The following sections must be included in the plan.

1. CHARTER

- a. This will govern the manner in which the Music HUB will operate. It will dictate board practices and voting rights, legal and accountancy framework and core responsibilities. Once completed, this document will be a market leader in Poland and could be licensed to other cities, for the creation of other local Music HUBs.
- b. Competition Assessment: It is imperative that the board and its initial executive director complete a competition assessment, to ensure that the objectives and roles of the Music HUB do not entrench on any pre-existing businesses in Katowice - and any potential competitive nature be investigated and communicated. A simple list of stakeholders and assets, along with a communication strategy and meeting structure can ensure this is managed effectively and efficiently.
- c. The Music Hub will be open to everyone and the general space will be free of charge. There will be grant schemes for emerging artists to use the studio, and online booking/application systems for the rehearsal spaces, equipment hire and the venue hire.

2. TIMELINE

- a. The Music HUB will be run by team members of the "City of Gardens/The City of Gardens Cultural Institution & the Katowice Cultural Institution" plus an external music advisor. The Music HUB will need a Music Hub coordinator, temporary project managers with different backgrounds and expertises and one external music advisor. Communication and Marketing, accounting for the Music Hub will be executed by the City of Gardens internal staff.
- b. Furthermore, a timeline of construction and outfitting, including an ecological assessment to ensure that the activities of the Music HUB are as carbon neutral as possible. The network to manage these activities can be sourced simply and effectively.

3. BUDGET

- a. It is advisable that a budget of €100,000 be made available to develop the initial outfitting and structure of the Music HUB. Simultaneously, the Music Hub coordinator, with assistance from consultants and accountants, develops:
 - a1. Fundraising Strategy
 - a2. 5-Year Budget
 - a3. Summary of Outgoings and Incomings

4. PARTNERSHIPS

- a. A significant amount of the required materials for the Music HUB can be sourced through sponsorship and donations, including studio equipment, instruments, computer equipment and furniture. It is recommended that local government and its partners explore this.

5. COMMUNICATIONS AND MARKETING STRATEGY

- a. It is important that the Music HUB have its own voice. For this, a brand manual, social media strategy and marketing / communication strategy is required, all in Polish and English (representing the international aspirations of the Music HUB).
- b. It is encouraged that The City of Gardens Cultural Institution rely on their UNESCO City of Music network to assist in disseminating such information internationally. Internal communication can be debuted at a Katowice 'Town Hall Meeting'.

STAFFING

It is recommended that the Music HUB develops the following roles:

1. **MUSIC HUB COORDINATOR** – a neutral, but experienced individual who has local connections as well as experience across Poland and internationally.

Tasks include:

- Implementation of projects
- Programing
- Overseeing budgets
- Coordination of systems and Music Hub services
- Communication coordination

2. **TEMPORARY PROJECT MANAGERS & ARTIST COUNSELLING**

Tasks include:

- Managing several different projects and services
- Organisation of events
- Artist counselling
- Music Sector Mapping

3. **EXTERNAL 'MUSIC ADVISOR', BASED AT THE MUSIC HUB**

Tasks include:

- Managing industry relations, through the Music HUB.
- Networking events
- Implementing policy actions together with The City of Gardens Cultural Institution
- Capacity building
- Guide development
- Liaising with ZAIKS and the other institutions
- Member of the Unesco Programing Board and responsible for renewing yearly
- Development of Charter of Best Practices
- International Relations

Katowice has many active, engaged and informed cultural institutions, each dealing in a multitude of artforms, including fine art, theatre and dance. However, in the realm of popular music, often a disconnect emerges when comparing tactics against these other artforms, as developing one's music business requires different skills than what is often demonstrated. As such, it is recommended that a 'Music Advisor' post be created, or augmented, at The City of Gardens Cultural Institution, which will focus the music practitioners to one person responsible for developing and establishing the UNESCO music board and associative policies, as well as forming a dialogue between Katowice's music community and its administration. The Music Advisor will have a seat on Katowice's UNESCO music advisory board, but be independent of it. In saying this, the role is not necessarily filled by a municipal government employee, but does involve working very closely with the local governments as well as private institutions in the area. This person must work in a genre-neutral capacity, focused on business development, rather than cultural programming. Cultural programming is best left to a the Music Hub coordinator. The Music Advisor will be responsible for all industry engagement, as itemised in the Actions below.

4.2b Music Venue Structure

STAFF STRUCTURE

As a branch of the Music HUB, it is at the discretion of the offices whether management should be sourced from existing Music HUB staff or outsourced as a separate entity. All operational decisions should stem from the office regardless.

ADMINISTRATIVE STAFF

1. VENUE MANAGER / BOOKING

Roles include:

- Implementation of policies and strategies
- Reporting venue performance in terms of attendance and revenue.
- Booking bands and run events at the venue.
- Overseeing the venue calendar, communicating updates to the web staff.

2. ACCOUNT MANAGER WITHIN THE CITY OF GARDENS CULTURAL INSTITUTION

Roles include:

- Maintaining budgets
- Keeping accounts books on costs/profits
- Reporting margins to administrative staff/Music Hub
- Checking nightly income reports
- Filing end-of-year tax statements

3. FREELANCERS

Roles include:

- Web maintenance - creates/maintains venue's online platform with coherent calendar, booking system, contact page, and updated links

4. PR & MARKETING TEAM

Roles include:

- Acting as public representative of the venue at community and industry events such as panels and Music HUB meetings
- Liaising with the web team to streamline physical and digital campaigns as well as manage social media accounts

GENERAL STAFF

1. DOOR STAFF

- Operating on zero-hour contracts

2. PRODUCTION CREW (FREELANCE)

- Including stage manager, lighting technician, and sound engineer familiar and efficient with the building's equipment.

3. BAR STAFF (IF APPLICABLE)

- Part-time basis during the evening

4. SECURITY

- On the evening on a zero-hour contract basis
- Includes door staff, backstage security and in-crowd authorities
- Can consist of volunteers (see below).

5. ARTIST LIAISON

- Securing the artist's rider, if applicable, and providing on-evening assistance
- Could be an opportunity for work placement, as detailed in later sections.

6. MAINTENANCE

- Engineers/plumbers/etc fixing any technical problems with the sound or lighting boards or physical structural damage.

7. VOLUNTEERS

- Optional additional staff on event evenings to assist in increased business activity.
- Opportunity to collaborate with local universities to provide students with hands-on live industry experience, even if as crew members, or encourage community involvement from a creational rather than consumer approach.

LICENSING

It is imperative that Music HUB ensures the venue has obtained all operational licenses to coincide with local regulations. The following are standard considerations:

- Performance/recorded music license (UK equivalent PRS/PPL)
- Liquor license:
 - » Recommended as an additional source of revenue and experience enhancement.
 - » Fees range from 525 PLN annually for a standard beer license (below 4.5% or between 4.5%-18%, each) or 2,100 PLN annually for a liquor license (above 18%).
 - » Taxes can be charged if sales reach above a certain threshold through alcohol sales, with 1.4% of sales above 37,500 PLN being the threshold for lower-level licenses, and 2.7% of sales above 77,000 PLN the threshold for a liquor license.⁵
- Noise restraints:
 - » Liaise with local authorities as well as neighbors to meet noise regulations, such as ceasing noise after certain hours and soundproofing the venue as much as possible.
 - » Noise complaints are the most common cause of venue closure.
 - » Noise restrictions are overseen by the Silesian Marshal Office (Urząd Marszałkowski Województwa Śląskiego)
- Age restrictions:
 - » In order to maximise attendance and community involvement, as well as keep with Music HUB goals of youth engagement, the venue needs to be accessible by all ages and family-friendly.
- Occupancy capacity: in keeping with fire safety and health safety standards.

LAYOUT AND DESIGN OF MUSIC VENUE

The music venue should have the following areas:

- Lobby

5 <https://www.sekap.pl/katalog.seam?id=561&actionMethod=katalog.xhtml%3ApeupAgent.selectParent&cid=20665>

- Cloakroom
- Stage
- Floor/seating area
- Green room
- Rehearsal room
- On-site offices
- Restrooms
- Bar
- Backstage loading dock for venue stock and performance equipment
- Parking (recommended to accommodate 35% of venue capacity)

The venue must have its own equipment and provide a top-of-the-line standard backline, although should allow artists to bring their own equipment if unique and vital to the performance. Rehearsal space should also be provided for acts, bookable for a low, affordable fee or provided free of charge, and should be filled with basic equipment such as amps, leads, microphones, music stands, and a piano and drum set.

Disabled access is vital to the venue, as it certifies the building is accessible to all audience members. Disabled access includes parking, ramps, elevators (if applicable), and disabled restrooms and seating areas.

