
IFACCA D'ART REPORT N^o 27

Major Performing Arts Organisations: A Review of the Issues for Funding Agencies

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Major Performing Arts Organisations: A Review of the Issues for Funding Agencies

EXECUTIVE SUMMARY

From the early 1990s, governments have showed increasing interest in major performing arts organisations. Initially this was focussed on improving their financial stability and viability, but more recently, governments' interests have broadened to include artistic and access issues and the management of the relationship between government funders and the organisations.

However, despite governments' growing interest in, and attention to, the major performing arts sector, little international comparative data was available on major performing arts organisations and almost no documentation on the relationship between government funders and these organisations – the variety of support mechanisms, expectations and evaluation requirements.

These circumstances provided the impetus for IFACCA and the Australia Council for the Arts to undertake a significant international research project from 2006 to 2008 to explore issues relating to government support for major performing arts organisations.

There were three elements to the project, two questionnaires seeking input from IFACCA members on their major performing arts organisations and their funding relationships with them and a mini-summit on government support for the sector. The mini-summit shared information on challenges faced by governments and their major performing arts sectors and identified ways to address the challenges and strengthen governments' funding partnerships with the sector.

There was broad geographic input into the project. A total of 71 people from 28 countries (located in Africa, Asia, the South Pacific, the Americas, and Europe – including all of the United Kingdom) contributed to the data collected and/or to the mini-summit.

Analysis of the questionnaire responses provided clear information on the nature of the organisations considered by the responding countries to be major performing arts organisations. They are generally large, have high turnovers, are expensive to run and possess artistic, state-related or historical significance. They are spread across the art forms of dance, music, opera and theatre, with a preponderance of music and theatre organisations and are based almost entirely in major cities (with populations exceeding 1 million), although not solely in capital cities. The major performing arts organisations in the countries that participated in this project include some of the world's most significant performing arts organisations and all participating countries regard their major performing arts organisations as having an ongoing pivotal role in the cultural life of their country.

The questionnaire research also indicated that the majority of responding countries support at least some of their country's major performing arts organisations through their national arts support agency and that these organisations often receive the majority of the country's government funding in the performing arts.

Almost all of the countries that participated in the project expect their major performing arts organisations to achieve higher artistic standards than other funded performing arts organisations. The most significant roles identified for major performing arts organisations were setting artistic standards for their country's performing arts sector and representing their country internationally.

This project has shown that countries differ in how they fund and monitor their major performing arts organisations, but, despite this, the major performing arts organisations and their governments are facing common issues, such as models for interaction between major

performing arts organisations and the broader sector; accessing philanthropic support; the impact of digital technology on the sector; leadership and governance of the organisations; and assessing artistic quality. The mini-summit demonstrated that there is potential value in continuing to share information on such issues.

Major Performing Arts Organisations: A Review of the Issues for Funding Agencies

INTRODUCTION

From the early 1990s, there has been increasing interest from governments in major performing arts organisations. Initially, this reflected concerns about the financial viability of these companies. A number of inquiries and initiatives were undertaken by governments and/or philanthropic foundations in the United Kingdom, North America, Australia and New Zealand to identify contributing issues and develop and implement programs to stabilise the companies (see Appendix 5). This work generated broader general interest in the sector and more recently the focus of concerns has widened to encompass artistic and access issues.

These developments provided the impetus for a significant research project undertaken jointly by IFACCA and the Australia Council for the Arts from 2006 to 2008 to explore issues relating to government support for major performing arts organisations. The project had three distinct elements:

- IFACCA's 27th D'Art question, posed jointly by IFACCA and the Major Performing Arts Board of the Australia Council for the Arts in 2006;
- a more detailed survey of IFACCA members on their major performing arts organisations and government support mechanisms for this sector in 2007; and
- a mini-summit, hosted by IFACCA and the Australia Council for the Arts in Adelaide, Australia in February 2008 on support for major performing arts organisations.

The D'Art question in August 2006 sought to find key personnel in national arts councils and ministries of culture with responsibility for policies, programs and initiatives that supported major performing arts organisations and to initiate a research program that would inform a mini-summit in Australia in 2008 on support for major performing arts organisations. Agencies from 15 countries responded to the question and a Preliminary D'Art report, issued in June 2007, summarised the data provided - exploring the parameters used to define major performing arts organisations and the key issues that were identified for these organisations. The report is reproduced in Appendix 1.

The more detailed survey distributed to IFACCA members in September 2007 aimed to develop a global snapshot of the major performing arts sector and government support mechanisms for the sector. Responses were received from 13 countries (see Appendix 2.1).

The mini-summit held in Adelaide, Australia, on 26 to 29 February 2008 focussed on support for major performing arts organisations and issues impacting the sector. Thirty delegates from 15 countries attended (see Appendix 3). Their discussions were based on the data gathered through the D'Art question and the survey and on input from the guest speakers who included Carrillo Gantner, President of the Victorian Arts Centre Trust, Robyn Archer, singer and public advocate of the arts, Peter Steidl, Director of Strategy Lab, JWT and Louise Walsh, Director, Artsupport Australia. A report on the mini-summit was distributed to IFACCA members in April 2008. Issues discussed at the mini-summit are listed at www.ifacca.org/ifacca_events/support-major-performing-arts-organisations.

This report brings together the three elements of the research project on the major performing arts sector: the 2006 D'Art question, the 2007 survey and the 2008 mini-summit. It provides a synthesis and overview of the key issues and dilemmas that were identified in the survey responses and in the mini-summit discussions. The report has been drafted by Jackie Bailey, with editorial assistance from Christopher Madden, and additional overview and analysis by Dr Catherine Brown-Watt PSM.

Contents of the report are:

1. Analysis of findings: The main body of the report provides an analytical synthesis of the key issues and findings arising from the project, including the discussions at the mini-summit. Topics range from the theoretical to the technical, including definitions of the sector, interdependencies and dynamics in the sector's 'ecology', the impacts of digital technology and philanthropic trends, leadership and governance, and the assessment of artistic quality.
2. Detailed data and analysis of responses from the two research elements of the project:
27th D'Art question: The Preliminary D'Art Report released in June 2007 provides a framework for approaches to defining 'major' performing arts organisations, and sets out the key issues for the sector identified by the respondents to the original D'Art question (Appendix 1).
Detailed international 'snapshot' survey: Appendix 2 provides a digest and analysis of responses to the survey distributed in September 2007. The digest provides information from 13 countries on the major performing arts sector in their country and government's role in the sector.
3. Contributors: There was broad geographic input into the research project, through IFACCA members from Africa, Asia, Europe (including the United Kingdom), North, South and Central America and the South Pacific. In all, 71 people from 28 countries contributed in some way to the project. They are listed in Appendices 1.1, 2.1 and 3, and a summary of the countries represented is at Appendix 4.

For convenience, a list of resources referred to in this report is provided at Appendix 5. However, most of these resources, and this report, can be found online at IFACCA's topic page, which is updated when new publications, news and events on the topic become available. The page is at www.ifacca.org/topic/support-for-major-performing-arts-organisations/. As always, we welcome any comments or additions to this report at info@ifacca.org.

ANALYSIS OF FINDINGS

This section provides an analytical synthesis of the key issues arising out of the research project, including the discussions at the mini-summit held in Adelaide in February 2008. The project has shown that the majority of governments from the 28 contributing countries around the world support at least some of their country's major performing arts organisations through their national arts support agency. However, it has also revealed differences in the major performing arts sectors across these countries and variety in the approaches and models used in the delivery of government support. The analysis here focuses on some of the key common issues identified through this project.

What is the 'major performing arts sector'?

The term 'major performing arts' (MPA) in this report comes from Australia, where it is used to refer to a group of 28 performing arts organisations that fulfil certain key roles: they are national flagship organisations; they are flagship organisations for the state in which they are based; they are specialist repertoire companies; or they represent Australia internationally. These companies receive ongoing base funding grants¹ and the Australian and State governments have structured their funding programs according to which category a company falls into.

However, as the definitions outlined in the Preliminary D'Art Report at Appendix 1 indicate, different countries adopt different approaches to defining the group of significant or special performing arts organisations in their country, including size, types of products, and institutional or historical factors.

For simplicity, this paper adopts the Australian terminology of 'major' performing arts organisations (MPOs) to represent the various definitions. A 'major' performing arts organisation can be thought of simply as playing a vital role in the nation's arts ecology and national identity.

The primary product of MPOs is live performance.

Key costs for MPOs are:

- performers, including guest performers
- production costs (creative artists, sets, costumes, rehearsals, technical crew)
- venue costs
- marketing
- administration/infrastructure
- artform development and innovation
- artist training
- education and access programs

Key revenues are derived from:

- earned income: box office, performance fees (including touring), rentals of productions
- government grants
- private sector income: sponsorship, philanthropy
- cross-subsidisation: merchandise, recording contracts, distribution, broadcasting.

Funding levels for major performing arts organisations

MPOs are generally large, have high turnovers, are expensive to run, and possess artistic, state-related or historical significance. As a result, these organisations often receive a large proportion of public arts funding. In 8 of the 11 countries that provided information in the 2007 survey on their MPOs' share of their total performing arts sectors, MPOs receive the

¹ www.australiacouncil.gov.au/about_us/artform_boards/major_performing_arts_board

majority of government funding to the performing arts (see Appendix 2, Table 4). In Australia, the MPA companies receive approximately half of the entire funding for all artforms that is administered by the Australia Council for the Arts, the national government's arts funding agency.

Challenges for governments in funding major performing arts organisations

Given their status and perceived value, some MPAOs assume that government funding is unquestionably secure. The challenge then faced by arts funding agencies is management of the funding relationship with the companies and management of public expectations of their role within the arts ecology. Issues that arise include:

- What leverage do funding agencies have to encourage the companies to improve their accessibility or relevance to the broader populace, or their artistic currency, innovation or vibrancy?
- Given MPAOs' significant level of public funding, how do funding agencies measure and ensure 'value'?
- How do funding agencies support the growth of smaller companies into 'major' performing arts organisations?
- How do funding agencies support a major company's transition to a smaller company, if that becomes appropriate?

