

preface

One of the great strengths of music making in our society is that it embraces many traditions, cultures and genres. It is inclusive, bringing together those who seek to make this the basis of their career as well as those whose career paths take them in different directions. The artistic endeavour of musicians takes place within the context of a changing world.

What musicians do and how they do it in the 21st century are, and will continue to be, affected by social, economic and technological changes as well as the new forms of expression created by the musicians themselves.

This report draws on the experience of a wide and representative cross-section of those who are committed to, and have responsibilities in, the music scene of this country. It looks forward to secure the opportunities for future generations of musicians – performers, composers, teachers and leaders. Its significance goes well beyond funding systems and administrative structures, important as they are. In providing a platform to encourage further debate and discussion of what have been identified as significant issues, this report recognises that it is a stage within a process of change and development.

It is particularly appropriate for Youth Music to be contributing to this debate. Youth Music was

established in 1999 by Chris Smith, then Secretary of State for Culture, Media and Sport, with a remit to promote its objectives through advocacy and advice as well as funding. It exercises the advocacy role through the strata of government departments, agencies and professional bodies, working in collaboration with others to ensure the quality of musical leadership. Training is one of Youth Music's identified priorities.

I am very grateful to the Steering Group which guided and endorsed this research, to the Group's able chairman, Peter Renshaw, and to Rick Rogers, the researcher, who completed the Herculean task of assembling the evidence and writing the report. The report concludes with recommendations for, amongst others, the Higher Education Funding Council for England, which generously supported the research. Many thanks, also, to all those – from the training sector, individual institutions, employers within the music industry and individual musicians – who contributed to the research. I hope that all who share a concern for the education and training of professional musicians of the 21st century will find this report useful.

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1 *introduction*

1.1 This report considers the work, education and training of professional musicians. Funded by the Higher Education Funding Council for England (HEFCE) and managed by Youth Music, the research set out to ‘inform bodies responsible for training and professional development, along with those in the music industry, about the changing patterns of employment for the professional performer’.

1.2 It is an area that has been investigated several times since the 1965 Calouste Gulbenkian Foundation report *Making Musicians*. Significantly, in 1978, a second Gulbenkian investigation *Training Musicians* (the Vaizey report) was set up because ‘the training of professional musicians had not changed to meet employment needs; and there was a deeper malaise in some sectors of the profession – a paradox at a time when the reputation of British music has never stood higher’. Much of what that report said remains highly pertinent. More recently, government funding councils have focused on the training and employment of musicians through the conservatoires (the Gowrie report in 1990, the Tooley and Sutherland reports in 1998). Other key organisations, such as the Arts Council of England, Association of British Orchestras, Musicians’ Union, National Music Council, and Policy Studies Institute, have sought to devise a map of, and direction for, training and employment in the music industry.

1.3 Our brief has been different. We were asked to look afresh at what is meant by ‘musician’ and by ‘performance’ in relation to the cultural changes in this country. In effect, what are the musicians of the early 21st century doing in a world that is changing socially, musically, economically and technologically? And how well are the education and training sectors addressing those changes?

1.4 We therefore map what it is that musicians do – as well as perform or compose – in order to

build a multi-stranded career. We describe the state of the industry that musicians have to work in and how that is altering perceptions of the musician. We consider the content, provision, and funding of training for musicians, and for those who teach music at various levels of expertise and areas of musicianship. We document the music education and training pathways that young people take, and who becomes a musician and who does not.

1.5 In carrying out our brief, we have talked with, and surveyed, music students and professional musicians; with those who educate, train and support them; and with those who employ or commission them for performance, composition, or teaching in the wide range of work locations in which musicians are in demand.

1.6 We have also drawn on the considerable evidence that currently exists on educating and training musicians. We have accepted the validity of all the statistical evidence already in the public domain, and have been transparent in the methodology for collecting new data, much of which are in the appendices. There are though some serious, and well-known, gaps in the available knowledge of the current state of and trends in music training and music making. We indicate where additional work is needed specifically in order to give us the information that can help in providing for the 21st century musician.

1.7 Finally, we make a series of practical recommendations based on the needs and aspirations of today’s musicians, and of those for whom they perform and with whom they work. These recommendations, which we consider can be readily carried out, aim to improve the opportunities for a wider range of young people to become musicians, and for those who do so to be able to work successfully in our new music culture.

2 *redefining the roles of the musician*

2.1 Language leads us to understanding, but it can also prevent us from questioning what we do and why, and encourage an adherence to a stereotype. Revisiting the terms in common usage in the musical world can enable us to respond positively to changing circumstances, to explore new roles, and to innovate. Two specific terms that need to be addressed in this context are musician and performance.

2.2 What is expected of musicians today? How much, and in what ways, is the dynamic between musician and audience changing to encompass a broader range of expectations, challenges, activities and roles? What is the impact of musicians' growing engagement, or re-engagement, with the wider society in which they work?

2.3 Musical practice is now embedded in, or being seen to have growing relevance and power in, much wider social contexts than what is restricted to traditional music venues and to recording studios. Being a musician today involves having the opportunity to take on a series of roles, different from and broader than the act of performing or composing. Most musicians have a portfolio career, carrying out tasks and engaging in activities which are music-related but other than the conventional act of performing – ie, a concert or gig.

2.4 A perception of the musician which focuses exclusively or primarily on this conventional act can limit, and sometimes create ambiguity in, the relationship between musicians, between musicians and their employers, and between musicians and their audiences. In short, it can be a challenge for all concerned. For example, how far do those who engage with musicians allow them – or wish them – to act out or fulfil other, more varied, roles? Do they say: this is not what we expect of a musician? In the same way, of course, the

musician might say: this is not what being a musician is about. Further, do we automatically give a greater value to the musician who is a high-quality performer than to the musician who is a high-quality leader, mentor or teacher?

2.5 Evidence shows that a narrow view of the role of musician and of performance is increasingly being challenged and examined. There are a growing number of examples of musicians, orchestras, trainers and audiences exploring and enjoying these different perspectives of what it is to be a musician. Some of these perspectives have long existed but rarely been recognised and, regrettably, often marginalised. However, evidence also shows that significant areas within education, training and employment have yet to address effectively the changing realities of being a musician.

2.6 This dual process of redefinition and rediscovery has three vital functions. It can:

- assist in examining and understanding the consequences of cultural change;
- help to underpin a re-appraisal of funding and qualification processes in order to open up more opportunities in the portfolio culture in which musicians, and other artists, operate; and
- bring the benefits of music to a wider range of people as participants and audiences.

Any redefinition therefore must embrace, and make explicit, musicians' creative energy and influence within different, but related, artistic and social contexts.

2.7 In seeking this new definition of the musician, we drew on the knowledge and experience of the research project's steering group, and the views of music students, professional musicians and music administrators through a series of surveys and focus groups which we have used as part of this research. We have also drawn on the work done

by the Qualifications and Curriculum Authority (QCA) to devise a set of guidelines for awarding bodies in developing accredited higher level music and teaching related qualifications which recognise a wide variety of personal musical interests and a broad range of occupational musical competencies (see *appendix A.2*).

2.8 One term in current use – the ‘performer/teacher’ – embraces the two main roles of many of today’s musicians. It has merit in properly and explicitly defining what the majority of musicians actually do out of interest, commitment, or in order to make a living. It can also be a useful device to attract grant-aid from both arts and educational funding sources. Yet this term lacks sufficient support among musicians, and particularly those musicians who also teach, to become an overarching term. ‘I am a musician, whatever else I do,’ commented one.

2.9 Responses from our survey of musicians suggest that there are circumstances in which the term performer, rather than musician, is preferred by those engaged in the profession, as it better suits the activity being undertaken. However, the consensus was that musician should encompass the term performer, be that as player, singer or composer.

2.10 Consequently, our task was seen as enlarging the concept of the musician. A broader definition of musician can more effectively overcome the current hierarchical approach (actual or perceived) to a musician’s various roles, genres and traditions. In its place, we can encourage the view of a continuum of role, genre and tradition, so that, for example, the roles of performer and teacher can, in the appropriate circumstances, have an equal value for the musician and for those who employ, fund, work with or otherwise engage with the musician.

2.11 At the heart of any redefinition must be the musician’s main function: an engagement with the artistic enterprise. Musician is the generic term from which flow such diverse roles as composer, performer, leader and teacher, in

all genres, cultures and traditions. By putting the musician at the core, with the many various roles originating from that core, a parity of recognition and respect across genre and tradition can be promoted.

2.12 What, then, are these roles or areas of engagement for the musician? We identified over 50 music-related roles or skills (see *appendix A.1*). They fall within a number of related areas and, significantly, within a continuum of activities, where one thing can lead on to another. One might see it as a genetic code for the musician, with the four central roles being: composer, performer, leader, and teacher, with linked roles relating to one or more of them.

2.13 These four central roles are determined by the nature of the art form itself. There is considerable overlap between roles, even within one session or context. To fulfil a particular role, the composer may be a songwriter, orchestrator or arranger, while displaying the more enigmatic qualities of visionary, innovator, risk-taker or explorer. While a performer may sing or play an instrument, the role may require elements of being a composer through improvisation and of leadership as a bandleader. The role of musical leadership may find expression in a workshop, traditional concert setting or rehearsal. Carrying out an effective role as a teacher requires qualities of musical leadership and judgment as well as the competencies of a performer and, in some instances, those of a composer. We articulate these roles, which have relevance across all genres of music, to assist the definition of what musicians do in the music industry as well as helping to define the specific function of training.

2.14 If we seek to clarify the role of musicians, and explicitly acknowledge the wider range of roles available to them (and, of course, to those who engage with them), we must inevitably look at what we mean by performance. Our survey of musicians highlights three main perceptions of performance: first, the straightforward concert or gig; second, the

technical or production element of performance; and third, a wider perspective of performance as any music-related situation in which the musician engages with other people, including teaching, mentoring, leading workshops, and so on.

