A Vision for the Music Industry in the West Midlands.
A Vision for the Music Industry in the West Midlands.

Background
This report has been commissioned primarily to inform potential investment in the West Midlands music industry by Advantage West Midlands between 2008 and 2011.

In particular this report will suggest options for projects to be included in the Audio and Music Programme of Activities that is outlined in the Screen, Image and Sound Cluster Plan 2008 – 2011.

To do this the report will include:

1) A Brief Evaluation of the Music work undertaken by Digital Central
2) An Overview of the Region
3) A Suggested Outline of Activities

Methodology
This report has been compiled by using a number of sources of information:

1) Minutes and Documentation from the Digital Central project at Birmingham City University (BCU)
2) Reports, Strategies and Planning Documents for music and the creative industries both National and Regional.
3) Interviews with Music companies, freelancers and organisations and agencies that support the Music Industry

This approach has been adopted to gain as many views as possible and to set them against the current context for music. The ambition for this report is to try to set out a vision based on the needs of the industry as a whole to try to build consensus around a package of support for the forthcoming Audio and Music Programme of Activities.
Section One

A Brief Evaluation

This section will look at the work undertaken by Digital Central so far and look at the opportunities that arise from the first phase of activity (2005 – 2008).

Background

Digital Central was a regional development project funded by Advantage West Midlands that worked to help the West Midlands to be nationally and internationally recognised for its digital media and music sectors. That includes Film, Television, Animation, Interactive Media, Computer Games, Digital Imaging, Music and Radio.

Digital Central developed and supported activity against three key strategic themes: networking, showcasing and innovation.

From 2008/9 the funding from AWM that was spent on Digital Central will be split into three pots. The first will be aimed at support for Film, Television, Animation, Interactive Media, Computer Games and Digital Imaging and will be administered by Screen West Midlands. The second will support the Business Futures programme and the final pot will be aimed at support for audio and music and will be put out to tender so that it can be delivered by the most appropriate organisation(s).

Evaluation

After reviewing the documentation from the project such as reports and minutes from meetings it is clear that Digital Central has achieved many things during its two years. It is not in the scope of this report to comment on the non-music activity of Digital Central other than to say that the screen and new media sectors do seem to have a more coherent strand of activity in the project.

The music projects that have been supported were all worthwhile and in most cases very successful. Digital Central’s role in these projects varied, sometimes simply adding a small amount of funding support to match a great deal from elsewhere through to projects where Digital Central took the lead and funded the projects entirely.
Feedback from those in the music industry that I interviewed was mixed. Some of this was due to the high expectations placed on the Digital Central project from the outset set against the relatively small budgets that Digital Central had to implement the many ambitions people had for it. Other issues came out of the way the project progressed and some individuals’ personal experience of applying for funding through the scheme. These are addressed below.

Impact
Digital Central has had a number of successes that will leave a lasting impact on the local industry:

The Research
A significant strength of Digital Central was its ability to utilise the academic assets of Birmingham City University. As a result a number of helpful reports and studies were published during the project.

Amongst the music based research there were three reports that in the end formed a box set of music reports. The first one was 'Making Money out of Music' by Professor Tim Wall. This was a very useful document outlining how the music industry makes money and how the international market relates to regional music activity.

The second document '20 Things You Need To Know About Music Online' by Andrew Dubber is equally helpful and continues to be quoted by people I meet as useful.

Simon Harper's collection of views from members of the region’s music industry 'Music Matters – a regional profile' was equally useful and was a good basis for this report. This booklet concluded that the priorities for the regional music industry going forward were:

- Working Together
- Working with public bodies
- Promoting the West Midlands
- Working internationally
- Capitalising on our heritage
All of these areas are considered again in this report as they came up as key themes in the interviews I conducted with music industry professionals.

However, for those of us who like to read these documents they are very useful but for the vast majority of music industry practitioners their impact is less tangible at this stage. There is a feeling now amongst those I interviewed who had engaged with Digital Central, that the focus of the next phase (i.e. the Audio and Music Programme of Activities) should focus on action leading from those report findings.

Venue Development
The venue development project was very simple: To look at what venues needed to do to improve their ability to host live music and to help a number of venues make those improvements. There was an interesting and helpful music venue survey that lead to a report that informed the funding process.

Despite a reasonably small response to the survey this project was successful as it had a very clear vision behind it and garnered good support from the industry.

Projects
Digital Central was able to support a number of important and successful initiatives in the region including:

- supporting Capsule to hold the Metal Symposium and a subsequent project on music heritage
- enabling music companies to go to MIDEM and to San Francisco for a games conference
- Events like Birmingham Jazz Festival, Gigbeth and Rootsville were also supported

Issues for Digital Central

Letting committees get in the way
The most important issue that has arisen from my observations and from people I have spoken to on this subject is the lack of strong direction for the music work that DC undertook. This may well be in part due to a sensitivity that has arisen from the perceived ‘ in fighting’ in the sector. This led to DC holding a series of consultative
meetings and forming a number of groups to try to steer the direction of the music work.

This approach took in the views of a very diverse group of sector specialists and so there was no shortage of ideas and no real mechanism to prioritising them. DC should have taken a stronger lead so that the parameters of these discussions could be more clearly defined. A common observation was that many projects started and then stalled because of apparent changes of direction during the project. This lead to disengagement by many industry partners and some mistrust that was a result of a simple lack of clarity.

Also from the minutes of one of the meetings there was concern raised by those on the committee about the admin spend of the project – however they also wanted those on the committees to get paid for their time. This model was obviously unsustainable but perhaps came out of frustration from those 'consulted' that their time was not being well spent.

*Lack of joined up planning*

Many of the businesses I interviewed observed that Digital Central seemed to operate in isolation to other similar projects, possibly missing out on opportunities to make the Digital Central budget go further through strategic partnerships.

This is backed up by interviews undertaken with key agencies during this research that almost universally felt that they had very little involvement in Digital Central and so had not found ways to add value to the project through the work that they were doing. Most had praise for some elements of the projects work but felt that their own lack of knowledge of the project as a whole was probably evidence of a general lack of a joined up approach.
Section Two

An Overview of the Region

Excerpt from the Regional Economic Strategy

The West Midlands sits at the heart of the UK and has the advantage of having a diverse landscape that includes the counties of Shropshire, Staffordshire, Warwickshire and Worcestershire; the unitary authorities of Herefordshire, Stoke-on-Trent and Telford and Wrekin; and the seven metropolitan districts of Birmingham, Coventry, Dudley, Sandwell, Solihull, Walsall and Wolverhampton.