Attendees at the February 2008 mini-summit identified a number of related and more detailed issues of interest, including:

- The 'balancing act' required by government agencies to ensure that MPAOs both preserve the traditional 'canon' and provide opportunities for the creation of new and innovative work. (The nature of the repertoire presented by a performing arts company affects its financial dynamics, with new and lesser-known works generally attracting smaller audiences. Choice of repertoire is therefore inevitably linked to the challenge of balancing income and expenditure – often referred to as 'the challenge of the repertoire model'.)
- Models for interaction between major performing arts organisations and small to medium organisations for mutual benefit
- The potential impact of digital technology on arts organisations, including major performing arts organisations, and on audiences
- Growth in individual philanthropy and ways in which arts funding agencies can help channel funds towards the arts
- Leadership and governance, and the skill requirements of managers and boards of arts organisations, particularly major performing arts organisations
- Assessing artistic quality and supporting organisations to conduct artistic self-assessment

The next sections look at these issues in greater detail.

The 'balancing act': preserving the traditional canon versus new and innovative work

Major performing arts organisations operate across a range of artforms: dance, opera, theatre and music. They generally include a nation's largest and most traditional artform companies, such as orchestras, opera and ballet companies. These organisations face significant challenges in relation to balancing heritage and new works as can be seen in a Sydney newspaper article in October 2007 that accused Australia's symphony orchestras of failing to perform original work and being very large and expensive 'cover bands'².

Many funding agencies, therefore, monitor the balance between the performance of traditional works and the development and performance of innovative works by living composers, choreographers and playwrights, for their nation's MPAOs. They require the

² Westbury, M., 'Mozart Cover Bands Rake in the Moolah', *Sydney Morning Herald*, 18/10/ 2007.

MPAOs to report on the number of new works they present and/or how many new and emerging artists they use. Questions still arise, however, in regard to appropriate benchmarks for the number of new works and emerging artists for these organisations.

In many instances, it will be the funding agency's macro-view which provides an answer to this question. Agencies can consider whether the MPAO sector *as a whole* represents a balance of traditional and new artworks. Further, agencies can look at whether the MPA sector contributes its own unique offering of traditional and new works to the larger performing arts sector. At the individual organisation level, funding agencies can consider whether each organisation is doing enough to keep its artistic agenda dynamic, its performers motivated and its audiences in continued or growing attendance.

Models for interaction between small and large organisations

MPAOs can be viewed as part of a performing arts 'ecology,' both within each country and globally. A healthy performing arts ecology will include vibrant large and small performing arts companies and individuals, fulfilling different roles across the artforms and catering to a variety of audiences. Often, MPAOs can benefit from interaction with the smaller sector and vice versa. In many countries, the smaller arts organisations have greater flexibility to experiment and innovate, and they originate many of the new works in the performing arts sector. Partnerships between MPAOs and smaller companies can give MPAOs access to innovative work and artists. There are benefits for both - for example, exposure of both companies to the artistic and production practices of the other, and increasing the potential audience reach of both.³

Models of interaction used in the IFACCA member countries include:

- Co-productions and co-commissions, with an emphasis on creative equality
- Mentorships – formal and informal
- Artistic exchanges (between directors, designers and other key creatives)
- Networking and informal support such as prop-sharing, providing inexpensive or free rehearsal space, lending dramaturgical support
- Seeing each other's work
- An MPAO auspicing a smaller organisation, hosting them or even incorporating them into the MPAO's mainstage program under the MPAO's brand name. This model is used by Malthouse Theatre in Australia, which views itself as a creative hub for the small-to-medium sector.

The potential impact of digital technology on arts organisations and on audiences

Continuing advances in digital technology will affect the MPAOs and require changes in the way they currently do business. Internationally, performing arts organisations are making advances in using digital technology to deliver live performance, raise revenue, extend access and reach, build audiences, and deepen customer relationships.⁴

Digital technology is being used to alter the cost-profit formula of performing arts organisations. In the past, MPAOs have been limited in realisable profits because of their high fixed costs and limited hall sizes. With the advent of high definition digital distribution of performances to cinemas and via the Internet, some MPAOs are seeking to change this formula through mass distribution. For example, the Metropolitan Opera, New York is leading the way in high definition, digital simulcasts of productions. Its worldwide program of cinema broadcasts attracted more than 920,000 people during the 2007-08 season, as well

³ Australia Council for the Arts, 2008, *Interconnections and the Creative Workforce in the Australian Theatre Sector*, Australia Council for the Arts, Sydney.

⁴ Australia Council for the Arts, *Don't Panic: The Impacts of Digital Technology on the Major Performing Arts Industry*, Australia Council for the Arts, Sydney, 2008.

as higher attendances at its own live performances, higher subscriptions and increased donations.⁵

Areas of main impact include:

- An increase in the number of people experiencing the live performance digitally
- Using digital technological advances in managing arts companies of the future
- Digital marketing strategies
- Deepening customer relationships
- Cross-subsidisation (recordings)
- Online educational products
- Digital archives
- Digital technology in the production and augmentation of the live performance

In the wake of digital technology, there is also scope for organisations to build relationships with the screen and new media industries, for example, in training performing arts directors and designers to take the videography of a performance into account when directing stage productions and in developing products for the Internet.

Growth in individual philanthropy and ways in which arts funding agencies can help channel funds towards the arts

The responses to the 2007 survey suggest that countries differ in terms of the levels of philanthropic funds that make up the balance of MPAO income. There is a strong tradition of public funding for the arts in Europe, for example, compared to the majority of non-earned income being sourced from private philanthropy in the United States. In Australia, MPAOs receive approximately 35 percent of their funding from government, with a high reliance on box office income for ongoing sustainability (see Appendix 2, Table 6). Mini-summit attendees agreed that individual philanthropy was an area of potential growth in their countries as a means to boost MPAO income.

Ways in which funding agencies can support MPAOs to obtain individual philanthropy include support for new approaches to customer relationship management to make the most of an organisation's audience base, as well as the funding agency supporting a broker of philanthropic relationships. For example, the Australia Council for the Arts works with the Australia Business Arts Foundation which aims to connect companies with potential philanthropists as well as enhancing a culture of philanthropy. The Council has also established Artsupport Australia to work directly with arts organisations to increase philanthropic support. Its initiatives include a capacity building program that provides seed funding for philanthropy development staff positions within organisations, including MPAOs, and arranges mentorship support.

Leadership and governance, and the skill requirements of managers and boards of arts organisations

The issue of supporting MPAOs in the development of strong and empowered forms of governance emerged as a common imperative for government agencies. The majority of MPAOs amongst the survey respondents are either government bodies or not-for-profit/charitable organisations. Finland and Australia are the exceptions to this rule, with a number of institutions structured as private corporations with independent boards.

Leadership of an arts organisation is a complex task, requiring a special combination of vision, management skills, people skills and creativity. Managers of arts organisations have to balance artistic imperatives with meeting the 'bottom line'. Studies have shown that arts

⁵ See www.metoperafamily.org/metopera/broadcast/template.aspx?id=4668.

managers are generally deeply passionate about their organisations, but risk burn-out, and have often come into management positions without prior management experience.⁶

MPA chief executives need to ‘inspire large groups of diverse people to work together to deliver creative product, within tight budgets, to often unpredictable audiences.’ Desirable CEO capabilities include⁷:

- Personal leadership
- People skills
- Managing a complex network of stakeholders
- Moving the organisation forward, involving having a vision translated into practical plans
- Artistic knowledge and empathy with the arts
- Solid capabilities in basic business practices

The MPA environment requires that CEOs employ a range of leadership styles according to the circumstances as set out in the table below.⁸

Type of leadership	Characteristics	When this is suitable
Charismatic	The leader is visionary and inspirational, often the founder of the organisation	Times of crisis or when the organisation is new/emerging
Participatory	The leader heavily involves organisational members in leadership	Often suited to organisations with well educated and committed staff, but can slow reaction times of organisation
Transactional	The leader clarifies expectations and provides resources in return for efforts on the part of the employees	Operational management eg to get performances running and events managed.

Funding agencies, as a result, can play a key role in supporting MPAO managers through:

- the provision or subsidisation of management training;
- support for capacity building for potential leader successors, to support succession planning; and
- support for the development of a professional culture of management, through management networking events, high-level workshops and partnerships with leading national management training schools.

Other forms of support which funding agencies can provide include:

- support for boards of governance, such as briefing on the arts environment and tailored information on the stakeholder expectations for an arts organisation (eg private donors, public funders, subscribers);
- regular information on external environmental trends which may impact on organisations⁹; and
- research and strategic information to assist MPAO leaders to formulate decisions about the future (eg sector analyses, reports on new trends in the MPA sector).

⁶ Liteman, M., *Planning for succession: a toolkit for board members and staff of nonprofit arts organisations*, Illinois Arts Alliance Foundation, 2003;

Hoyt, K., *Succession planning and leadership development for chief executives in the major performing arts*, Report prepared for Major Performing Arts Board, Australia Council for the Arts, May 2006

⁷ Ibid.

⁸ From Cray, D., Inglis, L., and Freeman, S., ‘Managing the arts: leadership and decision making under dual rationalities’, *Journal of Arts Management, Law and Society* 36(4) 295.

⁹ AEA Consulting, *Anticipating Change in the Major Performing Arts Sector*, Australia Council for the Arts, Sydney, 2008.

Assessing Artistic Quality

One of the main issues facing funding agencies is how to conduct artistic assessment of MPAOs in a way that meaningfully measures value and artistic excellence.

At the least interventionist end of the spectrum, the Australian MPAOs conduct ‘artistic self-assessment’. MPAOs are asked to report on their method of assessment, including who their assessors are, and this is checked for robustness. Funding is not made contingent upon external assessments of companies’ artistic excellence, although funding agreements with the companies may require particular artistic activities, such as the commissioning of new works or support for artist development.