2.15 The latter perception suggests that the term performance could become too generalised to be of use in clarifying or describing musicians' wider activities much beyond that of the conventional performance. If this is the

case, we need to look for an alternative term. The Royal College of Art (RCA) uses the term 'professional practice' in such contexts as monitoring graduate destinations. This seems an equally appropriate term for the music sector. It could also have ramifications for looking at the training of musicians across the board, and act as an impetus for filling gaps and introducing courses for new, marginalised or largely ignored genres and areas of musicians' engagement.

3 *the music industry*

3.1 What is happening in the music industry is challenging musicians to re-examine and redefine their roles. The industry is driven by part-time, self-employed, low-paid, and multi-activity working. For every one full-time employee there are nine who work part-time, or on a self-employed basis¹. So the majority of musicians have to be as creative in terms of earning a living (let alone building a career) as in their playing, singing or composing.

3.2 Based on the statistics collected by the National Music Council (NMC), relating to 1997/98, the full-time equivalent of 130,324 people work in the industry²:

- 44% are producers of music (providing the technical, managerial, publishing, promotional and administrative infrastructure for live or recorded performance). Breaking down the 44%, those working in recording companies, retailing and distribution of recordings total 23%; live performance production (excluding performers) 11%; production, retailing and distribution of musical instruments 7%; publishing 2%; and managers, agents and promoters 1%.
- 32% are creators of music (performers 31%, composers & songwriters 1%), while all those involved in putting on live performance, both producers and creators, total 43% of the 130,324.
- 24% are teachers of music, who work professionally in education and training, including instrumental music tutors working privately and/or in music services, specialist music teachers in state and independent

secondary schools, and those teaching in higher education.

3.3 The NMC statistics show that 87% of musicians perform music defined as 'pop, rock, country, etc.'; 7% classical music (orchestras, chamber music, solo artists); 4% military bands; 2% musical theatre. A more recent Association of British Orchestras' estimate³ for the overall number of core players in the national orchestras and ensembles is around 1,700 of whom over half (53%) are employed on a freelance basis. The ABO also estimates that, overall, orchestras and ensembles spend almost as much time in educational or community-related activities (over 40%) as they do on conventional performance. According to the Musicians' Union, most musicians (58%) earn the majority of their living in ways other than through conventional performance⁴. The trend is for more musicians to spend more time on educational and community activities.

3.4 The Performing Right Society (PRS) lists 33,000 composers and songwriters, of whom about 12,000 are active, with the rest picking up historical royalties. Of the 33,000, it is reckoned that 85% of music royalties goes to just 5% of them. The British Academy of Composers and Songwriters (BAC&S) has a membership of 3,700, of which 2,900 are songwriters, 500 concert writers and 300 media writers. The National Music Council cites a 'conservative industry estimate' of 1,500 full-time composers and songwriters.

3.5 While all these figures are seen as a valuable rule-of-thumb for the level of

1 *Creative Industries Mapping Document 2001*, March 2001, Department for Culture, Media and Sport.

2 *A Sound Performance: the economic value of music to the United Kingdom*, July 1999, NMC/KPMG.

3 *Knowing the Score*, July 2000, Association of British Orchestras.

4 *Nice Work – If You Can Get It! a survey of musicians' employment 1978-98*, Norton York & Dave Laing, 2000, Musicians' Union.

employment in an industry that is very difficult to pin down, they do not give the whole picture⁵. The statistics on which full-time equivalence is calculated suggest that the actual number of those involved in the industry is likely to be nearer 200,000, with still more working as composers and songwriters, playing part-time, or working in education or training whom these statistics do not pick up. At the same time, many musicians play in a group, teach, and do other music-related jobs. As the National Music Council comments:

As much as we would wish to categorise activities within narrowly-defined non-overlapping sectors in our analytical framework, the music sector does not, in practice, operate in this way, and overlaps exist in a variety of areas. Musicians operate within a range of musical styles; successful artists and established ensembles compose, record, and perform, deriving separate income streams from all three activities; and many performers teach. Issues of overlap also exist within the infrastructure: venues will support many kinds of music activity and some will additionally double as recording venues. [*A Sound Performance*, 1999, page 6]

3.6 This overlapping of activity inhibits attempts to provide an accurate picture of the industry. However, it also reveals a strength of the industry in the influence and expertise that musicians can bring from one role to another. For example, there is the improving effect on music education in schools of having professional musicians involved in workshops, teaching, mentoring and conducting.

3.7 This part-time and flexible pattern in the music industry is also acknowledged by the Department for Culture, Media and Sport (DCMS) in its *Creative Industries Mapping Document 2001*:

Self-employment, part-time and occasional employment and multiple job-holding (often embracing an arts-related and non-arts

occupation) are characteristic patterns of employment in the music industry. Quantifying this type of employment is therefore difficult. For example, most pop musicians do not achieve success in the recording industry but are likely to find work in pubs, clubs and as session musicians. Also, of the 1,000 UK record producers it is estimated that only half are full-time producers.

Composers' and musicians' approach to work and employment is typically flexible and entrepreneurial. This is in part due to the nature of the music industry which rewards innovation and is responsive to and in the fore-front of changing fashions, but it is also explained by the autonomy which is characteristic of the creative process itself. [page 9.06]

What musicians perform

3.8 What are the genres in which these musicians work? Some 87% of musicians perform pop, rock, country, folk, jazz, world and other music; the remaining 13% cover a mix of classical music, military bands, and musical theatre⁶. Over half of the composers or songwriters joining the Performing Right Society (PRS) each year write pop/rock music; 25% dance; 9% media; 4% each compose classical, country, or folk music; 2% jazz; and 1% world music⁷. Dance embraces such genres as hip hop/rap, funk/disco, house, garage, techno, swingbeat, trance, left field, big beat, and ragga. Ballet comes within classical; line dancing under country, and morris dancing under folk.

3.9 Of those responding to the Youth Music survey of musicians (see appendix B), almost two-thirds (64%) perform 'classical' music, and almost half (44%) perform jazz – the same proportion as pop. Around one in four performs rock, folk, blues and latin music. One in seven

5 Some statistics use minimum rather than actual figures; others are based on full-time equivalence rather than the actual numbers working. There is overlap, with people working across several employment categories; and there is time-lag, with some statistics dating back to 1991.

6 *A Sound Performance: the economic value of music to the United Kingdom*, July 1999, NMC/KPMG.

7 Performing Right Society statistics, 2001.

(14%) performs indie/alternative music and one in eight (13%) reggae. However, of most interest is the number of different genres performed by individual musicians, and the number of instruments each plays. Over half (52%) perform in four or more different genres and almost half (41%) play three or more instruments.

3.10 What we see happening is a growing interest in, exploration of, and exposure to a wider range of musical genres by musicians and audiences. The increasing opportunities for, and confidence of, different ethnic and social communities to pursue their own musical traditions and experimentations are attracting wider interest in, enjoyment of, and respect for them. Recent research on London's music economy lists, 'not exhaustively', at least 50 different genres and sub-genres⁸. Many elements are influencing this development, including the growing contributions made to society by minority ethnic groups, the increased accessibility of music from all parts of the globe, and the creative energies of artists of all traditions to move beyond their own musical boundaries.

Where musicians perform

3.11 Where is music being performed? One way to find out is by looking at performance royalties. Most musicians earn royalties from their music being performed in public – live, recorded or broadcast – in such venues as pubs, clubs, hotels, restaurants, cafes, shops, cinemas, commercial dance halls and discos, holiday centres, hairdressers and waiting rooms.

3.12 The biggest contributors to the £83.1 million of royalties for public performance

collected by the Performing Right Society (PRS)⁹ are pubs 25%; clubs 13%; hotels, restaurants & cafes 12.5%; and shops & stores 10%. Concert income is just 8.5% of which £1 million (1.2% of all royalties) comes from classical concerts with the bulk from popular concerts¹⁰. Live performance accounts for a quarter of royalties. Broadcasting royalties total around the same at £83.5 million, coming from independent TV & radio 50.3%, the BBC 38.3%, and satellite & cable stations 11.4%.

3.13 This big picture tends to obscure the wide variety of locations in which musicians perform or have their work played. For example, the Youth Music survey of musicians identified over 40 types of venue in which musicians perform (see appendix B). Many, and especially those termed, or who term themselves, community musicians, work in health care, social care, formal and informal education, and youth and criminal justice settings. The size of this part of the music industry may be indicated by the fact that annually there are over 4,000 concerts in UK hospitals¹¹.

3.14 This miscellany of location for music, and the outlets through which people can now hear or see music being performed, attests to the pervasive social and economic influence that music has on individuals and groups in contemporary societies¹². The trends are that this will increase in quantity, diversity, and quality – both in terms of reproduction and performance. More significantly, perhaps, a parallel trend is the growth of new forms of reproduction and types of performance.

3.15 The other major factor affecting the lives of musicians is how opportunities in different areas of work increase and decline because of changes in technology, musical tastes, public funding policy, generational balance, social and

⁸ *The Value of Music in London*, Dave Laing & Norton York, Cultural Trends 38, 2000.

⁹ *The Power of Music: PRS annual report and yearbook 2001-2*, Performing Right Society.

¹⁰ The rest of the royalties come from cinemas 5.7%, industrial premises 4.5%, dance halls & discos 2.9%, transport 2.8%, educational establishments 2.7%, hairdressers & waiting rooms 0.9%, holiday centres 0.9%, non-commercial halls 0.8%, variety 0.5%, plus general purpose (eg aerobics classes) 6.3% and other (eg circuses) 3.1%.