The population of the West Midlands is 5,365,400 - 9% of the GB total. The region’s capital city, Birmingham, is the second largest city in the UK and has a population of over 1 million people. (Source: ONS)

There are 2,520,000 people employed in the West Midlands and 166,000 unemployed, an unemployment rate of 6.2%. (Claimant count rate of 3.9%)\(^1\)

\(^1\) http://www.advantagewm.co.uk/the-west-midlands-region/regional-statistics.aspx
The Regional Economic Strategy for the region published in 2007 outlines the agencies’ priorities for the next funding period. The strategy refers to three important components of the regional economy:

**Business, Place and People.**

*Business* refers to the contribution that ‘businesses’ (a term used in its widest sense and including social enterprises and not-for-profit organisations) make to the productivity and growth of the regional economy, and to the demand for employment of the region’s workforce.

*Place* focuses on the role of place in both attracting and enabling economic growth (i.e. high-quality locations and environments which encourage businesses and a highly skilled workforce); also in dissuading or constraining economic activity (poor-quality environments can limit investment, reduce aspirations and lead to negative stereotyping).

*People* refers to the contribution of the region’s population and their skills to the sustainable growth and increased productivity of the West Midlands economy; and to ensuring that everyone has the opportunity to develop to their full potential.\(^2\)

The music industry has much to offer to the aims of the strategy: the economic impact of the region’s music businesses; the ability of music activity to help to define the place and the role of music and music education in developing the people of the region. These will be explored below.

The Music Industry

National Picture
Many of the facts and figures that are readily available regarding the UK music industry are those of the recorded music market. In addition figures relating to employment in the sector do not measure freelance workers. These are key issues for the sector when making the case for its economic and cultural impact.

Increasingly you cannot get a sense of the entire work of the music industry on record sales alone so this report will present a picture that includes the broadest range of music sector activity.

The music industry is going through a rapid period of change as physical record sales are in decline and internet sales - though on the increase – are leading to issues with file sharing and illegal downloads.

There is also a change in the way that people listen to music as more and more people listen via portable devises such as phones and MP3 players. As a result music not only becomes less tangible and more accessible but also becomes more easily dispensable. Young people recently interviewed at the Gigbeth conference told of how they illegally download music onto their mobile phones and on average only keep it for two weeks.

A revolution is happening in the way consumers obtain and pay for music and the music business is transforming itself for a new environment. Like many revolutions, this is a continuous process and there are many divergent views within the industry on where it will end. 3

The UK is still the third largest market for recorded music in the world behind the USA and Japan and we also buy more recorded music in the UK per head than any other country (2.7 per head in 2006).4

3 IFPI Digital Music Report 2008
This is probably because UK artists are doing so well both here and abroad, as the BPI observes:

*Although selling music via traditional channels has become increasingly testing, there is no doubt that the past 12 months have been a golden period for British repertoire.*

The success of UK artists indicates that labels are still able to find and develop new talent despite the decline in their traditional income streams. In addition new technologies have helped labels find new and innovative ways of marketing artists and connecting with their audiences.

The rise of ‘DIY music' through social networks such as Myspace and the ability for bands and their management to communicate and sell directly to their audiences without the need of help from the established music companies has got everyone thinking about a new way to do business. It has become easier to develop effective websites on your own and music companies are able to present their music and services in new ways and more cheaply than before (for example simple Youtube videos or online interviews between artists and fans).

As a result the businesses and musicians are prioritising their online presence and becoming interested in the cross over between a range of digital media. In addition the demand for music content for games and films is increasing – although there is much work to do in this area to create an understanding between the sectors on how this operates in practice.

Through interviews with those involved in radio it is apparent that mainstream commercial radio is becoming increasingly homogenised and the recent take-over of GCap by Global Media will mean that brands such as Choice and Galaxy will become even more consolidated. BBC Radio is leading in the listening figures and continues to innovate and have excellent music programming. However the general national picture is that DJs are not engaging with new music in the way that they would have had to because of the rise of very limited play lists. This is not good for emerging musical talent but also is not producing exciting and diverse radio shows.

---

5 BPI Statistical Handbook 2007
At the same time as declining record sales the live music scene grew in 2007, the UK live music market was up by eight percent to approximately £743 million in ticket sales alone.\textsuperscript{6} There are a growing number of festivals and live venues are reporting increasing numbers.

And these things are still shaking themselves out. The music industry has not changed — it is changing. Naturally, we will see a change of ratios within business models:

- Patronage has already made something of a comeback through online micropatronage.
- Attendance at live gigs has shot through the roof in the last few years.
- Amateur performance and a demand for online music education (including sheet music) is growing rapidly.
- CDs are dying out as the primary method of consumption of music.\textsuperscript{7}

The Live Music Forum’s report in 2007 suggests that this enthusiasm for music should be nurtured with the suggestion that free rehearsal spaces for young people should be introduced and this has subsequently been matched with a pledge from the Government to support the recommendation in its Creative Britain strategy.

In addition to this the UK music education sector has undergone a period of unprecedented government support with initiatives like the Music Manifesto and Youth Music.

The Music Manifesto has lobbied the government to improve and protect music education in schools. This has resulted in a number of initiatives such as national rollout of full class instrumental tuition “Wider Opportunities” and Howard Goodall’s Sing Up! Scheme aimed at getting every school singing.

Youth Music has concentrated its efforts on out of school activities for children up to the age of 18 and has therefore boosted the level of community music activities available to young people. As a direct result the workforce of ‘music leaders’ was strained and so Youth Music set up Musicleader to train and develop those who provide this activity and to introduce other musicians to the career option.

\textsuperscript{6} Mintel Report on Live Entertainment 2007
\textsuperscript{7} Andrew Dubber (2007), 20 Things you Should Know About Music Online
The Creative and Cultural Skills Sector Skills Council that covers music is currently developing a number of projects that will offer opportunities to the music industry. The National Skills Academy will be based in Thurrock and will be working with employers to deliver work-based training in technical and backstage skills. This comes from an identified need for more skilled stage technicians nationally. There will also be regional ‘spoke’ projects so that delivery can occur across the country.