At the other end of the spectrum is third-party assessment. The Scottish Arts Council, for example, employs independent assessors to attend performances. Their assessments are publicly published on the Internet, and MPAO boards are given tools for discussion of artistic issues in an attempt to ensure more effective dialogue with artistic directors on artistic issues. Wales also uses assessors, who are agreed upon with the company, but are not paid. Canada uses 780 peer assessors who assess a company once every two years. The assessors are not appointed by government, but are selected as part of a jury process. They are identified by Canada Council staff from 16,000 applications per year. In England, the Arts Council itself used to conduct artistic assessments, but that system is under review following the McMaster report.¹⁰

In Chile, grant assessment is divided into two sections – technical assessment and qualitative assessment. In Korea, the government reviews funding applications annually using committees for each artform. In Singapore, the Minister appoints the Board members of the orchestras and similarly in Hong Kong SAR, the Arts Development Council attends company board meetings and appoints members to sit on the companies’ boards.

All agencies reported that finding the appropriate tool for artistic assessment of an MPAO was not an easy task. It can be difficult to allow a company the security of its funding, not subject to external artistic assessment, whilst also ensuring the ongoing artistic vibrancy of the sector. This is an area that may warrant further, cross-agency research collaboration.

CONCLUSION

This research project has confirmed the significance of the major performing arts sector and the important role played by MPAOs in many countries. The companies include some of the greatest performing arts organisations in the world. They present work of the highest quality, showcasing the best international artists to international audiences,

The research has also highlighted the challenges faced by government funding bodies in managing their funding relationships with these companies. Whilst management and governance of the companies has improved significantly in the last 10 – 15 years, more work needs to be done in this area. Other issues also need ongoing focus, including the role of MPAOs in stimulating and supporting the artistic development of their artform sector and the importance of MPAOs ensuring the broadest possible access to their work. IFACCA will monitor future research by its members on MPAO issues and upload the material onto its website at: <http://www.ifacca.org/topic/support-for-major-performing-arts-organisations/>.

¹⁰ McMaster, Sir Brian, *Supporting Excellence in the Arts*, Department for Culture, Media and Sport, England, January 2008.

Appendix 1: Preliminary report

D'Art report number 27: Support for Major Performing Arts Organisations: Preliminary Report on Definitions and Issues

Prepared by Trish Ludgate, Australia Council for the Arts, and Christopher Madden, IFACCA
Released June 2007

Introduction

This report summarises the outcome of IFACCA's twenty-seventh D'Art question, which was initiated jointly by IFACCA and the Major Performing Arts Board of the Australia Council for the Arts (www.ozco.gov.au/boards/major_performing_arts). The question was distributed on 30 August 2006. Context for the question is reproduced in Appendix 1.3.

The aim of the D'Art was to find senior executives in national arts councils and ministries of culture who were responsible for the coordination of policies, programs and initiatives that support major performing arts organisations in order to invite them to take part in a mini-summit in Australia in 2008 and to enlist their help in developing information resources for the mini-summit.

Twenty-one people responded to the D'Art request (listed in Appendix 1.1). Questions were completed by 16 respondents from 15 countries:

- Australia: Australia Council for the Arts
- Canada: Canada Council for the Arts and Council of Arts and Letters of Quebec
- Colombia: Ministry of Culture
- Cuba: National Council of the Arts and Sciences
- Finland: Department for Culture, Sport and Youth Policy
- France: Ministry of Culture and Communications
- Greece: Hellenic Culture Organisation
- Mexico: National Council for Culture and the Arts
- Namibia: Ministry of Youth, National Service, Sport and Culture
- New Zealand: Creative New Zealand
- Singapore: National Arts Council
- South Korea: Arts Council Korea
- Switzerland: Pro Helvetia (Arts Council of Switzerland)
- USA: National Endowment for the Arts
- Wales: Arts Council Wales

In addition to supplying contact details for the relevant senior executive, respondents were asked to provide the definition (if there was one) of major performing arts organisations used by their agency. Respondents were also asked to rank by order of importance a list of issues relating to the support of major performing arts organisations, and to identify any additional issues that they perceived to also be important. This report summarises the responses received.

Defining 'major' performing arts organisations

Respondents were first asked whether their agency had a formal definition of 'major' performing arts company. Figure 1.1 summarises the responses.

Figure 1.1: Does your arts council or ministry differentiate between 'major' performing arts companies and other companies that it supports?

Answer	No. of responses	Countries
Yes	10	Australia, Canada (National), Canada (Quebec), Cuba, Finland, Greece, Mexico, Namibia, Singapore, South Korea, Switzerland
No	5	Colombia, France, New Zealand, USA, Wales

Respondents were also asked to provide any definitions used. Most definitions adopted a number of different types of defining factors. Figure 1.2 provides a summary of the various factors sorted into broad categories (some categories are closely related or may overlap). A full list of responses by country is reproduced in Appendix 1.2.

Figure 1.2: Factors used to define a ‘major’ performing arts institution

Category	Factors	Defining variable	Country
Organisational factors	Financial indicators	Financially viable	Australia
		Preponderance of private and earned revenues	Canada (nat) ¹¹
		Increasing levels of financial support from the broader community	Australia
	Size	Annual income/turnover/budget	Australia, South Korea, USA
		Number of hired artists	South Korea
		Housed in a permanent building/physical structure, in that it implies large size	Colombia, Switzerland
		Audience/public attendances	Australia, Greece
	Significance	Number of performances per year	Greece
		Artists of national/international significance	Canada (nat)
		Programming makes a significant contribution to arts practice	Canada (nat)
Global nature of the actions of the large companies		Canada (nat)	
Ongoing commitment to the development of the artform and artists		Australia, Canada (nat)	
Activities and outputs	Range and type	Ongoing commitment to the development of artists	Australia
		Ongoing year-long programming of work	Canada (nat)
		Sustained commitment to infrastructure development	Canada (nat)
	Quality	Continuity and commitment	Greece
		Demonstrate the highest artistic standards in performances	Australia
		Artistic value	Greece
		Company board reflects national/international communities	Canada (nat)
Other	Political, legal or institutional	Act of parliament/Parliamentary mandate	Finland, Namibia
		National, state and university organisations	Mexico
		Determined at city and local government level	Switzerland
		History/precedence	Colombia, Singapore, South Korea, Wales

Policy issues

To help identify important topics for the agenda of the mini-summit, and to guide preparatory research for the mini-summit, respondents were asked to rank a selection of issues by order of importance. Some of the issues overlapped or were closely related. However, three topics clearly ranked as being of the highest perceived importance: financial viability and sustainability (including earned income); governance and leadership of major organisations; and measuring the impacts and/or value of major organisations.

¹¹ Note that the definition applied to organisations in all artistic disciplines only for the allocation of new funds in 2006-08 and is not used in the Canada Council's ongoing programs.

The full list of topics by ranked importance is:

1. Financial viability and sustainability (including earned income)
2. Measuring the impacts and/or value of major organisations
3. Major organisations' relationships with audiences and the general public
4. Governance & leadership of major organisations
5. Alternative funding sources and mechanisms such as corporate sponsorship and philanthropy
6. Evaluation & reporting of achievements and quality
7. Developing, managing & reviewing of contractual arrangements between funders and organisations
8. Programmatic and artistic freedom
9. Employment conditions and human resource management
10. Costs of venues and capital expenditures

Respondents were asked to provide up to two additional issues they perceived as important, or that the mini-summit could address. Additional topics suggested were:

- The relationship between major organisations and small-to-medium organisations (Australia)
- Capability development programs (Australia)
- Achieving an appropriate balance between funding to established or major arts organisations, mid-sized and emerging organisations (Canada)
- Repertoire and creation of new works (Canada Quebec)
- Artistic direction and 'donators' (Canada Quebec)
- Projects leading to Audiences Development: new audiences' inclusion, critic audiences (Colombia)
- Capacity to innovate artistic creation and programmatic skills (Colombia)
- Participation of companies in international festivals and international performance possibilities (Cuba)
- International exchange possibilities for directors, actors and other creatives, including relevant international conferences (Cuba)
- Promotion of innovation and the diversity of the creativity (France)
- Promotion/export in the international market for performing arts (Mexico)
- Strategies and mechanisms of promotion and dissemination (Mexico)
- Motivation/advocacy for arts to improve national budget allocation (Namibia)
- Emerging leadership and demographic changes in audiences (USA)
- The role of nurturing and developing talent (Singapore)
- The role of developing repertoire and content for the country (Singapore)
- Public arts and city rebuilding through arts and culture (South Korea)
- Shifts in audience participation and access to the arts via changing technologies (USA)

Appendix 1.1: Respondents, preliminary report

Responses to this D'Art question were received from:

- Guillermo Cortés, Instituto Nacional de Cultura, Perú
- Nicole Doucet, Conseil des arts et des lettres du Québec, Canada
- Mario Garcia Durham, National Endowment for the Arts, USA
- Michael Eakin, Arts Council England
- Retha Louise Hofmeyr, Ministry of Youth, National Service, Sport and Culture, Namibia
- Jinsoo Hwang , Arts Council Korea
- Georgia Iliopoulou, Hellenic Culture Organisation, Greece
- Monica Kanarek Mellado, Conaculta, Mexico
- Pius Knüsel, Pro Helvetia/The Swiss Arts Council, Switzerland
- Trish Ludgate, Australia Council for the Arts
- Jarmo Malkavaara, Arts Council of Finland
- Elaine Ng, National Arts Council, Singapore
- Benoît Paumier, Ministry of Culture and Communications, France
- Bárbara Elva Rivero Sánchez, Consejo Nacional de las Artes Escénicas, Cuba
- Clarisa Ruiz Correal, Ministry of Culture, Colombia
- Katri Santtila, Department for Culture, Sport and Youth Policy, Ministry of Education, Finland
- Brent Thawley, Creative New Zealand Toi Aotearoa
- Elena Theodoulou – Charalambous, Ministry of Education and Culture, Cyprus
- Peter Tyndall, Arts Council of Wales
- Kelly Wilhelm, Canada Council for the Arts
- Jeremy Winter, Ministry for Culture and Heritage, New Zealand

Thanks to everyone who contributed!

Appendix 1.2: Definitions

The table below provides the full answers to Question 1(b): If [your arts council or ministry does differentiate between ‘major’ performing arts companies and other companies that it supports], what definition does it use?

