



music:)ally

MUSIC ALLY REPORT

**UK & Vietnam collaboration
and development
opportunities for the
music business, 2024-2027**

An industry education and
development blueprint for the
Vietnamese music industry



UK/Viet Nam
Season 2023

**Presented as part of the
British Council's UK/Viet Nam
Season 2023 programme**

About Music Ally

Music Ally was founded in 2002 with a mission to help the global music business understand and benefit from digital technology and trends. We publish daily news, weekly insight, and remain ever positive about the future.

We run business conferences to discuss and share knowledge; and we also provide workshops and training to the industry using our own inhouse content. Our clients range from huge global companies like Google, Meta and Spotify; major and independent labels and academic organisations, music managers and the artists and songwriters that are the lifeblood of this industry.

We publish in English, Spanish and Japanese and believe that the future of the industry is connected, global and diverse.

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Introduction

The United Kingdom is the third largest recorded-music market in the world, worth £1.32bn in 2022 according to industry body the BPI.

Those revenues have grown for eight consecutive years, with streaming accounting for 67.2% of those revenues. Meanwhile, exports of British recorded music grew by 20% in 2022, with more than 400 UK artists being streamed more than 100m times that year.

That's just for recordings. Collecting society PRS for Music's collections grew by 22.9% in 2022 to £964m, with £836m of that paid out to publishers and songwriters.

It's a healthy picture for the industry, yet the UK has also been at the centre of the global debate about how streaming pays off for musicians, as well as rightsholders.

The British parliament held an inquiry into streaming that shed plenty of light on the modern music economy, and people's views on how it could and should improve.

This all makes the UK a fascinating market to study for anyone in another part of the world keen to learn from what it does well, but also where it could improve.

That's the focus of this report, produced by Music Ally in collaboration with Hozo International Music Festival for the British Council, as part of the British Council's UK/Viet Nam Seasons 2023 programme.



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We've interviewed a number of decision-makers and experts from the British music industry about what makes this market tick, as well as what they see as its key challenges and blind spots.

The report also includes the views of a number of interviewees from Vietnam, offering their thoughts on what's happening in the country that's exciting; where they see that improvements can be made; and their hopes for the ongoing growth and evolution of the Vietnamese music industry.

The report focuses on four topics in particular: the creator economy; creative entrepreneurship; live music; and digital.

The creator economy is the community of artists, songwriters and producers in the UK, from the music education they receive as children and young people, to their knowledge of how the music business works, and efforts to make sure this community is as diverse and inclusive as possible.

The creative entrepreneurship section focuses on the teams around artists: labels and

managers, and the structures and initiatives that exist to help them develop their skills and their businesses.

The live section explores the importance of grassroots music venues to the industry, including the tough challenges they are facing in 2023, and how those are being addressed.