¹¹ The Council for Music in Hospitals, 2000.

¹² See *The Power of Music* by Professor Sue Hallam, 2001, Performing Right Society (PRS).

cultural attitudes, economic circumstances, and even legislation. These variations can be different in particular music sectors. For example, education work has increased across the board, especially the demand for workshops; recording work has also grown in some sectors but declined dramatically in others. Opportunities to play in classical concerts have fallen; while live music in theatre is an increasingly rare activity¹³.

3.16 The BBC, one of the largest commissioners of new music from individual composers, has recently doubled its commissioning budget to £375,000, resulting in more than 70 composers being commissioned. However, the rest depend largely on smaller-scale and occasional commissioners, individual and often serendipitous initiatives, the ability to create their own opportunities, and the level of business coming from film, television and other media outlets. The British Academy of Composers & Songwriters (BAC&S) reports that, overall, there are fewer opportunities for composers, both in commercial terms and through sponsored commissions.

3.17 While more media outlets means more product being generated, more people are in the industry and an even larger number appear to be trying to break into it. This is generated in part, explained one songwriter, by 'the advances in technology that mean you can produce a recording in your own bedroom'. In addition, musicians report that the industry is contracting in many areas, and that companies are investing

in a smaller number of acts which have to produce a financial return very quickly¹⁴. The wastage, both in human and resource terms, is enormous.

3.18 One can argue about whether to intervene, and if so how, in order to protect particular groups or musical genres. But the more critical issue is how far musicians, and those who produce or employ musicians, can be better equipped to meet the challenges that exist, to be pro-active in taking advantage of change, and even to create and control change themselves.

3.19 The market forces driving the music industry, together with a rapidly changing cultural landscape, nationally and globally, have enabled, or required, the musician to break out of the traditional categories that define being a musician. Sometimes, change can be created by the new ideas and directions of musicians who seek to challenge, rather than be driven by, market forces. For some, change is an exciting and creative prospect; for many it is like being cast adrift in a volatile and, in some areas, vulnerable industry without the skills, knowledge and expertise that could have been provided during their education and training. The problems in providing an accurate picture of the number, characteristics, environment and workstyle of musicians across the whole industry have meant some less than adequate responses within the education, training and employment frameworks and a reluctance to act decisively on behalf of future musicians.

¹³*Nice Work – If You Can Get It!: a survey of musicians' employment 1978-98*, plus subsequent interviews with Musicians' Union, Association of British Orchestras, and Youth Music survey findings.

¹⁴Comments by members of BAC&S and the Musicians' Union, and respondents to the Youth Music survey.

4 *training and development*

4.1 The changing face of the music industry is challenging music education and training providers to reappraise their priorities and ensure that what they offer is fit for the purposes of the 21st century musician. This applies as much to the primary school as it does to the conservatoire.

4.2 Any redefinitions of role and purpose which lead to greater diversification and multi-skilling have to create or retain the highest standards. But such changes open up the debate about what constitutes quality and excellence. Currently, a single narrow view of excellence can prevail which creates a hierarchy of achievement ranging, for example, from solo performer to ensemble musician, orchestral player, opera chorus, music therapist, teacher and administrator.

4.3 It is increasingly recognised in the professional arts community that no single immutable standard of excellence can exist. Any valid view of excellence has to be defined in relation to context and fitness for purpose. All musical activities must strive for excellence, but the criteria used to judge this will vary depending on the aim and context.

4.4 An urgent task, therefore, is to produce a common framework for evaluating and assessing quality that accords with diversity of need and purpose across all music genres. To achieve this, the education and training sector needs to engage in a collaborative mapping exercise which brings together appropriate criteria for making judgments within the diverse range of music activities.

4.5 The 21st century musician needs a 21st century education and training sector which offers quality, accessibility, diversity and

flexibility. In addition, every aspiring musician requires access to four areas of opportunity:

- to practise,
- to perform or compose,
- to acquire personal and industry-related skills beyond that of making music,
- to gain accreditation for the skills acquired.

This would mean the ready availability of facilities, expertise and funding. Such opportunities and resources must also be on hand for professional enrichment throughout a musician's career.

Training pathways

4.6 The training pathway for musicians can start as early as five years of age. Formal education structures exist through the school curriculum, the music services, instrumental music exams and school-based exams, and for some, attendance at Saturday centres for young musicians run by local education authorities and the conservatoires, membership of youth orchestras, ensembles and choirs, attendance at a specialist music or choir school, and then into further or higher education. Of course, many musicians do not take such a straight route, going their own way, moving into the FE and HE sector later, or seeking training while pursuing a different, if related, career. The pathway is also determined by the musical genre or performance-related activity in which a musician wishes to work and by the perceived employment prospects across each genre or activity.

4.7 Almost 17,000 students are enrolled on music-related courses across 57 further education institutions in England¹. Two-thirds of them are for National Vocational

1 Learning & Skills Council statistics 2001.

Qualifications (NVQ) level 3, including A levels, national diplomas, and graded music exams. Over 14,000 students study music, full- or part-time, on degree courses across 84 UK higher education institutions – an increase in student numbers of 46% in five years compared with 30% for all creative arts & design subjects and 18% for all subject areas². The 10,000 studying for a first degree in music represent 1% of all undergraduates across all disciplines in UK universities. In addition, over 2,600 postgraduates study music – 1% of all postgraduates. Contemporary music training is available through over 250 courses at over 120 FE, HE and commercial institutions covering creative, instrumental, business, and technical areas. Of the higher education music students, over a quarter (27%) of undergraduates and 42% of postgraduates study at the seven conservatoires in England³.

4.8 Five key questions need addressing in the formal training and professional development of musicians:

- How far does music education and training reflect the diverse reality of the music industry – and that of contemporary musicians and audiences?
- How effective and accessible are the opportunities for the continuing professional development of musicians?
- Does the content of the courses, and the environment in which students learn, produce the kind of musicians who will be able to thrive in a multi-stranded industry?
- How far do the further and higher education sectors provide courses which embrace a wide range of musical genres?
- Is there sufficient access to higher level courses for talented musicians, of any genre, whatever their educational, social or ethnic background?

Matching training to the industry

4.9 The training sector comprises those institutions, almost exclusively in higher education, delivering professional courses which match the diverse needs of the industry. Any mismatches between training and the reality of the music industry are highlighted by what happens to music graduates. Higher education courses in music divide largely into those which train musicians for performance, as in the conservatoires and a handful of universities, and those, mainly in universities, which provide students with expertise in other aspects of music. This is reflected in the first destinations of university first degree music qualifiers going into employment. Statistics show that 13% enter ‘performance-related’ employment (listed as musicians, musical instrument players, composers or arrangers), 8% become teachers of music and/or dancing, and 74% go into ‘other occupations’⁴.

4.10 A career in music is more diverse and serendipitous than many other specific careers. It can also be a slow-burn career, especially for singers. Thus, while first-year destinations are interesting, they cannot provide a clear picture of the futures that await music graduates. Monitoring over periods of five and even ten years can give a better idea of what is happening to music graduates.

4.11 Unlike the universities, the conservatoires have not been required to keep or provide information on the destinations of their graduates. What information they have is patchy, and focused on the ‘successful’ graduate rather than maintaining a consistent, comprehensive and long-term profile of those they have trained. This is changing, due largely to HEFCE’s criteria for ‘premium’ funding, revised in November 2000 following the 1998 Sutherland report on the funding of specialist institutions. The crucial criterion here is that

2 HESA statistics 2001, and *Patterns of Higher Education Institutions in the UK*, Universities UK, 2001.

3 Birmingham Conservatoire, Guildhall School of Music & Drama, Leeds College of Music, Royal Academy of Music, Royal College of Music, Royal Northern College of Music, and Trinity College of Music.

4 HESA statistics 2001.

‘more than 75% of graduates are working primarily in professional music performance, as performers of music, within five years of graduating from the institution’⁵.

4.12 Currently, it is not known precisely to what extent the conservatoires are fulfilling this criterion – nor do they know. Conservatoires see the 75% criterion as a target to aim for rather than one that has already been achieved. For example, one conservatoire commented that graduates go on to ‘a reasonable level of employment in the music industry, although the number of graduates employed in full-time employment appears limited’. Other conservatoires quote statistics for those going into performance-related employment of between 8% and 46%. One conservatoire reaches the 75% level by making assumptions about the future employment of those graduates going on to further study.

4.13 One conservatoire analysed its alumni database and carried out a telephone survey of past students. The database showed that ‘the vast majority of ex-students are gainfully employed as professional musicians in the UK and around the world’, with the largest group (20%) being orchestral players. The survey found that 92% of those contacted had ‘some form of employment in music’. Their main source of income was performance (46%) and teaching (25%). The older the graduate, the more likely that they taught – as instrumental music tutors in schools (62%) rather than classroom teachers (16%) or private teachers (16%). Very few graduates worked exclusively in performance or teaching.

4.14 Just 3% of the most recent graduates were doing what the survey termed ‘high-profile solo performance’ compared with 12.5% of graduates four to five years on – the slow-burn part of a musician’s career. Similarly, those in principal positions in orchestras comprised 3% of most recent graduates compared with 6% four to five years on. Taking both cohorts of those graduates citing performance as their main source of

employment, the type of performance (all instruments) was:

type of performer

54% orchestral performer

19% chamber musician

16% singer

7% instrumental soloist

4% principal player.

The survey also revealed the proportion of performers who did *not* list performance as their main source of employment, thus illustrating the state of the performance market. For example, only 3 out of 20 pianists listed performance as their main source of employment. Overall, only 44% of performers gave performance as their main source of employment:

percentage of different types of performer listing performance as their main source of employment

51% orchestral performer

50% singer

36% chamber musician

31% instrumental soloist

27% principal player

44% all.