Approaches to defining ‘major’ organisations by country

Country	Definition
Australia	<p>In Australia, the ‘major performing arts organisations’ have a clear definition stemming from the Major Performing Arts Inquiry Final Report Securing the Future (December 1999), which is:</p> <p>‘Recommendation 5.1.1: A company that meets all of the following criteria</p> <ul style="list-style-type: none"> • should be designated as a major performing arts company; • be a dance, music, opera or theatre company or a hybrid thereof; • demonstrate the highest artistic standards in performances; • show an ongoing commitment to the development of the artform; • demonstrate an ongoing commitment to the development of artists within the artform; • show evidence of a sizeable and increasing audience base; • have a minimum average annual total income of \$1.6 million over the previous three year time period; and • demonstrate an ongoing ability to be financially viable, including increasing levels of financial support from the broader community.’
Canada (national)	<p>A Key Institution: an organisation directed by an artistic director and/or a general manager selected by a board reflecting local/national/international communities, with ongoing year-long programming of work of many artists, of national/international significance. The main programming must make a significant and sustained contribution to a practice supported by the Canada Council.</p> <p>The organization must have a sustained commitment to infrastructure, and have a preponderance of private and earned revenues. This definition applies to organisations in all artistic disciplines. This definition applied to organizations in all artistic disciplines for the allocation of new funds in 2006-08 and is not used in the Council’s ongoing programs.</p>
Canada (Quebec)	<p>We set up a working group in 2002-2003 (council of arts and theatres) on the definition, characteristics and duties of an institution. This exercise enabled us to better determine the global nature of the actions of the large companies and to intervene differently with part of this group by drawing up contracts of objectives over 4 years, the submission of the more important financial accounts, and annual meetings with the directors of these large companies.</p> <p>In 2007 we wish to start this work around the symphony orchestras and opera houses.</p> <p>In 2005 we created a mechanism to watch over organisations in difficulty due to patronage, governance problems or chronic deficits and to work with them to find solutions to those problems.</p>
Colombia	<p>The Ministry of Cultura of Colombia doesn’t have a formal differentiation between ‘major’ performing arts organisations and other companies it supports. However, the Ministry gives permanent support to organisations that could be considered like “major” performing companies as Festival Iberoamericano de Teatro (Iberoamerican Theatre Festival), which develops one of the most important theatre festivals around the world and has a representative support from others official institutions and private organisations. The Ministry has also a Programme for private artistic organisations that have physical infrastructure suitable to present to audience its artistic work and these from others companies. The criteria to access to the</p>

Approaches to defining 'major' organisations by country

Country	Definition
Colombia contd.	<p>Programme are related directly to running a physical space and less with the artistic company for itself.</p> <p>Recently, the Ministry works to generate a permanent tool to evaluate the development of these organisations and allow, consequently, a classification that helps policy makers to bridge the programme. It also aims to improve support to artistic creation.</p> <p>Is important to note, the Ministry supports special projects of all kinds of performing companies such as: national tours, local and national festivals and creation and production projects.</p>
Cuba	<p>The National Council of the Performing Arts, through the Artistic Vice-presidency and specialists in the Direction of Artistic Development, oversees all the many performing arts companies across the country. Specialists make periodic visits to these companies, which allows us to assess the state of development of them and to rank by the importance of their artistic results</p>
Finland	<p>In Finland we could call our national institutions as "major" performing arts companies. They are Finnish National Opera and Ballet, Finnish National Gallery.</p> <p>We also have 56 theatres, 27 orchestras and 137 galleries which are subsidized by the state due to act for theatres and orchestras and due to act for galleries. I wrote down act for theatres for an example so You could see what kind of system we have. And almost all of them too fulfil those criteria.</p> <p>Act for theatres</p> <p>In Finland all theatres are independent. Only one of them, National Theatre, is completely subsidized by the State. At the moment 56 theatres are subsidized by the state due to act for theatres. This means that approximately 1/3 of those theatres budget comes from the State, 1/3 from the municipality and 1/3 from ticket selling. State funding is based on number of person years. There is a certain amount of person years, Full-time equivalent (FTE) person years, in a state budget, that ministry can divide for theatres. At the moment, one person year (FTE) is in a state budget €31,567 and theatre will have 37% of that. Year 2006 total sum is €33,000,000.</p> <p>So the budget of the theatre is based on the work they do. Theatres do count number of person years by the following way:</p> <p>The number of person years is given for the calendar year preceding the reporting date, e.g. the data given in autumn 2006 concern person years in 2005.</p> <p>Average salaries of permanent full-time personnel:</p> <p>The number of permanent full-time personnel (1) is calculated for each month. The monthly figures are added up and divided by 12. Unfilled vacancies and unpaid leaves of absence are not counted in the number of personnel.</p> <p>For salary expenditure (2), the salaries of permanent full-time personnel, excluding social insurance payments, are added up; for theatres and orchestras, salary costs exclude real estate personnel. The sum is then divided by the number of permanent full-time personnel, which yields the average salary of permanent full-time personnel (3).</p> <p>The number of person years in the institution</p> <p>The institution's other salary expenditure, persons hired by freelance</p>

Approaches to defining 'major' organisations by country

Country	Definition
	<p>contracts, (4) - all excluding social insurance payments and for theatres and orchestras also excluding real estate personnel - is divided by the average salary of permanent full-time personnel (3); the result figure is then added to the number of permanent full-time personnel (1). The figure is rounded off to the nearest number.</p> <p>Above and beyond theatres subsidized by the State due to act for theatres, we do have in Finland professional theatres outside of act. We do call them free groups and those are financed discretionary by the Arts Council of Finland.</p>
Greece	Artistic value, continuity and commitment, number of performances per year, public attendance, financial perspectives.
Mexico	National Dance, Theatre and Opera Companies; State and University Companies.
Namibia	The major performing arts company is the National Theatre of Namibia which has the mandate from government to promote the performing arts on regional and national basis. It also occupies state-owned buildings and uses state assets as required.
Singapore	The NAC Singapore has a grant scheme that supports the major arts companies. Under this scheme groups are funded on a two-year basis, maximum cap of funding is 30% of operating budget. I suppose these are the companies we consider as major. For your information, we also fund companies on an annual basis, which tend to be the mid-range type of arts organisations. In addition to this, there are also two orchestras that are currently funded by the Ministry; funding level is higher which is capped at 60%.
Sth Korea	We initiated in 2006 a special grant program, called "special grant program for professional performing arts organisations" for major professional performing arts organisation. We categorise it based on the size, credit, history, budget, hired artist.
Switzerland	<p>Pro Helvetia distinguishes major performing arts organisations by a simple physical element: they own an immobile infrastructure for producing and performing - an infrastructure they can afford only thanks to generous public funding. All organisations without such an infrastructure are called independent. The presence of a physical structure implies a relevant size of the organisation.</p> <p>Pro Helvetia supports independent performing arts organisations only - for a few exceptions which concern invitations for major performing arts organisations abroad. If the product is considered of high quality and specific enough, Pro Helvetia contributes a percentage to the costs of the guest performance.</p> <p>From a systematic point of view, major performing art organisations fall into the responsibility of local (communal) bodies, if they are too weak, the cantons take over, and that's it. Superiority in cultural matters belongs to the cantons. Except for special projects (i.e. tours abroad, as mentioned in the preceding mail, or projects of nationwide importance), the Swiss confederation does not support major art organisations. We have a pyramidal system: cities provide most of the support (for all institutionalized organisations plus the large part of the independent organisations), the cantons attempt at counterbalancing the cultural life of big and small cities, the confederation has only very limited competencies.</p> <p>You can conclude this from the level-specific financial contributions to cultural production in Switzerland:</p>

Approaches to defining 'major' organisations by country

Country	Definition
	<ul style="list-style-type: none"> - cities together about 900 mio CHF p.a. - cantons together about 800 mio CHF p.a. - confederation about 200 mio CHF p.a. (the lion's part of this goes into the national library and the national museum of history). <p>None of the Swiss theatres or ballet companies or orchestras gets any money from Berne!</p>
USA	<p>We have no formal designation although we recognize the distinction and design our programs to address small, medium and large organisations. Budget is determinant.</p>
Wales	<p>The Arts Council of Wales doesn't differentiate between 'major' performing arts organisations and other companies it supports. Last October the Minister for Culture, Welsh Language and Sport announced that he would be taking over the funding of six national organisations. These six were not selected on any particular criteria. This proposal was rejected by the Welsh Assembly and consequently a review has been established to look at the funding of the Arts in Wales (due to be published in December 2006).</p>

Appendix 1.3: Context for Preliminary D'Art Question

Support for Major Performing Arts Organisations: Issues, policies and trends

30 August 2006

Australia Council for the Arts and IFACCA

The Australia Council for the Arts and the International Federation of Arts Councils and Culture Agencies (IFACCA) will be co-hosting a mini-summit in early 2008 on issues relating to the support of major performing arts organisations.¹² In preparation, we are looking to identify policy issues and to locate key personnel to inform and focus debate at the mini-summit.

As a first step, we are looking to find senior executives in national arts councils and ministries of culture responsible for the coordination of policies, programs and initiatives that support major performing arts organisations. Once we have identified these people, we will ask them to help develop mini-summit background materials and invite them to take part in the mini-summit.

CONTEXT

Statistics from the IFACCA Directory indicate that the majority (88 percent) of national arts support agencies provide financial support to arts and cultural organisations. Many of these organisations will be 'major' or large performing arts organisations (more on definitions below).

Our definition of 'major performing arts organisation'

This D'Art question adopts the term 'major performing arts' to denote large and culturally significant performing arts companies. In Australia, the 'major performing arts organisations' have a clear definition stemming from the Major Performing Arts Inquiry Final Report *Securing the Future* (December 1999), which is:

'Recommendation 5.1.1: A company that meets all of the following criteria should be designated as a major performing arts company:

- be a dance, music, opera or theatre company or a hybrid thereof;
- demonstrate the highest artistic standards in performances;
- show an ongoing commitment to the development of the artform;
- demonstrate an ongoing commitment to the development of artists within the artform;
- show evidence of a sizeable and increasing audience base;
- have a minimum average annual total income of \$1.6 million over the previous three year time period; and
- demonstrate an ongoing ability to be financially viable, including increasing levels of financial support from the broader community.'