MARKETING

- Should stem from and be agreed upon with the Music HUB.
- Includes online, on-site (such as the venue marquee and posters) and around town (working with the music tourism office).
- Event campaigns should commence no more than one month in advance, and no less than two weeks in advance. General venue campaigns should last no longer than six months before a new campaign is launched.

ONLINE

- User-friendly, updated, and streamlined between platforms.
- Booking systems should work with universal platforms such as Paypal, or a custom-designed, but simple interface
- Should provide e-receipts and confirmation emails, as well as keep purchaser's details on file to automatically send updates on event changes
- Event calendar for a one-stop list of performances for the public to browse and choose from, divided by month and filled at least a month-3 months in advance. Each event's profile should lead directly to the ticketing portal.
- Enquiries and contact page for public feedback and community engagement.

FINANCES/ACCOUNTS/FUNDING

- Overseen by the accounts manager and Music HUB board.
- Annual budget projection and a bi-annual account audit, with a quarterly performance review in terms of income and attendance.
- Ticket fee standards, or the money received by the venue as a service fee, should be decided by Music HUB. There are several options:
 - » Small door price & percentage of sales
 - » Percentage of sales
 - » Larger door price

- Refund policy in the case of cancellations, both on behalf of the venue and the ticket holder. Elements of such a policy are refund deadlines (for example, full refund if a thirty-day notice is given, etc.) and process time (meaning the time between refund confirmation and refund provision).
- It is worth providing 'ticket insurance' to ticketholders at a small excess fee at the time of purchase.

SYSTEMS OF OPERATION

- Communicate with nearby venues to coordinate programming so no two venues are marketing towards the same genre on any given night. This lessens competition and allows audiences to attend more events if desired.
- End-of-term performance venue for institutions such as the Academy of Music, thus cementing a relationship and promotion of the educational sector in the music industry.

WORK PLACEMENTS

Collaboration with local universities to offer work placement/apprenticeships for its students, either in the administrative offices or among the production team.

It is at the discretion of the Music HUB to determine a payment plan for such, if any, and the duration of the placements, although three months is a minimum recommendation, with one year being the maximum period.

4.3 Actions of the Music HUB

ORGANISATIONAL ACTIONS WITH THE MUSIC HUB

Action 1 Develop a 'Welcome to the Music Business' guide for musicians

According to the respondents, the breadth of talent in Katowice is extensive, but the business skills of its musicians needs improvement. Not all musicians wish to undertake formal education. Therefore, the Music HUB should design, write and make available a 'Music Business Toolkit' for all musicians, outlining basic and important information all artists must be aware of to develop their careers. Such a guide would outline all funding programs and support, as well as provide a list of venues, studios, workshops, and performance opportunities available in the city for aspiring musicians. It would include the contact information of relative businesses for musicians to build their networks. Such a guide would further their understanding of opportunities available to them and build a strong foundation of self-education through the provision of a coherent summary of fundamental knowledge. This information should be made available online and be updated constantly. It is imperative that musicians are presented with an introductory industry guide relating to the local and connective infrastructure in the surrounding area.

Action 2 Be the contact point for all inquiries regarding music (like brak in Bergen or Rockcity in Hamburg)

- Artist counseling during half a weekday - fixed appointments
- Questions about the music industry
- Questions about funding
- Help facilitating rehearsal spaces
- Questions about events at the Music HUB and Katowice
- Questions about international festivals, contacts etc,
- Staff within the Music HUB that has a broader knowledge of the music business and local area

RESPONSIBILITY: TEMPORARY PROJECT MANAGER WITHIN THE MUSIC HUB

Action 3 Develop a workshop series, featuring industry professionals, for training purposes, and establish ‘Katowice Music Business Mixers’ and ‘Meetups’.

One of the most challenging issues to overcome in Katowice is the relationship between its music practitioners. As a result, the Music HUB should establish monthly meetups to discuss local affairs, network and build trust. The meetings should be free, open to the public and relaxed, featuring a talk from a local, national or international industry leader. It is imperative that the Head of Music takes part in these meetings and introduces businesspeople to each other, to best maximise networking.

In addition to bringing in national and international buyers to Katowice’s music festivals, this workshop series on a number of integral music industry topics will continue to develop trust and network sharing.

Action 4 Develop a “Katowice Music Mentorship Network’ of experts that donate 1-2 hours a month to work with local musicians.

An obstacle that needs to be overcome in order to develop a prosperous, locally-focused and supportive music sector is ensuring that trust is backed up with partners working together. There has been success in markets in Canada and the United States where programs are developed to set up mentorship structures, either in person or online, between experienced industry representatives and developing musicians and businesspeople. This could be done by enticing those already funded by the city, or offering small representation allowances to businesses to participate. A mentorship strategy, spearheaded by the Music Hub, will directly address a number of the challenges our survey respondents expressed.

Action 5 Provide training and guides on how to utilise data and analytics in the music industry to all musicians.

Analytics and data are the future of music industry revenue and transparency. It is important that Katowice promotes fair trade and fair payment for artists. In doing so, educating music professionals on analytics and data technology through guides, short courses, guest speakers or features in other programming will help the next generation of music entrepreneurs. This could be done during a one-day workshop or digital summit at the Music HUB and be accessible online or in physical formats. Workshops could cover topics such as monetising streaming on platforms such as Spotify or YouTube, distribution through online/global stores such as iTunes and Amazon, and how to translate collected data on sales and consumption trends into an effective strategy.

RESPONSIBILITY: EXTERNAL CONSULTANCIES

Action 6 Employ local musicians to teach primary school students on a part-time basis at the Music Hub

One of the challenges voiced by a number of local musicians in the survey was the dearth of local opportunity to develop new relationships alongside earning capital to progress their careers. A pioneering program in the United States, Youth on Record, employs local musicians to teach music and music business to youth. This could be adapted for Katowice, where local musicians can be deployed, through a policy-led initiative, to teach the new generation of youth music. The musicians can earn extra money, while also contributing to the local community and the music ecosystem.

This could be done on a freelance basis with 2-3 hours per week per artists at the Music Hub.

FUNDING & FINANCING ACTIONS WITHIN THE MUSIC HUB

Action 7 Have a transparent standardised application process and funding scheme within the organisations in Katowice with a yearly rotating jury.

As mentioned above, Katowice needs transparent funding schemes and institutions. The City Council can provide funds to projects at the Music Hub and The City of Gardens Cultural Institution will expand their funding schemes. Both need standardised approval and denial process, with a strict timeline, for all applications for funding, and to ensure procedures are adhered to. Both need neutral juries that decide about the applications. Those jurors have to change every year and should consist of different experts in genres. A sub-group of the Unesco advisory board could for example be the jury .

There are several different ways of funding. Research within other countries has proven that matching funds and micro-financing programs are the best ways to support the industry by keeping them engaged.

ARTIST FUNDING:

- Tour and showcase support - national and international - 50% funding and max of 2000 zł per person in the band
- Album support - 40% of the total costs can be funded / 60 % should come from the artist / label - max of 60,000 zł funding
- Marketing support - national and international marketing campaigns, matching up to 50% of expenses incurred

FESTIVALS:

- Support festivals of all genres of music especially those that include and support Katowice based up and coming artists and music professionals.
- The funded projects should have a positive impact on the music business and the music scene overall.

INFRASTRUCTURE:

- Call for concepts - funding for projects that support the music scene in Katowice - 5000-10000 zł per project

Action 8 Introduce a label micro-financing program (2000-4000 zł) for artists to set up labels or release their own material.

Business development in Katowice relies not only on having the space and time to create, but also on the financing. Working with private financiers (banks, for example), Katowice could establish a micro financing structure for musicians and music businesses, up to 4000 zł, to start a new business.

Action 9 Commission research to look at establishing a grassrootsvenues fund.

Similarly to the new entrepreneurs / microfinance support, another structure could be implemented to encourage venues to apply for new equipment and technologies to enhance their sound, or organise courses to train sound people and light technicians. Funding could be collected from government allocation, stakeholders investment, or public funding such as donations.

RESPONSIBILITY: COORDINATOR OF THE MUSIC HUB

Action 10 Publish all successful applicants and how much they have received in public funding on a website (like FACTOR).

Ensure that public information is communicated to applicants before it is made public, to build consensus. This information will act as a series of case studies for potential future applicants as well as research institutions, with transparency acting as the greatest asset for accuracy.

Action 11 For those that receive funding, it is mandatory they attend networking events.

One manner in which capacity-building can be developed to encourage and foster trust and support within the community is to bring together recipients of support to network, to learn from each other and develop relationships. In the United Kingdom, for example, certain funds require recipients to attend networking and reporting sessions as part of their allocations, and this often fosters a more sustainable, closer relationship with the funder, the structures in place and the city as a whole. It is recommended that those who receive funding from Katowice's public support structures - in whatever capacity - participate in industry meetups and networking sessions.