4.15 It is essential that the training of musicians is related to the needs of the industry and underpinned by a comprehensive programme of research in performance practice. This should be sufficiently wide ranging to embrace all aspects of the music industry. For example, the recent stabilisation programme which has helped to secure the development of British orchestras needs to resonate within the training sector.

The training of music teachers

4.16 The majority of musicians take on some kind of teaching role as private tutors or instrumental music teachers in local music services. A range of accredited training courses are offered for such work, including the ubiquitous courses of the Associated Board of the Royal Schools of Music (ABRSM) and the

5 *Funding of Specialist Higher Education Institutions*, HEFCE document 00/51, 2000.

hybrid distance-learning diploma programme in music teaching (Mtp) developed by the Incorporated Society of Musicians (ISM) with the University of Reading. A significant minority of musicians go on to train as qualified classroom teachers once they have graduated. Most entrants to postgraduate teacher training (PGCE) music courses come from the universities. Conservatoires' priority is fitting students for high-quality performance. However, most of these students will also teach in some context, and many will gravitate to teaching more than to performance. A combination of the culture of conservatoires and HEFCE's premium funding criteria, and specifically the requirement to have 75% of graduates working primarily as performers of music, inhibits conservatoires from providing a teacher-training element.

4.17 Some conservatoire courses do cater for a teaching role. For example, in conjunction with Manchester Metropolitan University, the Royal Northern College of Music (RNCM) offers a PGCE in music with specialist strings teaching. As part of the University of Central England (UCE), Birmingham Conservatoire has close links with the university's faculty of education. Trinity College of Music, which closed its music education department when it was considered to fall outside the HEFCE premium funding criteria, currently offers a BA(hons) music degree in performance and teaching studies, involving learning about instrumental teaching and pedagogy. For over ten years, Guildhall School of Music & Drama has had a compulsory module in teaching skills but this has not led on to a PGCE. Overall, though, only a small proportion of conservatoire students are covered by such courses.

4.18 Students' views on acquiring training for teaching vary, as our series of music student focus groups show (*see appendix C.1*). The majority have an interest in, and some a commitment to, acquiring teaching expertise. However, they differ on the suitable timing for

such activity within or after their main areas of study and practice, and are unsure about the teaching options open to them in terms of accreditation, financial reward, and employment opportunities. Most find the prospect of being a classroom teacher uninviting and would prefer other routes to working with children and young people in a range of educational, community and youth settings that attract status and make better use of their musical skills.

4.19 This suggests that the sector as a whole should assess the potential for providing, in collaboration with other specialist providers, sufficient and accessible training opportunities for young musicians to develop a teaching role.

4.20 Encouraging more talented musicians into some kind of specialist teaching role is an urgent task. Music is a shortage subject in teacher training for secondary schools in England and Wales. Recruitment to training courses consistently misses the annual target number set by the DfES, although at a provisional 8% below target in 2001/2 considerably less than the 17% of four years ago⁶. For 2001/2, the DfES hoped to recruit 747 students for music. At the same time, the number of vacancies for music teachers in secondary schools in England and Wales more than doubled from 0.8% to 1.8% of teachers in post⁷.

4.21 The overall target for the number of initial training places for primary teaching was reduced for 2001/2 by 4.4% from 13,130 to 12,547 (because of changes in the primary school population). However, comparing 2001/2 with 2000/1, the number of specialist training places for music has dropped by 20.5% – more than any other subject. Of the 81 providers of primary training in 2001/2, only 30 (37%) offered music places compared with 39 (48%) in 2000/1. The target places for music offered by these training providers declined from 375 to 298 – fewer than any other subject area – and

6 *School Teachers' Review Body: eleventh report 2002*, Cmnd 5353, The Stationery Office, 2002.

7 DfES written evidence to the School Teachers' Review Body, September 2001.

also fell as a proportion of all places made available. Since 1999/2000, specialist places for music are down from 3.0% to 2.4% of all places⁸.

Continuing professional development for musicians

4.22 It can be very difficult for musicians to acquire additional skills once they leave the formal education and training sector to pursue a career. Opportunities for continuing professional development (CPD) are uncoordinated. The provision offered can be inaccessible because of cost, time, or location. This applies as much to community musicians as to orchestral players. For example, provision of appropriate professional development courses, especially in music leadership, has failed to keep pace with the increasing opportunities for education and community work for musicians. Those running music schemes in community and education settings cite the lack of suitable training as a major impediment both to increasing the quantity and improving the quality of such activities.

4.23 Orchestras are beginning to address the lack of additional training for players, and some innovative work is underway in some conservatoires. However, the majority of orchestral players feel they have not been trained in skills that would enhance their career, such as education work, including leading workshops; a range of business and management skills; and expertise in health, safety and legal issues⁹. Composers see the key issues for them to be effective networking and career structures, better communication, more accessible information about what is going on, and greater collaboration between those

working in different musical genres. Musicians' concerns about honing existing skills or acquiring new ones emerge in our own survey of musicians (*see appendix B*). Skills in business, music technology & ICT, and marketing are as sought after as better technique and composition skills.

4.24 A recent HEFCE working group on continuing professional development in arts and design concluded that while there is a broad range of good practice in higher education in providing CPD opportunities tailored to professional workers' needs, this good practice exists largely in dispersed pockets¹⁰. Some progressive work goes on to develop the 'informed and reflective musician'¹¹. The working group concluded that, overall, CPD is poorly matched in volume and accessibility to current and foreseeable needs for structured support for personal and professional development. The report, which does not analyse CPD by art form, recommends greater regional collaboration between training and other interested bodies on planning, marketing, managing provision within institutions, sharing good practice, and changing the culture of institutions and practitioners.

4.25 Following its mapping of the skills and training needs of the music industry, Metier, the national training organisation of the arts & entertainment sector, has recommended that further and higher education providers should ensure their students have business and entrepreneurial skills, presentation, networking and negotiation skills¹². Metier is currently working with other arts and education agencies to develop an effective framework of learning targets and non-graduate qualifications for continuing professional development.

8 Teacher Training Agency statistics, 2001/2.

9 *Orchestral Provision in the UK*, Musicians' Union (MU), 2000; and *Report on the position on training and development in the contract orchestras and the four major London orchestras*, Metier/MU, 2001.

10 HEFCE Arts and Design CPD working group report, 2001. It can be downloaded from the HEFCE website at www.hefce.ac.uk/pubs/hefce/2001/01%5F67.htm.

11 see *The British Conservatoires' BMus (hons) Award: current attributes and key directions for the future* by Alastair Pearce, Birmingham Conservatoire, 1997.

12 *The Music Industry: skills and training needs in the 21st century*, Metier, 2001.

4.26 It also reports that employers are ‘disillusioned’ with the level of commercial acumen and entrepreneurial skills delivered through course content. Employers say they look for flexible, multi-skilled workers with excellent communication skills. However, few employers appear willing, or able, to supply or open up opportunities for such training themselves.

4.27 Musicians would benefit from much greater collaboration between education and training institutions and agencies, orchestras and other employers of musicians to deliver professional development opportunities on a regional basis that fit the local and regional needs of musicians and those with whom they work.

4.28 Further and higher education institutions need to be more robust in, and in some cases more committed to, offering a wider curriculum in order to produce musicians who are fit for the 21st century music industry. They also need to address the kind of music activities that their students will be engaging in, as well as, and sometimes instead of, performing or composing.

4.29 A range of work is already underway by the Arts Council of England (ACE), HEFCE, Metier, Music Education Council (MEC), and Qualifications and Curriculum Authority (QCA) on course content and accreditation training frameworks offering opportunities for musicians to develop the appropriate employment skills during their formal training, and later through professional development. In addition, the Association of British Orchestras is in discussions with the conservatoire principals on a range of issues, including the professional development of orchestral players. Sound Sense, the national development agency for community music, is working with Metier, Musicians’ Union and others, to establish effective training frameworks to meet community musicians’ diverse needs, as well as providing professional development opportunities itself.

The type and content of courses

4.30 The courses offered by the further and higher education sectors, including the conservatoires, need to reflect overall the type and level of skills, range of musical genres and global reach, high quality of training and honing of talent demanded by the music industry, and by the cultures that make up society today. The artistic and technical demands inherent in musical traditions and genres, including those outside the canon of western classical music, vary and therefore inevitably affect the duration and intensity of training courses. A review of the current criteria for premium funding will need to include a comprehensive and more sophisticated refinement of these factors.

4.31 In response to the changes in the music industry, contemporary music courses are currently offered by over 120 institutions and agencies across degree, BTEC, HND and other accredited courses¹³. Of these courses, 44% cover technical and audio engineering, 42% are creative or instrumental, and 14% business. In the last ten years, new courses, such as commercial music at the University of Westminster, and new institutions, such as Liverpool Institute for Performing Arts (LIPA) and the secondary level BRIT School for performing arts and technology, have been established to cater for this aspect of the music industry. In addition, Rockschoool offers accredited contemporary pop music exams and workshops to complement the more traditionally focused music exam boards.

4.32 Recent research shows further education in London is ‘expanding fast’, including ‘extensive provision of community music activities and of music courses in adult and continuing education services’¹⁴. There are moves to increase activities across a range of contemporary music styles in the schools sector, although this is probably the hardest area in

13 *Music Education Directory 2000*, Ariadne, 2000.

14 *The Value of Music in London*, Dave Laing & Norton York, Cultural Trends 38, 2000.

which to effect change because of lack of resources and specialist knowledge.