Other terms and definitions may be used in other countries. Comparative companies might be termed 'flagship', 'national' and 'royal' performing arts companies. The significance of major companies might therefore be determined across a number of characteristics, including:

- Size (of turnover, staff, sometimes as a proportion of the performing arts sector),
- Significance of activities (national, cultural, artistic)
- Quality of products and services (artistic standards and national and international recognition)

¹² Mini-summits bring together a small group of managers (10 to 20) from arts councils and ministries of culture over two to three days to explore key policy concerns, develop joint initiatives and forge ongoing networks. More information, including reports from previous mini-summits, is at the IFACCA website:

http://www.ifacca.org/ifacca2/en/organisation/page04_mini.asp.

- Political, legal or institutional considerations (national, royal, state, municipal companies)
- Range and type of activities undertaken.

Due to their size and significance, the relationship between major performing arts organisations and governments is a special one. In an enquiry in Australia in 1999, for example, it was estimated that 31 major performing arts companies made 'a disproportionate artistic, access and financial contribution to Australian life.' The enquiry found that, though major companies represented just 17 percent of the total number of subsidised companies and received 49 percent of the government funding to the sector, they provided 86 percent of the employment, brought in 79 percent of the total self-generated income and reached 71 percent of the total paying audience.

Major performing arts organisations are therefore highly visible and key to the success and sustainability of performing arts sectors in most countries, their health often being seen as a barometer for the health of the broader performing arts sector. Their significance has made them subject to much analysis and research. Indeed, it was an economic analysis of major performing arts organisations, published in 1966 by Williams Baumol and Bowen, that is commonly recognised as the founding of the academic subject known today as 'Cultural Economics'.

Despite this attention, there has been little comprehensive international data comparisons on major performing arts organisations, and nearly no documentation of the variety of support mechanisms, evaluation requirements, and relationship management issues that exist between funders and major performing arts organisations.

Policy issues

Different countries have different approaches to how such companies are funded and monitored by government: whether they are overseen by a ministry, an arm's length agency, or directly by parliament, the type of funding they receive (direct, indirect, matching), the policy framework and reporting requirements, all differ significantly from country to country.

Yet, despite these differences, recent reports, analyses and policy reviews indicate that there are common issues being faced around the world by policymakers and supporters of major performing arts companies. A selection of these issues is listed earlier in the Policy Issues section of Appendix 1. Below is a list of selected resources for further information and context.

Selected references and resources

- Arts Council England, 2006, *A statistical survey of regularly funded organisations 2003/04 - Statistical report 8*, http://www.artscouncil.org.uk/publications/publications_for_subject.php?sid=23.
- Australia Council for the Arts, *Major Performing Arts Board*, http://www.ozco.gov.au/boards/major_performing_arts/
- Department of Communications, Information Technology and the Arts, 1999, *Securing the Future - Inquiry into the Major Performing Arts, Commonwealth of Australia*, http://www.dcita.gov.au/_data/assets/pdf_file/10700/Securing_the_Future_-_Inquiry_into_the_Major_Performing_Arts.pdf.
- McCarthy, Brooks, Lowell and Zakaras, 2001, *The Performing Arts in a New Era*, RAND Corporation, http://www.rand.org/pubs/monograph_reports/MR1367/
- Performing Arts Research Coalition (PARC), USA <http://www.operaamerica.org/about/parc/parc.html>
- CPANDA, *Arts and Cultural Organizations: Overview of Available Data*, <http://www.cpanda.org/research-guides/artsorgs.html>

- Mission, Money, Models, UK, <http://www.missionmodelsmoney.org.uk/render.aspx?siteID=1&navIDs=712,724,726>
- Arts Council of Wales, 2004, *Pilot Programme for Sustainable Arts Organisations: Encouraging a climate of supported change and innovation*, <http://www.artswales.org.uk/publications/Stability%20Pilot%20Programme%20Guidelines.pdf>.
- John Holden, 2006, *Cultural Value and the Crisis of Legitimacy: Why Culture Needs a Democratic Mandate*, Demos, <http://www.demos.co.uk/publications/culturallegitimacy>

APPENDIX 2: Digest of survey responses

This appendix provides a digest of responses to the survey distributed in September 2007. Copies of the survey are available on request. Responses were received from thirteen countries.¹³ A list of respondents can be found at Appendix 2.1.

The digest of responses is divided into two main sections:

- Section 1: Overview of the major performing arts sector
- Section 2: Government Agency role in the Major Performing Arts Sector

The survey, and its compilation and analysis were undertaken by Jackie Bailey, Research Analyst, Australia Council for the Arts, in 2007-08.

Section 1: Overview of the Major Performing Arts Sector

All respondents' countries have performing arts organisations which they would categorise as, in some way, 'major'. Building on the earlier Preliminary D'Art report,¹⁴ this report defines a 'major' performing arts organisation as one which is deemed to play a vital role in the nation's arts ecology and national identity. Such an organisation will typically have historical or state-related significance, a reasonably high turnover, and is expected to reach high levels of artistic excellence.

1. Size, Location and Government Funding of MPAOs

The Major Performing Arts (MPA) sectors of the respondent countries include some of the world's most significant major performing arts organisations. MPAOs are spread across the artforms of dance, music, theatre and opera, with a preponderance of music and theatre organisations. MPAOs are based almost entirely in major cities (with populations exceeding 1 million), although not solely in capital cities.¹⁵ Appendix 2.2 lists the organisations to which the data here relates.

Table 1: Number of MPAOs by artform

Country	Dance	Music	Theatre	Opera	Other	Total
Australia	5	10	9	4	-	28
Bulgaria	2	1	1	1	-	5
Canada ¹⁶	6	20	28	8	1	63
Cayman Islands	1	3	-	-	-	4
Denmark	1	5	5	1	-	12
England	2	-	2	3	2	9
Finland	11	27	46	1	-	85
Ireland	-	3	3	2	-	8
Kenya	-	-	-	-	1	1
New Zealand	3	8	8	1	3	23
Scotland	2	2	4	1	-	9
Singapore	1	2	5	-	-	8
Total	33	85	113	20	6	259

¹³ China's respondent agency does not have responsibility for MPAOs and therefore its response has not been included in this data.

¹⁴ Appendix 1.

¹⁵ See Appendix 2.2 for details of MPAO names and locations.

¹⁶ Canada's responses combine separate responses from the Canada Council, British Columbia, Manitoba and the North-Western Territories.

Table 1A: Sources of government funding for MPAOs

Country	No. of MPAOs	Percent of organisations funded by respondent agency	Percent of organisations funded by other government entities/other levels of government
Australia	28	100	100
Bulgaria	5	100	-
Canada	67	100	100
Cayman Islands	4	<i>n/a</i>	<i>n/a</i>
Denmark	12	85	62
England	9	100	33
Finland	85	100	100
Ireland	8	88	38
Kenya	1	100	100
New Zealand	23	100	100
Scotland	9	100	100
Singapore	8	100	100

Note: *n/a* = not applicable

2. Turnover of MPAOs

The major performing arts sector's turnover range¹⁷ varies between respondents: in Bulgaria the range is \$0.19m – \$0.59m (USD)¹⁸, whereas in England the lowest MPAO turnover is \$21.9m and the top of the range is \$190.33m (USD). Therefore, when agencies discuss their nation's MPAOs, they are referring to institutions with different income ranges both within their nation and in comparison to other nations' MPAOs. Whilst turnover may be a determinant for some agencies in defining an MPAO, this varies widely.

Table 2: Financial turnover of MPAOs

Country	Local currency	Range (local currency million)		Range (USD million)	
		Minimum	Maximum	Minimum	Maximum
Australia	AUD	2.1	56	1.9	49.5
Bulgaria	EUR	0.13	0.4	0.2	0.6
Canada (combined)	CAD	1	53	1	52.5
Cayman Islands	KYD	<i>n/a</i>	<i>n/a</i>	<i>n/a</i>	<i>n/a</i>
Denmark	DKK	44	684	8.7	134.5
England	GBP	11.2	97.7	21.9	190.3
Finland	EUR	0.2	44.5	0.3	65.4
Ireland	EUR	1	6	1.5	8.8
Kenya	KES	<i>n/a</i>	<i>n/a</i>	2.5	2.5
New Zealand	NZD	0.5	15	0.4	11.6
Scotland	GBP	1.5	12	2.9	23.5
Singapore	SGD	1.2	14.1	0.8	9.8
Average turnover				3.55	45.98

¹⁷ 'Turnover' refers to the total income, from all sources, over a 12 month period.

¹⁸ Currency converted at <http://www.xe.com/ucc/> January 2008.

3. Artforms of MPAOs

As can be seen from Table 3 below, MPAOs in the sample include the artforms of dance, music, theatre and opera, with a majority in music and theatre. Of the respondents, only three had circus organisations amongst their MPAOs (Australia, China and Finland). Almost all respondents had dance, theatre and symphony orchestra organisations that they considered to be MPAOs and many had opera organisations.

Table 3: Artforms covered by MPAOs

Country	Dance	Theatre	Musical		Circus	Symphony Orchestra	Chamber Orchestra	Other
			Theatre	Opera				
Australia	✓	✓		✓	✓	✓	✓	
Bulgaria	✓	✓	✓	✓		✓		
Canada (combined)	✓	✓	✓	✓		✓		
Cayman Islands	✓						✓	✓
Denmark	✓	✓	✓	✓		✓		
England	✓	✓	✓	✓		✓		
Finland	✓	✓	✓	✓	✓	✓	✓	
Ireland		✓		✓		✓	✓	
Kenya	✓	✓	✓			✓		✓
New Zealand	✓	✓		✓		✓	✓	✓
Scotland	✓	✓		✓		✓	✓	
Singapore	✓	✓				✓		

4. MPAOs' share of the total performing arts sector

Only 11 countries provided data on their MPAOs' share of their total performing arts sectors. Table 4 shows that MPAOs receive the majority of government funding in their country's performing arts sectors in 8 of these countries. However, they earn the majority of box office income in only 5 of the 8 countries and stage the majority of performances in the performing arts sector in 6 of the 8 countries.