There are also two new qualifications being developed. The Creative Apprenticeship and the Creative Diploma. Both of these qualifications have been developed in partnership with employers and will offer work-based learning for students. This will offer opportunities for the music industry to work in partnership with education and the aim is to train a generation of young people who have realistic experiences of the workplace before they leave school or college.
The West Midlands Music Industry

The West Midlands has a fantastic track record of producing excellent musicians across a wide range of genres. This is a strength of the region but also presents difficulties when describing the region’s ‘scene’. In fact the region has a rich diversity of ‘scenes’.

There is also an issue of lack of infrastructure, as local music guru, John Mostyn points out in his consultation for Digital Central:

“The biggest weakness is that out of over 60 artists from the area to have entered the top 40 albums or singles charts in the last five decades less than five have been on labels based in the region and none published by publishers in the region”.

This issue highlights an issue for the region around lack of infrastructure that seems to be widely acknowledged by those interviewed. The region has talented musicians, a good live scene and a number of good managers and labels. However when musicians succeed they tend to leave the area and go to London and often take the management and labels with them. However if the publishers and other key elements of the infrastructure were in the region they would stay behind and be able to use the success of past musicians to nurture new talent. This is also an issue in other regions of the UK as London retains the influential music industry figures.

In 2006 The Creative and Cultural Skills Footprint report claimed that there were 5340 people working in music in the West Midlands. This survey used proxies and estimates to build into this figure those who are also self-employed. It also includes all sorts of music jobs including musicians, jobs in music businesses, at venues and as educators.

The West Midlands has a strong tradition of music from diverse cultures from the rise of Reggae in the 1980s or the recent success of Bhangra. Now there are new and emerging sounds generated by young people who are defining their own cultural sounds for example Soweto Kinch’s Jazz that incorporates Hip Hop or Vijay Kishore’s Jeff Buckley crossed with Sufi songwriting. This is a huge opportunity for the region as new genres are defined and musical identities are blurred.
In the ‘Eastside’ district of Birmingham there is a long tradition of live music activity and the area has grown and developed a good reputation as a creative quarter of the city in recent years. Part of the planned redevelopment of the area though includes the introduction of new residential accommodation that is already leading to noise abatement orders and a nervousness that the live music of the area will be threatened in the long term if this continues. This kind of issue is not exclusive to Birmingham and there is need for a co-ordinated campaign at a strategic level to work with local authorities and developers to find solutions, as this statement in the Creative Britain report suggests:

“In line with the recommendations of the Live Music Forum, we will encourage the protection of live music venues, building on the example set by the work of the Mayor of London. Our vibrant, diverse and thriving musical heritage depends on the availability of venues of a wide range of sizes and sophistication and our intention is to ensure their future is protected.”

Also in the ‘Eastside’ area of Birmingham an old and established music venue ‘The Institute’ is currently being re-developed by MAMA Group to revitalise this listed building back into full health. Part of the plan will create more and better used performance spaces in the main building but there are also plans to install office space for music companies that might become in itself a ‘hub’ of like minded music activity that can create collaborative opportunities.

The activity of the region, despite its immense successes is still not as visible to those outside the region and this is attributed to lack of coverage in and interest from the national press and the idea that A&R staff prefer to go further north from London to qualify for their overnight expenses!

These are both true to some extent but Birmingham’s musicians and music scene have had some excellent coverage in music magazines like NME and even was listed as one of the top five music cities of the world by Billboard magazine in 2007.

Industry press such as Music Week feature other regions more often than the West Midlands simply because those regions invest in sizeable campaigns and don’t wait

---

for the coverage to appear on its own. The West Midlands has no shortage of stories to tell and needs to get better at telling them.

Radio in the region is suffering from the same homogenisation that is occurring across the country. Those that I interviewed were clear that there were only a few stations locally that supported local music -like Kerrang! – but even the good examples could be encouraged to do more. As radio listener figures fall the need to make radio become more bespoke and local grows ever more important.
Who are the key players?

This report cannot claim to list all the people that contribute successfully to the music industry in the region, however it can list examples of those who do. Feedback collected by Digital Central in one of its workshops identified that “At the moment – always the same people having the same conversations. We need fresh blood”

Traditionally many of the key representatives of the music industry nationally and regionally represent and lobby for the recorded music industry. These voices are very important but it is essential now that the live music sector is also consulted on this work.

Promoters such as Capsule (Jenny Moore and Lisa Meyer) and Heducation (Miles Hesketh) and venue owners such as MAMA Group (Adam Driscoll) and smaller venues such as the Tin Angel (Richard Guy) in Coventry should also be consulted and involved in work such as the Audio and Music Programme. Also, successful council run ventures like Wolverhampton Civic (Mark Blackstock) and Town Hall (Simon Wales) should be encouraged to link up with and contribute to the work of AWM.

As should organisations that work with the music industry such as Big Cat (Nick Morgan) and Audio Urban Productions (Warren Fisher) to make sure that issues for their event support services are considered as part of the wider picture.

The region has a host of successful recording studios and producers such as Artisan (Jon Cotton) through to emerging projects like CMAT (Bob Ramdhanie).

There are some really innovative and quietly successful record labels such as Static Caravan (Geoff Dolman), Type (John Xela) and Boy Wonder Records (Anthony Herron) that do not currently engage with AWM projects. It would be good to involve these in addition to some of the more established labels like Revolver (Paul Birch) and FDM Records (Kieron Concannon).

The region also has a diversity of music that it should be proud of and projects like the Audio and Music Programme need to involve key players such as Bhangra in Birmingham (Ninder Johal), Punch (Ammo Talwar) and Say Arts (Abid Iqbal).

---

9 Extract from notes of session at Plugged In 2007
Organisations that have a track record of developing regional scenes and artists should also be consulted. **Birmingham Jazz** (Tony Dudley Evans) and **Miss Moneypennies** (Jim Ryan) would be included in that list as well as organisations with a remit for supporting those in the industry like **Musicleader** (Baz Chapman), **Upstart Stoke** (Sarah Austin) and **Gigbeth** (Clare Edwards).

It is also important to involve the education sector in the discussion as they contribute significantly to the success of the regional sector and are important collaborators either as researchers or trainers. These conversations should range from secondary schools and FE colleges with a strong track record in music provision, through to the universities in the region that have innovative music courses.

Whilst other regional agencies like the Arts Council and local authorities are not part of the music industry as such it is very important that the **Audio and Music Project** engages with them to make sure that projects are complimentary to the work that they are doing and share strategy information and best practice.
Section Three

A Suggested Outline of Activities

This section is designed to suggest an approach to and some ideas for the Audio and Music Programme of Activities.