4.33 Well over half the 48 English higher education institutions with postgraduate education offer contemporary music courses, including music technology, film and media, music theatre, folk music, community music, popular music, sonic arts, and audio-production. All seven English conservatoires have some element of contemporary music. However, the broad range of contemporary music genres are less well served, especially at conservatoire level, except for jazz. Birmingham and Leeds are developing Indian and world music strands. Popular genres are largely uncatered for. The challenge for the FE and HE sectors is to maintain sufficient flexibility to respond to change in both the industry and the art form.

4.34 A further development to which the sectors have already given some attention is the cross-fertilisation between art forms and between academic and professional disciplines being created by a growing number of musicians seeking to redefine and extend the artistic territories in which they work. This is, for example, generating developments in music therapy and healing, as well as links between institutions responsible for training in other arts disciplines.

4.35 Valuable work has already been done by over 20 conservatoires across Europe to identify elements of, and map good practice in, 'music education in a multicultural European society'¹⁵. Set alongside this are a range of initiatives jointly and individually by the English conservatoires to fit students more appropriately for the music industry by giving them a broader set of skills than those relating to performance¹⁶. To date, though, much of this work remains marginal or optional in the higher

education sector. This is, in part, due to funding criteria for conservatoires which give weight to performance objectives and appear to ignore other significant skills required for employment in the industry.

4.36 The mission statements of all the conservatoires reflect what one describes as the need to 'prepare students for a successful career in music according to the evolving demands of the profession'. A second seeks to develop students' 'resourcefulness'. Another aims to increase opportunities for all, and 'the provision of vocational and non-vocational courses which are open to members of the community at all levels of musical ability and aspiration, from beginners to postgraduates'. A fourth is more ambitious still with a mission that aims to:

- create a culture which fosters collaboration, innovation, personal motivation and reflection, mutual tolerance and respect, professional integrity and a lateral approach to problem solving;
- implement a curriculum which aims at high standards of performing skill and at the development of individual autonomy, curiosity, leadership, flexibility and risk-taking through imaginative forms of teaching and learning;
- achieve an educational environment which supports outstanding practice-based research, continuing professional development and innovative approaches to the design and delivery of teaching; and
- form significant local, national and international partnerships and collaborations with professional and artistic organisations and educational and community groups.

4.37 Taken together these statements comprise a valuable template for the sector as a whole to use. Crucially, it provides a basis for widening participation not just at this level of education and training but throughout the system.

15 *Music Education in a Multi-cultural European Society*, Association Europeenne des Conservatoires, Academies de Musique et Musikhochschulen (AEC), 2001.

16 See *Making Music Work*, RCM, 2000; and projects initiated through HEROBC funds; and such initiatives as RCM's Woodhouse Centre and RNCM's external education projects scheme.

5 *widening participation*

5.1 The need to widen participation in music provision extends across the education and training system, from primary schools through to conservatoires. It is a challenge that all the sectors have to address, in terms of socio-economic and educational background, of ethnicity, and of disability. The level and type of participation in one sector can influence participation across the education and training system. For example, there are particular issues relating to widening participation in the conservatoires, including their dependence on the training of the young, the range and scope of the curriculum taught in schools, and how many musical genres covered in schools are also offered at conservatoire level.

5.2 The Government is committed to working towards wider participation in higher education while continuing to improve standards. It has set a target of 50% of those aged 18 to 30 should be in higher education by 2010¹⁷. HEFCE's Widening Participation Fund aims to bring the representation of minority ethnic groups and of social and educational groups more in line with the norms of the population through outreach and student progression projects. Institutions are required to submit a widening participation strategy and action plan to HEFCE, which allocates funds for carrying out aspects of the action plans¹⁸.

5.3 Higher education institutions face a major challenge in widening participation in terms of attracting more high quality entrants from under-represented social and ethnic

backgrounds. The conservatoires are particularly challenged. A study by Universities UK on good practice in widening access to higher education found music to be one of the subjects where significant barriers exist¹⁹. At a conference in June 2001, the study's director Dr Maggie Woodrow commented:

For music in higher education, the conservatoire remains the pinnacle, but the very name has a preservative aspect and associated with it are all kinds of cultural and institutionalised ideas that constitute a barrier to widening participation. [see *Damned by Elitism* in the education section of *The Guardian*, 26 June 2001]

5.4 A survey by the National Audit Office, published in January 2002, found that while women and minority ethnic groups are well represented in higher education, levels of participation are still low for those with disabilities or from poorer social classes²⁰. These trends are reflected in the intake for music courses, except that those from minority ethnic groups are not well represented, according to Higher Education Statistics Agency statistics and institutions' own figures.

5.5 Currently, the percentage of young entrants to all higher education degree courses from state schools is 85% for the UK and 84.4% for England²¹. National statistics on the school background of music students are not available. However, statistics from two universities indicate that a higher proportion of music students come from the independent sector compared with the student population as a

17 *Delivering Results – a strategy to 2006*, national learning targets and *Departmental Report 2001-02 to 2003-04*, DfES, October 2001.

18 HEFCE is currently consulting on a new funding scheme *Partnerships for Progression* which will include elements of widening participation (December 2001, ref 01/73).

19 *From Elitism to Inclusion: good practice in widening access to higher education*, CVCP/Universities UK, November 1998.

20 *Widening Participation in Higher Education in England*, National Audit Office, January 2002.

21 Higher Education Statistics Agency statistics 2001.

whole, but also that within the state sector intake, more come from comprehensives than the student population as a whole.

5.6 Unlike the universities, conservatoires have not been required to provide information on the educational, social or ethnic origins of their students, nor of their destinations once they have graduated. This has led to some significant gaps in knowledge about the young people they attract, educate and train.

5.7 Only three conservatoires were able to provide statistics on students' educational background. One had 75% coming from state schools or colleges compared with the higher education sector benchmark of 80%. Another found the educational background of current applicants to be 43% from state schools, 14% from specialist music schools, and 12% from independent schools. No information was available for 31% of applicants, and when these were excluded, the proportions were: 63% state, 20% specialist, and 17% independent. Data from a third showed 56% of new entrants from state schools, 25% independent, 13% specialist, and 6% other (eg, sixth form colleges). According to the DfES, 7% of children in England are being educated in independent schools.

5.8 One conservatoire comments:
 When assessing its current performance, [the institution] is significantly handicapped by a lack of concrete data. [It] does not operate its undergraduate admissions system through the Universities and Colleges Admissions Service and so has no access to UCAS information on the social class and school of origin of undergraduate entrants (which in turn means that HEFCE is unable to publish performance indicators ... in these areas), nor to the more detailed analyses across a range of demographic variables which UCAS can provide.
 It adds that lack of time and resources severely limits its ability to research and produce data to the extent required to underpin a widening participation strategy. This situation seems to apply to all the conservatoires. The 75% figure for recruitment from the state sector is 'believed

to compare well with other conservatoires', but the conservatoire adds that:

an impressionistic analysis ... suggests that recruitment is generally from a narrow base in terms of social class and, among British students, certain ethnic minorities may be under-represented in our student body in comparison with their proportion of the general population.

Again, it is a situation common to all the English conservatoires.

5.9 One HEFCE-originated indication of who goes to conservatoires (and who does not) is the percentage of entrants from low participation neighbourhoods. Only one of the four conservatoires on which data are kept meets its benchmark target²²:

Entrants from low participation neighbourhoods

	RNCM	Trinity	RAM	RCM
benchmark %	12	12	10	12
entrants %	12	8	6	3

The development of musical genres

5.10 The development within the higher education sector of a wider range of musical genres and cultural traditions in music depends, in part, on increasing the proportion of trained musicians and teachers coming from, or steeped in, those genres and traditions, who teach throughout the education and training system. Such genres cover western as well as minority ethnic and world music traditions. In addition, the culture and ethos of many higher education institutions will have to change in order to absorb and do justice to this development. There is, too, a priority to retain quality and excellence at the highest international level if the music industry is to operate effectively on this global stage. No single institution can offer the diversity of genres that we have today. This suggests that a collaborative strategy between the conservatoires and other higher education institutions would enable the sector to diversify

22 *Performance Indicators in Higher Education in the UK 1998-99, 1999-2000 (01/69)*, HEFCE, 2001.

more and to extend the range of opportunities for excellence in different genres.

5.11 Such a development would include greater participation at this level of education and training by currently under-represented social and ethnic groups.

Ethnicity and music training

5.12 In 1999-2000, one in 11 (9.1%) of the 15-24 age group in Great Britain had a minority ethnic background²³. The proportion of students from minority ethnic groups entering a music course at a further education college almost matches this proportion at 8.8%²⁴. The proportion of young people from minority ethnic backgrounds applying for and being accepted for degree and HND courses is increasing. For example, those gaining a university place is one in eight (12%). However, the proportion falls to 4% for those taking a music degree or HND course²⁵. The minority ethnic degree student population of the six HEFCE-funded conservatoires is 10.8% with a range from 4% up to 16.1%. However, the size of a conservatoire's minority ethnic population is currently determined, to varying degrees, by the proportion of overseas students it attracts²⁶. No conservatoire has statistics on the proportion of UK minority ethnic students:

Minority ethnic and overseas students as percentage of all students

	<i>minority ethnic</i>	<i>overseas*</i>
	%	%
RAM	16.1	29.1
Trinity	15.7	16.6
RCM	11.0	18.5
Birmingham	9.5	4.3
RNCM	5.9	11.2
Leeds	4.0	6.7

*excludes those from other EU countries

5.13 Attracting students from overseas is a crucial element in conservatoires' aim to maintain high standards of musicianship and to increase income. Most overseas students come for the traditional western classical training that conservatoires offer rather than to pursue other musical genres or traditions. Of the 76 overseas, including other EU, countries represented in the conservatoires' student population, almost two-thirds come from 12 countries: Japan, Sweden, USA, Spain, Greece, Australia, Ireland, Korea, Taiwan, Norway, China, Germany and France. Using available conservatoire statistics, it can be estimated that around a quarter of overseas students (excluding the EU) come from what in this country would be designated as a minority ethnic background. This would bring the proportion of UK students from such backgrounds in conservatoires down to less than half the 10.8% figure.

