EXECUTIVE SUMMARY

A. Key issues / findings

- A conservative estimate of £5M*pa is currently spent by the music industry on education and training.
- The industry may be willing to increase this spending (capability unknown).
- The industry is willing to support a new SSC (resources, advice, collaboration).
- There is an identified need for an SSC to represent the music industry (specifically to address professionalisation of education & training).
- The industry is willing to work with HE / FE / training.
- Diverse skills needs have been identified with soft skills high on agenda.
- The industry requests more cross sub-sector collaboration / dialogue

** It should be noted that £ ½m of this is invested by METIER and therefore NOT generated within the industry.*

B. Key requests for SSC activity

A future SSC should :-

- be industry led and consult music industry on an ongoing basis.
- facilitate communication with and between industry, government and education.
- be accountable to industry.
- oversee the categorisation and linking / rationalisation of education & training activity conducted by the industry to synchronise efforts and avoid duplication.
- encourage initiatives which are cross sub-sector or cross industry / education or both.
- be involved in CPD and encouragement of existing workforce to re-skill / re-educate (notably in soft skills).

C. Key skills across entire sector

Overall, the most important key skills identified (unprompted), listed in order of importance are:

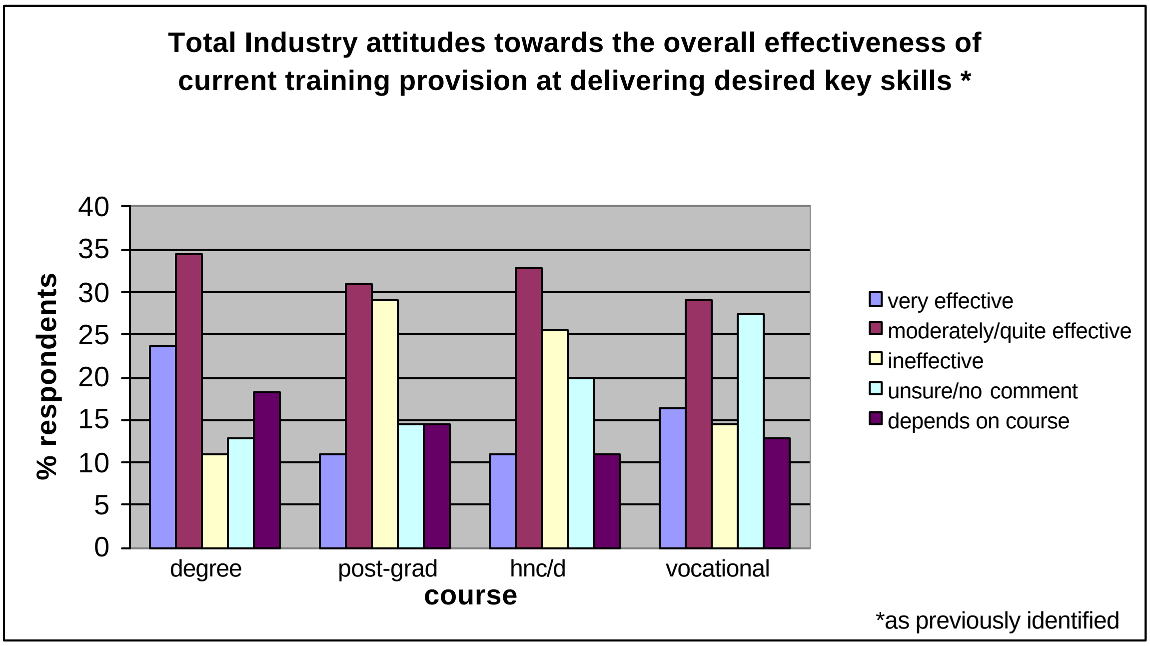
1. **Communication skills** (including client / staff relations, diplomacy, groups, interpersonal and presentation skills, and public speaking)
2. **Finance** (including budgeting, freelance, taxation / accounting, and charity)
3. **Administration / Organisation** (including time management and fundraising)
4. **Technical skills & knowledge**
5. **Flexibility** (including multi-functionality and diversification)
6. **Management**
7. **Business skills & awareness**
8. **Industry & sector knowledge**
9. **Marketing**
10. **Performance**
11. **Creativity**
12. **Dedication / Motivation / Drive / Ambition / Commitment**
13. **IT** (including Internet)
14. **Leadership** (including creative direction, encouragement, and crowd control)
15. **Legal skills & knowledge**

Soft skills / hard skills

One of the most consistent messages arising from this survey in relation to key skills at various career stages is the increasing importance of so-called 'soft skills' (communication skills, flexibility, etc). While hard skills (IT, finance, technology, etc) are deemed crucial for entry into the industry (or a given sub-sector or professional career path), the sector is almost entirely agreed that enhanced soft skills are the main driving force behind career progression and moving between sub-sectors.

D. Industry attitude towards existing education and training

The attitude of the music industry towards existing education and training programmes is predominantly supportive. Many requests for an evaluative mapping exercise and further information indicate an industry trying to develop an understanding of the existing and possible future value of training and education.



E. Existing industry investment in training and education

The music industry's total estimated financial, time and human resource investment in training and education based on information obtained in this research survey is just below £5 million. This estimate figure does not include *all* planned training provision that may already be in progress or at trial stage, while it also excludes any investment which may be in existence but for which information or figures were not forthcoming from various sources. One can therefore safely assume that the actual figure of music industry investment in education and training is significantly higher than £5 million. It should be noted that the training and education investment made by the music industry trade organisations in terms of time, effort and finance is substantial and contributes significantly to this total.

It should also be noted that public funding, most notably for and within sub-sector G here surveyed (The Education and Training Sector) has been included in this estimate figure, and that sub-sector G indeed contributes the highest overall share within this figure (48%). It is followed by sub-sector A with 26%, E with 11%, D with 8%, and C with 7%. (See appendix 6)

Types of investment

In terms of different types of investment in education and training in the music industry, the following figures emerge from this research exercise.

The estimated total financial investment is led, again, by sub-sector G with 58%, followed by sub-sector A with 20%, D with 5%. E with 11% and C with 6%.

The total time, administrative, and human resources investment in training and education, on the other hand, is estimated to be led by sub-sector A with 35%, followed by sub-sector G with 32%, D with 12%. E with 11% and C with 10%.

From undertaking this present mapping exercise and in compiling the ensuing data, the following becomes clear: The various sub-sectors are engaged in a whole range of different activities defined as 'education and training', which may need to be further categorised or put into a workable and transferable taxonomy.

F. A new SSC : projected support from the music industry

Although the industry's approach to contributing financially to a new SSC must be described as 'unwilling', there is great willingness to contribute in advisory and collaborative capacities. The secondment of (human) resources to any future SSC and its potential activities is 'probable' across the industry.

Intimated degree of Industry Support for Future SSC Initiatives