In preparing this section I have looked at how other similar projects in the UK and beyond operate. This is to try to avoid ‘re-inventing the wheel’ so that the Audio and Music Programme of Activities can build on the learning of other projects.

I have also investigated what projects and priorities other regional and national agencies will be pursuing between 2008 and 2011. This is designed not just to set a context for the suggested activities but also to encourage and inspire collaboration and mutual understanding between the Audio and Music Programme of Activities and other agencies in the region.

I have also added a section on what the music industry can do for itself in an attempt to stimulate a conversation with colleagues about how the music industry in the region can make changes and improvements without the need for funded projects or government interventions.

Examples of similar projects in the UK and beyond

Following a review of other relevant schemes around the world, it is apparent that there are not many large-scale schemes that are also ongoing. Many projects to support the music industry spring up and then finish once the funding ends, which is similar to some of the stories from my interviews in the West Midlands. However a few schemes stand out as being long-term commitments with funding to match.

World

Canada Music Fund

The Canada Music Fund has a number of strands of activity. One project is the Music Entrepreneur programme that aims to support established music businesses to become stronger and therefore expand the sector. There is a programme that supports music industry sector associations so that they can better support and advise their member music organisations. There is also a component designed to
encourage more Canadian based recordings and so groups can apply to have funding for their CD or music video. These programmes are considered to be highly successful and are well respected in the industry. The scheme also has a very large amount of government investment every year ($27.75 million in 2006).

Other
Internet research uncovered a number of music industry related projects from around the world including a project in Dakar that trained and supported a number of music industry professionals to go to MIDEM. Another research project from Senegal recommended supporting training for musicians and managers and as they do not have a CD pressing plant in the area, one suggestion was to build one so all the music is produced in the area!

UK
Own Industry
This programme is supported by the Arts Council and provides support for SMEs in the East Midlands. Their aim is to help build up the local industry infrastructure by working with music promoters, producers and labels to develop and grow their businesses. They do this through delivering a programme of business and professional development and helping them to become better networked with complementary business contacts.

Generator
Generator is a music development agency funded by the Arts Council in the North East. In a similar way to Own Industry, Generator does not give out grants to musicians or music organisations but instead offers events, training and a number of schemes that they can tap into. This can include, workshops covering legal advice and general music industry guidance as well as tailored schemes to help develop the work of promoters or DJs and MCs. Generator is now trying to expand its work nationally.

MDA
The MDA, the music development agency for Liverpool, funded by the Northwest Development agency and others delivers a range of joined up support for the music industry. As well as business support packages from start up to business growth, there are IT and other training courses and an interesting link up with the area’s
Youth Music Action Zone. Therefore this means that unlike many of the other industry support projects it recognises actively the link between music education and the industry.

**Lessons from other schemes**

Interestingly a number of the projects highlighted from other parts of the world focus on funding a number of individual bands to make recordings or music videos etc. This is a risky strategy that invests small (or in the case of Canada, large!) amounts in many groups on the basis that this ‘increases the chances’ of successful bands coming through from the area. This is a lottery style approach even if you have impressive ‘experts’ judging the entries because ultimately the success of individual bands is not an exact science.

In contrast the project in the East Midlands works on the basis that it is not at this very early level that intervention is important. The ‘Own Industry’ project focuses on helping small and medium sized music business such as record labels, producers and promoters grow their businesses so that ultimately musicians will benefit from an improved industry landscape.

In the West Midlands the issue that is cited by most people interviewed is lack of mid to large-scale organisations that have the ability to offer an infrastructure for the region. Therefore bearing in mind the small amount of finance available for the Audio and Music Programme and the risks involved in funding bands directly I suggest that any funding that is given out should be to support a smaller number of the region’s ‘best bets’ – therefore music companies that are most likely to create ongoing opportunities for musicians and the local industry infrastructure.
What other agencies in the region are doing

Local Authorities
In Birmingham the creative industries contribute 5.2% towards Birmingham's economy, second only to the business and Professional sector

Birmingham City Council in partnership with AWM and the Arts Council are currently putting together a festival strategy for the city. This will result in a report outlining a support for festivals and major events in Birmingham from 2008 – 2012. The report will also include a joint investment strategy for the major stakeholders outlining the revenue streams and funding opportunities that can facilitate the plan.

Birmingham City Council has run a successful programme of business support for the Creative Industries (BSCI) for a number of years now. This project has a number of elements, from the Creative Space programme that helps businesses set up new business facilities, through to business support from a range of consultants. This programme has been successfully delivered by the city council in partnership with Business Link through funding from AWM and is a good model of how agencies can work together to increase the impact of a scheme.

Staffordshire County Council has just published a mapping document of music activities and organisations in the county. This is a really useful document that looks at the current provision and gaps in activity in the area. The report covers everything from schools activity through to professional music groups, labels and amateur groups. The accompanying appendix is particularly helpful in giving a flavour of the area. Staffordshire intends to use this document to inform its activities in the coming years and The Music and Audio Programme should work in collaboration with Staffordshire on this.

In Wolverhampton, like a number of other areas in the region, the local council owns and runs music venues that are an important part of the musical economy of the region. Examples of this good practice in a town like Wolverhampton should be shared throughout the region.
**Arts Council of England, West Midlands**

As a result of the Creative Economy Programme, Arts Council is tasked with helping to deliver its objectives through 'venture capital' funding that will be available to companies that have projects that: “combine artistic excellence with commercial potential”. This fund will be delivered in partnership with the RDAs and represents the Arts Council’s shift towards working more flexibly with the creative industries.

This will be further enhanced by an expansion of the Arts Council’s Cultural Leadership Programme to include management courses targeted at small businesses.

The West Midlands will be part of a pilot of a new network of ‘regional beacons for the creative industries’ led by Advantage West Midlands that will “look at ways in which the business support framework can best deliver benefits for the creative industries.”

The regional Arts Council has also been active in supporting key projects in the region like British Midlands Music in MIDEM and promoters like Capsule and Birmingham Jazz. It is also collaborating with Birmingham City Council and AWM on the new Festival Strategy.