MARKETING & COMMUNICATION ACTIONS WITHIN THE MUSIC HUB

Action 12 Develop a high quality website that communicates the stakeholders in Katowice and their value to international buyers.

In addition to the formal UNESCO bid city created by City of Gardens / The City of Gardens Cultural Institution, a 'one stop shop' for Katowice's music and music business community would assist buyers in finding out how to approach and do business with Katowice in a simple, defined fashion. This could be completed in conjunction with the 'music map' and provide a list of contacts, venues, a mixtape or SoundCloud playlist and other marketing activities. It is vital that this website is not only user-friendly, but search engine optimized in order for potential buyers to navigate around it both prior to and following communication with the Katowice music business community.

The website should also contain a contact and feedback page, which would encourage both public and private sectors to engage with initiatives building the music district by providing comments. The site will offer a summary of initiatives, perhaps as a copy of the Manifesto, opportunities for updates via newsletter, and, of course, contact information, either through a direct portal or by a listed directory of contacts. This will be a simple, streamlined platform for interested parties to receive basic, yet vital, information in forming strategic suggestions and opinions useful to The City of Gardens Cultural Institution. It is suggested any correspondence received will in turn be sent a signal of confirmation, be it by e-mail or other means, to reiterate engagement in consideration of remarks received.

Action 13 Develop a 'map' of Katowice's music contacts for foreign businesses interested in trading with local companies

In order to facilitate the most active and engaged music business offer, it is said that one must create the 'path of least resistance' to the buyer. Have a database of Katowice music contacts available for any foreign businesses interested in trading in Katowice, preferably in the form of a literal digital map with dots representing cultural institutions and links to their work. This could be run in accordance with the music and cultural information hub proposed in Action 2 for domestic or visiting enquiries, and a user-friendly online portal for international prospects. A streamlined registration process needs to be developed to facilitate new business applications for inclusion in the database.

Action 14 Creation of community noticeboard

Available both online and offline, this would be a port of call for all industry stakeholders to find information on events and opportunities such as networking and upcoming programs. This encourages activity within the industry by highlighting key proceedings from a trusted, collective source, and publishing to the greater community allows a broader audience and engagement rate. Updates can be posted via newsletters or social media, although all should lead back to an accumulation of sources via the website and updated physical listings at the Music HUB offices.

Action 15 Ensure that all communication is done through one defined, structured voice.

Katowice must communicate through a singular voice to the outside world in the realm of music and music industry development. It is recommended that City Council, The City of Gardens Cultural Institution and Music Hub speak in one voice, the conversation can be led by The City of Gardens Cultural Institution and the PR & Communications team.

RESPONSIBILITY: IKKMO PR & COMMUNICATION TEAM

POLICY ACTIONS WITHIN THE MUSIC HUB

Action 16 Encourage all local musicians to join the musicians union, artists associations and encourage more local copyright transparency, to influence national transparency

Związek Zawodowy Polskich Artystów Muzyków Orkiestrowych, ZZ PAMO, is the Polish musicians union and is a member union of the International Federation of Musicians. STOART is the Artists Performers Association and STOMUR the Popular Music Performers Association. Having an informational and supportive hub run by musicians and associations that support artists is vital in nurturing growth from an empathetic perspective. Musicians unions offer legal advice, networking opportunities and career advice and act as a platform to politically lobby for musicians' best interests at local and national levels. High participation figures ensure that the majority interest is represented by the union and lend a voice to musicians in any community.

In the interviews, it was discovered that many local musicians are not registered with the national collection society, ZAIKS. If local musicians are not registered with this administration, the usage of their works in many forms is not remunerated, leaving them unable to capitalise on certain income streams. It is important that Katowice encourage all their tax-paying musicians to register their works and make the necessary relationships to ensure that this is respected on all sides of the transaction. Without proper registration, building trust in governance and institutions will be hampered.

RESPONSIBILITY: MUSIC HUB COORDINATOR

Action 17 Develop an Audience Development plan for the Music Hub and other venues.

There are a number of incentive programs in existence around the world that encourage a bigger audience (students or local businesspeople) to go see local live music. An initiative or platform, aimed at Katowice's extensive student population, to encourage them to go see local live music would raise awareness of local artists, provide a stronger platform for development and increase the development of the ecosystem. A broader audience development plan with Discounts, a specific evening every month that showcases artists at a reduced rate, targeted newsletters and marketing or concerts of student-run nights needs to be developed. Still, it is important that these shows are not completely for free, as the audience has to be educated to pay for concerts.

Action 18 Support exchange, artist-in-residence programs and mentorship between Katowice's music hub and music scene and international partners.

In addition to fostering business mentorship programs, it is advisable to use the breadth and depth of Katowice's music making community and the Music Hub to continue to foster relationships with each other through artist-in-residence exchanges or studio exchanges. The Music Hub will have rooms available for artists to stay for a period of time and to use the Music Hub facilities. The artists don't have to be only musicians, this program can be open to visual artists, designers etc. Such collaborations could be coordinated in conjunction with local festivals (Tauron, ARS, NOSPR activity), foundations etc. and be utilised to satisfy the necessary requirements on the cultural side of the UNESCO 'stamp'.

The artist-in-residence program will be free of charge for the artists, they are supposed to leave a piece of work in Katowice in exchange for hospitality.

Utilities will be higher if artists live in the building constantly.

RESPONSIBILITY: MUSIC HUB TO TAKE CARE OF THE APPLICATION PROCESS AND ARTISTS AND THEIR NEEDS, EXTERNAL CONSULTANCY FOR DEVELOPING THE INTERNATIONAL RELATIONSHIPS IN COOPERATION WITH IKKMO.

INTERNATIONAL ACTIONS WITHIN THE MUSIC HUB

Katowice is a world renowned creative city. It is small enough to project a unique identity, yet large enough to attract import businesses, including tours, festival visitors and musical collaborators. As the 4th largest city in Poland, and a major stop for touring artists, Katowice can do more to entice foreign artists to perform in the city, while encouraging more collaboration with local artists. It also must play its part in supporting the Polish music industry as it continues to develop and export content. Katowice can be a national thought leader in internationalising its music community.

Action 19 Coordinate music trade missions for international buyers and journalists at Katowice's festivals.

Katowice has some of the most exciting and interesting music festivals in the world. These festivals are its calling card and its promotional vehicle. It would be best to use them as tools to foster and develop stronger international relationships with buyers and the national / international music industry by providing them with first-hand experience of the Katowice music scene. Further, this could lead to trade mission opportunities for Katowice representatives to establish ties in international markets and study successful strategies to implement domestically.

RESPONSIBILITY: EXTERNAL CONSULTANCY

Action 20 Coordinate, with local, private partners, targeted showcases at festivals for national and international buyers in local venues to showcase local talent.

Venues feel left out of large-scale music festivals, except NOSPR and SPODEK. One opportunity to develop and sustain Katowice's grassroots music venue infrastructure is to develop 'off-venue' or secondary programming, in conjunction with its festival promoters, at its major festivals. This can involve utilising classical and jazz performances in secondary venues and provide more infrastructural support to developing and fostering the relationship between emerging local artists (and businesses) and the major music festivals in the city.

RESPONSIBILITY: MUSIC HUB TO ORGANISE / EXTERNAL CONSULTANCY

The work begins after the showcase, it is said. It is imperative that in all networking and showcasing opportunities, the invited buyers personally meet and interact with the showcasing artists, as this fosters commonality and most often, buyers email back artists whom they have personally met. This could be done by providing a dedicated networking space at the festivals as well as employing a liaison dedicated to ensuring all opportunities are utilized.

RESPONSIBILITY: MUSIC HUB PROJECT MANAGEMENT TO ORGANISE

Action 21 Establish a network of international professionals to select showcasing artists; Create a ‘Friends of Katowice’ program.

This is an Action that has been adopted in “Reverb”, Adelaide, Australia’s music strategy. There, a small group of international ‘friends of the city’ was coordinated to act as mentors, select showcasing artists, attend conferences and provide industry data. This could comprise of national and international partners and be split across genre and sector. Such partners can negotiate deals and discounts with suppliers and be a first ‘port of call’ for international activity.

RESPONSIBILITY: MUSIC HUB COORDINATION

Action 22 Join the Music Cities Network

Music Cities Network is a public/private network dedicated to improving communication, sharing research and intelligence, exploring policy and advocacy, and networking for policy makers and city leaders. The network is aimed at making cities wealthier, healthier and more international through music.

It is a membership-based network, focused on four objectives

1. Improving cities through music policies
2. Building greater networks and creating an actionable agenda for change
3. Providing and sharing a one-stop repository of information and researching surrounding global music cities activities
4. Curating a music player exchange / collaboration (business, artists, cultural institutions and education)

The network begins as an information- and research-sharing repository, protocol series, and message board and evolves into a trade association that develops the concept of ‘music cities’ externally (to politicians, economic development agencies, chambers of commerce) for destination marketing and business improvement.

