



Arts Council of Northern Ireland

Audit of the Traditional Music Sector in Northern Ireland



Dermot McLaughlin
Creative Strategic Solutions
March 2015

Published October 2015

Contents

1. Introduction.....	page 2
2. Acknowledgements.....	page 4
3. Executive Summary.....	page 5
4. Main Findings.....	page 7
5. Recommendations.....	page 10
6. Defining the Traditional Musics sector.....	page 13
7. Audit of Traditional Music services (including tuition) ...	page 17
8. How Traditional Music tuition is delivered.....	page 30
9. Access to instruments.....	page 37
10. Competitions.....	page 43
11. Performance Infrastructure.....	page 47
12. Professional development opportunities.....	page 51
13. Partnerships and collaborations.....	page 52
14. Investment.....	page 54
15. Media.....	page 58
16. CD production.....	page 61
Appendix 1 individuals and organisations contacted.....	page 64
Appendix 2 publications and other sources consulted.....	page 68

1. Introduction

This audit of Traditional Music in Northern Ireland was commissioned by the Arts Council of Northern Ireland (ACNI) as one of the actions contained in the *Arts Council of Northern Music Strategy 2013-2018* (ACNI) and as an action under its Traditional Arts Policy as set out in *Art Form and Specialist Area Policy 2013-2018 - Traditional Arts*. The strategic context and rationale for commissioning the review is described in the *Arts Council of Northern Ireland Music Review and Strategy* (Ackrill, Knowles 2011).

The terms of reference for the audit were set by ACNI as follows:

- Work with the Arts Council to develop an agreed definition of the Traditional Musics sector in Northern Ireland;
- Establish the quantity & quality of all Traditional Music services (including tuition);
- Detail the context of Traditional Music tuition delivery (statutory/non-statutory i.e. identify opportunities, profile participants etc.);
- Assess the level of accessibility to Traditional Music instruments;
- Identify organisations who participate in Traditional Music competitions;
- Provide details on performance infrastructure i.e. in formal & informal settings;
- Identify Traditional Music organisations offering professional development i.e. training, mentoring etc;
- Identify partnerships & collaborations within the Traditional Music sector;
- Identify existing investment within the Traditional Music sector and potential funding opportunities;
- Provide an overview of media coverage & presentation i.e. who, what, when, where and how; and
- Establish level of recording and commercial CD/online release activity.

The audit was primarily a descriptive exercise and it sought to describe the core elements of the Traditional Music sector in Northern Ireland. In doing this, the audit has helped to establish benchmarks and baselines against which future development and change can be observed and measured. It has also helped identify strategic gaps and opportunities that need to be considered in the context of ACNI's current strategy for 2013-2018.

The section dealing with working towards developing a "*definition of the Traditional Musics sector in Northern Ireland*" was, of necessity, more discursive than descriptive. This section should be read as a contribution to a broader discussion being led by ACNI on developing an agreed definition of the Traditional Musics sector in Northern Ireland.

The approach to undertaking this audit involved literature review, desk-based research, interviews with individuals and representatives of organisations, and analysis of a survey that examined the provision of Traditional Music tuition in Northern Ireland. The bulk of the

interviews and related research took place in the period October-December 2014. Review and analyses of responses and other documentation took place in the period December 2014-January 2015.

A list of individuals and organisations consulted can be found at **Appendix 1**.

A list of publications and other sources consulted can be found at **Appendix 2**.

ACNI	Arts Council of Northern Ireland
BBC NI	British Broadcasting Corporation, Northern Ireland
CCÉ	Comhaltas Ceoltóirí Éireann
DCAL	Department of Culture, Arts & Leisure
ELB	Education and Library Board
GAA	Gaelic Athletic Association
IMRO	Irish Music Rights Organisation
LCM	London College of Music
NIBA	Northern Ireland Bands Association
NICVA	Northern Ireland Council for Voluntary Action
NIPDS	Northern Ireland Piping and Drumming School
NITB	Northern Ireland Tourist Board
OCN	Open College Network
PDQB	Piping and Drumming Qualifications Board
PRS	PRS For Music Limited
RSPBANI	Royal Scottish Pipe Band Association Northern Ireland
RTÉ	Raidió Teilifís Éireann
UCAS	Undergraduate Courses at University and College

2. Acknowledgments

I wish to thank all of the individuals and organisations who provided information, knowledge, insight and suggestions for this audit, and who made time for the meetings, conversations and email exchanges that formed a large part of this work. I also wish to acknowledge the contribution of the members of voluntary committees and boards who gave of their time generously. For a full list of the individuals and organisations that were contacted in connection with this audit, please see **Appendix 1**.

3. Executive Summary

This audit established that Traditional Music in Northern Ireland engages a large number of people on a regular basis throughout the year and throughout the region. The most sustained activity is in tuition and education with 118 mainly non-statutory providers offering at least 452 weekly traditional music classes catering for some 5295 participants of whom 70% are aged 24 or under. The needs of participants across all age groups are met by a wide variety of approaches to the processes of transmission, teaching and learning.

The Traditional Music sector relies heavily on voluntary support and activity combined with public funding – almost all tuition is provided by voluntary non-statutory organisations. Within the sector there are individuals and organisations who have accrued experience and insight over many decades of teaching, organising and promoting Traditional Music at community level and more widely. This represents a significant social and cultural asset for Northern Ireland.

Public funding, mainly from ACNI, plays a central role in ensuring that access to tuition on a regular basis is possible for large numbers of people; subsidy also reduces or removes financial barriers, so that more than 80% of participants pay £4 (four pounds) or less per weekly class; and subsidy helps to sustain a regular, if modest, source of income for Traditional Music teachers.

Within the sector there are consistent demands for more and improved resources to support tuition programmes, to expand access to instruments, to improve professional development opportunities, and to develop a more coherent, strategic and empathetic approach to Traditional Music among Departments and Agencies with responsibility for education, music and the arts. There is a widespread view within the sector that Traditional Music is not well understood, or its potential fully appreciated, within the formal music and education systems.

There are diverse views within the Traditional Music sector in Northern Ireland about how best to describe the traditions and the materials of music, song and dance that are shared by all participants, followers and enthusiasts. The prevailing view that emerged during this audit was that any definition of Traditional Music in Northern Ireland should be inclusive and based on people's musical traditions, and particularly on the shared aspects of the materials of the tradition; and there was an acknowledgement that Traditional Music, as it exists in Northern Ireland, is expressed and enjoyed in a great and complex variety of ways that makes it distinctly different here compared to almost anywhere else.

The performance infrastructure for Traditional Music encompasses festivals, widespread and regular informal music-making (such as pub sessions), folk and traditional clubs, parading events, broadcasting, touring performances organised by professional promoters,

programming by arts venues and competitive events. Northern Ireland's Traditional Musicians have excelled at the highest levels of competition both as soloists and as bands on an All-Ireland and World Championship basis.

Against this background of extensive year-round activity involving many people, there is relatively little coverage of Traditional Music in the print media, although coverage in the broadcast media (principally BBC NI) tends to be more substantial partly because of access to programmes broadcast by TG4 and RTÉ radio and television including Raidió na Gaeltachta.

There is a low level of activity in Traditional Music CD production in Northern Ireland and traditional musicians feel that current support structures in Northern Ireland inhibit rather than encourage CD production, but that this situation can be easily improved.

The establishment in October 2014 of The Forum for Traditional Music is a positive development that has created a sense of cohesion and the potential for common purpose within a fragmented sector. The Forum has identified a number of issues and challenges that were also identified by this audit, particularly in the areas of standards in education & training in traditional music, and access to resources including musical instruments.

4. Main Findings

This audit found that:

- There were 118 providers of Traditional Music tuition services in Antrim, Armagh, Ballinamallard, Ballymena, Ballymoney, Ballynahinch, Banbridge, Bangor, Belfast, Carrickfergus, Castlewellan, Clogher, Coleraine, Cookstown, Crumlin, Derry, Dromara, Dromore, Drumquin, Dungannon, Dungiven, Dunloy, Ederney, Enniskillen, Fivemiletown, Glenariff, Keady, Kilkeel, Limavady, Lisbellaw, Lisburn, Lurgan, Magherafelt, Markethill, Newry, Newcastle, Newtownabbey, Newtownards, Newtownbutler, Newtownstewart, Omagh, Portadown, Sion Mills, Strabane, Templepatrick, Waringstown (p.17-29);
- Almost all of these 118 are non-statutory providers (p.17-29);
- 63 of these providers received public funding for their tuition programmes (p.17-29);
- 452 Traditional Music classes were held on a weekly basis (p.17-29)
- 406 teachers were engaged in teaching 5295 students (p.17-29);
- There was unmet demand for Traditional Music classes in Ballymena, Ballymoney, Ballynahinch, Banbridge, Belfast, Carrickfergus, Castlewellan, Coleraine, Cookstown, Crumlin, Derry, Dromore, Drumquin, Dungannon, Dungiven, Ederney, Enniskillen, Fivemiletown, Glenariff, Keady, Lisbellaw, Lisburn, Lurgan, Magherafelt, Markethill, Newry, Newtownabbey, Newtownbutler, Omagh, Portadown, Rathfriland, Strabane, Waringstown (p.17-29);
- There was unmet demand for access to musical instruments on loan in Ballymena, Ballymoney, Ballynahinch, Belfast, Carrickfergus, Castlewellan, Coleraine, Derry, Dromore, Drumquin, Dungannon, Dungiven, Ederney, Enniskillen, Fivemiletown, Glenariff, Lisbellaw, Lurgan, Magherafelt, Markethill, Newry, Newtownabbey, Newtownbutler, Omagh, Portadown, Strabane (p.17-29);
- Pay rates for Traditional Music teachers in Northern Ireland were lower than elsewhere in the United Kingdom: 48% of NI teachers were paid an hourly rate of £20-£29, and 28% of NI teachers were paid £9 or less per hour; most UK regional teachers received an average hourly rate in the range £25-£36 and the mid-point was £30 (p.17-29);
- 70% of Traditional Music students are aged 6-24 (p.17-29);
- 60% of Traditional Music classes were held in local halls, including church halls and community centres (p.17-29);
- 81% of Traditional Music classes cost £4 or less per week (p.17-29);
- The preferred teaching method was a combination of oral transmission with written notation (p.17-29);
- More than 2500 musical instruments were available on loan (p.17-29);
- There were at least 30 makers of traditional instruments in Northern Ireland (p.17-29).

Gathering evidence on other aspects of Traditional Music – such as numbers attending Traditional Music events - was problematic. The reasons are complex and they include how data classification, collection and categorisation are operated, as well as issues to do with ticketing at outdoor and other events (p.55).

Traditional Music relies to a large extent on unremunerated voluntary support which includes people's time, access to and use of facilities, equipment and other resources, and access to a body of knowledge and expertise that is grounded in communities and individuals throughout the region (p.17-29).

Public funding plays an important role in sustaining Traditional Music activity and in removing financial barriers to participation in Traditional Music. For example public funding subsidises the costs of tuition programmes so that the cost of attending a Traditional Music class in Northern Ireland is £4 or less for 81% of participants, and public funding for the purchase of instruments enables people to avail of musical instruments on loan (p.17-29, p.54-57).

Tuition programmes run throughout the year and offer people of all ages the opportunity to engage with Traditional Music simply for its own sake, or for competition purposes, or for examinations or as a pathway towards a career in music (p.17-29, p.43-46).

There is consensus among providers of music tuition that there is an opportunity to develop a method for teaching aspects of Traditional Music that currently have few teaching aids and resources (specifically oral transmission and group learning); and that there is scope for developing a teaching method that has greater and more accurate empathy with the concept of oral transmission and with the diverse cultural values that characterise all forms of Traditional Music in Northern Ireland (p.28)

Media coverage of Traditional Music is marginal with regular coverage in print confined to a very small number of columnists whose focus is usually on the pipe band scene; BBC NI radio and television coverage in 2013/14 had an audience reach of 117,000 people (radio) and 100,000 people (television), with 6.5 hours television broadcast hours in 2013/14. Northern Ireland audiences also have access to RTÉ and TG4 which adds significantly to the amount of Traditional Music that is available to radio and television audiences in Northern Ireland; for example in 2012 TG4 broadcast 101 television hours of Traditional Music, and in 2013 this increased to 136 hours (p.58-60).

The level of activity in CD production and publication within the region is low; within the Traditional Music sector, there is dissatisfaction with how ACNI supports CD recordings for Traditional Music and musicians and others have suggested how this can be improved (p.61-63).

Traditional singing in English and in Irish currently occupies a relatively weak and marginal position; demand for classes is low and performance opportunities are scarce,

notwithstanding the emergence of singers' clubs and singing circles in recent years (pages 9, 22, 23, 48).

The current funding and support systems favour access to and participation in Traditional Music usually as a collective activity, with teaching normally delivered in group settings (p.18). During research interviews on this topic some concerns were expressed that lack of resources meant there were relatively few opportunities for high-level small group or one-to-one teaching and that this could cause an imbalance by prioritising access over accomplishment and quality.

The recent establishment by ACNI of the Forum for Traditional Music is seen as a positive step, and an opportunity to improve how Traditional Music functions within the cultural and social infrastructure in the region (p.52).