Table 4: MPAOs share of performing arts sector

Country	MPAOs hold the majority of performances	MPAOs earn the majority of box office income	MPAOs receive majority of government funding for the performing arts
Australia	✓	✓	✓
Bulgaria			
Canada			
Cayman Islands			✓
Denmark	✓	✓	✓
England			
Finland	✓	✓	✓
Ireland	✓	✓	✓
New Zealand	✓	✓	✓
Scotland	✓		✓
Singapore			✓
Total no. of countries	6	5	8
Percent of all respondent countries	55	45	73

5. Governance structures

Most MPAOs in the respondent nations are either government bodies or not-for-profit/charitable organisations. Finland and Australia are the exceptions to this rule, with a number of institutions structured as private corporations.

Table 5: Governance structures

Country	Private corporations	Charitable organisations	Government bodies
Australia ¹⁹	26	-	3
Bulgaria	-	-	5
Canada	-	67	-
Cayman Islands	-	4	-
Denmark	-	12	1
England	-	9	-
Finland	50	9	29
Ireland ²⁰	6	-	2
Kenya	-	-	1
New Zealand	-	21	-
Scotland	-	9	-
Singapore	-	7	-

6. Artistic Standards

MPAOs are expected to achieve higher artistic standards than those required from other organisations, with the exception of Canada where the same artistic assessment criteria are applied to MPAOs and smaller organisations. Most respondent agencies employ either external peer assessment, agency assessment, self-assessment or a combination of these to assess artistic quality.

7. Role of MPA Organisations

Respondents were asked to rank the role of MPA organisations in relation to the following responsibilities:

- Developing and performing new works
- Developing and performing local works
- Taking artistic risks
- Setting artistic standards for the country
- Representing the country internationally
- Providing access to people in non-metropolitan areas
- Other roles

Responses indicated that MPAOs' most significant roles were to set artistic standards for the country and represent the country internationally. MPAOs share the roles of developing and performing new and local works and touring to non-metropolitan areas roughly equally with the small-to-medium performing arts sector.

8. MPAOs' significance

All of the respondents regard their MPAOs as being unique or possessing historical significance. Many MPAOs were the first of their kind in their country, and are seen as

¹⁹ Some organisations also have foundations. All the organisations have official status to receive tax-deductible donations.

²⁰ Some of these organisations also have separate charitable foundations which can collect donations.

having an ongoing ‘pivotal role in the cultural life of the country.’²¹ Many MPAOs also possess state-related significance of some kind, either constituted by law (for example the New Zealand Symphony Orchestra and Bulgaria’s MPAOs), or as an implicit status.

9. Venues

Owning a venue is not a uniform characteristic of MPAOs across or within the respondent countries. In Bulgaria, Canada, England and Singapore, either all or the majority of companies have their own venues. In most of the other respondent countries about one-third of organisations have their own venues, with a low in Australia where only four of the 28 MPAOs have their own mainstage venues.

10. Other activities

MPAOs from all the respondent countries engage in activities beyond mainstage performance, including:

- Education
- Touring to other cities (major and non-major) within the country
- Developing artists

Respondents noted that the level of activity varied between organisations, but that the sector as a whole engaged across the gamut of these pursuits, which suggests that MPAO sectors are characterised by a breadth of activity well beyond mainstage performance.

11. Attendance and Audience trends

There was insufficient information to provide a snapshot of attendance and audience trends.

12. MPAOs’ income

Table 6 shows that the ratio of MPAO income from government funding versus earned income varies between countries. Government subsidy makes up a lower proportion of overall income in Australia and New Zealand than the other countries. Bulgaria is at the top end of the scale with government subsidy at 88.5 percent of its MPAOs’ income.

Table 6: MPAO sources of income

Country	Percent from government subsidies	Percent from box office, private sector, other income
Australia	37	63
Bulgaria	88.5	11.5
Kenya	50	50
New Zealand	35	45

Notes on Table 6:

- Australia: Non-government funding is comprised of 48 percent box office, 11 percent sponsorship and philanthropy and 4 percent other.
- New Zealand: Government funding is made up of 25 percent from central government and 10 percent from local government; non-government funding is 30 percent box office and 15 percent sponsorship.

²¹ England survey response.

- Singapore: Direct government funding is SGD\$20.86m pa
- There was no data available from other respondent agencies.

13. Proportion of the national arts funding budget allocated to the MPAOs

There was insufficient information to provide a snapshot of the proportion of overall national arts funding budgets allocated to the MPAOs.

14. Proportion of MPA government funding per artform

There was insufficient information to break down MPAO government funding by artform.

Section 2: Government Agency role in the Major Performing Arts Sector

This section provides an overview of the role of the government agencies in the MPA sector of their country. It looks at whether agencies are responsible for their government’s funding relationships with MPAOs, the way in which the funding relationship is managed, and the funding models for MPAOs.

1. Agencies’ rôle vis-à-vis MPAOs

Most of the agencies in the sample are responsible for managing the majority of government funding to their countries’ MPAOs, with nine of the thirteen respondent agencies responsible for more than 50 percent of MPAO government funding delivery. The exceptions were as follows:

- China’s respondent agency is not responsible for providing funding to the MPAOs at all. The Ministry of Culture fulfils this role.
- Scotland’s Arts Council was the only other agency to be responsible for less than a third of total government funding to the country’s MPAOs; and
- Canada and New Zealand’s respondent agencies were responsible for less than half of total government funding to their MPAOs.

2. Agency funding models for MPAOs

The model used to fund its MPAOs is different for each agency. The following key characteristics can be discerned from Table 7:

- Some agencies provide multi-year funding (Australia, Denmark, England, Scotland) whilst others provide funding on a one-year basis (Bulgaria, Cayman Islands, Finland, Ireland) and others deliver a mix of the two (Canada, New Zealand).
- Agencies’ funding grants to MPAOs generally go towards the costs of operation and the artistic program. In many instances, MPAOs can also apply for supplementary funding for touring, commissioning and project funding
- Some agencies enter into formal contracts with MPAOs to implement funding arrangements (Australia, Denmark, England, Finland, New Zealand and Scotland).

Table 7: Agency Funding Models

COUNTRY	Key points about funding model
Australia	<p>The agency administers tripartite contracts (signed by the federal government, State government and the MPAO). The contract runs for three years and provides the MPAO with base funding, calculated on the basis of the company’s costs, level of artistic risk, international touring activity and the estimated ability of the company to earn income in its marketplace. The mix of State and federal government funding is determined by the category of the company (eg if it is a State flagship company it will receive most of its funding from the State government).</p> <p>MPAOs must meet criteria relating to artistic excellence, financial turnover and artform. An organisation can approach the agency at any time to begin discussions about whether to become an MPAO.</p> <p>The agency also provides project grants for touring, young artist and new work grants.</p>
Bulgaria	<p>Funding for each MPAO is calculated on the basis of the organisation’s number of employees. The funding cycle is one year. The agency provides base grants, project grants and one-off grants, touring and education grants.</p>
Canada	<p>The same funding model is applied to all performing arts organisations (MPAOs and smaller organisations). Funding criteria relate to artistic quality, outreach and administration, with the emphasis on artistic criteria. Multi-year grants are</p>

	available for stable organisations.
Cayman Islands	Grants are considered by a panel and based on peer review. Grants are either one off or one year at a time up to a maximum amount. Applications are accepted for core grants, professional/education grants and project grants.
Denmark	Base grants are connected to four-year contracts between the Ministry of Culture and the MPAO.
England	Funding is agreed on a three-year basis. Each MPAO has a Funding Agreement which outlines conditions of the grant. Funding is revisited at each 'spending round.' Grants cover core overheads, performance and education activities.
Finland	The agency decides funding which is discretionary and determined annually.
Ireland	The orchestras are not funded by the agency but are funded by the state broadcasting corporation. The key MPAO, the Abbey Theatre, is funded under a unique three-year funding arrangement. This model may be extended to other MPAOs. The other MPAOs are currently funded under the Regularly Funded Organisations program which provides funding in advance: decisions are taken six months prior to the funding year, and funding is provided for one calendar year at a time.
	Funding is provided as a base grant which is a contribution to core costs and costs of the artistic program. Organisations can apply for additional funding eg commissioning funding, project funding.
Kenya	N/A
New Zealand	One to three year grants, mainly based on historical reasons. The agency provides base grants plus some one-off capability building grants.
Scotland	Five year agreement by the agency.
Singapore	Grants are provided on a two-year basis, except for the national orchestras which receive funding on a three-year basis. Other funding schemes cover international touring, marketing development, training and professional skills development. Funding is capped at no more than 30 percent of the MPAOs' total expenditure.

3. Agencies' decision-making power

Most agencies have extensive decision-making power, with a role in making decisions about how much funding to provide to an MPAO and which organisations to fund. Details are available in Table 8 below.

Table 8: Agencies' decision-making role

Country	How much funding to provide to an organisation	Which organisations to fund	Administration of contracts
Australia			✓
Bulgaria	✓	✓	✓
Canada	✓	✓	
Cayman Islands		✓	✓
Denmark	✓		✓
England	✓	✓	✓
Finland	✓	✓	
Ireland	✓	✓	✓
New Zealand	✓	✓	✓
Scotland	✓	✓	✓
Singapore		✓	✓

Notes on Table 8:

- Australia: The agency is also responsible for providing advice to the government and the Board on funding decisions; supporting capacity building and good governance; and monitoring companies' progress against a range of designated criteria in the areas of good governance, artistic vibrancy, financial viability and access.
- England: The agency is responsible for monitoring organisations.

4. Conditions of funding

The agencies all require reporting from the MPAOs in return for funding. Reporting normally covers organisational information on revenue, attendances, regional touring, educational activities and total expenditure. Organisations are also often asked to publicly recognise the agency's funding (eg by including the agency's logo on brochures). The frequency of reporting varies between agencies. Table 9 documents the conditions of funding for the responding agencies.