4.3 Policy actions

These Actions are relating directly to the implementation or reformation of policy. These will increase music- and musician-friendly policies in Katowice, creating more cohesion, cooperation and music industry development. These Actions are to be led by The City of Gardens Cultural Institution, but include a wide range of stakeholders, from national organisations to local musicians, festivals, policymakers and other businesses. They are presented in a non-linear fashion; There is no particular order for these to be implemented, but each is as important and integral to music industry development as the next.

Without a trusting, supportive administration, a clear chain of command, a defined communication process and a definitive transparent value chain, other policy initiatives will not be supported by those that matter most - the artists.

GOVERNANCE

Action 23 Publish a Manifesto of Initiatives

This will be a short, one-page manifesto, published by the The City of Gardens Cultural Institution, summarizing the initiatives undertaken in this venture (i.e.: objectives outlined in the Actions). It will list the paths of completion, to encourage full transparency between the private and public sectors. The Manifesto will be updated as initiatives progress and are subsequently completed to hold the private sector accountable for resolution according to the projected timeline.

RESPONSIBILITY: IKKMO

Action 24 Construct and mandate a ‘Katowice Music Industry’s Best Practices Charter’.

The advisory board, its activities and initiatives should be governed by an independent, agreed-upon document called a ‘charter’ or ‘code of best practices’. Similar to other codes and regulations at City Hall, it must be endorsed by the Mayor and his administration and be ratified in council chambers as a working document that guides and governs how Katowice supports its music business ecosystem. It must outline a dedication to transparency, network and capacity building, the responsibilities of the advisory board, the process of its members joining and leaving and its reporting procedure to city hall, the regional government and the Polish national government. This would be a first in Poland and showcase, to other cities, the valuable and integral role the music ecosystem - in all its facets - has in encouraging city development. Standardising and formalising this pledge is integral to its success and adoption.

RESPONSIBILITY: CITY COUNCIL / PART OF THE 5 YEAR STRATEGY PLAN

Action 25 Set up a more researched-focused institute within The City of Gardens Cultural Institution

This department would handle international- and sister-cities-based work. The key activities involved would include compiling data and sharing the best practices charter (see Action 26), while ensuring free availability of such information to any funded organisation. The research will be ongoing and at regular intervals, and will include developing export and international relations pertaining to the music industry, as well as conduct regular censuses on local and industry trends data, keeping information on file for collaborative institutions and for internal use in progressing the industry accordingly. This Action would link with the Action 22 “join the Music Cities Network”, as there will be a lot of research focused projects within the network.

RESPONSIBILITY: IKKMO

Action 26 Create a cultural institutions charter of best practices

Katowice offers a number of different public sector organisations comprising of many different music genres and auspices. It is best that not only are all genres treated transparently, but all music-related support be placed in line with other cultural and creative industries support in the city. The most assertive manner to approach this is by creating a charter of best practices, outlining the objectives public institutions pursue across the cultural industries. The charter should communicate:

- All genres and disciplines are treated equally in Katowice.
- Cultural and Economic arguments for supporting mechanisms are to be treated differently.
- Katowice should adhere to a robust diversity and disability policy in supporting as wide range of views as possible in the city.

- All support provisions be communicated in simple Polish with deadlines, reporting practices and procedures.

RESPONSIBILITY: CITY COUNCIL

Action 27 Have monthly meetings with executives to share best practices

Meetings will see up-to-date charters as well as present the opportunity to outline core responsibilities and share with each, to minimise competition and duplication. This facilitates efficiency in task completion, and institutions will be aware of the validity of their roles as being equal to that of City of Gardens in the progression of Katowice as a Music City. Ensuring each party is aware of role allocation also invites collaborations between parties, which will enhance task completion rather than the hinderance of competition. It is recommended that an attendance policy is set in place for participating institutions to ensure understanding of best practices in accordance with given responsibilities, and that the procedures are documented by a 'secretary' for future use.

RESPONSIBILITY: IKKMO

Action 28 Investigate tax credit infrastructure for the music business.

There are a number of tax credit and tax incentivisation systems that cities can develop music infrastructure, including tax and rate relief for new venues for soundproofing and new equipment or micro-grants to musicians to purchase new equipment, see also Action 9. An audit of tax credit infrastructure nationally and internationally can help identify further measures that can be used, from a regulatory perspective, to support musicians and music business in Katowice.

RESPONSIBILITY: IKKMO WITH CITY COUNCIL

Action 29 Arrange a yearly 'music town hall meeting', first in 2016

To develop an engaged music ecosystem that supports local musicians and industry, it is important that the breadth of Katowice's music listening community be a part of the debate and discussion. In Toronto, for example, a 'Town Hall' meeting was organised for constituents, to discuss how music impacts living in the city. Such a meeting with the support of local politicians and administrators would help further understand challenges and mine the community for solutions. Parties represented would include aforementioned Head of Music, local musicians, and local institutions from The City of Gardens to academic institutions to set in place the year's expectations for common understanding. It is best that this be developed after other implementations, to ensure the music community supports the mission and promotes it to the local community.

RESPONSIBILITY: MUSIC HUB

Action 30 Establish a Katowice music industry advisory council

It is important that those impacted by the decisions are involved in making them, and that there is a singular chain of command between music practitioners and city council. In addition, the council can be kept abreast of city council amendments and ordinances and develop, over time, a trusting and beneficial relationship that benefits all stakeholders. It is imperative that the organisation and maintenance of the council is completed transparently, with appropriate checks and balances, and consists of:

- A. males and females
- B. all sectors (venues, festivals, managers, labels, musicians)
- C. all genres.

- D. support providers (staging, lighting, studios)
- E. politicians
- F. arts support organisations

The advisory board can be split into working groups, each responsible for understanding, unpacking and supporting a sector of Katowice's music economy. Working groups that are best to begin with include:

- A. Licensing and Planning
- B. Use of Public Space
- C. Festivals and Venues - Live Music
- D. Education and Talent Development
- E. Networking
- F. International and National Relations

RESPONSIBILITY: IKKMO

Action 31 Create a Music District

Katowice is a city that has a centrally-located set of entertainment zones. The main street leading up to the Mariacki church is one; NOSPR is another. To support business development and standardise regulation, two 'music districts' can be created - a summer one and a winter one, to support and standardise music and music making projects. This includes developing more sustainable relationships with bars, restaurants, hotels and hostels, providing tax credit, rate relief of support for sound proofing and security development, standardising licensing and planning practices and developing a 'deed of easement' structure for new residences that respect the existing businesses in the zone.⁶

RESPONSIBILITY: IKKMO WITH CITY COUNCIL

Action 32 Analytics to measure festivals.

In order to best manage Katowice's extensive festivals offer, it is recommended to analyse and measure the festivals on their economic and social impact on the city, the number of visitors and where they are from, the investments the festivals take, the fees they spent, how many local acts they present etc.

RESPONSIBILITY: EXTERNAL CONSULTANCY

Action 33 Reform Free Music Festivals, starting from 2017

Katowice, like the rest of Poland, operates large-scale, city-funded free music festivals. While these develop community engagement, too many can be detrimental to the development of Katowice's music infrastructure, as our respondents have noted. It is best that an audit of these festivals be conducted and a plan to charge an entry fee, even if that entry fee is minimal, donated to charity or reinvested back into the community. This is already being practiced by several area festival charging very little for tickets. It is not recommended that all free festivals be reformed, but that an audit of their impact on paid festivals be investigated, to explore the full scope of Katowice's festival offer. Katowice is one of Poland's (and Europe's) premier festival cities - and it needs to micro-manage that responsibility

RESPONSIBILITY: IKKMO

Action 34 Develop a Festival Transport Strategy

In order to develop more engagement with local musicians and consumers, City of Gardens / The City of Gardens Cultural Institution is encouraged to work with the Silesian

transport authorities (train, bus and airport) to promote its festivals and ease the usage of public transport to and from the festival. This includes a car pooling strategy, extending bus hours during festival times and promoting events through activities and initiatives at Katowice and Krakow airports. In Seattle, for example, musicians are hired to perform on baggage carousels to welcome tourists and visitors, and pamphlets are handed out outlining all city festivals - music and otherwise. This can encourage a more welcoming feel for the city to visitors - music and otherwise.

RESPONSIBILITY: MUSIC HUB COORDINATOR / IKKMO/ CITY COUNCIL

REGULATIONS

Action 35 Conduct a review of licensing and planning structures that apply to the music industry in Katowice.

The backbone of a music ecosystem is a healthy and supportive planning and licensing infrastructure that benefits and encourages music and music business activity. It is imperative that Katowice audit its planning structures, including licensing restrictions, noise attenuation, affordable housing commitments, planning requirements, consents, public space usage and permitting.