5. Recommendations

1. *ACNI to continue its work on developing a definition of Traditional Music in Northern Ireland by bringing the findings of this audit back to the Forum for Traditional Music as an initial exercise in consultation; and following further engagement with the Forum, to broaden the base of consultation to include DCAL and other Departments, and other agencies involved in cultural activity and enterprise (p.16)*
2. *ACNI to initiate exploratory discussions with the Forum for Traditional Music and with others including Musical Futures, ELB's and third-level institutions, on developing new and better resources for Traditional Music tuition (p.29)*
3. *ACNI to work with the Forum for Traditional Music to improve opportunities for sharing resources such as expertise, personnel and facilities including space (p.29)*
4. *ACNI to examine the gaps in capacity and skills identified in the audit, and to identify how these might be addressed by others including NICVA and other agencies (p.29)*
5. *ACNI to acknowledge and affirm the vitally important and valuable role that the non-statutory sector plays in maintaining and developing the traditional arts in Northern Ireland, and to build on the opportunity of the Forum for Traditional Music to ensure that decisions of policy and strategy are informed by expertise 'on the ground' (p.36)*
6. *ACNI to consider undertaking a more detailed assessment of the needs of tuition providers in order to inform a more strategic and planned approach to supporting this aspect of the infrastructure for Traditional Music in Northern Ireland (p.36)*
7. *ACNI to maintain support for schemes that facilitate access to musical instruments (p.42)*

8. *ACNI to invite instrument makers to participate in the Forum for Traditional Music (p.42)*
9. *ACNI to consider a more strategic approach and an updated policy for funding instrument purchase e.g. research needs and trends across the entire sector; consider a focus on high quality instruments on loan to learners who show exceptional potential and who need a better instrument, and a similar approach to instruments for exceptional professional performers (p.42)*
10. *ACNI to develop a policy position, with others, on support for instrument makers in Northern Ireland (p.42)*
11. *ACNI to acknowledge the role and impact of competition in traditional music in Northern Ireland, as a platform for high artistic standards and as a valid performance context in its own right (p.46)*
12. *ACNI to work with venues, promoters, Audiences NI, NITB and others to establish the extent of any unmet demand for Traditional Music performance in Northern Ireland and identify any barriers to responding to this demand (p.50)*
13. *ACNI to consider ways of supporting and promoting the performance of traditional song (p.50)*
14. *ACNI to work with others including NICVA and Voluntary Arts Ireland to identify developmental resources and opportunities for people and organisations working in Traditional Music (p.51)*
15. *ACNI needs to harness the opportunity presented by the Forum for Traditional Music to encourage greater cohesion within the Traditional Music sector, and to create a supportive environment for experiments in collaboration and cooperation on a project or programme basis (p.53)*
16. *ACNI to consider and explore with the Forum for Traditional Music issues raised during this audit, for example in the area of methods and resources for teaching Traditional Music, or in the area of developing support for showcases of Traditional Music from Northern Ireland, or the idea of technical support for small voluntary organisations based on the model used by the Ulster Scots Community Network (p.53)*

17. *Any initiative by ACNI or other funding agencies to encourage collaboration and cooperation needs first to help organisations identify specific areas of need and opportunities for improvement so that there are tangible positive goals, rather than a dominant focus on reducing spending (p.53)*
18. *ACNI to take a lead role in setting, with others, an agenda for research, development and capacity building focused on the traditional arts for the following purposes: to help guide future public investment in sustaining the traditional arts in Northern Ireland, to help inform policy on current or future investment in this sector, and to establish how traditional arts can continue to contribute to society and economy in the region. (p.56-57)*
19. *ACNI to work with NITB to develop an agenda of ideas and implementation plans that can exploit opportunities to reposition Traditional Music more accurately, more prominently and more effectively in Northern Ireland's tourism offerings to visitors, particularly where experiential tourism is concerned. (p.56-57)*
20. *ACNI to take a lead role in initiating a baseline study of the audience in Northern Ireland for Traditional Music. (p.56-57)*
21. *ACNI to design and implement a media campaign to increase awareness and visibility of traditional music by building on the strengths of established performance infrastructure such as festivals, competitive events and the availability of good quality informal music making (p.60)*
22. *ACNI to review the effectiveness and impact of its policy on supporting recordings (or other digital assets) by Traditional Musicians, and compare with support systems that are used elsewhere (p.62-63)*
23. *ACNI to set out its objectives for supporting recordings by Traditional Musicians (p.62-62)*
24. *ACNI to review the suitability and effectiveness of the current rules that govern existing funding for recordings by Traditional Musicians (p.62-63)*

6. DEFINING THE TRADITIONAL MUSICS SECTOR

One of the purposes of this audit was to work with the Arts Council to develop an agreed definition of the Traditional Music sector in Northern Ireland. ACNI describes Traditional Music as a significant component of the traditional arts in Northern Ireland which *“incorporate the indigenous music, song and dance of the region and other art forms that relate to these disciplines such as story-telling, Mumming and other manifestations of folk custom and tradition.”* (ACNI Art Form and Specialist Area Policy 2013-2018 Traditional Arts).

One way of defining the Traditional Music sector in Northern Ireland is to list all the activities and practices that fit under the label ‘Traditional Music’ as it exists in common usage today. The term ‘traditional’ describes a continuous dynamic process of transmission and development across generations, with a reliance on oral transmission, and with a sense of common ownership of a body of music whose composers are generally unknown or anonymous. For example, such a list includes learning and playing an instrument such as the bagpipes or fiddle or accordion, or singing traditional songs and ballads in English or in Irish; the list also includes pipe bands, drumming, céilí bands, ballad groups, flute bands, accordion bands, professional Traditional Music bands as well as composers, arrangers, publishers, music promoters, teachers, instrument makers, writers, broadcasters, academics and others. This definition is enhanced by adding that the music and song and dance that we’re talking about are the expression of an authentic, living, adaptive tradition of European folk music that we know has been shared between Ireland and Scotland (and their diaspora) for centuries. Some easily recognisable elements of it include isometric tunes such as reels and jigs and marches, solo and group dances that go with the music, songs such as ballads, and a strong sense of dynamic continuity with the past. A further refinement of this definition or list would be to identify where this music is played and heard – in houses, in open-air settings, in concert halls, on radio, on YouTube, at festivals and so on. In the case of Northern Ireland, this definition could also include a large number of organisations and individuals who are funded by ACNI and others to promote Traditional Music.

Another approach to defining The Traditional Music sector in Northern Ireland is to describe, rather than simply list, the elements of the complex whole that is Traditional Music in Northern Ireland.

The Traditional Music sector is home to a broad spectrum of people who are engaged and involved in a rich variety of expressions of Traditional Music. In this context the term ‘Traditional Music’ refers to a contemporary living tradition of folk music, song and dance that is identified globally with Ireland and with people who have Irish connections or affiliations. This is a very significant living tradition of European instrumental & vocal music and dance that has developed a distinctively unique and complex identity within these

islands and there is a particular musical affinity between Ireland and Scotland that is clearly evident in Traditional Music in Northern Ireland.

Within Ireland, this living tradition is generally understood by practitioners to represent elements of a living culture that is shared, to greater or lesser extents, with Scotland and with areas of Irish and Scottish settlement throughout the world. There are well established and widely acknowledged affinities, shared repertoires and similar cultural values that are held in common between Ireland (and especially Northern Ireland) and Scotland, and these have helped shape the sound and feel of this living tradition of music, song and dance. The closeness of this cultural relationship was captured accurately by the late John Doherty (c.1901-1981), a legendary figure in Traditional Music in the 20th century, when he said: "*There's only a paper wall between Irish and Scottish music*".

There is a wide variety and richness of expression that characterises Traditional Music in Northern Ireland. These characteristics bring a distinctive depth, intensity and complexity to the living culture of Traditional Music in the region. This is something that makes it quite unlike any other region in Ireland or anywhere else where this music is found.

The rich diversity of traditional music within Northern Ireland is well described in a number of publications including *The Northern Fiddler* (Feldman, O'Doherty, 1978), *With Fife & Drum* (Hastings, 2003), *Hidden Fermanagh* (Maguire, 2003), *All the Days of His Life: Eddie Butcher in His Own Words* (Shields, 2011) and *Handed Down: Country Fiddling & Dance in East and Central Down* (Boullier, 2012).

The term 'traditional' describes something that is living and changing over time, being passed from generation to generation, and Traditional Music exists more as a process rather than as an artefact or object.

The cultural complexities in Northern Ireland today are easily seen in the fact that the terms '*Irish Traditional Music*' and '*traditional Irish music*' and '*Traditional Music of Ireland*' and '*Traditional Music from Ireland*' are all used to refer to essentially the same thing but from different (and often oppositional) cultural perspectives.

The diversity of views among practitioners of Traditional Music tends to focus not on the materials of the music itself (the tunes, songs, dances and their lore) and there is no disagreement about what a reel is, or what the difference is between a 6/8 jig and a 9/8 jig. Instead there is some debate on what the universal set of these things should be called. For example, in addition to the plurality of opinions about terms described above, there is also a healthy diversity of views about the term 'Traditional Musics' instead of 'Traditional Music' to describe the rich variety of expressions of Traditional Music in Northern Ireland. The Arts Council of Northern Ireland currently uses both terms.

During this audit, almost all respondents identified with an inclusive approach to describing Traditional Music and the Traditional Music sector in Northern Ireland; and almost all used

Ireland and Scotland (and their diaspora) jointly as reference points, reflecting the shared origins and domains of circulation of this living tradition. Interestingly, alongside this broad consensus, perceptions remain among practitioners that there could be better mutual awareness and mutual appreciation of the dynamic interplay between the Irish and Scottish elements of the living tradition as it exists in Northern Ireland today. A small number of respondents representing the Ulster Scots sector referred to Scotland exclusively as the point of reference or the single source for their interpretation of what, for them, constitutes a culturally separate and distinct Traditional Music and Traditional Music sector in Northern Ireland. However this view is challenged by other respondents, from right across the sector, who question the authenticity and accuracy of the Ulster Scots label being applied in a limiting way to the music, song and dance that, historically, have always been held and enjoyed in common between and within the peoples of Ireland and Scotland.

At the macro-level, the Traditional Music sector in Northern Ireland includes individuals who perform, compose, make instruments, teach, and who devise, programme, produce and present events such as festivals, competitions and concerts; it includes the people who attend events; it includes organisations that provide services such as tuition, training and access to resources including musical instruments, archival materials, printed materials and audio-visual materials; it includes venues that feature the presentation of Traditional Music in their programming; the sector also includes journalists, critics, broadcasters, bloggers and others whose interests and work feature Traditional Music; and an important part of the Traditional Music sector is the range of public or statutory bodies and agencies in arts, culture, heritage, tourism, education and other areas whose role and functions include providing support and other resources for Traditional Music.

In the research interviews there were discussions about developing an agreed definition of the Traditional Music sector in Northern Ireland, and the following propositions were articulated by respondents:

- The terms 'Traditional Music' and 'Traditional Music sector' are inclusive and based on the materials of the music, song and dance and not on other factors
- An inclusive definition of 'Traditional Music' will, by default, define 'the Traditional Music sector'
- The Traditional Music sector is largely voluntary and community based – any definition needs to reflect this
- Traditional Music is a living contemporary art form and any definition should be based on this
- A definition of Traditional Music needs to acknowledge both the Irish and English language components of the tradition

- The individual artist needs to be more prominent in any definition of Traditional Music and the Traditional Music sector
- A definition needs to acknowledge that there is artistic excellence side by side with widespread access and participation in Traditional Music in Northern Ireland
- There needs to be an emphasis on the concepts of ‘living tradition’ and ‘orally transmitted culture’ and on the processes of transmission that define and sustain the Traditional Music sector
- A definition needs to show empathy with, and understanding of, the particular aesthetic and cultural values that (a) underpin Traditional Music and (b) distinguish it from other forms of music and from the systems that are designed around those forms
- A definition of the Traditional Music sector must acknowledge the existence of the professional streams of activity and career pathways that have always existed alongside the community-based and voluntary practice of the music
- A definition needs to embrace the rich diversity of how Traditional Music exists and how it is performed and appreciated in Northern Ireland
- A definition of ‘Traditional Music’ should be a precursor to a definition of ‘traditional arts’
- A definition could be illustrated by contemporary and historic examples that show the breadth and diversity of the art form and the scale of the sector and community of practice
- A definition of the Traditional Music sector should not be based primarily or exclusively on organisations, individuals or events that receive funding
- A definition of Traditional Music needs to be negotiated with people right across the sector, and discussions needs to take account of how individuals and communities identify themselves and their engagement with Traditional Music

This summary of insights and views from within the Traditional Music community is part of this audit’s contribution to working with the Arts Council of Northern Ireland “to develop an agreed definition of the Traditional Musics sector in Northern Ireland.”

Recommendation: ACNI to continue its work on developing a definition of Traditional Music in Northern Ireland by bringing the findings of this audit back to the Forum for Traditional Music as an initial exercise in consultation; and following further engagement with the Forum, to broaden the base of consultation to include DCAL and other Departments, and other agencies involved in cultural activity and enterprise (education, broadcasting, social development, tourism etc)

7. AUDIT OF TRADITIONAL MUSIC SERVICES (including tuition)

The Audit looked at the range of Traditional Music services being provided in Northern Ireland, with a particular emphasis on tuition. In addition to interviews and desk-based research, there was a survey of organisations involved in teaching Traditional Music in Northern Ireland. The objective of the survey was to establish a baseline of quantitative data, and also to get insight and feedback from the Traditional Music community about issues, ideas and needs.

The survey was administered by ACNI and was sent to two groups comprising 1482 members in total:

Group A: 433 arts organisations and individuals involved directly or indirectly in Traditional Music

Group B: 1049 schools.

156 responses were received, almost all of these from the 433 members of **Group A** which comprised 28 Traditional Music clients of ACNI, 13 music venues, 5 large festivals, 70 organisations and agencies (including Local Authorities, Ulster Scots Agency, band forums), 79 individual artists, 29 instrument makers and 209 bands. This represents a response rate from this group of 36%, and a response rate of 11% of the entire number to whom the survey was sent.

7.1 Number and frequency of Traditional Music classes in Northern Ireland:

QUESTIONS:

- *Do you deliver Traditional Music tuition (instrumental, singing) on a weekly basis?*
- *If yes, how many Traditional Music classes do you deliver weekly?*
- *If yes, how many weeks in the year?*
- *If not weekly, please describe the frequency of your Traditional Music tuition programme*
- *Please provide the total number of students receiving Traditional Music tuition over the past 12 months*
- *Please provide the number of teachers you currently work with to deliver your programme of Traditional Music tuition*

The findings of the survey show that Traditional Music tuition is available throughout Northern Ireland on a year-round basis, supported by an extensive infrastructure of voluntary activity and expertise; the following locations were identified: Antrim, Armagh, Ballinamallard, Ballymena, Ballymoney, Ballynahinch, Banbridge, Bangor, Belfast, Carrickfergus, Castlewellan, Clogher, Coleraine, Cookstown, Crumlin, Derry, Dromara, Dromore, Drumquin, Dungannon, Dungiven, Dunloy, Ederney, Enniskillen, Fivemiletown, Glenariff, Keady, Kilkeel, Limavady, Lisbellaw, Lisburn, Lurgan, Magherafelt, Markethill, Newry, Newcastle, Newtownabbey, Newtownards, Newtownbutler, Newtownstewart, Omagh, Portadown, Sion Mills, Strabane, Templepatrick, Waringstown

- There are 118 providers of Traditional Music tuition services in Northern Ireland
- There are 452 Traditional Music classes held on a weekly basis throughout Northern

Ireland

- 406 teachers are employed in providing Traditional Music classes in the region
- Classes run on average for 36 weeks during the year, with some providers operating up to 50 or more weeks a year

7.2 Cost of weekly Traditional Music classes in Northern Ireland:

QUESTIONS:

- *Please indicate the cost of tuition for students on a per class per week basis*
- *Please indicate if your Traditional Music tuition programme offers any incentives aimed at increasing affordability from the list below: Concessions e.g. under 18, OAPs, Discounts e.g. family price, Neither, Other*

Most classes are provided free of charge to students; 15% of providers offer concessions aimed at under 18's and OAP's, 10% offer discounts aimed at families and 9% offer other affordability incentives including free use of equipment/instruments, and fundraising activity to subsidise cost of tuition:

- 57% of all classes are provided free of cost to the student
- 81% of all students pay £4 or less per class
- 11% of all students pay between £5-£14 per class
- 8% of all students pay £20 or more per class

7.3 Class sizes in Traditional Music tuition:

QUESTION:

- *Please provide the percentage of classes you deliver by range of participants (options included 1:1 tuition and groups of up to 24 and more students)*

Class sizes range from small (1-4 students) to large groups (24 or more students) and based on the responses to the survey, the most commonly occurring class sizes are:

- 5-9 students (x63)
- 1-4 students (x59)
- 15-19 students (x40)
- 20-24 students (x31)
- 24+ students (x30)
- 10-14 students (x24)

7.4 Age profile of Traditional Music students:

Question:

- *Please indicate the percentage of students receiving Traditional Music tuition by age*

The age profile of students is very broad and different providers deal with groups of different age profiles, and not all providers have an equal distribution of age groups among their students; evidence from the survey suggests that:

- 97 providers cater for students in the 6-24 age group and this age group represents 70% of their student numbers
- 97 providers cater for students aged 15 or under, and this age group represents 53% of their student numbers
- 91 providers cater for students in the 16-24 age group and this age group represents 20% of their student numbers
- 73 providers cater for students in the 25-54 age group and this age group represents 33% of their student numbers
- 43 providers cater for students aged 55 or over, and this age group represents 9% of

their student numbers

7.5 Grading of classes in Traditional Music:

QUESTION:

- *Please indicate if your Traditional Music tuition programme includes any of the classes listed below (options included Auditions for new Students, Beginner classes, Intermediate classes, Advanced classes, and Other)*

Traditional Music classes are provided at a number of different grades (beginner, intermediate, advanced) and different providers offer different combinations of grades; 11% of providers use auditions to assist in assigning students to classes; the evidence from the survey indicates that 94% of Traditional Music tuition providers can cater for beginners, 76% can cater for intermediate, and 42% can cater for advanced levels:

TABLE 7.5

Grading system	Number of providers	Number of providers as % of total
Auditions for new students	2	2%
Auditions + beginners + intermediate	6	5%
Auditions + beginners + advanced	4	4%
Beginners	17	15%
Beginners + intermediate	36	32%
Beginners + advanced	2	2%
Beginners + intermediate + advanced	40	36%
Intermediate	3	3%
Other	1	
TOTAL	111	

7.6 Preferred teaching resources:

QUESTION:

- *Please rank the resources used by teachers in your Traditional Music tuition programme in order of preference (options included Publications, Recordings, Online resources and Own materials; these were ranked 1-4 in descending order of preference)*

Providers of Traditional Music tuition were asked to rank the resources used by their teachers, in order of preference, from among the following: publications, recordings, online resources and own materials. Respondents ranked their own materials as most preferred (71%), followed by publications (25%), recordings (21%) and online resources (6%):

TABLE 7.6

	Number of responses	Rank 1	Rank2	Rank 3	Rank 4	NA
Publications	95	24 (25%)	22 (23%)	15 (16%)	15 (16%)	19 (20%)
Recordings	92	19 (21%)	23 (25%)	21 (23%)	11 (12%)	18 (20%)
Online resources	87	5 (6%)	19 (22%)	22 (25%)	18 (21%)	23 (26%)
Own materials	111	79 (71%)	15 (14%)	5 (5%)	9 (8%)	3 (3%)

7.7 Preparation of students for examinations in Traditional Music:

QUESTION:

- *Do you prepare students for Traditional Music examinations?*

The survey asked providers of Traditional Music tuition if they prepared students for examinations and a significant majority of respondents said that this is not part of the service that they provide:

TABLE 7.7

Do you prepare students for Traditional Music examinations?	YES	NO
	27	90
	23%	77%

7.8 Examination syllabi offered to students in Traditional Music:

QUESTIONS:

- *Please indicate which syllabus you normally deliver to students for Traditional Music examinations (options included London College of Music, Trinity College London, Piping and Drumming Qualifications Board and Other)*
- *On average, how many students enter examinations each year?*

Providers of Traditional Music tuition who prepare students for examinations in Traditional Music deliver a range of syllabi which are listed in the table below, and some providers offer more than one syllabus. 29 providers of Traditional Music tuition who prepare students for examinations reported that on average, they prepare 14 students annually for examinations; the number of students that each provider prepares annually ranges between 1 and 100; the survey indicates that a majority (69%) of students who prepare for exams prepare for the London College of Music syllabus, with 20% preparing for the PDQB exams, 8% for Trinity College London and 3% for the NIPDS exams.

TABLE 7.8

Syllabus	Number of providers	Average number of students who prepare for exams and who take this syllabus annually	This number of students as % of average number of students who prepare for exams annually
London College of Music	11	209	69%
Piping & Drumming Qualifications Board (PDQB)	8	61	20%
Trinity College London	4	23	8%
Northern Ireland Piping & Drumming School (NIPDS)	1	8	3%
Comhaltas Ceoltóirí Éireann	1		

OCN Level 2 (Bflat flute)	1		
UK Dance Alliance	1		

7.9 Preparing students for competition:

QUESTION:

- *Do you prepare students for competitions?*

The survey results indicate that a majority (58%) of providers of Traditional Music tuition prepare students for a variety of competitions (solo, ensemble and bands) that happen within Northern Ireland, on an all-Ireland basis and on an international and/or world championship basis:

TABLE 7.9

Do you prepare students for Traditional Music competitions?	YES	NO
	67	49
	58%	42%

7.10 Types of competitive event:

QUESTION:

- *Please list the competitive events you prepare students for, including any that are held outside Northern Ireland*

The range of competitive events includes local competitions, festivals and feiseanna; regional & provincial heats and finals; all-Ireland heats and finals; and world championship events.

7.11 Venues for Traditional Music classes in Northern Ireland:

QUESTION:

- *Please indicate which type of venue(s) where your Traditional Music classes take place (options included School, Community Centre, Theatre/purpose built arts centre, Office/Industrial Unit, Local Hal incl. Church Hall, and Other)*

Most Traditional Music classes take place throughout Northern Ireland in local halls, community centres, church halls or school buildings; a small number of purpose-built arts centres or theatres are used, and other venue types include house, industrial unit/office, social club, café, football supporters' club and third-level educational facilities:

- 60% of Traditional Music classes are held in local halls, including church halls, and community centres
- 28% of Traditional Music classes are held in school buildings
- 3% of Traditional Music classes are held in purpose-built arts centres or theatres
- 8% of Traditional Music classes are held in other types of venue

7.12 Preferred methods of Traditional Music teaching and transmission:

QUESTION:

- *Please tick only those instruments that you currently include in your Traditional Music programme and indicate in each whether they are taught through oral transmission, music notation or both*

Classes are offered in a wide variety of instruments and in traditional singing, and preferred teaching methods include the use of written notation, oral transmission and a combination of both. The evidence provided by the survey strongly suggests that the combined approach is the most preferred, followed by a preference for oral transmission, followed by a preference for the use of written notation:

TABLE 7.12

Instrument	Number of providers	No preference indicated	Oral transmission	Written notation	Both
Accordion	30	6	1	4	19
Banjo	14	4	2	1	7
Bagpipes	23	3	2	2	16
Bodhrán	17	5	8	0	4
Bouzouki	1	1	-	-	-
Concertina	8	1	2	4	1
Drumming	73	9	24	3	37
Fiddle	29	5	3	4	17
Flute	46	9	4	2	31
Guitar	18	5	3	3	7
Harp	5	1	1	0	3
Mandolin	8	3	1	1	3
Music Theory	14	4	0	3	7
Piano/keyboard	4	2	0	0	2
Singing	10	2	4	0	4
Tin whistle	42	6	8	6	22
Uilleann pipes	10	2	1	0	7

7.13 Distance learning & online methods:

QUESTION:

- *Are you currently involved in teaching Traditional Music through distance learning, including the use of on-line classes or tutorials?*

The use of distance learning and online teaching methods is uncommon, with 10 providers currently using such methods and 3 providers considering using these approaches in the next 12 months.

7.14 Unmet demand for classes in certain instruments:

QUESTION:

- *Please indicate if you have received queries about hosting or have waiting lists for music classes in instruments that you cannot currently provide*

There is evidence of unmet demand for classes in almost all instruments in many areas: Ballymena, Ballymoney, Ballynahinch, Banbridge, Belfast, Carrickfergus, Castlewellan, Coleraine, Cookstown,

Crumlin, Derry, Dromore, Drumquin, Dungannon, Dungiven, Ederney, Enniskillen, Fivemiletown, Glengariff, Keady, Lisbellaw, Lisburn, Lurgan, Magherafelt, Markethill, Newry, Newtownabbey, Newtownbutler, Omagh, Portadown, Rathfriland, Strabane, Waringstown and the following table describes this demand and ranks each instrument or group of instruments based on the number of reported requests for classes:

TABLE 7.14

Rank (1=greatest demand, 11=least demand)	Instrument	Number of providers who report unmet requests for tuition in this instrument
1	Drumming	x20
2	Flute	x16
3	Accordion	x13
4	Fiddle	x11
5	Bodhrán Guitar	x10 x10
6	Piano/keyboards Tin whistle	x7 x7
7	Banjo Music theory	x6 x6
8	Bagpipes Harp	x5 x5
9	Singing Uilleann pipes	x4 x4
10	Concertina	x3
11	Bouzouki Brass Fife Mandolin	x1 x1 x1 x1

7.15 Instrument loan schemes:

QUESTIONS:

- *Do you operate an instrument loan scheme as part of your Traditional Music programme?*
- *Please provide the number of each of the instruments you have in stock from the list below*

Instrument loan schemes are an important integral element of the infrastructure of Traditional Music tuition in Northern Ireland. The schemes fulfil a number of functions including:

- Facilitating, improving or maintaining access to instruments
- Removing financial or other barriers
- Creating opportunities to ‘try before you buy’
- Supporting the local and regional market in musical instruments (manufacture, retail, maintenance)
- Providing good quality instruments for players at all stages
- Creating access to high quality instruments for players who face limitations from their current instrument

- Creating stability and continuity for providers of Traditional Music tuition services and those who avail of these services

Evidence from the survey indicates that 61 providers of Traditional Music tuition operate loan schemes, and that 2540 instruments are in circulation through these schemes. The most numerous instruments that are available on loan are flutes (x968 or 38% of total), drums (x544 or 21% of total), accordion (x357 or 14% of total), fiddle (x343 or 14% of total) and bagpipes (x118 or 5% of total). The table below is based on the evidence of the survey and it describes the size and composition of the Traditional Music instrument-on-loan bank in Northern Ireland:

TABLE 7.15

Instrument	Quantity of units of this instrument available on loan in NI	Number of loan schemes that offer this instrument
Accordion	357	22
Banjo	7	2
Bagpipes	118	13
Bodhrán	14	4
Bouzouki	0	0
Concertina	9	2
Drumming	544	56
Fiddle	343	14
Flute	968	33
Guitar	14	4
Harp	12	2
Mandolin	4	2
Piano/keyboard	1	1
Tin whistle	49	3
Uilleann pipes	25	6
Miscellaneous	75	2
TOTAL	2540	

7.16 Unmet demand for certain instruments-on-loan:

QUESTION:

- Please indicate if you have received queries or requests to loan instruments that you do not stock/currently provide

In the survey, 47 (66%) of the 61 providers of instrument-on-loan schemes reported that there is demand for instruments that they are currently not able to provide:

TABLE 7.16

Rank (1=greatest demand, 10=least demand)	Instrument	Number of providers who report unmet demand for this instrument to be available on loan
1	Flute	14

2	Drums	13
3	Fiddle Tin whistle	8 8
4	Accordion	6
5	Bagpipes Bodhrán Guitar	5 5 5
6	Banjo Concertina Uilleann pipes	4 4 4
7	Harp	3
8	Piano/keyboards	2
9	Fife Mandolin	1 1
10	Bouzouki	0

Source of subsidy	Number of providers who receive subsidy from this source	This number as a % of Traditional Music tuition providers who receive public subsidy
Ulster Scots Agency	38	60%
Arts Council of Northern Ireland	16	25%
Education and Library Board	2	3%
Local Authority	1	2%
Foras na Gaeilge	1	2%
PEACE III	1	2%
Other	4	6%
TOTAL	63	

7.18 Fees offered to Traditional Music teachers in Northern Ireland (hourly rate):

QUESTION:

- *Please indicate the range of fees that you currently offer Traditional Music teachers on an hourly rate basis*

The survey examined the range of fees currently offered in Northern Ireland to Traditional Music teachers on an hourly rate basis. A significant proportion (48%) of the 103 providers who provided data indicated that they offer an hourly rate of £20-£29; just under a third (28%) offer an hourly rate of £9 or less, and 13% offer a rate of between £10-£19 per hour. A recent survey of fees for private music tuition, conducted by independent statisticians at the University of Reading on behalf of the Incorporated Society of Musicians (www.ism.org), examined data from around one thousand (1000) teachers in the United Kingdom and found that most private teachers charge between £25 and £36 per hour. The mid-point (in the sense that half the teachers charged more and half charged less than this figure) was £30.

The majority of providers interviewed for this audit said that they aimed to offer the best rate possible within their resources in order to attract and retain tutors; none of the providers was able to offer their tutors travel expenses or a contribution towards travel expenses, with the exception of the Ulster Scots Agency which pays £0.45p per mile:

TABLE 7.18

Hourly rate (£)	Number of providers who offer this hourly rate	This number as a % of Traditional Music tuition providers who offer an hourly rate
0-£9	29	28%
£10-£19	13	13%
£20-£29	49	48%
£30-£39	8	8%
£40-£49	3	3%
£50 and more	1	1%
Total	103	

7.19 Preferred methods for recruiting new teachers:

QUESTION

- *Please indicate your most used method in recruiting teachers for your Traditional Music programme (options included A suitably trained former pupil, Peer recommendation, CV and Formal interview)*

This survey asked about the most used methods in recruiting Traditional Music teachers and the findings indicate that providers of Traditional Music tuition rely mainly on peer recommendations and on the availability of suitably trained former pupils when it comes to recruiting new teachers; formal interviewing is not widely used, and recruitment based on a person's *curriculum vitae* is uncommon:

TABLE 7.19

Method of recruitment	Number of providers who prefer this method	This number as a % of Traditional Music tuition providers who recruit new teachers
Peer recommendation	51	49%
Suitably qualified former pupil	42	40%
Formal interview	8	7%
CV	4	4%
TOTAL	105	

7.20 Desired qualities in Traditional Music teachers:

QUESTION:

- *Please indicate the qualities that you normally require/desire when recruiting a new Traditional Music teacher (options included Teaching experience, Success in local community as a performer, Success in National/International competition, and Academic or professional qualification)*

The survey asked Traditional Music tuition providers to indicate the qualities that they normally require when recruiting a new teacher; most providers (59%) cited 'teaching experience' followed by 'success as a performer'; neither 'success in competitions' nor 'academic/professional qualifications' appear to be significant factors in the decision to recruit a teacher:

TABLE 7.20

Quality normally required when recruiting a new teacher	Number of providers who prioritise this quality	This number as a % of Traditional Music tuition providers who recruit new teachers
Teaching experience	64	59%
Success as a performer	34	31%
Success in competitions	7	6%
Academic/professional qualification	4	4%
TOTAL	109	

7.21 Training & development opportunities for Traditional Music teachers:

QUESTION:

- *Please tell us if your teachers access any of the training and development opportunities listed (options included Courses, Conferences, In-house training, Coaching/mentoring, Paid internships, Formal apprenticeships, Work experience, and Other)*

The survey found that 65 providers work with teachers who have access to training and development opportunities that include in-house training, attendance at courses, coaching and mentoring, work experience and other opportunities:

TABLE 7.21

Type of training/development opportunity to which your teachers have access	Number of providers whose teachers avail of these opportunities	This number as a % of Traditional Music tuition providers whose teachers avail of training and development
In-house training	21	32%
Courses	12	18%
Work experience	11	17%
Coaching/mentoring	10	15%
Other	6	9%
Conferences	2	3%
Formal apprenticeships	2	3%
Paid internships	1	2%
TOTAL	65	

7.22 Top three areas of need:

QUESTION:

- *Please tell us what you consider the three greatest areas of need for Traditional Music teachers*

Respondents identified a broad range of needs and these can be categorised and prioritised as follows:

1. Funding – there is a need for increased funding to maintain and increase access to Traditional Music tuition services throughout Northern Ireland, to cover teachers; fees and other overheads
2. Musical instruments –there is a need to keep expanding access to Traditional Music instruments, to maintain the quality of existing instruments, and to ensure the availability of instruments for instrument banks
3. Building capacity – there is a need for better resources of Traditional Music teachers and for teachers who are coming anew to Traditional Music, there is a need to develop a method for teaching Traditional Music especially in group settings, there is a need for a consistent approach to qualifications & accreditation, and there is a need to ensure that the sector has access to suitably experienced people

During research interviews respondents identified other issues and concerns about their capacity to continue to deliver their programmes, including the following:

- A number of organisations referred to problems and pressures arising from the burden of administration on small voluntary organisations who receive grants – the issue is not resistance to accountability, it is a really practical issue of resources, people and time
- Organisations referred to opportunities for better sharing of resources and expertise (e.g. trained teachers, space, teaching materials) but expressed frustration at not having time or support that allows them to explore and develop these opportunities
- Some organisations referred to a need for more practical and expert technical support such as the mentoring and assistance services provided by the Ulster Scots Community Network

to its affiliated organisations, particularly in assisting with funding applications and supporting small voluntary organisations in meeting regulatory and other governance issues

Recommendations:

- *ACNI to initiate exploratory discussions with the Forum for Traditional Music and with others including Musical Futures, ELB's and third-level institutions, on developing new and better resources for Traditional Music tuition*
- *ACNI to work with the Forum for Traditional Music to improve opportunities for sharing resources such as expertise, personnel and facilities including space*
- *ACNI to examine the gaps in capacity and skills identified in the audit, and to identify how these might be addressed by others including NICVA and other agencies*

8. How Traditional Music tuition is delivered

The Audit looked at how statutory and non-statutory organisations planned and delivered programmes of traditional music tuition in the region. The picture is of a diverse sector of activity that is reliant on voluntary, non-statutory support. There are issues to do with consistency in standards and approaches to teaching that need to be resolved.