**Musicians’ Union (Central)**

The Musicians’ Union (MU) in the region is very active and works well in partnerships across the region and beyond (the MU Midlands region covers both East and West Midlands). As a result the MU not only offers its core services to its members but also adds value to a number of other projects. One important example, relevant to this report, is their support of networking events in the region. The MU currently works in partnership with the Technology Innovation Centre’s Creative Networks events by offering free drop in surgeries each month and supporting the Birmingham Music Network (BMN) who meet on the same day in the same venue to encourage musicians to go to both events. The MU also contributes financially to some of the speakers at the Creative Networks event and funds the tea and coffee at the Birmingham Music Network meetings.
As a result of the MU seeing the value of the BMN meetings they are about to set up similar monthly networking meetings in the region. In the West Midlands catchment, these will take place in Stoke, Stratford and Derby.

**Advantage West Midlands**

The Screen, Image and Sound Cluster has published its three year cluster plan which includes **The Audio and Music Programme**. This is the main music activity planned by the SIS Cluster at this stage. However there is also crossover with the Tourism section of Advantage West Midlands in their work on the Festival Strategy for Birmingham and with the regeneration departments involved with the development of ‘Eastside’ in Birmingham.

**Business Link West Midlands**

Business Link West Midlands supports regional business from start-ups to more established companies. They also support individuals as well as registered companies as they recognise that the sector is very diverse. Therefore support ranges from “Pre start and start up support in partnership with Tribal Creative Launchpad” to “Business Diagnostic at transactional, intermediate and transformational levels- with a specialist creative business advisers”

Business Link has supported a number of music projects in the region and continues to do so through specialist consultancy support in areas like graphic and web design, PR, marketing, branding and financial planning as well as business advice, guidance and training needs analysis.

**Learning and Skills Council (LSC)**

During my conversations with industry professionals the discussion often touched upon education and how many small businesses and sole traders want to find ways to engage with colleges and other educational providers. The desire to link up is also expressed from the educational groups that I talked to. However, how this might occur and what it might lead to is unclear. This is because there is a nervousness around two things. Firstly SMEs and freelance workers are concerned about their

---

10 Business Link West Midlands Presentation March 2008
capacity to engage either in their own training or the training of others in work based learning initiatives. The colleges and education sector are often so busy delivering their outcomes that they have little time left to properly engage and consult with employers.

In the West Midlands the LSC has undertaken an innovative piece of work designed to match up their provision better to the needs of employers in the Creative sector. The Creative and Media Balance Sheet Review and Action Plan comes out of some employer consultation undertaken between July 2007 and February 2008 in the region and looks at all the creative industries.

The report looks at the gaps between education provision and the needs of employers in the industry. A number of areas have been highlighted for action including the need for “Real world work-related learning”. The report recognises the issues surrounding SMEs and freelancers being able to support this kind of learning in collaboration with schools and colleges and suggests some ways forward. In addition the report suggests that we must “Challenge employers to be more proactive in influencing the provision they need” so that it can be more fit for purpose.

The Screen, Image and Sound cluster is noted in the action plan as a key partner in developing some of the work and it is envisaged that The Audio and Music Programme of Activities could also play a role in this.

Colleges will also be encouraged to be more outward facing when the LSC undertakes its ‘Framework for Excellence’ review in 2008. This review process will look at three areas: Finance, Quality and finally Responsiveness which will encourage colleges to respond more to local employers’ needs as well as those of their students.

Creative and Cultural Skills, Sector Skills Council
Creative and Cultural Skills (CCSkills) are developing a number of projects aimed at supporting those in the creative industries. These include Creative Choices – a career advice programme for people in the industry; Creative Knowledge Lab – a portal of Creative Industries information and the National Skills Academy based in Thurrock with regional delivery partnerships called ‘spokes’.
The National Skills Academy has a very active group currently positioning itself as the ‘spoke’ for the West Midlands. The Midlands Offstage Skills Consortium (MOSC) comprises a good number of theatre technical managers who have come together to work with the CCSkills to develop the local activities. However there is a shortage of music venues and technicians represented on this group. In the case of the larger subsidised theatres, there is usually a technical manager who can make it part of their job to attend the MOSC meetings. However, the music venues, many of whom are smaller do not tend to have the capacity to send technical staff (who are often contract only) to these meetings and so music venues are underrepresented.

There is a need for a project like The Audio and Music Programme to broker these relationships to make sure that music venues and technicians do not miss out on this opportunity.
Recognise and encourage what the industry can do for itself

Much of the frustration documented in both the Digital Central Music Industry Interviews and in my consultation seems to centre around the idea that in the West Midlands at least, the industry has done itself a disservice. Projects, organisations and alliances have formed in recent years and created a level of negative politics through very public ‘falling outs’ and a general sense of missed opportunities.

Having said all of that there are many ‘key players’ who have not got involved in any of this activity and have just got on with the day job. From talking to many people in this category I get a sense that they don’t feel that there is currently a regional or local body that they can sign up to or that they feel represents their needs.

It is not the scope of this study or appropriate for me to unpick how this situation came about in this document. The important thing is now to look forward to how the industry can represent itself better and therefore make the most of the opportunities that exist.

*If we really are an industry – then it can’t be all about public funding*

I believe that there are a good number of talented people in the region. Almost everyone I have talked to and come across in the course of this report is passionate about music and wants opportunities to fulfil the potential of their work. It is time to direct this passion and energy into a joint vision where the industry contributes its expertise and energy, and individual companies and sole traders can see their own needs and aspirations supported too.

As the job of selecting a group of people to ‘represent’ everyone is proving so difficult, maybe there is a way of forming a working coalition amongst the industry that brings together the active innovators in the region.

It is important that any new project consults with the organisations that already exist to support the music industry locally like Music West Midlands as well as working with national bodies like the Association of Independent Music (AIM) and BPI. This should be to learn from what has gone before and to find ways to involve the widest range of people in the project where appropriate.
The **Audio and Music Programme of Activities** although in itself is associated with a small amount of investment from AWM, could be the opportunity that the industry takes hold of and ensures that it is not missed.

To do this three things need to happen:

1. The industry needs to feel ownership of the project so that it can benefit from the extensive experience and energy of those in the sector in the region
2. The project needs to engage with the public sector and act as a broker for the music industry helping to break down barriers and communication problems that currently inhibit good relationships
3. The project needs to set out with manageable delivery targets, to share these with those in the industry and to report on these on a regular basis.