5.14 Perhaps of greater concern is the low proportion of young people from minority ethnic backgrounds opting to become teachers – and more particularly music teachers. For example, statistics from the Graduate Teacher Training Registry (GTTR) show that while the proportion of minority ethnic students entering a postgraduate PGCE course is 5% (4.8% for primary courses), the proportion of those training to become secondary music teachers is only 1.7%. Put another way, in the four years 1997 to 2000, just 32 minority ethnic students began a PGCE course specialising in music (13 Black Caribbean, 4 Black African, 4 Asian Indian, 4 Asian Chinese, 3 Black other, 3 Asian other, 1 Asian Pakistani). In addition to the low intake of students from minority ethnic backgrounds, there is a further worrying trend. A declining proportion of such students are being accepted in relation to the number applying. By contrast, those from a white background are more likely to be accepted²⁷.

23 Office for National Statistics, 2001.

24 Learning & Skills Council, 2001.

25 *Statistical Bulletin on Widening Participation*, UCAS, 2001.

26 Figures provided by the conservatoires; Guildhall unable to provide relevant statistics.

27 *Annual Statistical Report: 2000 entry*, Graduate Teacher Training Registry, 2001.

5.15 At undergraduate level, the Teacher Training Agency (TTA) keeps information on the three phases of primary, key stages 2/3, and secondary, but not on individual subjects. The latest statistics²⁸ show that the proportions of minority ethnic first-year trainees in 1999/2000 were 5.9% at primary, 4.3% at key stages 2/3, and 7.5% for secondary.

5.16 The latest population statistics²⁹ show that one in ten of the 0 to 14 age range comes from a minority ethnic group – higher than any other age range. Between 1992-94 and 1997-99, the minority ethnic population of Great Britain grew by 15%, compared with 1% in the white population. In some inner city areas, minority ethnic groups together make up the majority of the population, and some local authority estimates suggest that from 2010 onwards in cities such as Birmingham minority ethnic groups will be the majority. This points to an increasing need for a multi-cultural approach within schools, for more teachers from minority ethnic backgrounds, and for further and higher education to respond with a broader cultural content of arts, and specifically music, courses.

5.17 Much work still needs to be done to increase access to music in higher education for young people from minority ethnic groups and from less privileged backgrounds. Higher education institutions, including conservatoires, are currently using grants from HEFCE's third stream of funding to develop schemes to widen participation³⁰. Some conservatoires are already addressing the task of attracting a broader range of talented students.

5.18 'Widening participation should permeate the whole ethos of the [conservatoire]' concludes one conservatoire's strategy document. But the conservatoires are aware of the challenges which currently face them in achieving any significant improvement in the short or even medium term. A key issue is seen to be: how to maintain the high standards

required to produce graduates who can pursue a performance-based career while at the same time widening access. One conservatoire expresses it as 'addressing the apparent contradiction between the necessarily discriminating requirements for conservatoire entry and the ethos of widening participation'. Significantly, the link is made between greater access and 'the changing nature of the music profession in the 21st century and its implications for conservatoire education'.

5.19 A major barrier to greater access is seen to be the inadequacies of music education while children are at school. For example:

The skills required for admission are not those gained from the general school curriculum and thus the number of suitably qualified applicants depends heavily on early instrumental tuition provision, the availability of which [we] can influence only in a minor way.

Another is more explicit:

... the learning process for intending instrumentalists depends critically upon a long lead-time in terms of suitability for higher education within the conservatoire environment. For instance, pianists and string players who are at the appropriate level for entry into higher education within the conservatoire sector are likely to have begun learning their instruments at age five or six. There are two inevitable corollaries to this: that participation can best be widened by investment at the base of the pyramid, ie within the primary (and secondary) school music sector; and that targets for widening participation at the level of the institution will clearly require a very long lead-in time.

5.20 Conservatoires do not appear to see their junior departments as an opportunity to broaden the social, educational and ethnic base of their work with children and young people, or as a means to collaborate more widely with LEA music services and other aspects of music provision at this level. While no detailed

28 *Initial Teacher Training in England 1999/2000; performance profiles*, Teacher Training Agency, 2001.

29 Office for National Statistics, 2001.

30 Through, for example, the Widening Participation Fund & Higher Education Active Community Fund.

statistics are available on the social, educational or ethnic background of pupils entering junior departments of conservatoires or specialist music schools, the statistics that are available, anecdotal evidence, the means by which these institutions identify and recruit applicants, and the variability in the provision offered by music services and schools suggest that a higher than average proportion of children from the independent sector or from already high participation neighbourhoods benefit from such tuition.

5.21 The conservatoires know they can do more, and wish to do so. One approach being adopted is to extend their reach through the need to give students experience of ‘educational outreach work – experience which is ever more frequently required by professional musical organisations’. In effect, create a benign circle of music students going back into the arts education system in some capacity to teach, mentor and act as role models for younger students at primary and secondary school. This can be extended into their professional lives through a new set of qualifications which fall short of being a full-time classroom teacher but offer the status, accreditation, opportunity and, crucially, pay to be an attractive and mutually beneficial element in a musician’s career.

Elitism and exclusivity

5.22 Misconceptions about elitism and exclusivity can bedevil music provision. First, it is clear that some music depends on the existence of an elite group of musicians, as with some types of south asian and western classical music, and opera from a range of musical genres or traditions. They are elite because the development of talent requires a lengthy period

of training and a high standard of musicianship. This can also give an exclusivity to the performance of such music. We should not confuse elitism with exclusivity. The first is essential for high quality; the second is a product of social, cultural and economic factors and perceptions – and can be changed. Elitism and inclusiveness can be compatible. The second issue is about who gets to be an elite musician – and that brings us back to exclusivity. Currently, by a combination of neglect, accident and design, the music education and training system is geared more to exclusivity than to wider participation. This does not have to be the case, and can be adjusted without loss of excellence.

5.23 Provision for the music curriculum in state schools, for example, remains variable in terms of coverage and quality. The additional government resources in recent years appear to have brought some improvement, and further planned initiatives to widen opportunities will also undoubtedly have a beneficial effect. Youth Music has used its lottery and other funds to develop, through a programme of Youth Music Action Zones, local and regional collaborations which embrace agencies and institutions across musical genres and across educational sectors. Indeed, Youth Music encourages such collaborations across the full range of its funding programmes. This work highlights the potential of what can be done given the right level and kind of resources, expertise, and administrative frameworks. However, much remains to be done to ensure that both in-school and out-of-school provision are increased to and maintained at a level which underwrites a wide range of musical opportunities for children and young people wherever they are in the country.

6 *funding*

6.1 Providing 'specialised musical education and professional training at the highest international level for performers and composers'³¹ is expensive. This becomes apparent early in the education and training system with the four specialist music schools for eight to 18 year olds. These schools receive £7.12 million from the government's Music and Dance Scheme to educate 497 pupils – a cost of £14,327 per pupil³². Annual fees for the four schools range between £16,365 and £23,118. This includes the costs of boarding and specialist tuition. By comparison, boarding fees at the 34 state boarding schools cost parents between £3,720 and £7,320³³. In all state maintained schools (including those which offer boarding), local education authorities spend between £1,800 and £3,898 for each pupil's schooling³⁴. Of this, secondary schools spend between £1 and £3 on music resources³⁵. In addition, the current annual DfES Standards Fund grant to LEA music services is around £50 million, plus the LEA contribution of £9.4 million, which comes to around £8 per pupil³⁶.

6.2 At the other end of education system, music is also funded differently according to each higher education institution and the level of training offered. HEFCE's funding is based on a set standard of resource for each home and other EU student attending the institution. Different levels of resource or funding are determined by such factors as the nature of the subject (how much it costs to deliver), type of student (mature, part-time, etc), and the

institution's characteristics (size, location, specialisms, buildings)³⁷. There are four basic price groups or bands ranging from D (for most subject areas) to A (for the clinical stages of medicine, dentistry and veterinary science). The price groups for 2001-2 per full-time home or EU student according to the HEFCE formula are: A: £12,623 B: £5,610 C: £4,208 D: £2,805.

6.3 The four free-standing conservatoires (RAM, RCM, RNCM & Trinity) are allocated to price group C, but as they are specialist institutions (defined as having 60% or more of their courses in one or two subjects only) they are allocated extra, or 'premium', funding if they meet a specific set of criteria on accommodation, teaching arrangements, and graduate destination.

6.4 Birmingham Conservatoire, part of the University of Central England (UCE), is in price group B. It receives this funding via UCE, which 'tops up' the allocation to bring the funding more in line with the other conservatoires. All other university-based music departments are in price group C, except for Huddersfield University and Thames Valley University, of which the London College of Music and Media is part. Leeds College of Music is designated as a further education college with some higher education music courses funded by HEFCE at price group C but with no premium funding. Guildhall School of Music & Drama is not funded by HEFCE. Each conservatoire receives a different annual amount as their standard

31 Extract from Royal College of Music prospectus 2002/3.

32 DfES statistics 2001.

33 *Parents' Guide to Maintained Boarding Schools*, DfES, 2002.

34 NAHT survey of LEA budgets, December 2001.

35 *Art, Drama and Music in Key Stages 3 and 4*, SPAEM/OHMCI, 1999.