Statutory

The statutory provision of tuition in Traditional Music includes the formal education system at primary, secondary and third level. The current music curriculum for primary and secondary education is skills-based rather than genre-based, and this allows a student to opt to present Traditional Music in fulfilment of the requirements of the curriculum. This means that a student may present Traditional Music at GCSE and A Level. Traditional Music is not a core element of the music services provided by the Education and Library Boards (ELB's). There are occasional exceptions to this however and in a small number of localities, Traditional Music has emerged as a preferred and effective option that allows the ELB to deliver its services.

At third level, the options for studying Traditional Music include primary degree and postgraduate opportunities in music, music technology and sonic arts at Queen's University, Belfast (BMus Bachelor in Music, BSc Music technology and Sonic Arts, MA in Music (Irish Traditional) and PhD (Musicology, Ethnomusicology) and at the Ulster University (Bachelor of Music Hons, Master of Music). These third level options create opportunities for graduates to follow a range of careers within and outside of the music industry including careers as composers and performers, teachers, sound engineers, community music leaders and researchers.

During research interviews conducted for this audit, respondents spoke of the need for better and more systematic support and resources for teachers who use, or who may be required to use, Traditional Music at primary and second levels. There is a particular gap in resources for teachers who are coming to Traditional Music for the first time. At primary and secondary levels in particular, respondents observed that music teachers need the resources (materials, training and other professional support) to help students who choose to present Traditional Music in the examinations. There are a number of resources currently available for teachers to assist them in helping students prepare for examinations in Traditional Music and these include tutor books and course guides by providers such as Northern Ireland School of Piping & Drumming, Armagh Pipers' Club, and Comhaltas Ceoltóirí Éireann.

A number of other options, in some cases leading to qualifications, are available to teachers through the work of the non-statutory organisations that are discussed below.

It is worth noting the Traditional Music research resources and facilities that are available at the Ulster Folk & Transport Museum in Cultra which is part of National Museums Northern Ireland and funded by DCAL. The sound archive at the Museum holds some 6,000 hours of material dating from the early 1960's which covers a wide range of subject matters including Traditional Music and song, oral history, folklore alongside agriculture, crafts and trades, and transport. Some highlights from the Traditional Music collection include recordings of Ulster singers made by Hugh Shields in the 1960's and recordings made of recitals and concerts of leading performers from 1995 to the present. Traditional Music recorded by the BBC is also accessible in the archive as is the RTÉ Raidió na Gaeltachta archive from 1972 to 2012. The museum also has a collection of Traditional Music on 78 rpm records, vinyl and CD and access to these important source materials is by appointment.

Non-statutory

The non-statutory provision of Traditional Music tuition in Northern Ireland encompasses a wide range of mainly voluntary organisations, some of which have been active in this field of music since the 1950's. These organisations and their members, affiliates, users, supporters, associates and others represent a very significant body of cultural and social capital and capacity within the community in Northern Ireland, in addition to such tangible assets as instruments, equipment and buildings. There is no economic or social value and impact assessment available of this sector in Northern Ireland.

The Arts Council of Northern Ireland funds a number of these organisations to assist with the costs of delivering programmes of regular (usually weekly) programmes of tuition and related activities, and in some cases funding from ACNI also helps organisations to engage administrative and managerial support. Other funders of the tuition programmes of Traditional Music organisations include the Ulster Scots Agency, National Lottery (via ACNI), Foras na Gaeilge and the local authorities, with occasional assistance coming from other sources such as Northern Ireland Council for Voluntary Action, EU funding programmes, the Colmcille grant scheme and Children In Need.

The range of venues used by these non-statutory providers includes purpose-built cultural centres, school buildings, community centres and halls.

Tuition is offered in a comprehensive range of instruments, in traditional song in the English and Irish languages, and dance.

Students are offered opportunities to take graded examinations in Traditional Music, primarily those offered by London College of Music (LCM) up to Grade 8 and Diploma level, and the examinations and qualifications available in highland bagpipe and drumming that are accredited by the Scottish Qualifications Authority and the Piping and Drumming Qualifications Board (PDQB). Other graded examinations are offered by Comhaltas Ceoltóirí

Éireann (CCÉ). Some of the graded examinations, for example those offered by LCM and PDQB, carry points for the purposes of the UCAS system of entry to third level education.

Based on research conducted for this audit, it appears that the main provider of a structured syllabus leading to examinations and accredited qualifications is the London College of Music (LCM) and the table below describes the scale of LCM's role in Traditional Music tuition in Northern Ireland:

TABLE 8.1

	2013 (part-year data)	2014
Number of teachers in NI offering LCM	99	767
Number of teachers in NI offering LCM in Traditional Music	26	80
Number of students in NI taking LCM	1518	8116
Number of students in NI taking LCM in Traditional Music	114	766

Note: no data available for 2012

The other significant providers include:

- Comhaltas Ceoltóirí Éireann (CCE) which provides regular structured classes (usually on a weekly basis) and reports student numbers of between 10,000 and 12,000 in Northern Ireland; CCÉ offer a graded programme of examinations called Scrúdú Ceoil Tíre (SCT) which cover 8 grades (4 grades at junior level, 4 grades at senior level);
- the Northern Ireland Piping and Drumming School (NIPDS) whose structured graded training programme is aimed at developing solo skills has around 3500 graduates in Northern Ireland;
- the Royal Scottish Pipe Band Association of Northern Ireland (RSPBANI) whose main focus is on training for band and competitive playing and whose courses serve an estimated 3000 members;
- the Ulster Scots Community Network provides opportunities and services to an estimated 25,000 members of bands, including a 20-week course in B-flat flute which is accredited by the Open College Network (OCN) at Level 2.

The non-statutory providers of Traditional Music tuition organise a busy calendar of classes, workshops and other events throughout the year in all parts of Northern Ireland. Among the leading providers, in terms of geographic spread and numbers, are Comhaltas Ceoltóirí Éireann, the Royal Scottish pipe Band Association of Northern Ireland, the Northern Ireland Piping and Drumming School, the Flute Bands League, Armagh Pipers' Club, and Belfast Traditional Music Society. Although there is a strong local focus on these tuition programmes, some organisations report that students travel considerable distances weekly,

within Northern Ireland, to attend particular classes or teachers. This represents a very significant commitment of resources on the part of students and their families, and it also affirms the quality and reputation of the services that the organisations and teachers provide.

The tuition providers in the non-statutory sector identify a number of issues and challenges including:

- a need to improve the supply of suitable teachers to meet growing demand for tuition;
- a need for more and better professional development opportunities for teachers and facilitators who work, or who wish to work, with Traditional Music in Northern Ireland;
- gaps in the resources that are available to teachers of Traditional Music in both the statutory and non-statutory systems;
- a need for funding to develop instrument banks to facilitate instrument-on-loan schemes;
- resource constraints mean that there are few opportunities for one-to-one teaching and for high-level masterclasses;
- tuition programmes need to strike a balance between rigidity and the openness and creative 'looseness' that is characteristic of Traditional Music;
- an opportunity to harness the accrued expertise, skills and good practice within this sector to develop better shared resources and facilities for teaching and appreciating Traditional Music and its culture in Northern Ireland.

There is significant variety among the structures and approaches used across the spectrum of these voluntary organisations. This is not surprising given the complexities and different requirements of the various sectors that together make up the Traditional Music community in Northern Ireland.

As an example, it is useful to look at the needs of the piping community in Northern Ireland and how these needs are met.

Piping in Northern Ireland involves mainly the Highland pipes and the Uilleann pipes. The piping community in Northern Ireland is diverse, successful and has produced performers of international status and up to All-Ireland and World Championship standard in both the solo tradition and the pipe band tradition.

In the case of Highland pipes there are two distinct streams of activity:

(a) Playing in the pipe bands which makes specific demands (artistic, technical) on players and

(b) Playing the Ceol Mór (Píobaireachd agus Canntaireachd) which is a solo art that has highly specific technical and aesthetic standards.

Each of these streams has different requirements in terms of teaching, learning and performing.

In the case of Uilleann pipes the requirements are different again, based on a different culture of oral transmission. There is an emphasis on solo performance of a different kind of repertoire, and an interest in fostering the adaptability to play Uilleann pipes in bands and other ensembles; a focus on improving the quality of instrument manufacture and maintenance requires an understanding of the wide range of Uilleann pipes that are in common use (from concert pitch down to B flat) and the fluid and dynamic nature of the repertoire.

The case of piping in Northern Ireland, as described here, has particular complexities because of the nature of the instruments and the different cultures of solo and ensemble playing that are well established parts of piping culture. This explains the need for the plurality of organisations and approaches that are involved in supporting the development of the piping scene in Northern Ireland. The full extent and diversity of this scene is well represented annually in October at the William Kennedy Piping Festival in Armagh.

This overview of aspects of the piping community illustrates a number of elements that are common throughout the culture of Traditional Music and how Traditional Music is taught and acquired, irrespective of instrument or medium. Organisations that are involved in Traditional Music tuition and promotion strive to take these, and other, elements into account. These mainly artistic and cultural elements include:

- Continuity – acknowledging and sustaining the success and effectiveness of methods and approaches developed over many years, whether these are based on oral transmission or on highly structured formally graded classes linked to a syllabus or curriculum
- Precedent – designing and carrying out tuition programmes based on effective models that have worked well elsewhere and in earlier times for Traditional Music
- Emphasis on the culture of learning in an oral tradition – this will influence the extent to which students are trained to learn by ear, and the extent to which they are encouraged or required to learn and use notation as a primary or secondary means of learning; this also has a bearing on the extent to which students are encouraged or discouraged to develop a reliance on the ‘text’ of the music
- Appreciation and understanding of the relationship between the music and dance
- Appreciation of the depth and breadth of repertoire in both instrumental and vocal music

Other factors that are at play here include:

- Emphasis on attaining formal qualifications as a stage in developing musicianship – some approaches offer a complete package that is virtually indistinguishable from a similar programme in classical music, through the full range of examination grades in theory and practical
- Emphasis on, or preference for, group learning rather than individual tuition
- Identification and awareness of master performers and ‘standard-setters’ within the tradition
- Goal-orientation, for example a focus on doing well in examinations or competitions, or a focus on mastering a significant element of the repertoire, or a focus on attaining a desired standard of technical accomplishment with reference to master performers
- Expectations of individual students and/or parents, guardians, families, peers – there can be an expectation that the return on investment in music lessons and instruments will be a qualification or other external validation or extrinsic reward, in addition to (or instead of) the intrinsic value and rewards that come from engaging with music for its own sake
- Operating in a demand-led environment which suggests that there is ‘market failure’ in formal or statutory provision of Traditional Music tuition – during the course of research for this audit, many organisations pointed out that their work involved filling gaps that ‘the system’ either ignored or could not fill

During interviews conducted as part of the research for this audit, a number of specific ideas, proposals and initiatives emerged including the following:

- There is interest in the preparation of a new Traditional Music curriculum for the London College of Music (LCM) examinations – these examinations carry points for UCAS
- Development by Comhaltas Ceoltóirí Éireann (CCE) of new resources and courses for teachers
- Development in Derry of a new academy for Traditional Music – Acadamh an Cheoil – which will open in early 2015 and will focus on providing support and services for teachers and facilitators, in addition to structured accredited courses for students

Observations

Current provision of tuition seems comprehensive, despite resource pressures such as funding to pay for tutors or to buy/maintain instrument banks; Traditional Music tuition is highly dependent on voluntary, informal structures and support, and it is difficult to envisage how Traditional Music tuition on this scale could be accommodated within the formal education system; in the Northern Ireland context, the traditional arts of piping have particular and complex needs that reflect the variety of instruments played, the various

contexts in which they are played, and the aesthetic and technical requirements of learners, tutors and performers – the current balanced approach to providing tuition offers a plurality of approaches and opportunities that is well suited to the needs to this sub-sector.

Recommendation: *ACNI to acknowledge and affirm the vitally important and valuable role that the non-statutory sector plays in maintaining and developing the traditional arts in Northern Ireland, and to build on the opportunity of the Forum for Traditional Music to ensure that decisions of policy and strategy are informed by expertise ‘on the ground’*

Recommendation: *ACNI to consider undertaking a more detailed assessment of the needs of tuition providers in order to inform a more strategic and planned approach to supporting this aspect of the infrastructure for Traditional Music in Northern Ireland*

9. ACCESS TO INSTRUMENTS

Traditional Music instruments are generally easily accessible for purchase from music shops, online retailers and other online services, and from indigenous craft makers based in Northern Ireland. There may be a waiting time for manufacture/delivery of some instruments made by the craft makers. Some Traditional Music organisations operate instrument-on-loan schemes, and these help remove financial barriers in the case of more expensive instruments. The advantage of these schemes is that they allow an individual to try an instrument for a term (or for up to a year) before deciding to make the financial and other commitments involved in learning an instrument.

ACNI operates the *Take It Away* scheme which facilitates the phased purchase of a musical instrument over a ten-month period. This scheme has been in operation since July 2012 and ACNI records (to end September 2014) indicate that 425 individual loans with a total value of £319,217 have been transacted under the scheme. The average loan value was £675. The average cost of an instrument purchased with assistance under the scheme was £750. ACNI has developed a supply network of seven retailers in Belfast, Derry and Portadown who help to operate the scheme and the net value of the scheme to retailers in this period was £309,161. At the time of writing, the scheme does not involve craft makers of Traditional Music instruments who are based in Northern Ireland. Research into a similar scheme in England shows that 81% of scheme users say they would not have been able to make their purchase without a *Take It Away* loan. Assuming that the same is true in Northern Ireland, this would mean that the scheme has so far facilitated sales of a total value £258,565 which would not have taken place if the *Take It Away* scheme did not exist. For the purposes of this research it makes sense to distinguish between two broad categories of instruments that are generally used in Traditional Music:

(a) instruments for which there is a well-established and relatively accessible and affordable supply chain through specialist music shops and online - examples of these would include tin whistles, accordions, fiddles, flutes, banjo, mandolin, keyboards, most drums & percussion instruments, guitars, and

(b) instruments that are often more difficult to obtain because of a more limited supply chain or because of manufacturers' waiting lists or because the cost of purchase may be a disincentive to beginners and/or their families - and examples of these would include Uilleann pipes, harp, Lambeg drum.