This way the project could ‘build [an] organic infrastructure’ as recommended by the Analysis of Creative Industries in the City of Birmingham written by Birmingham city council back in 2002.
Where the Audio and Music Project Fits in

The proposed **Audio & Music Programme of Activities** is therefore a small part of a complex regional music scene. It is important to start from this point to recognise that the project cannot fulfil every ambition that we have for the sector. However, I believe that it could fulfil an important co-ordinating role and provide the catalyst for greater success in the sector.

Defining a joint vision with the relevant local, regional and national agencies who have a role in developing the music industry

‘**Public funds should not subsidise music-related economic activity, but should be selective investment in creating and spreading knowledge, promoting innovation, and strengthening interrelationship and synergies between a regionally-based partnership**’

Through review of the work of Digital Central and a number of interviews with music industry professionals and local government agencies, and by reviewing the literature on the music industry in the region and beyond, there are 4 recommendations that rise to the surface:

1) Create all activities with a longer term goal in mind
2) Information flow and dissemination
3) Networks, Mentoring and Learning
4) Raise the Profile of the West Midlands and its Music

In the next few pages I will outline the ways that these areas may be tackled by **The Audio and Music Programme of Activities**. The list of suggestions comes directly from many of the interviews I conducted and attempts to reflect areas of consensus. Bids to deliver **The Audio and Music Programme of Activities** may suggest alternatives to these but should aim to fall under the four headings above.

---

11 Tim Wall (2006), Making Money Out of Music
4 key themes to be delivered by the **Audio & Music Programme of Activities**

1) **Create all activities with a longer term goal in mind**

It may seem inappropriate to put this in as a project recommendation and at the top of the list! This is here because there is almost no point in AWM funding the Audio and Music Programme of Activities if this is not a central feature of the work.

Much of the scepticism from the sector towards publicly funded projects is based upon a history of projects that have come and gone with no opportunity to demonstrate a long-term impact on the sector from which businesses and individuals can experience tangible benefits.

This is not to say that all projects have been unsuccessful. The Online Music Project and the Managing Music Course both funded by the Learning and Skills Council were very successful and amongst those individuals who undertook those programmes there are number of long term success stories. However what these projects had in common with those that didn’t work was the fact that they had no exit strategy and that although individuals involved in the project continue to offer some of what was delivered (mostly from their own goodwill) there has not been any sustained support allowing their success to be replicated and available to a wider cohort.

Therefore the Audio Programme of Activities should:

i) Work with the sector to unlock its latent capacity to help itself

ii) Develop key strands of activity only where there is commitment from established agencies and organisations
2) Information flow and dissemination

Information and access to it came up in almost every interview I conducted. Although the information people need to thrive in the sector is all out there on the Internet, the information does not present the necessary local relevance.

This might include:

i) A web presence that builds upon the current digital central website but that focuses on Audio and Music.

Elements that could be built upon:
- Dave Harte’s Digested Read (Brilliant!) – another idea came from the minutes of one of the Digital Central user groups was a music industries Research Database, up-loadable by third parties
- A dynamic ‘ask the expert’ section – where people who are mentors on the programme (see below) could respond to questions online.
- Information about opportunities in the music and audio world – including job opportunities, open tenders and funding opportunities and awards.

Elements that could be added:
- Career information and video interviews with people talking about their careers.
- Information about industry events – partnerships with AIM, BPI, MU etc. This would cover both national and international events on a calendar and would allow those who attend the chance to review the experience.
- Database of contacts in the region and beyond – this could be an online database up-loadable by the industry themselves.

ii) Events/master classes/ mentoring and coaching

It is recognised by those I interviewed that people have a variety of ways that they like to take in information. Some would use a web resource as outlined above, extensively, while others would like to have one to one contact with a mentor or coach (see below) and some enjoy going to events to hear speakers and ask questions.
Therefore there is a need for **The Audio and Music Programme** of activities to have some sort of event calendar that offers master classes and seminars on topics of interest. Topics suggested during this process include: music law, online music and live promotion and marketing. However these could be identified once the project is running and could complement and be followed up by topics at the Annual Conference (see below).

iii) Disseminate knowledge on the rapid technological changes and increasing global markets

This may be through the website, events and bespoke advice and guidance and may be based on specific market needs (e.g. exploiting mobile downloads).

The **Audio and Music Programme of Activities** could create alliances between sectors (e.g. computer games and music) and might also build on the work of the ‘Music for Media’ project at Birmingham Conservatoire and the **Online Music Project** funded by the LSC.
3) Networks, Mentoring and Learning

The need for different groups to network, to find out what other people do and learn from their experience, seems to be a key issue for the industry. Many people in music businesses feel isolated and work within a very small group of colleagues. Much of the rivalry and negative competitiveness that we experience in the local industry arises from miscommunication and misunderstandings about what competitor companies do due to lack of contact. There is a need to encourage greater networking and collaboration.

This might include:

iii) Working to supplement the work of Birmingham Music Network and the MU in developing active networks in each sub region

In the first instance this may not involve setting up new networks, but supporting those that already exist by promoting them and adding value where appropriate. For example this may simply include staff from The Audio and Music Programme of Activities making a point of being present at the network meetings. Representatives of BCU and the MU have done this with Birmingham Music Network and this has boosted the meetings tremendously. This also might include offering to provide guest speakers for the meetings to help generate new attendees.

The Musicians’ Union has now started new monthly network meetings in new areas of the region like Stratford and Stoke. These are being branded ‘Network Musician’ and are open to all in the industry regardless of MU membership. They will run along the same lines as Birmingham Music Network but the MU will invite guest speakers to informally present to widen the range of debate. The Audio and Music Programme of Activities should work with the MU to enhance these activities.

iv) Setting up formal and informal mentoring relationships in the sector and across the region

The industry has a number of very experienced practitioners, some successful and innovative mid career operators and many entry-level companies and freelancers. There are models of good practice in business coaching that could be applied to the music sector where mentors can be paired up with mentees for a contractual amount of time. Pairings can be based on a range of criteria
depending on what it is the mentee needs support on. A good scheme would pair people up who have lots in common as well as those who come from very different perspectives and differing parts of the region.

There are a number of good mentoring schemes in place in other sectors (Birmingham Future has one for the professional services sector) from which the guidelines for a music industry mentoring scheme could be modelled. Mentors and mentees could commit to meeting quarterly for one year with the support of the **Audio and Music Programme** after which the decision to continue would be theirs.

v) Fostering greater links between industry and the education sector. This would include the creation of a dynamic ‘ask an expert’ section on the website (see above) that connects mentors and education establishments with industry.