36 DfES statistics 2001.

37 See HEFCE circular 00/51 *Funding of Specialist Higher Education Institutions*, which is based on the recommendations of the Sutherland report *Funding of Specialist Institutions* (HEFCE, 98/10, March 1998) in parallel with the Tooley report *Review of Music Conservatoires* (HEFCE, 98/11, March 1998).

resource per student: RAM £10,240; RCM £10,240; RNCM £9,891; Trinity £7,627; Birmingham £5,610; Leeds £4,208. Both RAM and RCM funding includes an element for London weighting.

6.5 These differences in funding appear to create a degree of tension among the conservatoires and some of the university music departments. This tension reflects the problems engendered by the premium funding criteria and their impact on the priorities, policies and status within and between the conservatoires – as well as the perceptions and ambitions of the students who go to them.

6.6 Altogether, the six English conservatoires funded by HEFCE received a total of £18.6 million in 2001-2 through teaching, research and special funding – that is 0.4% of the £4,437 million distributed by HEFCE through these three funding streams. They also receive another £2.1 million from regulated tuition fee income from home and other EU students (*see table below*). This is only a part of conservatoires' income. They also raise their own funds from such sources as tuition fees from overseas students, endowments and sponsorships, and operating income. For example, the RCM receives just 38% of its annual income from HEFCE grants, 28% from academic fees, 25% from operating income, and 9% from endowments and interest. The fees received from overseas students are therefore a vital element in sustaining conservatoires' financial health.

6.7 In addition to teaching and research funding, HEFCE allocates a third stream of funding to encourage higher education institutions, including conservatoires, to develop closer links with business and the wider community. This includes entrepreneurial activities, improving business and community access to HEI resources and expertise, and student and staff involvement in schemes to work with young people, schools, prisons, hospitals and community groups. This began in 1999 with the Higher Education Reach-out to Business and Community Fund (HEROBC), which has now been incorporated into the Higher Education Innovation Fund (HEIF). There is also a Higher Education Active Community Fund (HEACF). Currently, over £120 million has been made available for schemes under these funds. HEFCE and the Learning and Skills Council (LSC) are consulting on proposals for a new Partnerships for Progression funding initiative to achieve wider participation in higher education.

6.8 This illustrates that it is through funding criteria that change can most effectively be created, and conservatoires can be assisted in their declared aim to widen participation, extend the musical experience of their students, develop policies for the recruitment and retention of staff, and provide an education and training that fits graduates for the 21st century music industry. But just how much does it cost to train a musician?

HEFCE grants to conservatoires 2001-2 (£)

	<i>teaching funds</i>	<i>research funds</i>	<i>total grant</i>	<i>fee income</i>	<i>total resource</i>
RNCM	4,143,928	370,612	4,589,540*	433,225	5,022,765
RCM	3,498,552	433,911	4,007,463*	339,700	4,347,163
RAM	3,449,438	480,877	3,930,315	263,905	4,194,220
Trinity	2,769,474	-	2,844,474*	346,150	3,190,624
Birmingham	1,807,098	58,000	1,865,098	518,247	2,383,345
Leeds	1,236,406	-	1,236,406	378,400	1,614,806

* includes £75,000 special HEROBC funding

[sources: *Recurrent Grants for 2001-2*, HEFCE, March 2001 & Birmingham Conservatoire]

The cost of training musicians

6.9 Conservatoires calculate the cost of running their courses in different ways. It seems not to be an exact science. No conservatoire can say (nor indeed can HEFCE) what it actually costs, and how long it takes, to train a professional performer in general, nor each particular type of musician, singer or composer. One principal pointed out:

It takes much longer than three or four years to train a professional performer. My own view...is that the period needed to progress from beginner to professional standard on most instruments (or voices) is in the range of 10 to 20 years, depending on the instrument/voice and the degree of natural aptitude possessed by the student (not to mention the teachers!)

Another conservatoire called for a study of longitudinal comparisons to assess just how long it does take to train different kinds of performer.

6.10 In 1998, the HEFCE *Review of Music Conservatoires*, chaired by Sir John Tooley (HEFCE, March 98/11) concluded on the issue of cost assessment:

There is a need to be fully informed on how costs and income arise in order to address the effective utilisation of staff/facilities and to define the resources needed to sustain the international competitiveness of these institutions. [page 7, para 18]

On university music departments, which are funded by HEFCE through the university rather than directly or separately, the report found that:

No analysis is available showing the costs of providing university music degrees (nor information to make any comparison with the conservatoires). It is thought to be a 'relatively' expensive arts subject, needing more space, equipment, and intensive teaching than most. [page 37, para 6.5]

6.11 Little has changed. One conservatoire said that the budget for particular types of course has been determined by 'historical accident'; another that 'no proper course costing system currently exists', but that one is being developed. So how is it done?

- Conservatoire A calculates an 'equivalence', devising a package for each course which costs the same, except for vocal training and opera which are both more expensive.
- Conservatoire B works out an average cost per student across each school of study, which 'gives an indication rather than reality, but does reflect a trend in the costs of each sector'. Distorting factors include small numbers on particular courses, staff vacancies and different contracts of service.
- Conservatoire C calculates overall costs only, with no direct attribution of overheads to specific courses. It works out what it can afford to spend on tuition, salaries and academic costs, and allocates budgets to a range of cost centres.
- Conservatoire D holds discussions between administrative staff and the heads of music departments on the following year's intake and the impact on resources, taking account of the conservatoire's strategic plan and existing unit of resource. Each department head prepares a budget for the coming year taking account of the variations in demand. On the basis of these draft budgets, a global forecast is prepared centrally. A second round of discussions is held if any trimming, pruning or cutting is needed. Budgets are then set and approved. They are reviewed later in the year and may be re-aligned if there is any fall-off in student numbers.
- Conservatoire E works out the cost of a course by adding up the relevant element of the course director's salary (17.5%), fees for visiting tutors (by far the largest element at 68.1%), administrative support (4.4%), plus course budget and overheads (10%).

6.12 While all this underscores the essential autonomy of the conservatoires, funding criteria might be changed to support more effectively their efforts in providing the most relevant and high-quality training for the 21st century musician, in attracting suitably qualified and talented students from a wider range of backgrounds, and in developing partnerships with other arts, education and training institutions.

The cost of training music teachers

6.13 No-one knows how much it costs to train a music teacher – indeed a teacher of any subject. The Department for Education and Skills (DfES) cannot provide such a figure on the grounds that the issues are too complex with many unquantifiable variables. The Teacher Training Agency (TTA) has a price tariff by which it allocates funding to initial teacher training providers based on different subjects and training routes. The training providers themselves have different ways of allocating the funding they get to resource training. They report that it is more expensive to train someone to teach music than most other subjects.

6.14 The TTA price tariff varies according to whether a subject is designated as a shortage subject. The range for secondary trainees goes from £3,505 to £4,064 per trainee, and from £3,681 to £4,267 for fast-track trainees. Music is a shortage subject and therefore funded at a rate of £3,629 for trainees and £3,811 for fast-track trainees. Tuition fees are £1,075 per trainee, irrespective of subject. Those training to become teachers via PGCE courses are also eligible for a £6,000 bursary. In addition, a ‘golden hello’ payment of £4,000 is also available to those training for some of the designated shortage subjects, but not for music.

7 findings

Redefining the roles of the musician

7.1 Evidence shows that a narrow view of the role of musician and of performance is increasingly being challenged and examined. A growing number of examples show musicians, orchestras, trainers, and audiences to be exploring and enjoying different perspectives of what it is to be a musician. Some of these perspectives have long existed but rarely been recognised and often marginalised. However, evidence also shows that significant areas in education, training and employment have yet to address effectively the changing realities of being a musician. [2.5]

7.2 The term ‘performer/teacher’, embracing the two main roles of many of today’s musicians, has merit in properly and explicitly defining what the majority of musicians actually do out of interest, commitment, or in order to make a living. It can also be a useful device to draw grant-aid from both arts and educational funding sources. Yet it lacks sufficient support among musicians, and particularly those musicians who also teach, to become an overarching term. [2.8]

7.3 Responses from our survey of musicians suggest that there are circumstances in which the term performer, rather than musician, is preferred by those engaged in the profession, as it better suits the activity being undertaken. However, the consensus was that musician should encompass the term performer, be that as player, singer or composer. [2.9]

7.4 A broader definition of musician can help to overcome the current hierarchical approach (actual or perceived) to a musician’s various roles, genres and traditions. In its place, we can encourage the view of a continuum of role, genre and tradition, so that, for example, the

roles of performer and teacher can, in the appropriate circumstances, have an equal value for the musician and for those who employ, fund, work with or otherwise engage with the musician. [2.10]

7.5 At the heart of any redefinition must be the musician’s main function: an engagement with the artistic enterprise. Musician is the generic term from which flow such diverse roles as composer, performer, leader and teacher, in all genres, cultures and traditions. By putting the musician at the core, with the many various roles originating from that core, a parity of recognition and respect across genre and tradition can be promoted. One might therefore see a genetic code for the musician comprising the four central roles of composer, performer, leader, and teacher, with linked roles relating to one or more of them.[2.11-2.13]

7.6 The term ‘professional practice’ offers a more appropriate description than ‘performance’ of the multi-stranded careers of the majority of professional musicians.[2.15]

The music industry

7.7 The overlapping of musicians’ different activities inhibits attempts to provide an accurate picture of the industry. However, it also reveals a strength of the industry in the influence and expertise that musicians can bring from one role to another. For example, there is the improving effect on music education in schools of having professional musicians involved in workshops, teaching, mentoring and conducting. [3.6]

7.8 There is a growing interest in, exploration of, and exposure to a wider range of musical genres by musicians and audiences. Increasing opportunities for, and confidence of, different

ethnic and social communities to pursue their own musical traditions and experimentations are attracting wider interest in, enjoyment of, and respect for them. Elements influencing this development include the growing contributions made to society by minority ethnic groups, increased accessibility of music from all parts of the globe, and the creative energies of artists of all traditions to move beyond their own musical boundaries. [3.10]