In the context of this research the term 'Traditional Music instruments' includes the following non-exclusive list of instruments which are in common use in the performance and teaching of Traditional Music in Northern Ireland in 2014: accordion, bagpipes, banjo, bodhrán, bouzouki, concertina, drums, fiddle, fife, flute, guitar, harmonica, harp, keyboards, Lambeg drum, mandolin, melodeon, piano, tin whistle, Uilleann pipes. This broad classification reflects the practice and the views of organisations and individuals who are involved in organising classes in Traditional Music.

As a cost benchmark exercise, the following table gives a snapshot at November 2014 of some examples of the cost of buying (unseen and untried) an entry level instrument or basic 'starter kit' online from a specialist music shop or online provider:

TABLE 9.1

Instrument	Price range from
Accordion	212
Bagpipes	99.99
Banjo	119
Bodhrán	49
Bouzouki	129
Fiddle	74.99
Fife	89
Flute	49
Guitar	129
Harp	99.99
Tin whistle	5.95
Uilleann pipes	332

The table below gives an indication of prices for entry level and mid-range instruments made by a sample of makers based in Northern Ireland, and also gives an idea of likely waiting times for manufacture & delivery of a range of instruments:

TABLE 9.2

Instrument	Entry level cost	Mid-range cost	High-end, customised	Waiting time (typical)
Bagpipes	895	990-1095	2195 upwards	
Bodhrán			200-220	1-3 weeks
Drum	100		450	Max 2 weeks
Fife	40		250	2-6 weeks
Flute	230	330	465	4-20 weeks
Fiddle		2,000-4,000	5,500-10,000	9-12 months
Guitar		2,500-3,500	7,950	8-16 weeks
Harp		2,300-2,500		6-8 weeks
Uilleann pipes	750 (practice set)	1500 (half set)	3500 upwards (full set)	Months

It is important to note that in most cases the supply of instruments is not determined by the number of makers based within the region. This is because the musical instrument market extends far beyond these islands and, as already noted, access to low cost instruments is widespread via online purchase.

The largest source of funding to assist with the purchase of musical instruments is the ACNI's Musical Instruments for Bands funding programme. This fund currently provides up to £200k per annum, although ongoing reductions in revenue and capital funding for the arts in Northern Ireland may have some impact on this scheme in future.

This scheme is open to bands based in Northern Ireland. In order to be eligible to apply, a band must be formally constituted. A number of useful resources and supports are available to the bands sector to assist with this:

- DCAL's publication *Marching Bands in Northern Ireland – Guidance Notes* which is a comprehensive and useful handbook of practical advice and information
- Assistance from the Ulster-Scots Community Network is available to bands who are trying to source or apply for funding – this includes the provision of practical guidance and assistance with governance and management issues, and the service aims to build organisational and managerial capacity within the bands sector

The ACNI Musical Instruments for Bands programme's objective is to improve the quality of music-making in the community by helping bands replace worn-out instruments and purchase new instruments.

The funding currently available (2014-15) for this programme is £200,000. Awards are available to assist with up to 75% of the cost of instruments and the maximum value of an award is capped at £5000. A band may not apply for an award within seven years of having received an award under this programme and its predecessors.

The following types of bands are eligible for this scheme:

- Accordion Orchestra/Band (part, melody or marching)
- Brass Band
- Concert Band
- Flute Band (part, melody or marching)
- Pipe Band
- Wind Band

Other organisations who wish to apply for funding to assist with the purchase of musical instruments can apply to the following ACNI schemes:

- Small Grants Programme for grants of up to £10,000, and in the current year (2014-15) the budget for this scheme is £500,000. The value of grants awards for musical instrument purchase under this scheme in the last three years is £4940.00
- Equipment programme for grants of over £10,000. The value of grants awards for musical instrument purchase under this scheme in the last three years is £12,563.00

Instrument-making

Although the scope of this audit is limited to assessing "*the level of accessibility to Traditional Music instruments*" it is helpful to describe briefly the situation regarding instrument making in Northern Ireland as it relates to this audit because local makers form part of the supply chain in the region.

There is tradition of artisan craft in making (a) instruments that are unique to Traditional Music in a general sense (such as Uilleann pipes, bodhrán and harp) and (b) instruments that are more distinctively specific to Traditional Music in Northern Ireland (such as the Lambeg drum and fife).

The following is the range of instruments that the craft makers in Northern Ireland can produce to order: bagpipes, bodhrán, bows, drum, fiddle, fife, flute, guitar, harp, Lambeg drum, mandolin, Uilleann pipes.

Much like the transmission of the music itself, the skills and expertise of makers is often passed on between people in versions of the master-apprentice model as well in more formal structured settings. In the case of Uilleann pipes, for example, the Armagh Pipers' Club are in the process establishing a pipe-making workshop at its HQ in Armagh City; Uilleann pipe-making in Northern Ireland may also benefit from the recent establishment in Dublin of a formally accredited Uilleann pipe-making course delivered by Na Píobairí Uilleann (NPU). This represents a significant step forward for aspiring makers and for the many aspiring players in Northern Ireland and worldwide who are on waiting lists for instruments. For technical reasons the NPU full-time course intake is currently limited to residents of certain LEADER areas in the Republic of Ireland, but access to the part-time course is open to residents of Northern Ireland. At the time of writing, NPU are exploring the possibility of developing a similar course aimed at flute makers.

In the case of flute and fife, Northern Ireland has produced a number of high-end makers including Sam Murray, Hammy Hamilton and David Angus.

Two high profile manufacturers operate at an industrial level within the music sector: Frazer Warnock (Cookstown) produce bagpipes and serve the general market worldwide and Andante (Rathfriland) produce a range of drums which service the general market worldwide. Other percussion instruments, including bodhrán and Lambeg, are served by a relatively small number of makers based within Northern Ireland.

At the time of writing, at least six fiddle makers are active and supplying the market within Northern Ireland. Duncairn Centre for Culture and Arts (Belfast) is running a course in fiddle-making. The course, taught by Rab Cherry, lasts 10 weeks and has six participants who will learn the basic skills required to produce an instrument from scratch. The Centre also has plans to introduce a course in flute-making.

Information and records held by ACNI suggest that there are at least 30 Traditional Music instrument makers active in Northern Ireland in 2014. During the course of this audit, it became clear that the full extent of Traditional Music instrument making in Northern Ireland is currently not well understood or described, and it is certain that the actual number of active makers is in excess of 30. Aside from the ACNI listing of makers, it is currently not easy to get access to a comprehensive list or guide to the craft makers who are active in the region.

The formal career pathway for instrument makers involves the acquisition of technical skills through second- and possibly third-level education and courses; the informal pathway is exemplified by the skilled, expert maker who is largely self-taught, sometimes with help from other makers, and involved in instrument-making as a primary career or as a hobby.

Aside from technical training opportunities within the formal education & skills systems, there would appear to be relatively few funding or business supports for those involved in what can be accurately described as traditional craft-making. State support for the craft sector is channelled through Craft Northern Ireland whose role is centred on the promotion and development of the design-led contemporary craft industry in Northern Ireland. Craft NI's defines design-led contemporary craft as design-led contemporary work that:

- demonstrates high standards of technical skill and design;

- does not reproduce or restore but is innovative in its use of materials, aesthetic vision and/or processes;
- reflects the signature of the individual maker.

Traditional instrument-making would seem to fall outside the scope of this definition as it relies on the ability of the maker to reproduce (and, in many cases, to restore) instruments in a consistent and reliable way. Craft NI offers information and courses on a range of skills and training opportunities that could be relevant to instruments makers, such as silversmithing and jewellery-making and business development and marketing programmes.

Business development supports are also available from InvestNI. Ruach Music (Kilkeel, Co Down) is a recent example of a musical instrument company that has worked with InvestNI to help build its business. The company designs and manufactures the cajon (box-shaped percussion instrument, widely used).

Comments and suggestions from within the Traditional Music community

Some respondents raised the issue of access to better quality instruments for students whose ability and progress may be hindered by an inferior instrument. The general view is that the high cost of better quality instruments can become a barrier to progress and a burden on individuals and their families. Respondents commented that the virtual absence of Traditional Music from ELB programmes means that the ELB system is currently not relevant to this issue.

There seems to be consensus that developing existing instrument banks and incentivising the creation of new instrument banks would be an effective solution for the following reasons:

- Maintain and improve standards of performance and the effectiveness of tuition
- Remove financial barriers that can prevent an individual from achieving their creative potential
- Create tangible goals for learners – the challenge and opportunity to progress to a better instrument
- Provide an incentive to aim for excellence
- Long-term investment in building cultural and social capital at community level
- Create a market for local instrument makers and dealers
- Build capacity within organisations to provide services that more fully meet the needs of the community

There is an agreed need for access to instrument banks for artistic, economic and social reasons; some organisations have successfully managed instrument banks and instrument-on-loan schemes for many years, and this indicates that there is appropriate expertise, capacity and experience within the community; organisations are well-placed to identify both creative potential and practical need within their communities, which means that instrument banks can be targeted to achieve the greatest benefit.

A number of organisations expressed surprise and a frustration that funding for musical instrument purchase appears to be targeted almost exclusively at marching bands.

On the other hand, representatives from within the bands' sector (a) described this funding as an essential contribution to the much greater costs of maintaining their stock of instruments and (b) commented that they believe that the bands' access to grant-aid is effectively restricted to this fund alone, which in their view means that they have limited or no eligibility to apply for funds for the kind of programmes that other Traditional Music organisations are funded to deliver (e.g. classes, workshops, other events).

Recommendations:

- *ACNI to maintain support for schemes that facilitate access to musical instruments*
- *ACNI to invite instrument makers to participate in the Forum for Traditional Music*
- *ACNI to consider a more strategic approach and an updated policy for funding instrument purchase e.g. research needs and trends across the entire sector; consider a focus on high quality instruments on loan to learners who show exceptional potential and who need a better instrument, and a similar approach to instruments for exceptional professional performers*
- *ACNI to develop a policy position, with others, on support for instrument makers in Northern Ireland*

10. COMPETITIONS

Competitions are an established and optional element of the Traditional Music scene in Northern Ireland and worldwide. Within Northern Ireland there are six main organisations that run competitive events. The scheduling of these is such that there is a calendar of competitive events in Traditional Music that runs right throughout the year, and is at its most active in the May-September period. A small number of these events are all-Ireland championships or finals.

Some organisations involved in the teaching of Traditional Music place a moderate to high value on competition and others place little or no value on competitions.

A relatively small number of organisations are involved in both the teaching of Traditional Music and the organisation of competitions in Traditional Music. These organisations are membership organisations or umbrella bodies with affiliates.

For many people, participation in competitions is a necessary or unavoidable part of the journey into the music. For others, taking part in competitions is a useful stage in a planned structured approach to improving musicianship, and competition success is seen as an objective peer affirmation of quality and achievement. Others see competitions as unnecessary, even pernicious, and capable of having a levelling or homogenising effect on Traditional Music, and damaging to its aesthetic & social values and its culture. In the world of Traditional Music, the role of competitions is discussed and debated vigorously. During research interviews for this audit there were diverse views expressed about the perceived merits and the perceived dangers of competition. Interestingly, many of the comments about competitions were also made, with equal vigour, about the role of examinations in Traditional Music.

Positive aspects of competition were cited, including:

- Competition helps to maintain and improve standards
- Competition provides a goal to work towards
- Competition provides a public platform which is good for performers and for audiences
- Success at competition can help kick-start a career in music as a performer, teacher or adjudicator
- Competition creates a social context where peers and their families & friends can meet
- Competitions bring economic, social and cultural benefits to towns, cities or regions that host them
- Success in competition creates profile locally and, in some cases, on an international level
- Competitions form the nucleus of festival events
- Competitions can attract the world's leading performers to visit and stay in Northern Ireland

Negative aspects of competitions were cited including:

- Competition violates the ethos and culture of Traditional Music
- Competition creates standardisation of repertoire, style, arrangement and technique
- Competitions are peripheral to the real values of Traditional Music
- Competitions are irrelevant to the quality of Traditional Music - there are few examples of influential master players in the tradition who ever took competitions seriously
- Many 'legendary' players would fail miserably in competition
- Competitions can create unhealthy pressures and stress for children and families
- Inconsistent standards of adjudication can mean that participation is to be considered as important as quality or the attainment of excellence, which sends a mixed message
- Competition and adjudication are incompatible with, and harmful to, the culture and aesthetics of a living oral tradition
- Success in competition can be over-rated and does not always guarantee musical quality or credibility

This diversity of views is reflected in the range of approaches that Traditional Music organisations take to competition.

Pipe bands are strongly associated with competitive events and Northern Ireland bands regularly attain high rankings in competitions at all levels up to and including European Championships and World Championships. There are currently four Grade 1 bands affiliated to the RSPBANI – Field Marshal Montgomery, Cullybackey, Ballycoan and Ravara. The Field Marshal Montgomery band has the unique distinction of having won ten world championship titles between 1992 and 2014.

Northern Ireland soloists and ensembles in other aspects of Traditional Music and song have also attained successes at competitive events such as Fleadh Cheoil na hÉireann/All Ireland Fleadh which represent a significant global platform for Traditional Music.

All of the organisations consulted during this audit identified a complex mix of benefits and positive attributes that can be associated with learning to play music, to sing and to dance. These positive attributes include fostering creativity, building confidence, helping with self-expression, creating affirmation of identity, improving understanding and good relations, deepening an understanding of living traditional culture, supporting personal development, improving social skills, and creating a pathway for lifelong learning. All of the organisations consulted during this audit showed a very full understanding of the diverse views and values that come into play when discussing competition and Traditional Music, and all recognised the spectrum of views regarding the intrinsic and extrinsic benefits that are attributes to competition.

Against this background of shared ideals, understandings and aims, the organisations' approaches to dealing with competitions falls into two broad groups:

- (i) some have a clear emphasis on preparing for competitions (and examinations),
- (ii) others place a greater emphasis on the acquisition of musical skills and appreciation of the social benefits of music-making as lifelong skills despite, and independent of, the value systems imposed by competition or other 'external' criteria.

None of the organisations consulted during this audit operates any policy of exclusion when it comes to preparation for competition. Indeed those organisations who hold a negative, an indifferent or a sceptical view of competition consider it entirely as a matter of choice for the individuals and families involved; these organisations' priority and focus is to provide instrumental tuition and an introduction to appreciating the social dimensions and benefits of Traditional Music as a creative cultural pursuit for its own sake. A consistent feature that came across during the research was the commitment of organisations to using qualified, experienced, reputable adjudicators, and a reliance on clear structures and systems to help manage all aspects of participation in competition. The issue of training and qualifications for adjudicators remains a challenge for some areas of Traditional Music, particularly in the less-regulated and more informal areas of practice. However an individual's lack of a formal qualification as an adjudicator may be counterbalanced by his or her skill, achievement and reputation as a performer or teacher.

The organisations

The following section identifies and briefly describes the main organisations involved in organising Traditional Music competitions in Northern Ireland; this does not include broadcasters' awards such as the BBC Radio 2 Folk Awards or the TG4 Gradam Ceoil, nor does it include local competitive events such as small festivals or Feiseanna (such as Feis Dhoire Cholmille/Derry Feis) which may include an element of Traditional Music in the syllabus or programme.