The project could also be a valuable broker between the National Skills Academy project and industry partners. In particular, small music venues that have not been able to engage with the development of the regions’ spoke (now called Midlands Offstage Skills Consortium or MOSC) can be brought in to see how they might be involved with the delivery of some of the work or benefit from the trainees as the project evolves.

With the Creative Apprenticeships starting in the region in Autumn 2008, there will be a need for more music employers to get involved in the work-based learning element of the scheme. **The Audio and Music Programme** could be kept well informed of the opportunities for engagement and actively encourage local music organisations to partner with those delivering the apprenticeships.

vi) Working with Business Link and other partners to provide access to the full range of business skills support
It is important that **The Audio and Music Programme** does not duplicate the business support that is already on offer in the region. Business Link West Midlands already partners a number of agencies and consultants to deliver its support to local music companies and so **The Audio and Music Project** should work in partnership with Business Link to develop this where appropriate.
4) Raise the Profile of the West Midlands and its Music

Almost universally those who were interviewed agreed that in particular Birmingham, but also the West Midlands as a whole has a PR issue. This can be achieved in a number of ways:

iv) Support the region’s ‘best bets’ to raise their game
This programme would have a budget for investment that would support a small number of regional music projects/companies. The companies involved would already have a track record of success and making their mark on the music industry. The scheme would identify those who require some investment to take their company/product/project onto a more ambitious level.

The scheme could be modelled on similar schemes like the East Midlands’ Own Industry Scheme that provides advice and training for the ‘best bets’ but it would also provide some cash investment to help these companies develop a new ambition.

This scheme would not be for bands directly but would support the kinds of companies that themselves offer support to musicians through their work. This will in turn help to develop the region’s infrastructure for the long term which will create a better environment for musicians and music groups.

With the investment available through the Audio and Music Programme there is only limited scope for cash grants such as this. However the provider of the programme should look at ways that other investment might be attracted to the scheme to offer added value to the recipient companies.

v) Encourage, collaborate with or deliver a high profile conference on a national platform
Many of those interviewed cited the ambition for an annual conference in Birmingham that could draw in music industry representatives from around the world as well as being an important resource for local companies and freelancers. The aim of this would be to give an annual focus to the project where partners can get together, share their knowledge and celebrate successes on an international platform.
The conference would examine subjects that are pertinent to the industry each year, bring in high profile speakers from across the UK and the World, and attract delegates from other countries.

The conference would link to any seminars run during the year so that conversations that begin at the conference have a route for follow-up and further debate.

Links will need to be made with other similar events around the world to ensure that the conference punches at the same level as other established conferences within a short period.

vi)  *Positively* lobby for the sector at the highest levels

The **Audio and Music Programme** of Activities will need to pro-actively tell the good news stories of the region. The emphasis should be not to be to tell the good news stories of the **Audio and Music Programme** but to offer its backing to existing music projects and companies and highlight their work as illustrations of the region’s success. This will mean investing in some PR support but also taking the time to understand who in the region are the best advocates for the music industry.

From research undertaken by Digital Central and my own interviews it is clear that fostering a good relationship with local media and radio is more than a PR job. Relationships need to be fostered possibly through some targeted, media-only events, and regular contact perhaps through an e-bulletin just for media professionals that highlights the success of existing media partnerships.

The **Audio and Music Programme** should ensure that it positions itself well with all the public sector agencies so that it can promote the work of the region’s organisations. Again it will be important for the project to not simply lobby for its own position but that it transparently connects the good work going on in the region to the decision makers in the agencies and in government.
vii) Work with UKTI and other agencies to develop an overview of the international events where opportunities to promote the region can be exploited.

The topic of international events came up in many of the interviews with industry specialists and this is an area where Digital Central has had some success so far. Support needs to be on offer for a range of events as different music businesses have a variety of motives for travelling to conferences and showcases.

The most experienced companies who have been travelling to events such as these for some years (SXSW, MIDEM, WOMEX etc) all identified that other major cities such as Manchester and Liverpool put on city showcases at many of these events. It was acknowledged that these showcases may not necessarily be instrumental in boosting the careers of the bands involved but do send out a bold statement to the international music community about those cities.

It also takes companies more than one visit to international events before they begin to make full use of the opportunities available to them. It was suggested that those who are experienced in certain events (e.g. Capsule and SXSW) might be able to take on a mentoring role with new companies so that they can get the most out of their first trips.

The Audio and Music Programme needs to examine how its support for the region to be represented at international events can enhance the support already available from UKTI and other agencies.

viii) Support showcasing at the highest level

There are a number of excellent live music promoters and music festivals in the region that need strategic support to raise the profile of the region and its musicians even further. There is a festival strategy being written by AWM, Arts Council West Midlands and Birmingham City Council to look at an overarching approach to events in Birmingham.

The Audio and Music Programme could look at how these events and others in the region can be supported to have greater impact on the image of the region and its music. One way would be to work with partners to develop a regional
market brand as a cultural music tourist destination by celebrating the region’s heritage (Heavy Metal, Reggae etc) and capitalising on its world music credibility.

Another way to do this would be to work with partners to create a calendar of events in the region that shows how many high quality events go on in the region and makes it easier for visitors and music fans to find access to information on key events.

Underpinning all these actions are the following core principles that come out of the learning of the music work of Digital Central and other music sector support projects:

1) The work needs clear strategic objectives from the outset and needs to stick to them.
2) The project needs to consult with, listen to and involve the sector at all times – BUT only to steer the outlined objectives and with a tightly defined remit.
Exit Strategies/Beyond 2011

As I have outlined above, the Audio & Music Programme of Activities should be compelled to work on its exit strategy from the outset of the project. This should be a core component of the work delivered and not simply planned in the final year.

There are some important ways that AWM could ensure that the Audio & Music Programme of Activities is an investment in the longer term development of the region, rather than a one off project with limited impact:

1) Ensure that the project provider(s) create a formal link and set of understandings with other local, regional and national agencies. This would position the project as a broker of good relationships with agencies – not just for funding reasons but also to inform longer-term policy developments.

2) Create the information resources and networks that can be ongoing beyond the 3 year project by building in long term partnerships that will commit to supporting the projects as part of their core mission.