RESPONSIBILITY: CITY COUNCIL

Action 36 Conduct a review of festival permitting infrastructure to look at streamlining processes and costs for applicants.

Katowice must develop a turnkey festival strategy so each festival is equally and transparently supportive by city council and importantly, time and resources are saved in easing and standardising permitting procedures, from provision of electricity and water, security, health and safety, tenting and personnel issues. One path of streamlining would be to digitize as many processes as possible, to include permitting, ticketing, and all information concerning events.

RESPONSIBILITY: EXTERNAL CONSULTANCIES WITH CITY COUNCIL

Action 37 Adopt the ‘Deed of Easement’ Policy in all local tenancy agreements.

The ‘Deed of Easement’ policy is a measure to alleviate the concerns of local residents in terms of noise with venues and festivals. It approaches the problem when the resident takes tenancy of an apartment next to a venue and communicates, in advance of such a tenancy, that a venue is present and as long as license conditions and noise levels are not breached, the resident cannot complain. This is only related to new residents beside already existing venues; if a venue is built next to apartments or other residences, it is expected the venue adopts the ‘Deed of Easement’. If residents are aware of venues and festivals, and respectful of them (and festivals respect noise attenuation measures), this saves resources and time in terms of noise complaints and fosters stronger relationships, especially in busier, noisier parts of the city.

RESPONSIBILITY: CITY COUNCIL

Action 38 Conduct a noise attenuation audit in public performance locations to ensure residents are not affected in the main square and NOSPR.

It is imperative that Katowice’s public squares (area around NOSPR and City Hall) are outfitted for live music, from busking to large scale concerts. Many technologies exist that ensure live music can prosper while local residences are protected from noise pollution. Katowice can become a world leader in noise attenuation and health and safety around live music.

RESPONSIBILITY: IKKMO

Action 39 Adopt the ‘Agent of Change’ Principle.

For all new developers in Katowice, it is imperative that existing licenses, as long as they remain within the rules, are protected so new residents do not complain about pre-existing noise. This is what the ‘agent of change’ policy legislates. Katowice should ensure this is enshrined in city legislature, to protect venues, pubs, clubs and any business that emits noise within its license provisions.

RESPONSIBILITY: CITY COUNCIL

Action 40 All city employees respond to emails within 5 days.

It is really important that city employees respond to emails within a defined timeframe, as many emails get missed and go unanswered. Response reliability encourages communication from prospective buyers and international representatives who know their enquiries will be made a priority. Although Katowice operates on a 30-day response scheme, this will only be acceptable when communicating with local institutions. The music industry is fast-paced, and when dealing with international clients in export and tourism development, email customs of immediacy will need to be adhered to.

RESPONSIBILITY: ALL

VENUES

Different scale and capacity venues are key for a vibrant music scene in a city. Katowice lacks grassroots venues for emerging artists, where they can perform, meet and practice.

Action 41 Produce a Katowice venues map

Survey the venues and produce a ‘Katowice’ venues map, outlining capacities, venue structure and outcomes from the venues. The results of which can be used to optimize venues for musicians, promoters, and attendees.

Furthermore a map is important to maintain venues at their current location and to strengthen their position when investors or building projects come into place. (See also Action 39)

RESPONSIBILITY: MUSIC HUB / EXTERNAL CONSULTANCY

Action 42 Conduct a Katowice music venue assessment.

Assess the technical requirements of Katowice’s venues in an effort to identify minor, cost-effective enhancements that can create better conditions for artists. This is very important to analyse the opportunities that emerging artists have to perform locally and often, and the role they have in developing a stronger and more united local music community. Understanding, in great detail, Katowice’s venue infrastructure is integral to establishing a strong live music market.

RESPONSIBILITY: EXTERNAL CONSULTANCIES WITH LOCAL PARTNERS.

Action 43 Establish meetups and networking activities between venue operators, to encourage collaboration, rather than competition.

Create a Katowice music venue map, outlining both a ‘cultural trail’ of sites while understanding how artists graduate through the system; ensure it is a ‘step ladder’ system. In addition, ensure that venue operators communicate with each other positively on shared issues, such as city policy and treatment of the night time economy.

RESPONSIBILITY: MUSIC HUB

4.4 Stakeholder engagement

EDUCATION

The building blocks of a healthy, sustainable and vibrant music ecology for any city is in its education, training and knowledge ecosystem surrounding its music practitioners. Katowice has a robust formal music education infrastructure, covering instrumental and theory training. However, it lacks structure in what would be considered informal music education; understanding the modern, complex music industry as a business. It is important to note that although this may be classed as 'informal,' this does not mean it shouldn't be taught by accredited institutions, and it is imperative that Katowice's higher education academies and institutions, along with its cultural institutions, collaborate further to address this in order to develop Poland's music business people of the future. The city itself is an educational and research case study - its multitude of students can be its researchers.

Action 44 Ensure there is a course that focuses on music business and copyright.

Katowice has one of the most extensive and impressive music education infrastructures in Poland. It is home to a number of classical and jazz music institutions, including IPIUM and the Karol Szymanowski Academy of Music. There are four compulsory subjects for students at the Academy of Music: Social Communication and Event Organisation, Promotion and Marketing of Cultural Goods, Music in the Cultural Context and Intellectual Property Protection. However, there is no globally accredited, professional music business university course in Poland. Therefore, it would be recommended to conduct an audit of the business structures of the existing courses, to ensure that students are being introduced to the correct topics, along with their performance related studies. This audit, through surveying and speaking to students, will assist in outlining deficiencies in the academic programs, if such exist, to understand what is lacking in music business education in Katowice, and Poland as a whole.

Katowice has an opportunity to become a national leader in the field and should use the strengths of its local higher academic structure to develop an international, bi-lingual music business program that can compete globally. This can draw an international student body to build upon existing networks, as well as ensure sustainability by ensuring the next generation has accredited, reliable educational resources.

RESPONSIBILITY: IKKMO WITH UNIVERSITIES

Action 45 Partner with international institutions.

In addition, exploring a partnership with an accredited music industry college such as BIMM, Berklee College of Music or SAE to bring them to Katowice, in partnership with local authorities, could create a lucrative opportunity to develop the music business ecosystem. This expands industry connections by giving Katowice access to partner university networks, and familiarizes foreign industries with that of Katowice through exchange programs.

RESPONSIBILITY: EXTERNAL CONSULTANCIES (UNIVERSITIES)

Action 46 Ensure music education in school is mandatory and all schools are equipped with the best music equipment possible.

From nursery through to high school graduation, The City of Gardens Cultural Institution and Katowice City Council must ensure that music education is a mandatory requirement

of local curriculum and that students are supported with the best musical equipment. According to the American Arts Education partnership, music education enhances motor skills, supports brain development, fosters working memory and cultivates critical thinking skills.⁷ Education should start from the earliest age possible, as this is how Katowice will sustain and foster its music development.

Similar to the program “Jeki” (Every child one instrument in Germany) primary schools in Katowice can apply to take part in the program. In the first two years the children can try and choose different instruments, in the third and fourth year they pick an instrument and learn to play it. The City of Katowice provides the teachers and instruments for the schools.

RESPONSIBILITY: CITY COUNCIL

TOURISM AND BRANDING

Action 47 Educate the tourism office about music and cultural information happening in the City.

Katowice needs to have a multi-lingual tourism office offering to explain how it is not only a City of Gardens, but also a City of Festivals and Music. The tourism office needs to be aware of the local concerts and festivals, and trained to provide advice to visitors to the music offering in the city.

BUDGET: IMPLEMENT IN THE TRAINING OF THE TOURISM OFFICE

RESPONSIBILITY: MUSIC HUB

Action 48 Translation of all city materials.

In all cultural infrastructure (museums, signage, hotels, music festival programming, city communication), Katowice must ensure all documents are professionally translated into English. This Action equally applies to websites, who should have translations readily available, conducted by the businesses themselves to ensure accuracy, rather than relying on the browser’s built-in translation app.

RESPONSIBILITY: IKKMO

Action 49 Develop optimized and user-friendly online presence

Initial research into both the bid and market research proved Katowice a difficult music industry to find online, spare major venues. Companies need to ensure they are search-engine-optimised and maintain user-friendly websites to promote both domestic networking and encourage export opportunities for international parties seeking information. It is worth getting in contact with Made Media, who operate the websites for institutions such as the Roundhouse, Royal Albert Hall, Museum of Science, and National Theatre or doing a workshop for website optimization at Music HUB.