The Flute Band League organises its competitions annually in February, and participates in the annual Championship of Ireland contests in September which is organised under the aegis of the North of Ireland Bands Association (NIBA) <http://www.niba.fsnet.co.uk/> The Accordion League and the Brass Band League organise competitions along similar lines. NIBA organises competitions that cater for the flute bands, accordion bands and brass bands that are affiliated to NIBA on an all-Ireland basis. In addition, other competitions are organised by non-affiliated bands (for example in Carrickfergus and Lisburn) and these are organised along similar lines in terms of entry procedures, selection of music and external, qualified adjudicators.

International Pan Celtic Festival www.panceltic.ie This annual event takes place at Easter and it celebrates the cultural links between Ireland, Scotland, Wales, Brittany, Cornwall and the Isle of Man. The event includes competitions in fiddle, harp, dance and traditional song. In 2014 the event took place in Derry which is also the location for the 2015 festival.

Comhaltas Ceoltóirí Éireann (CCE) <http://comhaltas.ie/events/competitions/> CCÉ is a membership organisation with a network of branches throughout Ireland, Britain, North America and other countries; CCÉ is involved in promoting the traditional arts and culture of Ireland; CCÉ organises its main competitive events as annual season (April-August) of competitions at county, provincial and all-Ireland levels, beginning around Easter and extending until August; competitions are organised in instrumental music (solo, duets, trios, small ensembles, céilí bands), traditional song (in Irish and English), and dance. CCÉ organises Fleadh Cheoil na hÉireann/All-Ireland Fleadh which is among the

largest Traditional Music events in the world. The All-Ireland Fleadh has been held only once in Northern Ireland and that was in August 2013 as a headline event during Derry-Londonderry UK City of Culture 2013.

Royal Scottish Pipe Band Association of Northern Ireland (RSPBANI) <http://www.rspbani.org/> is a membership body that governs and oversees pipe band competition in Northern Ireland, representing approximately seventy pipe bands and over three thousand individual members in Northern Ireland. The RPSBANI organises and delivers all Championship Pipe Band and Drum Major Contests in Northern Ireland and the Ulster Solo Piping and Drumming Championships. This constitutes an annual season of local, regional and provincial competitions (May-September); the 2013 All-Ireland pipe band championship competition, and the 2014 All-Ireland solo championships were held in Northern Ireland; the All-Ireland contests are held in Northern Ireland in alternate years.

GAEL LINN <http://www.gael-linn.ie> is a Dublin-based organisation devoted to promoting the Irish language and culture; with support from Foras na Gaeilge, RTÉ Raidió na Gaeltachta and Irish Music Magazine it organises Siansa which is a competition (November-April) for young traditional Irish music and singing groups. While Siansa is essentially a competition, the participating groups are mentored during the competition process by highly regarded Traditional Musicians. The event is run entirely through the medium of Irish.

Cumann Lúthchleas Gael/Gaelic Athletic Association (GAA) <http://www.gaa.ie/about-the-gaa/cultur-agus-gaeilge/scor/> The GAA is Ireland's largest sporting and cultural organisation, with a presence on all five continents. As part of its cultural programme the GAA runs an annual series of traditional arts competitions called Scór, designed to promote participation, enjoyment, inclusion and excellence. Throughout the winter and spring terms (November-April) there are club competitions, county finals and provincial championships that culminate in All-Ireland finals.

Recommendation: *ACNI to acknowledge the role and impact of competition in traditional music in Northern Ireland, as a platform for high artistic standards and as a valid performance context in its own right*

11. Performance infrastructure

Informal performance of Traditional Music is generally associated with music sessions in pubs. Pub sessions of Traditional Music originated in London during the 1950's and have become an important element of the Traditional Music infrastructure throughout Ireland and in most places where Traditional Music is played. According to NITB's *Music Tourism Business Insight* report (April 2012) the pub session is a significant attraction for visitors to the region: 77% of visitors visit a pub during their visit to Northern Ireland, and Traditional Music is identified as a core part of the pub experience, along with other local music.

The relatively informal nature of pub sessions can mask the fact that these sessions are nowadays more often organised than spontaneous, because many publicans see the provision of live music as an essential part of their offering to customers and it makes business sense to have live music available on a consistent and regular basis. For musicians, these sessions offer creative and social opportunities, as well as a limited source of income from time to time. For audiences, these sessions can offer an opportunity to experience something authentic and local that enriches their visit.

Over time, some pubs in both urban and rural areas have become closely associated with Traditional Music sessions and have developed reputations for quality and reliability for both performers and audiences – they are seen as 'destinations' for local and visiting musicians as well as tourists; other pubs host sessions that have a more local social function; and from time to time during festivals and other events, 'session trails' are organised to extend the range of opportunities for audiences to encounter live music in social settings.

There are difficulties for people who want to find out where these sessions happen, or where the 'best' sessions are, and the amount of information can appear limited. For example in larger urban areas, such as Belfast and Derry, there is no easily accessible and widely known single source of information on where to find Traditional Music sessions. While this can make it difficult for visitors and others in the tourism industry to make plans, it also adds to the attraction of 'finding' or unexpectedly coming across good quality authentic Traditional Music sessions. Even for people deeply involved in Traditional Music, there can be an element of speculation and adventure in finding a good session of Traditional Music and word of mouth (including use of social media) remains the best guide. This is not unusual in a society where there is a vibrant living culture of Traditional Music; visitors to Lisbon or Seville, for example, will encounter similar challenges to finding the 'best' or most 'authentic' performances of fado or flamenco music.

Informal communal music-making has other outlets as well. For example local branches of Comhaltas Ceoltóirí Éireann regularly organise music sessions in halls, hotels, schools and other non-pub venues, often as a performance outlet after weekly classes or practice, and in this context the opportunity to play music socially and for its own sake is a valuable extension of the learning and socialising experience.

There are many regular informal Traditional Music sessions held weekly, or more or less frequently, in pubs and hotels throughout Northern Ireland and it is beyond the reach of this audit to attempt a comprehensive listing. However the range of places that regularly host Traditional Music sessions includes venues such as pubs, bars, hotels, local halls and other cultural venues. One respondent

who was interviewed for this audit was able to provide a list of more than 20 regular Traditional Music sessions that were available in locations including: Ballycastle, Ballygally, Bangor, Belfast city centre, Cairncastle, Carrickfergus, Comber, Cushendall, Downpatrick, Glengormley, Glens of Antrim, Larne, Lisburn, Newtownards, and Portaferry.

While the situation regarding instrumental music looks very positive, a number of respondents commented on the relative lack of performance opportunities and other support for traditional singing (in English and in Irish) in Northern Ireland, citing the low number of traditional song events, the rarity of traditional song in festival and venue programming, and the difficulty in making CD recordings of traditional song in Northern Ireland. Respondents sounded a note of optimism regarding the emergence of singing circles and other initiatives that bring singers and listeners together and provide a supportive platform for song.

In other areas of Traditional Music, particularly where bands are concerned, the practice of playing informally and socially in settings like these does not usually arise, and the character and schedule of activity for bands is quite different: there is a sharp focus on practice and preparation for clearly defined performance goals and performance outlets such as competition or concert or parade or other events.

Competitive events provide a particular type of performance context for performers and audiences alike, and competitive events range in scale and reach from the local to the international and use both indoor and outdoor venues. Some of these competitive events such as the pipe band competitions can attract significant audience numbers. Competitive events organised locally by the bands sector, and county and provincial fleadhanna can also create significant opportunities for performers and audiences. The competition scene is discussed elsewhere in this audit (see SECTION 5)

The other principal performance outlets are at festivals, in arts venues, theatres and other cultural venues, and gigs & concerts at folk clubs and similar events.

Traditional Music features in both multi-disciplinary arts festivals (e.g. Belfast Festival at Queen's, Cathedral Quarter Arts Festival) and in more specialist traditional or folk music festivals (e.g. William Kennedy Festival of Piping, Walled City Tattoo, Geordie Hanna Singing Weekend). Based on information available from Culture Northern Ireland (www.culturenorthernireland.org), The Journal of Music (www.journalofmusic.com), www.musicfestivalsireland.ie and other sources, a calendar of festival events in Northern Ireland that focus on or include Traditional Music looks like this:

January-March:

- Féile Chaoimhín (February, Derry)
- Portstewart Songwriters' Festival (March, Portstewart)
- Busking in the City (March, Armagh)
- Saint Patrick's Festival (March, Armagh)

April-June:

- Cathedral Quarter Arts Festival (May, Belfast),
- Pan Celtic Festival (April, Derry)

July-September:

- Fiddler's Green Festival (July, Rostrevor),
- McCracken Summer School (July, Belfast)
- Foyle Folk Festival (August, Derry)
- Open House (August, Bangor)
- Gig'n'The Bann (September, Portglenone)
- Maiden City Festival (Derry)
- Culture Night (September, various locations)

October-December:

- Belfast Festival at Queen's (October, Belfast)
- William Kennedy Piping Festival (November, Armagh)

A number of purpose-built cultural centres offer Traditional Music as part of their programming, including the following examples:

- Duncairn Centre for Culture and Arts (Belfast)
- An Droichead (Belfast)
- Cultúrlann Uí Chanáin (Derry)
- Market Place theatre (Armagh)
- Waterside Theatre (Derry)
- Carn Tóchair (Maghera)
- Burnavon Arts Centre (Cookstown)
- Strule Arts Centre (Omagh)
- Cultúrlann Mac Adam Ó Fiaich (Belfast)

In addition to venues, professional concert promoters are involved in presenting Traditional Music. Among promoters the consensus is that there is a demand for good quality Traditional Music that is presented to a high standard; this view is challenged by others who say that Traditional Music is a 'hard sell' and something of a minority interest. Touring performances of Traditional Music are organised by Moving On Music which has experience across many genres of music and which offers professional management and a strong brand to the promotion of tours and the development of audiences in Northern Ireland; other tours are organised sporadically by other promoters or by the musicians themselves. From time to time pipe bands organise concerts by visiting soloists or other bands, and these are rare occasions when the music is performed outside a strictly competitive context.

It is striking that there is no Traditional Music summer school in Northern Ireland along the lines of successful models such as the Willie Clancy Summer School and the South Sligo Summer School – in addition to classes and lectures, the summer schools organise recitals and concerts that offer

performance and listening opportunities that would be otherwise unavailable to players and audiences.

Observations: *feedback from promoters and venues suggests that there is unmet audience demand for performances of Traditional Music; from the perspective of working musicians, the 'territory' is very small and it is easy to exhaust the available audience; information about access to many types of performance, from informal pub sessions to high level competitive events, can be difficult to get; although there is an infrastructure of venues, production, technical and promotional personnel, there is little evidence of a network of venues developing for Traditional Music to service the unmet demand that both venues and promoters refer to.*

Recommendations:

- *ACNI to work with venues, promoters, Audiences NI, NITB and others to establish the extent of any unmet demand for Traditional Music performance in Northern Ireland and identify any barriers to responding to this demand*
- *ACNI to consider ways of supporting and promoting the performance of traditional song*

12. Professional Development Opportunities

The survey of Traditional Music tuition found that 65 providers work with teachers who have access to training and development opportunities that include in-house training, attendance at courses, coaching and mentoring, work experience and other opportunities:

TABLE 12.1

Type of training/development opportunity to which your teachers have access	Number of providers whose teachers avail of these opportunities	This number as a % of Traditional Music tuition providers whose teachers avail of training and development
In-house training	21	32%
Courses	12	18%
Work experience	11	17%
Coaching/mentoring	10	15%
Other	6	9%
Conferences	2	3%
Formal apprenticeships	2	3%
Paid internships	1	2%
TOTAL	65	

The findings of the survey show that access to these training and development opportunities is spread across the sector and the breakdown of the 65 organisations that provide such opportunities is:

- Flute bands x21
- Pipe bands x12
- Schools and services in schools x11
- Accordion bands x9
- Silver bands x2
- Other organisations x10 (this group includes organisations such as Armagh Pipers' Club, Londonderry Bands' Forum, Belfast Traditional Music Society, and branches of Comhaltas Ceoltóirí Éireann)

Recommendations:

- *ACNI to work with others including NICVA and Voluntary Arts Ireland to identify developmental resources and opportunities for people and organisations working in Traditional Music*

13. Partnerships & Collaborations

The audit identified a small number of partnerships or collaborations or shared approaches to delivering tuition services, sharing artistic programming and reducing the production and delivery costs of certain types of event.

Examples of such initiatives include:

- RSPBANI developing agreements or partnerships with a number of Local Authorities to host pipe band contests – the purpose is to create certainty and stability for forward planning, and to manage the costs of holding outdoor events involving large numbers of people, and to facilitate better marketing and promotion of pipe band events by local and regional tourism interests
- Armagh Pipers' Club and RSPBANI working together on providing solo piping tuition that augments APC's own programme and enables RSPBANI's provision of services in an area where it currently does not have access to suitable space and other facilities
- An Droichead (Belfast) working with Cathedral Quarter Arts Festival and venues in the Cathedral Quarter to help with programming Traditional Music events

Observations:

- *The environment in which this audit was carried out in 2014-15 was characterised by uncertainty over future funding for the arts in Northern Ireland, and uncertainty and anxiety within the Traditional Music sector over funding for Traditional Music organisations and the services and programmes that they offer to the community, and funding and other support for Traditional Musicians.*
- *During interviews carried out as part of this audit, the overwhelming priorities that organisations identified were survival and stability; resource constraints (mainly people, time, and money) were cited as serious barriers to thinking and planning more strategically, and developing new ways of working with other organisations.*
- *Another factor that became apparent during research for this audit is that there is generally a low level of mutual awareness and acquaintance across the different parts of the Traditional Music sector and particularly among the various sub-sectors. That said, most organisations expressed a willingness and an interest in considering more collaborative working, provided there was a clear purpose and leadership incentives to help it happen.*
- *Interestingly, in the weeks following the commencement of this audit in October 2014 the inaugural meeting of the Forum for Traditional Music was convened by ACNI in Belfast and this was attended by 45 people including individual artists, promoters, managers, an instrument maker and representatives from 29 organisations across the entire spectrum of Traditional Music in Northern Ireland. This inaugural gathering identified a range of common interests and confirmed that there is scope for practical steps to increase cooperation among Traditional Music organisations.*

Recommendation:

- *ACNI needs to harness the opportunity presented by the Forum for Traditional Music to encourage greater cohesion within the Traditional Music sector, and to create a supportive environment for experiments in collaboration and cooperation on a project or programme basis*
- *ACNI to consider and explore with the Forum for Traditional Music issues raised during this audit, for example in the area of methods and resources for teaching Traditional Music, or in the area of developing support for showcases of Traditional Music from Northern Ireland, or the idea of technical support for small voluntary organisations (based on the model used by the Ulster Scots Community Network)*
- *Any initiative by ACNI or other funding agencies to encourage collaboration and cooperation needs first to help organisations identify specific areas of need and opportunities for improvement so that there are tangible positive goals, rather than a dominant focus on reducing spending*

14. INVESTMENT

The audit looked at existing investment within the Traditional Music sector and potential funding opportunities.

The main source of funding for Traditional Music in Northern Ireland is DCAL which funds the Arts Council of Northern Ireland and the Ulster-Scots Agency; local authority arts services occasionally fund events and projects that involve Traditional Music; other direct funding comes from Foras na Gaeilge whose role involves the support of activities that promote the use and appreciation of the Irish language and Ulster-Scots; tourism investment occasionally involves events that feature Traditional Music, for example the 2013 All-Ireland Fleadh Cheoil in Derry.