3) Focus the project on developing the capacity and profile of the region’s key music organisations so that they are stronger and more able to support themselves once the project ends.
### Appendices

#### Appendix 1

Those consulted during the writing of this report:

<table>
<thead>
<tr>
<th>Name</th>
<th>Organisation/Role</th>
</tr>
</thead>
<tbody>
<tr>
<td>Arthur Tapp</td>
<td>Catapult Club Live Music Promoter</td>
</tr>
<tr>
<td>Geoff Dolman</td>
<td>Static Caravan Record Label</td>
</tr>
<tr>
<td>Lisa Meyer</td>
<td>Capsule Live Music Promoter</td>
</tr>
<tr>
<td>Jenny Moore</td>
<td>Capsule Live Music Promoter</td>
</tr>
<tr>
<td>Jon Cotton</td>
<td>Artisan Studios Producer</td>
</tr>
<tr>
<td>Soweto Kinch</td>
<td>Soweto Kinch Productions Musician</td>
</tr>
<tr>
<td>Paul Birch*</td>
<td>Revolver Record Label</td>
</tr>
<tr>
<td>John Mostyn</td>
<td>Three Ones Music Agent and Manager</td>
</tr>
<tr>
<td>Geoff Pearce</td>
<td>Three Ones Music Agent and Manager</td>
</tr>
<tr>
<td>Phil Savage</td>
<td>Major Key Studios Sound Engineers/Tutor</td>
</tr>
<tr>
<td>Bal Kumar</td>
<td>Realtone Records Venue Owner</td>
</tr>
<tr>
<td>Ken Banks</td>
<td>Major Key Studios Recording Studios</td>
</tr>
<tr>
<td>James Burkmar</td>
<td>Music Industry Consultant</td>
</tr>
<tr>
<td>Markus Sargent</td>
<td>Glee Club Live Music Promoter</td>
</tr>
<tr>
<td>Andrew Dubber</td>
<td>BCU Director of Music Industries</td>
</tr>
<tr>
<td>Jason Hunt</td>
<td>Clarion Events Music Exhibition Organiser</td>
</tr>
<tr>
<td>Andy Derrick</td>
<td>Musicians Union Musician</td>
</tr>
<tr>
<td>Cllr Hendrix</td>
<td>Birmingham City Council Councillor</td>
</tr>
<tr>
<td>Boogie Dave</td>
<td>Drop Beats Not Bombs Live Music Promoter</td>
</tr>
<tr>
<td>Stef Lewandowski</td>
<td>Type Record Label</td>
</tr>
<tr>
<td>Simon Wales</td>
<td>Town Hall Live Music Promoter</td>
</tr>
<tr>
<td>Jim Ryan</td>
<td>Miss Moneypennies Live Music Promoter/Musician</td>
</tr>
<tr>
<td>Lara Ratnaraja</td>
<td>Business Link West Midlands</td>
</tr>
</tbody>
</table>

\* I would like to acknowledge assistance from Paul Birch in gaining access to very useful BPI statistics to help inform this report.
<table>
<thead>
<tr>
<th>Name</th>
<th>Organisation</th>
<th>Role</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dennis Seaton</td>
<td>Musical Youth</td>
<td>Musician</td>
</tr>
<tr>
<td>Anthony Hughes</td>
<td>Digital Central</td>
<td>Music Project Manager</td>
</tr>
<tr>
<td>Dave Harte</td>
<td>Digital Central</td>
<td>Project Manager</td>
</tr>
<tr>
<td>Robin Valk</td>
<td>Radio To Go</td>
<td>Consultant to the Radio Industry</td>
</tr>
<tr>
<td>Paul Cantrill</td>
<td>Birmingham City Council</td>
<td></td>
</tr>
<tr>
<td>Kevin Da Costa</td>
<td>Arts Council West Midlands</td>
<td>Music Officer</td>
</tr>
<tr>
<td>Mark Badger</td>
<td>Iron Man Records</td>
<td>Record Label/Tour Manager</td>
</tr>
<tr>
<td>Michael Ryan</td>
<td>Learning and Skills Council</td>
<td>Skills Development Manager</td>
</tr>
<tr>
<td>Bob Ramdhanie</td>
<td>Black Voices</td>
<td>Manager/Recording Studios</td>
</tr>
<tr>
<td>Dutch Van Spall</td>
<td>Big Help Music</td>
<td>Music Manager</td>
</tr>
</tbody>
</table>

+ thanks to those who wrote Digital Central Music Consultation Papers

Bibliography


Creative Options Consultancy (2008), Music Mapping: Staffordshire and Stoke-on-Trent Appendix: District by District Mapping

BPI (2008), Monthly Report January

BPI (2008), Monthly Report February

IFPI (2008), Digital Music Report

Sir Brian McMaster (2008) Supporting excellence in the arts - from measurement to judgement


IFPI (2007) The Recorded Industry in Numbers

Paul Birch, Music West Midlands


CCSkills 2006, The Footprint, A Baseline Survey of the Creative and Cultural Sector

Tim Wall (2006), Making Money Out of Music

Andrew Dubber (2007), 20 Things you Should Know About Music Online

Simon Harper (2007), Music Matters A Regional Profile

Bhangra in Birmingham, An Introduction to Birmingham as the International Capital of Bhangra


Mintel (2007), Report on Live Entertainment


Birmingham City Council (2008) Tender Brief - Feasibility Study For Festivals and Large-Scale Arts Events


Birmingham City Council (2002) Analysis of Creative Industries in the City of Birmingham


Paul Birch (1999) Creating National competitive advantage through Knowledge
Useful Websites

- Digital Central: www.digital-central.co.uk
- Advantage West Midlands: www.advantagewm.co.uk
- The BPI: www.bpi.co.uk
- IFPI: www.ifpi.org
- PRS Foundation: www.prsfoundation.co.uk
- Strategy – The Digested Read: www.strategydigested.blogspot.com
- Canada Music Fund: www.pch.gc.ca/progs/fmusc-cmusf/music_fund_e.cfm
- Own Industry: www.ownindustry.co.uk
- Generator: www.generator.org.uk
- MDA: www.mmda.org.uk
- Department of Culture Media and Sport: www.culture.gov.uk
- Learning and Skills Council: www.lsc.gov.uk
- Creative and Cultural Skills: www.ccskills.org.uk
- Business Link: www.businesslink.gov.uk
- Arts Council: www.artscouncil.org.uk
- The Musicians’ Union: www.musiciansunion.org.uk