Table 9: Conditions of funding

Country	Enter into contracts	Require reporting from organisations	Other requirements?	Notes
Australia	✓	✓	✓	The companies must fulfill their requirements under their contract with the Australian government and the relevant State government for funding. Each company is required to fulfill certain levels of activity, and to maintain financial stability and artistic excellence.
Bulgaria		✓		Reports required include: <ul style="list-style-type: none"> • Revenue from box office, sponsorship, donations • Average attendances, number of audience, ticket prices • Regional touring • Educational programs for the young /about the musical events • Total number of performances, number of new performances • Expenditure
Canada		✓		The organisations provide interim and final financial and statistical reports and must submit audited financial statements. They also provide reports on activities and results. All Canada Council grant recipients must publicly acknowledge that they have received Canada Council grants.
Cayman Islands		✓	✓	Reports required after conclusion; Recipients asked to volunteer time/expertise to non-profit cultural initiatives.
Denmark	✓	✓		The organisations must provide annual reports
England	✓	✓	✓	The organisations provide: <ul style="list-style-type: none"> • Copies of all board papers; • Audience figures for all performances; • Annual audited accounts; • A completed annual survey form with financial and statistical information
Finland	✓	✓		
Ireland				There is no formal contract. The funding relationship is reactive: based on the Council's response to the proposals made by the applicant organisations (though these are typically adjusted/renegotiated in light of the actual level of funding offered). The offer of funding comes with a standard set of conditions which acts as a de facto contract with the funded organisation.

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Monitoring arrangements are not formal.

New Zealand	✓	✓	
Scotland	✓	✓	
Singapore		✓	<p>The organisations submit reports (orchestras; quarterly: Major Grant Organisations: twice a year) which include a qualitative report of their artistic activities, audience outreach as well as corporate issues. They also report on their audience figures and submit their audited financial statement at the end of their financial year.</p>

APPENDIX 2.1: Respondents

- Jackie Bailey, Research Analyst, Australia Council for the Arts
- Bilyana Tomova, Member of the managing committee, National Fund 'Culture', Bulgaria
- Diana Andreeva, Researcher, National Fund 'Culture', Bulgaria
- Claire McCaughey, Research Manager, Canada Council for the Arts
- Douglas Riske, Executive Director, Manitoba Arts Council, Canada
- Ingmarie Thunander, Assistant Program Development Coordinator, British Columbia Arts Council, Canada
- Boris Atamenko, Manager, Community Programs, North West Territories Arts Council, Canada
- Marcia Muttoo, Managing Director, Cayman National Cultural Foundation, Cayman Islands
- Kan Yuhong, International Liaison Department, China Federation of Literary and Art Circles
- Anne-Marie Myhre, Executive Secretary, The Danish Arts Agency, Denmark
- Amanda Rigali, Interim Assistant Director Arts Strategy, Arts Council England
- Katri Santtila, Senior Advisor, Ministry of Education and Culture, Finland
- John O'Kane, Arts Director, The Arts Council, Ireland
- Quresh H. Ahmed, General Manager, Bomas of Kenya
- Brent Thawley, Manager Arts Infrastructure Services, Creative New Zealand
- David Taylor, Co-Director, Arts, Scottish Arts Council
- Elaine Ng, Director Performing Arts Development, National Arts Council, Singapore

We thank all respondents for their contribution

APPENDIX 2.2: List of major performing arts organisations in respondent states

Country	Artform	Company name	Company location
Australia	Dance	The Australian Ballet	Melbourne, Victoria
		Bangarra Dance Theatre	Sydney, New South Wales
	Opera	Queensland Ballet	Brisbane, Queensland
		Sydney Dance Company	Sydney, New South Wales
		West Australian Ballet	Perth, Western Australia
		Opera Australia	Sydney, New South Wales
		Opera Queensland	Brisbane, Queensland
		West Australian Opera	Perth, Western Australia
		State Opera South Australia	Adelaide, South Australia
		The Queensland Orchestra	Brisbane, Queensland
		Adelaide Symphony Orchestra	Adelaide, South Australia
		Melbourne Symphony Orchestra	Melbourne, Victoria
	Music	Sydney Symphony Orchestra	Sydney, New South Wales
		West Australian Symphony Orchestra	Perth, Western Australia
		Orchestra Victoria	Melbourne, Victoria
		Australian Opera and Ballet Orchestra	Sydney, New South Wales
		Australian Chamber Orchestra	Sydney, New South Wales
		Australian Brandenburg Orchestra	Sydney, New South Wales
		Musica Viva	Sydney, New South Wales
		Tasmanian Symphony Orchestra	Hobart, Tasmania
		Sydney Theatre Company	Sydney, New South Wales
		Melbourne Theatre Company	Melbourne, Victoria
		Queensland Theatre Company	Brisbane, Queensland
Theatre	State Theatre Company of South Australia	Adelaide, South Australia	
	Company B	Sydney, New South Wales	
	Malthouse Theatre	Melbourne, Victoria	
	Black Swan Theatre Company	Perth, Western Australia	
	Circus Oz	Melbourne, Victoria	
	Bell Shakespeare Company	Sydney, New South Wales	
	Australia – Total	29 (5 dance, 10 music, 9 theatre, 4 opera)	
Bulgaria	Opera and dance	National opera and ballet	Sofia

Country	Artform	Company name	Company location
	Music	Sofia Philharmonic Orchestra	Sofia
	Music and dance	State Music theatre "Stefan makedonski"	Sofia
	Theatre	State ensemble for folk songs and dances "Philip Kutev"	Sofia
		National Theatre "Ivan Vazov"	Sofia
Bulgaria – Total	5 (2 dance, 1 music, 1 theatre, 1 opera)		
Canada (national)	Theatre	Alberta Theatre Projects	Calgary, Alberta
		Arts Club Theatre	Vancouver, British Columbia
		Canadian Stage	Toronto, Ontario
		Citadel Theatre	Edmonton, Alberta
		Centaur Theatre Company	Montréal, Québec
		La Compagnie Jean-Duceppe	Montréal, Québec
		Ex Machina	Québec City, Québec
		The Grand Theatre	London, Ontario
		Lorraine Kimsa Theatre for Young People	Toronto, Ontario
		Manitoba Theatre Centre	Toronto, Ontario
		Neptune Theatre	Winnipeg, Manitoba
		Shaw Festival	Niagara-on-the-Lake, Ontario
		Soulpepper Theatre Company	Halifax, Nova Scotia
		Stratford Festival	Stratford, Ontario
		Theatre Aquarius	Hamilton, Ontario
		Theatre Calgary	Calgary, Alberta
		Théâtre Denise-Pelletier	Montréal, Québec
		Théâtre du Nouveau Monde	Montréal, Québec
		Théâtre du Rideau Vert	Montréal, Québec
		Vancouver Playhouse	Vancouver, British Columbia
	Music	Calgary Philharmonic	Calgary, Alberta
		Edmonton Symphony	Edmonton, Alberta
		Kitchener-Waterloo Symphony	Kitchener, Ontario
		Orchestre métropolitain du Grand Montréal	Montréal, Québec
		Orchestre symphonique de Montréal	Montréal, Québec
		Orchestre symphonique de Québec	Québec City, Québec
		Orchestra London (Canada)	London, Ontario
		Symphony Nova Scotia	Halifax, Nova Scotia
		Tafelmusik Baroque Orchestra	Toronto, Ontario
		Toronto Symphony	Toronto, Ontario

Country	Artform	Company name	Company location
		Vancouver Symphony	Vancouver, British Columbia
		Victoria Symphony	Victoria, British Columbia
	Dance	Winnipeg Symphony	Winnipeg, Manitoba
		Alberta Ballet	Calgary, Alberta
		Ballet British Columbia	Vancouver, British Columbia
		Les Grands Ballets Canadiens	Montréal, Québec
		National Ballet of Canada	Toronto, Ontario
		Royal Winnipeg Ballet	Winnipeg Manitoba
	Opera	Calgary Opera Association	Calgary, Alberta
		Canadian Opera Company	Toronto, Ontario
		Edmonton, Opera	Edmonton, Alberta
		l'Opéra de Montréal	Montréal, Québec
		Opera Ontario	Hamilton, Ontario
		Vancouver Opera	Vancouver, Ontario
<i>Canada national – Sub total</i>	<i>44 (5 dance, 13 music, 20 theatre, 6 opera)</i>		
Canada (British Columbia)	Theatre	Arts Club of Vancouver Theatre Society	Vancouver
		Bard On The Beach Theatre Society	Vancouver
		Belfry Theatre Society	Victoria
		Chemainus Theatre Festival Society	Chemainus
		Judith Marcuse Projects Society	Vancouver
		Playhouse Theatre Centre Of British Columbia	Vancouver
		Richmond Gateway Theatre Society	Richmond
		Western Canada Theatre Company Society	Kamloops
	Music	Coastal Jazz And Blues Society	Vancouver
		Langley Community Music School Society	Langley
		Salmon Arm Folk Music Society	Salmon Arm
		Vancouver Academy Of Music	Vancouver
		Vancouver Folk Music Festival Society	Vancouver
		Vancouver Summer Festival Society	Vancouver
		Vancouver Symphony Society	Vancouver
		Victoria Conservatory Of Music	Victoria
		Victoria Symphony Society	Victoria
	Dance	Pacific Ballet BC Society	Vancouver
	Opera	Pacific Opera Victoria	Victoria
		Vancouver Opera Association	Vancouver