In the current year 2014-15, public investment in Traditional Music organisations, events and projects is estimated to be:

- ACNI: £672,586 and ACNI funding for Traditional Music is provided through the following funding streams: Annual Funding Programme (£446,080), Musical Instruments for Bands (£104,415), Lottery Project Funding (£46,500), NI Touring (£6,077), Small Grants (£36,814) and Support for the Individual Artist Programme (£32,700).
- Ulster Scots Agency: £90,000 through the Music & Dance Tuition Programme (no other figures provided)
- Foras na Gaeilge: £26,450 Foras na Gaeilge funding for Traditional Music in Northern Ireland is provided mainly through its scheme for supporting festivals and events, *Scéim na bhFéiltí*.

Other support for Traditional Music includes an initiative by Invest NI working with the Armagh Rhymers by providing mentoring support for business development focused on opportunities outside Northern Ireland; such opportunities can include participation in trade delegations overseas, and during research interviews for this audit the Armagh Rhymers identified opportunities for tourism and investment agencies to commission events and cultural content for strategic promotional use overseas.

The idea of a 'showcase' of traditional arts was mentioned a number of times during the course of research interviews for this audit. Proponents of the idea identified benefits for the image and perceptions of the region, as well as work opportunities and exposure for traditional artists and the producers, technical and other support personnel that would be involved in a showcase venture.

A number of interviewees referred to the impact of funding programmes such as PEACE II and PEACE III that created a demand for events and activities that were provided at zero or very low cost to end users. The downside of this has been the erosion or the elimination of a willingness to pay for cultural services, such as performances in schools, and this has damaged the market for companies, organisations and individuals who had developed the market and demand for these services in the first place. The strategic issue here is a risk that schoolchildren will have fewer opportunities to experience a range of traditional arts and cultural events in the classroom.

NITB invests in research and has published *Music Tourism – Business Insight*, a paper that identifies Traditional Music as the one of the most popular reasons for visiting Northern Ireland. Research presented in this paper records a high level of demand for live music experiences on a small intimate scale, including local and Traditional Music. NITB goes on to comment that “*Traditional Music cannot be ignored and it is likely to remain a key selling point, particularly for visitors coming from outside ROI and NI*”. NITB has also identified experiential tourism involving Traditional Music and traditional arts as an area of opportunity that has not been developed to its potential.

Other local investment in Traditional Music comes through Local Authorities, through their own arts programmes and support of local venue infrastructure, and also through collaborations with organisers of competitive events and festivals that feature Traditional Music e.g. the RSPBANI partnerships with local councils (Omagh, Coleraine, Newry & Mourne) to host pipe band competitions that can be presented and promoted as a form of civic event and cultural service at local level.

Alongside public funding which helps to support a number of fulltime and part time jobs in the sector, there is significant investment of time, money and other resources on a voluntary unpaid basis by organisations, individuals, community groups and others. This can be said to represent a significant level of social, community and cultural capital. Without this sustained level of voluntary input at all levels throughout the Traditional Music community it is hard to imagine how the benefits of the public investment could be realised. This observation can also be said of the arts and cultural economy generally in Northern Ireland.

Finding facts and figures to quantify the measurement of this social, community and cultural capital is difficult and research for this audit indicates that in 2014 relatively few quantifications or analyses are available.

This mirrors the difficulties encountered in attempting to quantify the numbers of people involved in or engaged with Traditional Music, and indeed it is not always easy to understand what genre of music or activity is being described when attempting to focus solely on Traditional Music.

There is inconsistency in the classifiers and descriptors used to collect information that might include ‘Traditional Music’, for example research by professional Audience Development Agencies in the UK, gathers and presents data under ‘*culturally specific music*’ while other research (the DCAL Findings of the Continuous Household Survey) uses the terms ‘*Folk, or traditional or world music performance*’ and ‘*Irish dance performance*’. At the time of writing, the Millward Brown Ulster Omnibus Survey does not include questions relating to people’s engagement with Traditional Music.

This methodological inconsistency referred to above means that there is no clear framework for measuring and describing Traditional Music, its audiences and the reach of its activities. From a methodological perspective, in the absence of a consistent metric for describing and measuring the audience for Traditional Music, there are huge limitations to what can be done in terms of quantifying the audience and then, subsequently, developing it. These difficulties could be addressed by undertaking a baseline study.

Another set of difficulties arises in attempting to quantify audiences and attenders at Traditional Music events, and these difficulties arise from a mix of factors that include the nature of Traditional

Music events (both indoor and outdoor) which may not be ticketed or amenable to ticketing, methodology for gathering and analysing audience data, and the lack of consistency and specificity in the descriptors and categories of events/activities which might include Traditional Music.

Within the Traditional Music community there have been a number of attempts to describe the value of investment in events or sectors that receive public funding as an element of the funding mix. Three recent examples include:

- **“A Report on the Socio-Economic Impact of the Traditional Protestant Parading Sector in Northern Ireland”** (May 2013) research commissioned by the Grand Orange Lodge of Ireland in conjunction with other Loyal Orders and the Bands Community, conducted by RSM McClure Watters in association with Dr Dominic Bryan and funded by the Department of Social Development. This reports that the Traditional Protestant Parading sector generates economic and social benefits to the level of £54.04m per annum which is made up of £15.44m economic impact and £38.6m social capital
- **“Economic and Social Impact Study for the 2013 All Ireland Fleadh”** (June 2014) research commissioned by Dún Uladh Regional Resource Centre, Comhaltas Ceoltóirí Éireann and Fleadh Cheoil Doire 2013, and conducted by Venturei Network. This reports that the investment of public monies of £1,163,990 in the event generated an economic impact valued at £42.2m (primary spend £150,000, secondary spend £39.293m, PR & Media yield £2.76m). This excludes any quantification in economic or financial terms of social (non-monetary) benefits which were identified as strategic objectives for the Fleadh, which was a major programme element of Derry-Londonderry UK City of Culture 2013
- **“Economic and Social Impact Study for the 2013 Ulster Fleadh”** (March 2014) research commissioned by Dún Uladh Regional Resource Centre and Comhaltas Ceoltóirí Éireann, and conducted by Venturei Network. This reports that a public investment of just under £37,000 helped generate an economic impact of £2.247m (primary spend £14,018, secondary spend £2,075,150, PR & Media yield £157,917).

Observations: *there are few benchmark studies on investment in traditional arts and the benefits that arise from that investment; there is little evidence of a research agenda or a marketing strategy in Northern Ireland that are focused on the traditional arts; NITB has clear ideas about opportunities for developing and improving how Traditional Music is integrated into the region’s tourism industry and needs buy-in and expert support from within the Traditional Music community to exploit these opportunities.*

Recommendation: *ACNI to take a lead role in setting, with others, an agenda for research, development and capacity building focused on the traditional arts for the following purposes: to help guide future public investment in sustaining the traditional arts in Northern Ireland, to help inform policy on current or future investment in this sector, and to establish how traditional arts can continue to contribute to society and economy in the region.*

Recommendation: *ACNI to work with NITB to develop an agenda of ideas and implementation plans that can exploit opportunities to reposition Traditional Music more accurately, more prominently and*

more effectively in Northern Ireland's tourism offerings to visitors, particularly where experiential tourism is concerned.

Recommendation: *ACNI to take a lead role in initiating a baseline study of the audience in Northern Ireland for Traditional Music.*

15. MEDIA

The operating context for traditional print media in the last decade has been extremely difficult. The impact of digital and online media has created challenges and pressures for traditional media platforms who now struggle to retain their share of a declining market; and there is constant pressure and competition within newspapers for space for stories and features.

Regular specialist coverage of Traditional Music in the print media within Northern Ireland is scant, although there are regular columns on the pipe band scene in the Belfast Newsletter and the Irish News and from time to time the features sections of the papers will carry stories that involve traditional arts. The pipe band columns appear throughout the year and on a weekly or bi-weekly basis during the main competition season (May-September). Other band activity, including marching bands, generates regular coverage such as pictures and news of fundraising events in local papers and in the period February 2014-February 2015 this coverage amounted to 488 items including 19 in the Belfast Newsletter, 4 in the Belfast Telegraph and the remaining 465 in local regional newspapers. Aside from coverage of the band scene, local media coverage of traditional music is almost non-existent but some papers such as the Ballymena Times and Derry Journal carry listings and occasional features on Traditional Music, including news of concerts, festivals and other events and competitions results.

This audit involved a search of the following sixteen local newspapers, and found very little evidence of any regular or systematic coverage of any aspect of Northern Ireland's Traditional Music, Traditional Music events, or Traditional Musicians:

Antrim Guardian, Ballyclare Gazette, Ballycastle Chronicle, Ballymena Guardian, Ballymoney Chronicle, Carrickfergus Advertiser, Coleraine Chronicle, County Down Outlook, The Leader, Limavady Chronicle, Limavady Northern Constitution, Newry Democrat, Northern Constitution, Strabane Weekly News, Tyrone Constitution, Ulster Gazette.

The following search keywords were used: ***accordion, art, arts, bagpipes, band, bands, banjo, bodhrán, bodhrán, ceili, céilí, ceili band, céilí band, concert, concertina, culture, drum, festival, fiddle, fiddler, fiddlers, fife, fleadh, flute, flutes, Lambeg, marching band, pipes, pipers, pipe band, trad, traditional music, trad session, Uilleann pipes.***

Northern Ireland does not produce a magazine or journal for traditional music. Printed journals and magazines for traditional music include the generalist Irish Music Magazine (www.irishmusicmagazine.com) The Session.org (www.thesession.org) and Treoir (www.comhaltas.ie) and a number of more specialist publications such as Piping Times (www.collegeofpiping.org) and An Píobaire (www.pipers.ie). In addition to these, some organisations produce newsletters and bulletins aimed at both members and the general public.

Broadcast media coverage of Traditional Music in Northern Ireland is mainly by BBC NI (radio and television), TG4 (television) and RTÉ (radio and television).

BBC NI has specialist radio programmes on Traditional Music, including Ulster-Scots music, as well as Irish language programmes that occasionally feature aspects of Traditional Music. From time to time

BBC NI commissions and broadcasts documentary programmes on aspects of the Traditional Music scene in or from Northern Ireland.

BBC NI figures show that the combined average weekly reach for the three regular weekly programme strands (*Folk Club*, *Cúlán* and *Blas Ceoil*) was as follows:

- 2011/12: 122,000 people
- 2012/13: 111,000 people
- 2013/14: 117,000 people

BBC NI television broadcast provision for Traditional Music (mainly BBC TWO NI) includes documentary and performance-based programming and BBC figures show the audience reach as follows:

- 2011/12: 80,000 people
- 2012/13: 11,000 people
- 2013/14: 100,000

Both TG4 and RTÉ Raidió na Gaeltachta broadcast and repeat extensively their Traditional Music programmes. Traditional Music is a prominent element of Raidió na Gaeltachta programming throughout the day, and the station remains actively involved in recording and broadcasting live from Traditional Music events. TG4 has established an online archive of performances of traditional *sean-nós* song in Irish.

TG4's broadcasting of Traditional Music is quantified as follows:

- 2012: 101 hours of Traditional Music programming
- 2013: 136 hours of Traditional Music programming

The growth of online platforms has created more opportunities for organisations and individuals to present and to publish content that is related to Traditional Music. While some people may see this as an example of the dilution of the role of the traditional print and broadcast media, for others it represents an almost limitless opportunity to shape and share the stories and the news about Traditional Music. This direct access to readers and potential customers, both specialist and generalist, has helped to encourage the migration of existing Traditional Music publication to digital formats, and has created space for new publications (including newsletters and bulletins) to connect with a wider audience.

In this context, the boundaries are increasingly blurred between the 'traditional mainstream' media who are now online and everybody else who is online. Many Traditional Music organisations, festivals, events, individual artists, bands, fans and others now operate their own online media platforms on a continuous basis or as required; they produce, generate and control content; and they build relationships and engage with audiences/followers/friends/fans in ways that 'old' media could not; they provide online notice boards where members, affiliates and enthusiasts can post information, news and views; and they can sell merchandise and fundraise for projects using online platforms. At the same time, dedicated specialist Traditional Music journalism in mainstream media is in decline – this results in less space for fewer reviews and previews of albums, performances, events, publications, fewer profiles of artists, less discussion of strategic issues and trends that affect

the current state or future development of Traditional Music. In practical terms this may represent a reduction in the availability of external credible reviews and critiques that artists, bands and events can use when telling their own story and promoting themselves.

This is the dynamic shifting context in which the current level of media coverage of Traditional Music has to be viewed.

A significant source of information on Traditional Music events in Northern Ireland is Culture Northern Ireland (CNI) www.culturenorthernireland.org and this operates an extensive listing of events on its website. CNI describes its website as the region's "leading arts and cultural website, covering music, literature, heritage, sport, dance, theatre, the visual arts and much more besides. With thousands of articles, reviews, profiles, event listings, and multimedia content, CNI is a unique and exciting resource." CNI's listing service invites event organisers to register and list their events using a service called Listora. This allows organisers, venues and promoters to use CNI to list events in the Press Association's events database which provides content for the print and digital What's On sections of publishers such as The Guardian, TimeOut, TrinityMirror, The View Network and Visit Scotland. The CNI website also carries reviews and articles on a wide range of cultural topic including Traditional Music.

Relevant online media platforms for Traditional Music in Northern Ireland include the following general and specialist publications (this does not include consideration of websites and blogs operated by resource organisations, libraries, archives, bands, individual artists, festivals & other events, record labels/retailers):

- The Journal of Music <http://journalofmusic.com/> a comprehensive monthly magazine that offers critical writing on issues to do with music, listings, reviews, work opportunities and other news
- Tradconnect.com <http://tradconnect.com/> aims to connect Traditional Musicians throughout the world, and includes extensive listings and reviews as well as access to other resources including discussion forums
- Piping Today <http://www.thepipingcentre.co.uk/piping-today-magazine/> is the National Piping Centre's (Glasgow) bi-monthly magazine which seeks to promote the music, history and study of the bagpipes, and recently published has a feature on "The Northern Ireland Piping Phenomenon" here: <http://www.thepipingcentre.co.uk/wp-content/uploads/2014/09/PT66northernIreland.compressed.pdf>
- An Píobaire <http://pipers.ie/resources/an-piobaire/> is the monthly journal of Na Píobairí Uilleann, the membership organisation (Dublin) of Uilleann pipers which has a membership base in Northern Ireland

Recommendation: ACNI to design and implement a media campaign to increase awareness and visibility of traditional music by building on the strengths of established performance infrastructure such as festivals, competitive events and the availability of good quality informal music making

16. CD production

Traditional Music is an important element of the music industry in Northern Ireland. The industry itself faces a number of considerable challenges and these were clearly set out in the document “*Music Strategy for Northern Ireland*” (September 2011) by EKOS/Grant Thornton which was commissioned jointly by DCAL, Invest NI, ACNI and Belfast City Council:

“In particular, while NI is not short of musical talent in the form of composers, songwriters and musicians, the industry infrastructure is weak in a number of crucial respects:

- *There are few record labels that can be considered financially secure;*
- *With some notable exceptions, there is a lack of management talent both in music businesses and in artist management;*
- *Music publishing is largely undeveloped;*
- *Distribution is limited; and*
- *The market for live music is limited by the small population of NI.”*

The EKOS report also identified this priority: *“funding for artists to help them develop/record material”*

During research interviews, all of these points were made with reference to Traditional Music and often with greater force and emphasis. No respondent expressed satisfaction with the status quo.