RESPONSIBILITY: MUSIC HUB

Action 50 Develop more ‘Sister City’ Relationships

Katowice is an amazing example of putting culture at the heart of a city’s strategy, and it must use that strategy to continue to forge stronger relationships with other like-minded cities around the world. It is suggested that in addition to UNESCO, it explore membership in the sister cities council, global cultural districts network, world cities culture forum and others. Katowice’s current sister cities are Cologne, Germany; Miskolc, Hungary; and Ostrava in the Czech Republic. These relationships foster trade and tourism between cultures, which will aid in export strategies and help Katowice develop a global presence as a City of Music.

RESPONSIBILITY: CITY COUNCIL / EXTERNAL CONSULTANCY

7 <http://www.aep-arts.org/wp-content/uploads/2011/12/Music-Matters-Final.pdf>.

5. Actions Logistics

5.1 Timeline of Actions

ONGOING

- **Action 2** – Be the contact point for all inquiries regarding music (like brak in Bergen or Rockcity in Hamburg)
- **Action 15** – Ensure that all communication is done through one defined, structured voice.
- **Action 16** – Encourage all local musicians to join the musicians union, artists associations and encourage more local copyright transparency, to influence national transparency
- **Action 10** – Publish all successful applicants and how much they have received in public funding on a website (like FACTOR).
- **Action 11** – For those that receive funding, it is mandatory they attend networking events.
- **Action 29** – Arrange a yearly ‘music town hall meeting’, starting in 2016
- **Action 33** – Reform Free Music Festivals starting 2017
- **Action 40** – All city employees respond to emails within 5 days.
- **Action 43** – Establish meetups and networking activities between venue operators, to encourage collaboration, rather than competition
- **Action 45** – Partner with international institutions.
- **Action 50** – Develop more ‘Sister City’ Relationships

JUNE 2016

- Presenting report
- Application process for Music Hub staff / assigning new people for the open position
- **Action 30** – Establish a Katowice music industry advisory council

JUL–SEP 2016

- **Action 1** – Develop a ‘Welcome to the Music Business’ guide for musicians
- **Action 7** – Have a transparent standardised application process and funding scheme within the organisations in Katowice with a yearly rotating jury.
- **Action 23** – Publish a Manifesto of Initiatives
- **Action 35** – Conduct a review of licensing and planning structures that apply to the music industry in Katowice.
- **Action 47** – Educate the tourism office about music and cultural information happening in the City.

OCT – DEC 2016

- Opening Reception of the Music Hub in December
- **Action 4** – Develop a “Katowice Music Mentorship Network’ of experts that donate 1–2 hours a month to work with local musicians.

- **Action 9** – Commission research to look at establishing a grassroots venues fund.
- **Action 12** – Develop a high quality website that communicates the stakeholders in Katowice and their value to international buyers.
- **Action 14** – Creation of community noticeboard
- **Action 27** – Have monthly meetings with executives to share best practices
- **Action 37** – Adopt the ‘Deed of Easement’ Policy in all local tenancy agreements.
- **Action 41** – Produce a Katowice venues map
- **Action 48** – Translation of all city materials.
- **Action 49** – Develop optimized and user-friendly online presence

JAN–MAR 2017

- Official Opening of the Music Hub
- **Action 3** – Develop a workshop series, featuring industry professionals, for training purposes, and establish ‘Katowice Music Business Mixers’ and ‘Meet-ups’.
- **Action 6** – Employ local musicians to teach primary school students on a part-time basis at the Music Hub
- **Action 18** – Support exchange, artist-in-residence programs and mentorship between Katowice’s music hub and music scene and international partners.
- **Action 36** – Conduct a review of festival permitting infrastructure to look at streamlining processes and costs for applicants.
- **Action 39** – Adopt the ‘Agent of Change’ Principle.
- **Action 42** – Conduct a Katowice music venue assessment.

APR–JUN 2017

- **Action 5** – Provide training and guides on how to utilise data and analytics in the music industry to all musicians.
- **Action 8** – Introduce a label micro-financing program (2000–4000 zł) for artists to set up labels or release their own material.
- **Action 19** – Coordinate music trade missions for international buyers and journalists to Katowice’s festivals.
- **Action 38** – Conduct a noise attenuation audit in public performance locations to ensure residents are not affected in the main square and NOSPR.

JUL–SEP 2017

- **Action 13** – Develop a ‘map’ of Katowice’s music contacts for foreign businesses interested in trading with local companies
- **Action 17** – Develop an Audience Development plan for the Music Hub and other venues.
- **Action 22** – Join the Music Cities Network
- **Action 32** – Analytics to measure festivals.

OCT–DEC 2017

- **Action 25** – Set up a more researched-focused institute within The City of Gardens Cultural Institution
- **Action 21** – Establish a network of international professionals to select showcasing artists; Create a ‘Friends of Katowice’ program.
- **Action 34** – Develop a Festival Transport Strategy

JAN–MAR 2018

- **Action 31** – Create a Music District
- **Action 44** – Ensure there is a course Katowice that focuses on music business and copyright.
- **Action 46** – Ensure music education in school is mandatory and all schools are equipped with the best music equipment possible.

5.2 Benefit of Actions

The benefits of fulfilling and enacting the recommendations in this strategy are both qualitative and quantitative. It is integral that all interventions are mapped as they occur to explore the economic impact of these actions. It is estimated, in line with similar studies produced in the UK and Australia, that for every 1 zł invested in music in Katowice, 3-4 zł will be generated in economic impact. According to UK Music,⁸ music is outperforming the rest of the economy by 5% and for every £1 invested in music, £4 is generated in impact. In Australia, according to the live music census, for every \$1 AUD invested in music, \$3 is generated back.⁹ This is through a number of variables and avenues, including:

Greater skills development for Katowice's musicians across dissemination / distribution networks will improve their ability to market and sell their content without increasing cost.

Efficiency savings within the Katowice City of Gardens and cultural infrastructure make-up; as the two organisations merge, a more streamlined approach to music intervention, based in one building, will reduce overheads across business verticals, from staffing to administrative costs.

Further templating of economic impact assessments and evaluation mechanisms will further develop a catalogue of data that will develop better interventions, including the support delivered to festivals, for example.

By charging for free festivals - even 'pay what you can' - further revenue will be generated by the City out of its public festivals.

Increasing or introducing a music business program in Katowice will not only be a first in Poland and encourage inbound residence from foreign students (not local), but also further professionalise the music community in Katowice and provide / develop greater links with international networks.

Not only will Katowice become the City of Music in Poland, it will also become the music business incubator of Poland; a forward thinking, well structured city that supports its music makers and businesses with supportive policies and administrations. The most intangible but arguably integral benefit of this will be the development of trust within the city, and the increase in collaboration across sectors, genres, disciplines and authorities. It is integral that all those who live and work in Katowice work together without prejudice, and a neutral, bi-lateral approach to music making and music business, over time, will encourage and develop such a change. This was one of the largest challenges faced in conducting the study and research; a lack of trust and a frame of suspicion between stakeholders. It is imperative that this be a formative benefit. By taking these recommendations to heart and working on and with them slowly and meticulously, the Music HUB and implementing these recommendations will not only impact the economic situation of Katowice's musicians and music businesses, it will develop trust and increase capacity, creating opportunities that no one knows exists yet.

8 www.ukmusic.org/assets/general/Measuring_Music_2015.pdf

9 http://livemusicoffice.com.au/research/#/research_category/the-value-of-live-musicmaking-in-australia-2014/

6. Conclusions

Katowice is currently experiencing upwards economic growth and thus provides a promising and capable platform to transfer this into the music industry. With world-renowned infrastructure already in place, and validated by its recent UNESCO City of Music designation, Katowice is swiftly becoming a dominant music market. By implementing the Actions listed above, in consultation with Sound Diplomacy, The City of Gardens Cultural Institution and various public and private institutions, the city can ensure its developing market positively impacts sustainability.

The biggest sectors offering room for growth are Katowice's professional support and its export strategy. Grassroots musicians, of which there are many in the city, will benefit greatly by developing more trained music professionals in Katowice, from managers to producers and collection societies, which will streamline export strategies into marketable products, ready for global adaptability. This, in turn, will increase tourism as the world becomes more familiar with Katowice's musical offerings.

Alongside tourism, the establishment of a sustainable, reliable and transparent music industry will generate private music business, marking Katowice as a prime city for global musicians and music companies to conduct their trades.

7. Appendices

7.1. Interviews:

IREK DUDEK RAWA BLUES FESTIVAL

“In the 60s, there was a club and we did blues. It was still our roots; in Katowice, each band starts from blues. In 1981, I did the first edition of Rawa. For 12 years, it was all Polish. Then I left and went to Amsterdam [and] brought back a blues artist and a few bands from the US to play the festival in 1993/1994. I have three bands: symphonic, big band and rock & roll. The manager of Luther Allison saw me and invited me to play across Europe.