Country	Artform	Company name	Company location
<i>Canada BC – Sub total</i>	<i>18 (1 dance, 7 music, 8 theatre, 2 opera, 2 others previously counted)</i>		
Canada - Manitoba	Theatre	Manitoba Theatre Centre Manitoba Theatre for Young People Prairie Theatre Exchange Royal Winnipeg Ballet Winnipeg Symphony Orchestra Manitoba Opera Company	Winnipeg Winnipeg Winnipeg Winnipeg Winnipeg Winnipeg
<i>Canada Manitoba – Subtotal</i>	<i>3 (2 theatre, 1 opera, 3 others previously counted)</i>		
Canada – NWT	All	Northern Arts and Cultural Centre	Yellowknife
Canada – Total	63 (6 dance, 20 music, 28 theatre, 8 opera, 1 other)		
Cayman Islands	Dance Music	Cayman Nat'l Dance Company – Dance Unlimited Cayman National Choir and Orchestra National Concert Band Panoramers Steel Band	Grand Cayman Grand Cayman Grand Cayman Grand Cayman
Cayman Islands - Total	4 (1 dance, 3 music)		
China	Other Opera Opera & dance Dance Theatre Music	China Performing Arts Agency China National Peking Opera Company China National Opera House China Opera and Dance Company China Oriental Song and Dance Ensemble The National Ballet of China National Theatre Company of China China Children's Art Theatre China National Symphony Orchestra	Beijing Beijing Beijing Beijing Beijing Beijing Beijing Beijing Beijing
China – Total	239		
Denmark	Theatre, dance, opera, music Music Opera Dance Theatre	The Royal Theatre 5 regional symphony orchestras Den Jyske Opera Peter Schaufuss Balletten 3 regional theatres Copenhagen Theatre	Copenhagen - Århus Holstebro - Copenhagen
Denmark – Total	12 (1 dance, 5 music, 5 theatre, 1 opera)		
Finland	Opera and Ballet Theatre	National Opera National Theatre 56 theatres incl. Dance theatres	Helsinki Helsinki regional centres

Country	Artform	Company name	Company location
	Music	27 orchestras	regional centres
Finland – Total	85 (11 dance, 27 music, 46 theatre, 1 opera)		
England	Dance	Birmingham Royal Ballet	Birmingham
	Opera	English National Ballet	London
	Theatre	English National Opera	London
	Combined arts	Opera North	Leeds
		Welsh National Opera	Cardiff, Wales
		National Theatre	London
		Royal Shakespeare Company	Stratford Upon Avon
		Royal Opera House	London
		South Bank Centre	London
England – Total	9 (2 dance, 3 music, 2 theatre, 2 combined arts venues)		
Ireland	Theatre	The Abbey Theatre	Dublin
		The Gate Theatre	Dublin
	Music	Druid Theatre Company	Galway
		RTE National Symphony Orchestra	Dublin
		RTE Concert Orchestra	Dublin
		Irish Chamber Orchestra	Limerick
		Opera Ireland	Dublin
		Wexford Festival Opera	Wexford
Ireland – Total	8 (3 music, 3 theatre, 2 opera)		
Kenya		Bomas of Kenya	Nairobi
New Zealand	Opera	NBR New Zealand Opera	Auckland
	Music	Auckland Philharmonia	Auckland
		Vector Wellington Orchestra	Wellington
		Christchurch Symphony	Christchurch
		Southern Sinfonia	Dunedin
		Auckland Theatre Company	Auckland
		Circa Theatre	Wellington
		Downstage Theatre	Wellington
		BATS Theatre	Wellington
		The Court Theatre	Wellington
		Fortune Theatre	Christchurch
		Taki Rua Productions	Dunedin
		National Theatre for Children	Wellington
			Wellington

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Country	Artform	Company name	Company location
	Dance	Black Grace Dance Company	Auckland
		Footnote Dance Company	Wellington
	Music	Royal New Zealand Ballet (RNZB)	Wellington
		Chamber Music New Zealand	Wellington
		Choirs Aotearoa	Wellington
		New Zealand String Quartet	Wellington
		New Zealand Symphony Orchestra (NZSO)	Wellington
	Other	Kahurangi Maori Dance Company	Hastings
		Toi Maori Aotearoa	Wellington
		New Zealand International Festival of the Arts	Wellington
New Zealand - Total	23 (3 dance, 8 music, 8 theatre, 1 opera, 3 other)		
Scotland			
	Dance	Scottish Ballet	Glasgow
		Scottish Dance Theatre	Dundee
	Opera	Scottish Opera	Glasgow
	Music	Royal Scottish National Orchestra	Glasgow
		Scottish Chamber Orchestra	Edinburgh
	Theatre	National Theatre of Scotland	Glasgow
		Citizens Theatre	Glasgow
		Dundee Rep	Dundee
		Royal Lyceum Theatre	Edinburgh
Scotland – Total	9 (2 dance, 2 music, 4 theatre, 1 opera)		
Singapore			
	Music	Singapore Symphony Orchestra	Singapore
		Singapore Chinese Orchestra	Singapore
	Dance	Singapore Dance Theatre	Singapore
	Theatre	TheatreWorks	Singapore
		The Necessary Stage	Singapore
		The Theatre Practice	Singapore
		Singapore Repertory Theatre	Singapore
		WildRice	Singapore
Singapore – Total	8 (1 dance, 2 music, 5 theatre)		
TOTAL ALL COUNTRIES	494 (34 dance, 81 music, 111 theatre, 22 opera, 7 other, 239 unspecified)		

Appendix 3: Mini-Summit Delegates and Speakers

International Delegates

*Mr Robert Sirman, Director, Canada Council for the Arts
 Mr Martyn Bould, Chairman, Cayman National Cultural Foundation, Cayman Islands
 Ms Claudia Toro, Executive Director, FONDART, Chile
 Ms Huang Wenjuan, Deputy Director General of International Liaison Department China Federation of Literary and Art Circles (CFLAC), China
 Mr Kan Yuhong, Staff of the International Liaison Department, CFLAC, China
 Ms Chi Fei Josephine Wai, Director, Arts Support, Hong Kong Arts Development Council, China Hong Kong
 Ms Rebecca Yu, Senior Manager (Culture), Culture Section, Home Affairs Bureau, China Hong Kong
 Ms Barbara Matthews, Director of Theatre Strategy, Arts Council England
 *Mr Risto Ruohonen, Director General, Finnish National Gallery
 Mr John O’Kane, Arts Director, Arts Council of Ireland
 Mr Jang Yongsuk, Director, International Exchange Team, Arts Council Korea
 Mr Lee Sungkyum, Director of General, Arts Council Korea
 Ms Sabariah Ghazali, Principal Assistant Secretary, Ministry of Culture, Arts and Heritage, Malaysia
 Mr Mod Zaky Din, Director, Department of Culture and Arts State of Perak, Malaysia
 Ms Zaiton Md. Desa, Production Director of Istana Budaya, Ministry of Culture, Arts and Heritage, Malaysia
 Mr Stephen Wainwright, Chief Executive, Creative New Zealand
 Mr Lawrence Green, Director, Venture Education Ltd, New Zealand
 Ms Cecile Guidote Alvarez, Executive Director, National Commission for Culture and the Arts, Philippines
 Mr David Taylor, Co Director, Arts, Scottish Arts Council
 *Mr Lee Suan Hiang, Chief Executive Officer, National Arts Council of Singapore
 Ms Elaine Ng, Director, Performing Arts Development, National Arts Council of Singapore
 Mrs Susan Loh, Director, Market Development, Corporate Communications/International Relations, National Arts Council of Singapore
 Ms Jane Clarke, Director of Operations, Arts Council of Wales

Australian delegates

Mr James Strong AO, Chair, Australia Council
 Mr Rick Allert AM, Chair, Major Performing Arts Board, Australia Council
 *Ms Kathy Keele, Chief Executive Officer, Australia Council
 Mr Tony Grybowski, Executive Director, Major Performing Arts, Australia Council
 Ms Trish Ludgate, Major Performing Arts Board, Australia Council
 Ms Jackie Bailey, Major Performing Arts Board, Australia Council
 Mr Atul Joshi, Director, Key Organisations, Australia Council
 Dr Stephen Arnott, Department of Environment, Water, Heritage and the Arts
 Mr Jeff Andary, Director, Arts Development and Planning, Arts South Australia
 Ms Alexandra Hurford, Senior Manager, Arts Development, Arts SA, Australia

IFACCA staff

Ms Sarah Gardner, Executive Director, IFACCA
 Ms Natasha Eves, Research and Project Officer, IFACCA
 Mr Christopher Madden, Research Analyst, IFACCA

Guest speakers

Ms Robyn Archer AO
Mr Carrillo Gantner AO, President, Myer Foundation
Mr Peter Steidl, Strategy Director, JWT
Ms Louise Walsh, Director, Artsupport Australia

APOLOGIES

Ms Caroline Houben, Co-Director of Research, Observatoire des Politiques Culturelles, Belgium
Ms Bilyana Tomova, Member of the Steering Committee, National Culture Fund, Bulgaria
Mr Yvan Gauthier, Président-directeur general, Conseil des arts et des lettres du Québec, Canada
Mr John Brotman, Executive Director, Ontario Arts Council, Canada
*Ms Clarisa Ruiz Correal, Head of Arts, Ministerio de Cultura de Colombia
*Ms Georgia Iliopoulou, IFACCA Board Member
*Mr Qu'resh Ahmed, General Manager, Bomas of Kenya
Mr Kees Weeda, Secretary General, Raad voor Cultuur - Council for Culture, Netherlands
Mr Mario Garcia Durham, National Endowment for the Arts, USA

*Denotes IFACCA Board Members

APPENDIX 4: Countries of participants in research and mini-summit

Country	D'Art	Survey	Mini-summit
Australia	✓	✓	✓
Bulgaria		✓	
Canada	✓	✓	✓
Cayman Islands		✓	✓
Chile			✓
China (and Hong Kong SAR)		✓	✓
Columbia	✓		
Cuba	✓		
Cyprus			
Denmark		✓	
England		✓	✓
Finland	✓	✓	✓
France	✓		
Greece	✓		
Ireland		✓	✓
Kenya		✓	
Korea (South)	✓		✓
Malaysia			✓
Mexico	✓		
Namibia	✓		
New Zealand	✓	✓	✓
Peru			
Philippines			✓
Scotland		✓	✓
Singapore	✓	✓	✓
Switzerland	✓		
United States of America	✓		
Wales	✓		✓
Totals	15	13	15

APPENDIX 5: Selected resources

Below is a list of information resources referenced in this report. For information and links to these and other resources relating to the major performing arts, visit the topic page at the IFACCA website, www.ifacca.org/topic/support-for-major-performing-arts-organisations/

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