7.9 The market forces driving the music industry, together with a rapidly changing cultural landscape, nationally and globally, have enabled, or required, the musician to break out of the traditional categories that define being a musician. For some this is an exciting and creative prospect; for many it is of considerable concern. The problems in providing an accurate picture of the number, characteristics, environment and workstyle of musicians across the whole industry have meant some less than adequate responses within the education, training and employment frameworks and a reluctance to act decisively on behalf of future musicians. [3.19]

Training and development

7.10 A career in music is more diverse and serendipitous than many other specific careers. It can also be a slow-burn career. While first-year destinations are interesting, they cannot provide a clear picture of the future that awaits music graduates. Monitoring over periods of five and even ten years can give a better idea of what is happening to music graduates. [4.10]

7.11 No statistics are yet available which show to what extent conservatoires are meeting the HEFCE premium funding criterion that ‘more than 75% of graduates are working primarily in professional music performance, as performers of music, within five years of graduating from the institution’. [4.11]

7.12 While orchestras are beginning to address the lack of additional training for players, and some innovative work is underway in some

conservatoires, the majority of orchestral players feel they have not been adequately trained in skills that would enhance their career, such as education work, including leading workshops; a range of business and management and technology skills; and expertise in health, safety and legal issues. [4.23]

7.13 Many music students have an interest in, and some a commitment to, acquiring teaching expertise. However, they differ on the suitable timing for such activity within or after their main areas of study and practice, and are unsure about the teaching options open to them in terms of accreditation, financial reward, and employment opportunities. Most find the prospect of being a classroom teacher uninviting and would prefer other routes to working with children and young people in a range of educational, community and youth settings that attract status and make better use of their musical skills. [4.18]

7.14 It can be very difficult for musicians to acquire additional skills once they leave the formal education and training sector to pursue a career. Opportunities for continuing professional development (CPD) are uncoordinated. The provision offered can be inaccessible because of cost, time, or location. This applies as much to community musicians as to orchestral players. For example, provision of appropriate professional development courses, especially in music leadership, has failed to keep pace with the increasing opportunities for education and community work for musicians. Those running music schemes in community and education settings cite the lack of suitable training as a major impediment both to increasing the quantity and improving the quality of such activities. [4.22]

7.15 The courses offered by the further and higher education sectors, including the conservatoires, need to reflect overall the type and level of skills, range of musical genres and global reach, high quality of training and honing of talent demanded by the music industry, and by the cultures that make up society today. The artistic and technical

demands inherent in musical traditions and genres, including those outside the canon of western classical music, vary and therefore inevitably affect the duration and intensity of training courses. A review of the current criteria for premium funding will need to include a comprehensive and more sophisticated refinement of these factors. [4.30]

7.16 Much of the work to provide music students with the wider range of skills, knowledge and experience needed for the 21st century music industry remains marginal or optional in the training sector. This is, in part, due to funding criteria for conservatoires which give weight to performance objectives and appear to ignore other significant skills required for employment in the industry. [4.35]

Widening participation

7.17 There are some significant gaps in knowledge about the young people whom conservatoires attract, educate and train. Only two conservatoires were able to provide any kind of statistic for students' educational background. [5.6-5.7]

7.18 UK minority ethnic students are significantly under-represented on music courses in the higher education and teacher training sectors. These sectors acknowledge the challenges they face in widening participation

but need further encouragement and support in order to create a more inclusive student population. [5.12-5.20]

Funding

7.19 Differences in funding at the higher education level appear to create a degree of tension among the conservatoires and some of the university music departments. This tension reflects the problems engendered by the premium funding criteria and their impact on the priorities, policies and status within and between the conservatoires – as well as the perceptions and ambitions of the students who go to them. [6.5]

7.20 HEFCE's third stream of funding to encourage higher education institutions, including conservatoires, to develop closer links with business and the wider community shows how appropriate funding criteria can encourage change effectively and successfully. Changes in the premium funding criteria can assist conservatoires in their declared aim to fit graduates for the 21st century music industry. [6.7-6.8]

7.21 There is scant information on the real cost of training musicians in the higher education sector and of training music teachers for the primary and secondary sectors. [6.9-6.14]

8 *issues and recommendations*

8.1 Recognition of significant issues, and the priority given to each, are likely to be determined by the different responsibilities undertaken by institutions and individuals. Throughout this report we have attempted to identify and elaborate issues which directly affect the music industry and the training of musicians. The areas which appear to us to require continuing attention, review and, in most cases, immediate action are set out below. We do not wish to imply a hierarchy by the order in which they appear.

Issues

8.2 The education and training of musicians from the very earliest stages through to the mature composer, performer, leader and teacher need to reflect the diverse reality of the music industry. How can the present structures, within and across the training and education sectors be strengthened to ensure effective and efficient pathways for study, research, and continuing professional development?

8.3 The content of courses of study, and the environment in which students learn, determine the kind of musician who will be able to thrive and adapt within a multi-stranded industry. What measures can the sector take to ensure the relevance of studies to the future needs of students? How far can training institutions equip their students to meet the challenges, to be pro-active and even to control change in the music industry?

8.4 The wide range of musical genres within the music industry presents training institutions with choices relating to the scope and diversity of the courses they offer. The training needs of different genres, and the artistic expression within a genre, may require different patterns of

organisation. For the training sector to assume greater responsibility for the whole range of training needs, a collaborative approach will be required on the part of individual institutions. How far can the training sector assume responsibility for the needs of the industry across the whole range of genres and musical expression? What measures might be taken to encourage and facilitate greater collaboration between those working in different musical genres, across art forms, and in different academic or professional disciplines?

8.5 Evidence suggests that the nurturing of musical talent is conditional upon students' background. Training opportunities need to be widened and to become more inclusive. Is there sufficient access to higher level courses for talented musicians of any genre, whatever their educational, social or ethnic background?

How can the wider participation of currently under-represented groups be facilitated?

8.6 Musicians generally welcome opportunities to broaden their skills and develop a wider range of possible modes of operation during their professional life. How effective and accessible are the opportunities for research and continuing professional development? How is the responsibility for continuing professional development viewed by employers and by the training institutions?

8.7 Recruitment and retention of music teachers for school-aged pupils continue to be a major concern. Ultimately the quality of students who present themselves for training is dependent upon secure foundations at school level. How can individual institutions and the sector address this issue? What new partnerships might be developed to address this issue in both the short term and the long term?

Recommendations

8.8 The following recommendations are made in the recognition that those responsible for the education and training of students have, over many years, been moving towards a better match between the courses on offer and the changing patterns of employment for musicians. We address these recommendations to the Higher Education Funding Council for England, the sector as a whole (conservatoires and other associated training institutions), and employers. The recommendations are addressed to these sector interests and could be readily facilitated through one or more of the various existing fora for discussion. Our essential belief, however, is that such fora should be widely representative, including the music industry, training institutions, current music students and recently trained musicians. Given the resources, we believe that a start could be made within one year to deliver all of these recommendations.

8.9 We recommend that the **Higher Education Funding Council for England:**

- maintains the premium funding for the training sector;
- develops the criteria for premium funding to ensure a more appropriate match to the needs of the music industry;
- maintains and increases special funding provision, within the training sector, for institutions to ensure their entrants are more widely representative in educational, social and ethnic background;
- makes special funding provision, within the sector, for those institutions seeking to develop, in collaboration with the music industry, a wider representation of musical genre and artistic expression;
- monitors the outcomes of the current initiatives relating to the sector and to individual institutions;
- assumes initial responsibility to bring together all the training institutions in the sector to discuss how the recommendations in 8.10 are to be achieved.

8.10 We recommend that **the training sector:**

- ensures that there are accurate and up-to-date

data, across a five-year period, on the number, characteristics, environment and workstyle of musicians across the whole industry and in every genre;

- develops a common framework and vocabulary for assessing quality across all musical genres in accordance with the diversity of need and purpose;
- reviews, in collaboration with the music industry and professional associations and agencies, the overall provision for continuing professional development through appropriate courses, especially in musical leadership, which matches, in volume and accessibility, current and foreseeable needs for structured support for professional development;
- reports to HEFCE the outcome of this review, and as appropriate, making proposals to deal with unmet needs.

8.11 We recommend that **individual institutions:**

- maintain a consistent, comprehensive and long-term profile, over a ten-year period, of those they have trained, and maintain records of the background of the young people they attract, educate and train;
- review, and keep under review, the curriculum and delivery of courses to ensure that they are robust and relate to the needs of the music industry;
- seek ways, within the government's declared agenda, to widen participation of students from currently under-represented social and ethnic backgrounds and from the state education sector, including the setting and publishing of appropriate targets;
- in the case of conservatoires, examine how their junior departments relate to the work of their higher education provision and pursue initiatives to deliver a wider and more diverse intake.

8.12 We recommend that **employers:**

- especially those who are themselves disillusioned with current levels of skills delivered through course content, collaborate with training institutions and seek other ways to open up and supply training opportunities;

- seek ways for greater collaboration with education and training institutions to deliver professional development opportunities on a basis which fits regional and local needs.

8.13 Finally, in order to build a stronger foundation for the education and training of musicians, we recommend that **the appropriate government departments and agencies, along with the professional bodies who have responsibility for music education for children and young people**, consider together how best to:

- make provision, both in school and out of school, for nurturing and encouraging future generations who will sustain the music industry as composers, performers, leaders and teachers;
- recruit and retain talented and qualified music leaders and teachers;
- strengthen the links between the schools sector and the higher education training sector, to ensure accessible pathways to training.