One year ago, there was progress when I programmed a day of blues music at NOSPR, performing with the orchestra. Three years ago I invited met Keb’ Mo’, so hopefully in 2016 [he will perform]. I think that Katowice is the best place for new blues bands in Poland.

In the past, there were a lot of jam sessions and now it’s piecemeal. Everyone who plays at Rawa Blues often plays secondary shows. The program local bands was few, but because of the festival, in Poland there have developed 50 festivals and over 200 bands to play blues. When I started with the festival, there was only 1 festival and 1 blues. It is strong, I feel. More bands play blues, and the stars of blues that play at the festival are blown away by the young people that come to the event.

I want to try to invite as many types of blues as possible. There have always been few terms and conditions around my festival at the beginning. When I made the festival international, I needed sponsors. I got Pizza Hut and Grundig. Then I made money through television rights, but that’s not the case now. 4-5 years ago, City of Gardens gave me more money and then I was able to invite artists like Robert Cray.”

Free

“Yes, this is a problem in Poland. Too many concerts for free makes it very difficult to sell tickets for Rawa Blues. I have to reduce my ticket prices or give them for free. I give about 1000 tickets for free. I still want to present what is the best in the world with the blues.

What do you want to do?

“A two-day festival: one in NOSPR and, for the first time, the best blues musicians with the Katowice orchestra. I’m selling tickets and hotels with Novotel. We sold 60 rooms.”

Economic Impact:

When you come to our festival, you can’t go out and we don’t sell any beer or alcohol. The restaurant at Spodek prepares a special dinner, and we try to analyse this. The ticket cost is variable. I book five Polish bands, do exclusivity on the headliners, and I pay more, but I require exclusivity for that artist for all of Europe. We measure how many people are in the venue at each time:

At 11am it is about 300-400

At 3pm it is about 1000

At 5pm it is about 2000-2500

At 6pm it is about 4500-5000”

What is Lacking?

“There are some problems in that we have a lot of radio and TV, but they do not play local music and there isn’t enough interest in blues. The government also needs to think about the cost of living for musicians.

The cost of tickets compared to the cost of living is high; my tickets cost €15-€50.

There is no blues club in Katowice. I had one in the 1980s. We need to know what has happened with blues; there are now hip-hop clubs in blues.”

AGNIESZKA MŁYNARCZYK

SILESIA PHILHARMONIC ORCHESTRA

Agnieszka Młynarczyk - Silesian Philharmonic Orchestra

What do you want to do?

“We would like to prepare an event that can bring the world of theatre and classical music together. We have a choir in-house and want to bring that together, and focus on regional identity in that concept. We would like to realise that in other venues.

Generally, events are ticketed. There are 5 to 8 concerts per month, plus 10 special events per year. There are gigs at the venue as part of the city celebration.

It could be possible to meet and work with OFF/Tauron. Generally we are not approached, but we’d be open to it very well. Our relationship is not that collaborative.”

Economic impact

“We have not done [an analysis], but we only have concerts if we’ll either make money or for the promotion of musical culture. In my observation, after a few years of good promotion of the philharmonic and Katowice as a place of culture, music and so on, it does affect the value of the city. It’s intangible, but it does impact the city. There is a huge amount of recognition in events in Katowice. The mindset is changing here for the better. Cultural events are just another step in the city’s development. Even in 5 years in Katowice, it’s a big change.”

What is lacking?

“The biggest issue is financial; grant problems. There is a strong history in Katowice to promote and work with classical musicians. Culture is the best way to promote Katowice. But, generally, in population and business, thinking about ‘high art’ is seen as snobbish in some ways. There is a clear distinction between ‘high art’ and ‘pop culture.’ We would like to [promote] our activities as mainstream and open for everyone.

So we do jazz with classical and we are trying to do more of that - trying to be modern, open. We are thinking about working with other festivals in Katowice to prepare two projects, such as an international competition for conductors. We want to program other events across Katowice for that and want to collaborate with as many cultural institutions [as possible].

We still struggle with convincing people that we are modern. We collaborate with the city museums very well; we have a dialogue with them, like the Museum of History of Katowice, and we prepare exhibitions. For example, recording and working with a coal mine to create new creative projects.”

ANDRZEJ KALINOWSKI

LOCAL PROMOTER

What percentage of your attendance is from Katowice and Silesia, compared to the rest of Poland and International?

“50% Katowice citizens, the rest people from Silesia and Poland.”

How much do you spend for local marketing?

“It depends on the artist, but about 10-20%.”

How much do you spend for national and international marketing?

“National, 10%; international is not applicable.”

How many artists do you book that are from Katowice? From Silesia?

“Actually, I don’t book artists from Katowice and Silesia. There aren’t many of them, certainly on an artistic level, that would satisfy me. I don’t make gigs with local artists at all. Mostly I promote Polish artists who are already known on the international music market, as well as those who, in their projects, aspire to enter the international music scene.”

How do you find local artists? What are the places you go to find new acts?

“Such places are few. When it comes to music clubs in the whole conurbation, it would be 2 to 3 places. In Katowice, there is one club with a professional music scene, mostly hosting heavy metal concerts or popular national artists. There are several festivals, several local cultural institutions, which organize musical events (among others), mostly with artists already well-recognized in Poland and Polish music stars. There are very few clubs and pubs equipped with appropriate and separate space for concerts. In these places there is usually only a place for DJs.”

What is most lacking for artists and their representatives, in your opinion, in Katowice? Is it marketing? Social media? Education? Etc...

“Professional marketing, I think, and a lack of media specializing in promoting the local music scene nationally and internationally.”

Do you network with other venues, festivals, promoters, and music businesses in Katowice? If not, why? If so, where? Is it done anywhere specific or in an organised fashion?

“Occasionally, I personally tried to make contacts, and even initiated some cooperation, but mostly it was reluctantly accepted. Here, there is a peculiar situation that could be described as a mutual lack of trust. [You have a] musical environment of stage music (calculated on a less-demanding audience) on one hand, and on the other the environment related to the Academy of Music: classical music, also very traditional jazz education and certain selected trends in pop music. It’s a very hermetic and strongly hierarchical world, with few exceptions, and they have developed specific ways of communication. In contrast, when it comes to cooperation and meetings with promoters on the national level, especially from cities such as Warsaw, Kraków, Gdańsk, and Sopot, we meet regularly, even socially. They willingly exchange comments and suggestions, and we cooperate, even have joint projects, musical events, etc.”

In your opinion, is the local music in Katowice of high quality? And is the corresponding business (marketing, organisation, communication) of the same quality?

“It is not a level that satisfies me. And associated business? It is small: 2 to 3 concert agencies (heavy metal, blues, electronic dance music), which carry out their events on the national music scene. Local music business largely depends on the activities of local cultural institutions, the promotion policy of the city, certain political decisions and people in high positions in government offices and institutions. Very few music genres are able to exist without certain financial subsidies from local governments, and private and corporate capital insufficiently participates in the costs of implementing the musical events. Their interest is mainly limited to open music festivals in the summer. The local governments do not endorse or create a plane of interest by capital market activities specific to the culture.”

Any other thoughts?

“I would like to add something as a producer and promoter of concerts during the Jazz & Beyond Festival. When I choose artists, I rely on my experience and my taste as well as on everything that I can find in international music press. I also look into

programs of other European jazz festivals, record sales of individual artists, their recognition, awards, premieres, tours, and evaluate the current commercial status of an artist and his artistic rank, which does not always go hand in hand (we know that the jazz audience is very individualistic and critical). That's a lot of work, and a kind of passion, and I was the first persona in Upper Silesia to organize jazz concerts of high quality, a dozen years ago.

Today, I observe how many of my ideas, both repertoire and promotion, are copied by local cultural institutions that carry out similar events, which then (when I started) did nothing, absolutely nothing, in this regard. I also know that the realization of musical events, similar to our proposals by local cultural institutions, usually cost significantly more, although it does not really matter for decision-makers, who financially support primarily their own cultural institutions, treating us like some embarrassing necessity. Everything is justified by the necessity of practicing a specific cultural policy and image for the city of Katowice. What is more, a lot of concerts are for free, so people unwillingly pay for tickets even though they are quite cheap."

KATARZYNA PRYC **KINO TEATR RIALTO**

"I am the manager of a cinema theatre (old, stylish, elegant). Music is a part of our activity. We try to combine film and music. We organise screenings of silent movies with jazz groups. It gives film new life, the only possibility to show young people the very old films - it creates cultural continuity.

We have very good conditions for organising concerts. The venue was built in 1913 so the acoustics are very good.

Our capacity is 260 seated, 440 standing. To rent, it'd be 600 zlotys per hour with technical equipment. The cheapest ticket is 25 zlotys, but some are 180 zlotys. The venue is subsidized by the voivodeship. It is common to do a 70/30 door deal. The bar is an agent and the bar pays the rent every month. It's a public/private partnership.