Research carried out for this audit indicates that there are at least 14 recording studios operating in Northern Ireland.

In order to establish the level of activity in the production of CD recordings of Traditional Music in Northern Ireland, a search was carried out of the databases of the Irish Traditional Music Archive (Dublin) to identify and quantify how many CD’s of Traditional Music were produced in Northern Ireland in 2013 and 2014. The search parameters were by year and county. The principal limitations on this search related to the paucity and inconsistency of the location data that is available for the production and publication of CD recordings. The search results indicate that in 2012 there were 13 CD’s produced in Northern Ireland, and 10 CD’s in 2013, however these figures must be treated with caution and may be an over-estimate:

TABLE 16.1

Year	Number of CD recordings of Traditional Music produced in Northern Ireland
2012	13
2013	10
Total	23

Research interviews strongly suggest that within the Traditional Music sector in Northern Ireland there is little satisfaction with current arrangements for supporting recordings (production, promotion, marketing, distribution, touring) and also that awareness levels of opportunities, services and schemes offered by PRS, IMRO, Generator NI, Invest NI and others are low to almost non-existent.

With regard to Traditional Music and recording/publication, a consistent theme among respondents was that in terms of recording activity Northern Ireland is seen “*a backwater where nothing happens*” and that there is “*no proper understanding of the kind of support Traditional Musicians need with recordings*” and “*recordings play a particular role in Traditional Musicians’ careers that is different to the way classical and other genres work and the ACNI schemes should reflect this*”.

A number of respondents stressed the importance of a recording for purely aesthetic and artistic reasons, as an artist’s statement; others added that an artist’s career progression, credibility, professional profile and work opportunities are greatly influenced by having a recording, and that it is “*almost impossible to do business without having published a recording*”.

Other views suggested that the importance of recording is relative to other needs within the Traditional Music sector and that there are many greater priorities to do with access to tuition and instruments.

Others suggested that there is a need for a package of better business and development supports for musicians from ACNI and others including Invest NI, and that support for recordings should be part of this.

Numerous references were made to the Deis Recording Scheme that is operated by An Chomhairle Ealaíon/Arts Council (Dublin), as an example of an effective way of responding to the needs of the Traditional Music sector.

A number of respondents also suggested that a more strategic approach to recording and promoting Traditional Music from Northern Ireland would generate business and revenue for studios and technical personnel, as well as creating promotional opportunities for a good news story from Northern Ireland.

Observations: *there is little evidence of any impact within the Traditional Music sector arising from the strategic review and roadmap for the music industry in NI by EKOS/Grant Thornton that was published in September 2011; practitioners within the Traditional Music sector question the accuracy and effectiveness of the support systems that ACNI currently operate for Traditional Music recordings; many of the suggestions from within the Traditional Music sector resonate with the recommendations of the EKOS/Grant Thornton report.*

Recommendations:

- ACNI to review the effectiveness and impact of its policy on supporting recordings (or other digital assets) by Traditional Musicians, and compare with support systems that are used elsewhere

- *ACNI to set out its objectives for supporting recordings by Traditional Musicians*
- *ACNI to review the suitability and effectiveness of the current rules that govern existing funding for recordings by Traditional Musicians*

Appendix 1: individuals and organisations contacted

Donal Doherty	Western Education and Library Board	Derry
Gearóid Ó hEara	An Gaeláras	Derry
Eibhlín Ní Dhochartaigh	An Gaeláras	Derry
Odhrán Ó Maoláin	An Gaeláras	Derry
Richard Wakeley	Belfast Festival at Queen's	Belfast
Neil Martin	composer, performer (uilleann pipes, cello)	Belfast
Ian Burrows	RSPBANI	Belfast
Iain Carlisle	Ulster Scots Community Network	Belfast
Matthew Warwick	Ulster Scots Community Network	Belfast
Brian Carson	Moving On Music	Belfast
Robbie Hannan	Ulster Folk and Transport Museum	Belfast
Brian Vallely	Armagh Pipers' Club	Armagh
Eithne Vallely	Armagh Pipers' Club	Armagh
Mary Delargy	Linenhall Library	Belfast
Jane Cassidy	Traditional Singer	Belfast
Patrick Davey	Davey Music (education services)	Belfast
Tom Clarke	Belfast Traditional Music Society	Belfast
Maurice Leyden	Belfast Traditional Music Society	Belfast
Fiona Ní Mhearáin	Belfast Traditional Music Society	Belfast
Brendan McAleer	Dún Uladh/Comhaltas Ceoltóirí Éireann	Omagh
Gerry Lyons	Na Píobairí Uilleann	Dublin
Paul Flynn	An Chomhairle Ealaíon/Arts Council	Dublin
Catherine Boothman	An Chomhairle Ealaíon/Arts Council	Dublin
Thomas (Maxi) McElroy	Andersonstown Traditional & Contemporary Music School	Belfast
Ray Giffen	Duncairn Centre for Culture & Arts	Belfast
Ray Morgan	Glengormley School of Traditional Music	Belfast
Margaret Henry	Audiences Northern Ireland	Belfast

Amy Kieran	Audiences Northern Ireland	Belfast
Len Graham	Traditional Singer	Armagh
Pádraigín Ní Uallacháin	Traditional Singer	Armagh
Dara Vallely	Armagh Rhymers	Armagh
Geraldine Curran	Armagh Rhymers	Armagh
Anne Hart	Armagh Rhymers	Armagh
Liz Wasson	Armagh Rhymers	Armagh
Fiona Hughes	Armagh Rhymers	Armagh
John McAllister	Armagh Rhymers	Armagh
Dónal O'Connor	Traditional Musician, producer	Belfast
Mary Fox	All Set Cross Cultural Project	Portadown
Joanna McConway	DCAL	Belfast
Angela McAllister	DCAL	Belfast
Maria McAlister	ACNI	Belfast
Ciaran Scullion	ACNI	Belfast
Colette Norwood	British Council	Belfast
Noelle McAlinden	Arts Education specialist	Derry
Úna Monaghan	Traditional Musician (harp), composer, engineer	Belfast
Ciarán Morrison	Féile an Phobail	Belfast
Alan Kane	Craft NI	Belfast
Liz Doherty	University of Ulster, Magee Campus	Derry
Derek Moore	Ulster Bands Federation	Derry
Kenny McFarland	Ulster Bands Federation	Derry
Darren Milligan	Traditional Musician (bagpipes), Sontas	Derry
Kevin Doherty	Voluntary Arts Ireland	Derry
Sarah Doherty	Musical Futures	Derry
Billy Moore	Apprentice Boys of Derry, Maiden City Festival	Derry
Marie Therese O'Neill	Northern Ireland Tourist Board	Belfast
Martin Graham	Northern Ireland Tourist Board	Belfast
Claire Kieran	An Droichead	Belfast

Linda Ervine	Turas	Belfast
Richard Parkes	Field Marshal Montgomery Pipe Band	Comber
Proinsias Ní Ghráinne	Commissioning Editor, TG4	Galway
Karen Kirby	Editor Irish Language, BBC NI	Belfast
Sam Bailie	Northern Ireland Piping and Drumming School	Belfast
Mark Armstrong	Northern Ireland Piping and Drumming School	Belfast
Philip Aldred	London College of Music Examinations	London
John Howard	London College of Music Examinations	London
Gary McDonald	Journalist, Irish News	Belfast
Andrew Cromie	Journalist, Belfast Newsletter	Belfast
Fintan Vallely	Researcher, performer	Dublin
Tom Sherlock	manager, agent, business mentor	Dublin
Nicholas Carolan	Irish Traditional Music Archive	Dublin
Grace Toland	Irish Traditional Music Archive	Dublin
Maeve Gebruers	Irish Traditional Music Archive	Dublin
William Smyth	harp-maker	Newtownards
Aidan Mulholland	fiddle and bow maker	Belfast
Martin McClean	fiddle maker	Moneymore
Paul Irvine	Miller Wicks flute makers	Kilkeel
Martin Gallen	uilleann pipe maker	Strabane/Derry
Mervyn Waugh	harp-maker	Downpatrick
David Angus	fife maker	Donaghadee
Seamus O'Kane	bodhrán maker	Dungiven
Rab Cherry	fiddle maker	Belfast/Dublin
Stephen Henderson	percussion instrument maker	Kilkeel
Steve McIlwrath	guitar maker	Newtownards
Peter Boardman	fiddle maker	Donaghadee
Seamus O'Kane	fiddle maker	Belfast
Jim McKillop	fiddle maker	Cushendall/Dublin
Sam Murray	flute maker	Galway

William Mullan	flute maker	Ennsikillen
Brendan O'Hare	uilleann pipe maker	Belfast
FRAZER WARNOCK	highland bagpipe maker	Cookstown
Martin Preshaw	uilleann pipe maker	Fermanagh
Eamon Curran	uilleann pipe maker	Monaghan
Robbie Hughes	uilleann pipe maker	Strangford
Paul McAuley	bodhrán maker	Ballycastle
Eamon Maguire	bodhrán maker	Belfast
David Ausdahl II	guitar maker	Downpatrick
Alan Mayers	guitar and mandolin maker	Antrim
Sam Irwin	guitar maker	Belfast
Martin Dowling	musician, academic, researcher	Belfast
Stan McBroom	Musician	Belfast
Sheena Macdonald	Musicians' Union	London
Stephen Fullerton	InvestNI	Newry
Seán Kelly	Cathedral Quarter Arts Festival	Belfast
Ian Crozier	Ulster Scots Agency	Belfast
Kieran Gilmore	Promoter, Open House Festival	Belfast
Daithí Kearney	Dundalk institute of Technology	Dundalk
Gary Blair	Ulster Scots Agency	Belfast
Catriona Holmes	Ulster Scots Agency	Belfast

Appendix 2 Documents consulted and other sources

List of the principal publications, documents and other sources consulted (in addition to the websites of Traditional Music organisations based in Northern Ireland):

Arts Council of Northern Music Strategy 2013-2018 (ACNI)

Arts Council of Northern Ireland Music Review and Strategy (Ackrill, Knowles, ACNI 2011)

Art Form and Specialist Area Policy 2013-2018 - Traditional Arts (ACNI)

ACNI funding information: <http://www.artscouncil-ni.org/funding/for-organisations> and <http://www.artscouncil-ni.org/funding/for-individuals>

Ambitions for the Arts – A Five Year Strategic Plan for the Arts in Northern Ireland 2013-2018 (ACNI)

Creative Connections: A 5 year plan for developing the arts 2007-2012 (ACNI)

Review of the Musical Instruments for Bands Scheme (PriceWaterhouseCoopers, ACNI, 2006)

Music Industry Strategy for Northern Ireland (EKOS/Grant Thornton, DCAL, 2011)

DCAL Business Plan 2014-15 http://www.dcalni.gov.uk/dcal_business_plan_2014-15_-_version_of_25_april-2.pdf

DCAL Budget 2001-2015 http://www.dcalni.gov.uk/final_budget_allocation.pdf

Strategy to enhance and develop Ulster-Scots Language, Heritage and Culture 2015-2035 (DCAL)

Marching Bands in Northern Ireland – A study carried out on behalf of the Department of Culture, Arts and Leisure, in partnership with the Confederation of Ulster Bands (DCAL, undated)

Marching Bands in Northern Ireland – Guidance Notes (DCAL, undated)

DCAL reports from the Continuous Household Survey - http://www.dcalni.gov.uk/index/quick-links/research_and_statistics-3/statistical_publication/arts_publications/chs_adult_art_201314.htm

A Report on the Socio-Economic Impact of the Traditional Protestant Parading Sector in Northern Ireland (Grand Orange Lodge of Ireland, 2013)

Economic and Social Impact Study for the 2013 All Ireland Fleadh (Comhaltas Ceoltóirí Éireann, 2014)

Economic and Social Impact Study for the 2013 Ulster Fleadh (Comhaltas Ceoltóirí Éireann, 2014)

Treoir (published thrice a year by Comhaltas Ceoltóirí Éireann)

The Three Year Review (NITB 2011)

Music Tourism – Business Insight Series 2011-2012 (NITB 2012)

Living Legends – A practical guide to experiential tourism in Northern Ireland (NITB, 2013)

Intelligent Perspective Series Overview report - A practical guide to experiential tourism in Northern Ireland (NITB, 2013)

Culture & Creative Vibe - A practical guide to experiential tourism in Northern Ireland (NITB, 2013)

<http://www.investni.com/>

The Living and Working conditions of artists in the republic of Ireland and Northern Ireland (An Chomhairle Ealaíon, 2010)

Developing the Arts In Ireland: Arts Council Strategic Overview 2011-2013 (An Chomhairle Ealaíon, 2010)

Developing the Arts: Arts Council Strategic Statement (An Chomhairle Ealaíon, 2013)

Towards a Policy for the Traditional Arts (An Chomhairle Ealaíon, 2004)

Traditional Arts: Background discussion paper (An Chomhairle Ealaíon, 2005)

Deis Recording and Publication Award - An Chomhairle Ealaíon, <http://www.artscouncil.ie/Funds/deis-recording-award/>

Course materials by the Northern Ireland Piping and Drumming School (an extensive and detailed body of material including Drum-Major's certificate, Examination Book Grade 8, Piping for Highland Dancing, Techniques of Teaching)

The Fife - An Ulster Musical Tradition (Ulster Scots Community Network, undated)

The Lambeg Drum – Creating Ulster's Unique Traditional Instrument (Ulster Scots Community Network, undated)

Rhythms of Ulster – Popular Tunes for the Lambeg Drum (Ulster Scots Agency, undated)

The Journal of Music www.journalofmusic.com

GCSE Practical Collection 2015 (Davey Music, 2015)

Companion to Irish Traditional Music (Vallely, 2011)

Tined Out (Vallely, 2008)

Folk Music and Dances of Ireland (Breathnach, 1971)

Traditional Music and Irish Society (Dowling, 2014)

Website of Taisce Cheol Dúchais Éireann/Irish Traditional Music Archive www.itma.ie

Armagh Pipers Club Handbook 2014-2015

Armagh Pipers Club 45 Years (2012)

Londonderry Bands Forum brochure (undated)

Confederation of Ulster Bands Strategic Plan 1st June 2014-31st May 2017 (Confederation of Ulster Bands, 2014)

An Introduction to the B Flat Marching Flute (Ulster Scots Community Network, undated)

London College of Music syllabus for examinations in Irish and Scottish Traditional Music 2009-2012

A Future in the Making – Socio-economic survey of the craft sector in Northern Ireland, Executive Summary Report (Craft NI, 2006)

A Future in the Making – why the crafts matter, an advocacy document for the craft sector in Northern Ireland (Craft NI, 2007)

TG4 annual reports 2012, 2013, 2014

Na Píobairí Uilleann website www.pipers.ie

Ulster Folk & Transport Museum website <http://www.nmni.com/uftm>

Linenhall Library and website www.linenhall.com

British Council strategy 2014-2016 <http://www.britishcouncil.org/sites/britishcouncil.uk2/files/corporate-plan-2014-16.pdf>

Audiences NI website www.audiencesni.com

Scór –competition booklet https://www.gaa.ie/content/documents/publications/scor/Scor_Rulebook_2008_2010_100119122926.pdf

Gael Linn website www.gael-linn.ie