We run two cinema clubs. One is a film club for seniors. Before the screening, a piano player performs beforehand, and he is paid. The ticket price is 6 zlotys. There's another one, women's film club, where I invite musicians as well to be and be accompanied.

During summer we have a lot of outdoor events, so we don't organise much. Our activities are September to early June. We do 3 to 4 music events per month in the 8 months we do it. We also rent the venue to external promoters. We don't program according to genre. We try to do many genres and do it based on quality. Rialto is part of the regional film institute of the voivodeship.

It's only important that the band is good. It doesn't matter where they are from. It is important that the band is touring something or has a special project; mainly artists from abroad. From time-to-time it happens from Silesia."

What is lacking?

"Promotion is the biggest challenge. There are so many interesting artists presenting works and there are so many places presenting new things. Finding the audience is difficult. The ways of promotion are still changing and it is difficult to keep up. To promote an event, you need 30-40 people to get to an audience. The greatest task is to communicate it and bring the audience to you."

TOMEK SZABELSKI

PRESIDENT OF THE INICJATYWA ASSOCIATION, COORDINATOR OF RESEARCH, SOCIAL AND CULTURAL PROJECTS

What are you hoping to achieve?

“There are quite a few people who know this, but in December we’re organising a congress of cultural managers in Katowice - 500 people from Poland and Europe. There is a discussion session dedicated to music producers for events. 5 to 6 years ago, we started talking about this, but we called it building a society across events. Artist development theory and practice is developing here. Some people in Katowice which are close to the association of cultural managers think that we need to look at audience development more. In Katowice, there is a big strength here in our events.

I do believe that Katowice is one of the top 4 markets. There is a pride in people in living in Katowice.”

What are the strengths?

“4 years ago, I started to organise the Jazz & Beyond festival after the cultural centre stopped doing it. Now I do 11 concerts in 7 cities across the region.

You have the city subsidising international artists coming to festivals. It’s promotion and it keeps the festivals alive, especially in parks and new places that can show the placemaking side. There are a lot of events in the national orchestra.”

What is lacking?

“In Katowice, things are not well-prepared. Not everything is planned from a long-term perspective. What I mean by this is that quick activity is not as clear and refined as it could be, which can detract from the musical product. This is also true of the city government and the process of communication. The process of communication in Katowice is very hierarchical and when you get information you have to act very quickly, because things are more ad-hoc when they shouldn’t be.

The culture in the city is so important to all of us, but we don’t have a lot of people that are experienced in managing the politics of culture. It’s not personal, it’s processed and systemic. The process of cultural management needs to be more transparent. There needs to be more responsibilities in terms of communicating who is responsible for what.

Culture is often treated as a promotional tool. It’s great that there are a lot of things going on, but [there are] too many things. I don’t think the city politics are seen to love the culture as much as they should. Maybe there should be more public consultations. Maybe the city hall needs to have more town hall meetings, more commonality and more networking across cultural practitioners (festival buyers) and city hall people. There is a disconnect between the city hall and public. We need more town hall meetings, consultations and working groups. There are no cultural specific pathways to speak with the city hall. Two big issues are that the government needs to be more involved with programmers and the public in culture, and the NGOs. There needs to be an economic impact analysis done of festivals. Build a template for this. Translation is also really important.

There is a problem here with ticketing. Is it often undervalued. One free gig leads to customers wanting free tickets all the time. The value of live music is compromised, and it’s a small market, so you often get tickets for free.

Katowice has too many music venues, in my opinion. There was a big research done by the government of the voivodeship to analyse the culture needs of the citizens of Silesia. 2500 people were surveyed, and there were 40 questions. It was decided that there were too many events and people cannot decide where to go, because people only have a certain amount of money. People save money for the 2 or 3 big events per year, which takes away from the smaller events. That increases subsidy. The festivals are too close to each other, which puts pressures on consumers. For example, there are 4 jazz festivals. It can be argued that this is too many jazz festivals. If there was one festival, it would be better. Tickets are either too cheap or free.”

INTERVIEWS - MUSICIANS

ALAN WYKPISZ

Alan is a successful double bass player in several jazz bands, one of which has been released through Sony Music Poland. Originally from Katowice, where he attended the music academy, he moved to Krakow because of its solid infrastructure. "The scene is better and there are better venues to play," he says, citing the nightly concert opportunities and chances for professional networking (he doesn't collaborate with other genres and doesn't intend to do so). While he has been the recipient of funding, he did extensive research in order to receive it. He says funding is not a problem.

Katowice has a way to go before it reaches that level of Krakow, but it is moving in the right direction. Alan is happy to see the changes taking place.

KRZYSZTOF AND STANISLAW LASON

Both full-time professional musicians in a successful folk band, both studied at the Katowice Music Academy and have been in the business for over 10 years. Stanislaw acts as the band's manager and booking agent. While they don't live directly in the city, they do believe it offers everything they would need and has many interesting developments in place.

JAKUB AND IGA FEDAK

Both musicians, with Jakub working full time since last year and Iga balancing an additional part-time job, they work frequently with dance and children. They see Katowice's scene as high quality with a good community and opportunities to collaborate, such as jazz festivals. However, they desire professional partnership, such as labels, managers, and agents, as they currently do most of this work themselves. They've had offers, such as one based out of Krakow, but time and trust are big issues. Professionals should be reliable points of reference for business and networking information.

Katowice struggles to support young, emerging artists in terms of venue availability or showcase festivals, there is a lack of musical recognition in terms of local awards. Funding is limited, attributing what funding they have received from their local council to knowing someone 'on the inside.' This lack of transparency means insider knowledge is key to receiving funding.

MACIEJ GARBOWSKI

A contemporary classical musician from Katowice, Maciej works full time and has found success operating primarily abroad through a Berlin based label. He finds his biggest challenge is becoming heard outside of Poland and attracting attention, and thus wouldn't mind moving to London or Munich to focus his efforts.

Maciej would like to employ a manager, but the lack of professionals in the Polish industry makes this difficult. Instead, he has cultivated his business skills in the UK through initiatives such as Take 5 Europe. He says funding requires extensive research and is not easily available, although Places for Culture has given him the means for a new space, where he intends to offer workshops and small performance opportunities for young artists. It is expected to open in 2017.

PRZEMYSŁAW BOROWIECKI

Przemysław Borowiecki has released almost 37 albums through various bands and projects, collaborating with artists from different genres. He came to Katowice to be inspired by its aesthetics, which have changed over the past 5 years, and he has remained because his family is now based here.

He is an active industry member with many connections, although he struggles to survive due to his lack of promotion and selling expertise. He would like a manager to help him, but these are unavailable in the area. He has also never received any funding, although it would be useful for travel or for artist education on industry practices.

OVERALL POSITIVES

Katowice has great educational support in terms of contemporary classical and jazz music. Those genres also have good venue and rehearsal abilities due to their connections with the music academy. There are many noticeable initiatives in the area, and a fantastic festival scene to emphasize the quality in Katowice's contemporary, jazz, classical, electronic, and hip-hop musicians.

OVERALL CHALLENGES

There is a lack of opportunity in terms of venues and performance opportunities for emerging artists, and little networking availability to build professional and artistic relationships.

Music industry education is an important but lacking area, and could be helped through workshops and coaching opportunities. The shortage of business professionals, such as managers, labels and promoters, has been cited by many of our interviewees, and is a greater Polish problem (not limited to Katowice specifically). Combined, this means artists do not have access to resources for business-minded individuals. Funding transparency is an ongoing struggle, from research to allocation to application process, and many personal connections are required in order to be successful. Limited networking opportunities prevent trust among industry players, and most endeavors must be self-sustained.

Although Katowice has high rental rates, this does not seem to be an immediate problem as people don't mind living in the suburbs and commuting.

Polish music, especially the rare pop outfit, does not have a particularly strong international image, so export strategies should be focused on in order to improve opportunities.

7.2 Ethical Statement

In conducting this study and acting as a consultancy in the implementation of the proposed Actions derived therefrom, Sound Diplomacy will act with respects to the best interests and representation of Instytucja Kultury Katowice - The City of Gardens Cultural Institution (IKKMO), the city of Katowice, and itself.

In keeping with our own advocacy of transparency, all decisions and actions will be communicated to IKKMO before implemented, with the understanding that IKKMO has entered into the venture on a voluntary basis.

All information collated herein will be confidential to involved parties and will not be transferred between parties without their respective permissions, such as individual

survey respondents to IKKMO or the public, and report contents to the public (this is not to be confused with the separate, published declaration of proposed actions recommended to be made publicly available).

Sound Diplomacy ensures that all information collected for the report is bespoke, original, and will not be cited for future use without seeking the approval of IKKMO, as this report is strictly applicable to the project for which it has been drafted.



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