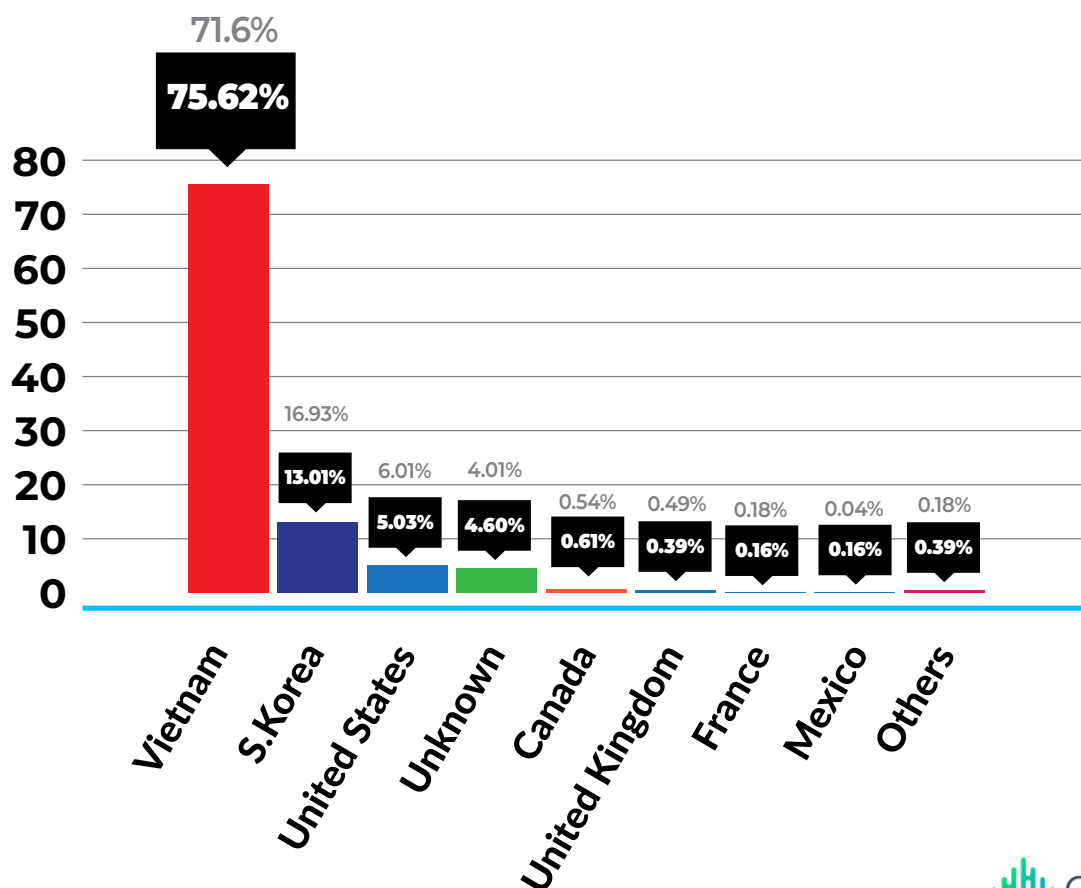
Our interviewees also had some thoughts on the importance of encouraging the next generation of music fans to go gigging, as well as the scope for British artists to tour Vietnam and vice versa.

The digital section explains how music rights holders are engaging with startups and the technology sector in the UK, including through incubators and accelerators. We look at how the British government gets involved in nurturing these relationships, and consider the digital skills that our interviewees see as being crucial for the next stage of the music industry's development.

In our conclusion, we also explain the growing debate in the UK about having a national music strategy to tie all the policy strands (and funding) relating to music together.

In common with most other markets, the streaming charts during 2023 in Vietnam have been dominated by local artists

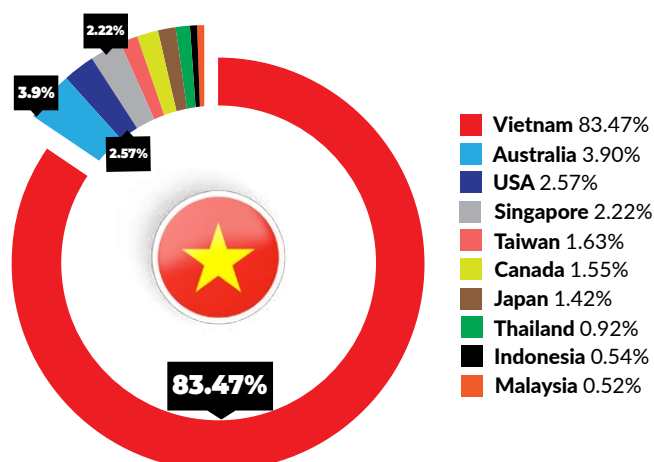
Korean artists account for 13% of the charts with the US a distant third, accounting for 5% of artists in the charts. No other country accounts for over 0.6% of entries in the charts. *Figures in grey represent weighted by chart position.*



Chartmetric

Vietnamese artists are starting to reach international audiences, in particular markets with a substantial Vietnamese diaspora

Although over 83% of listeners to the top 100 Vietnamese artists are in Vietnam, the share of listeners in other markets is rising. Below: share of listeners during 2023 (YTD)



Top Artists

Collaborations dominate the charts in Vietnam with the top 10 tracks during 2023 all being collaborations between domestic and intentional artists. Of the primary artists in collaborations and/or solo, the most successful artists in Vietnam during 2023 based on chart positions are:

RPT MCK	Vietnam (Hip-hop)
tlinh V	Vietnam (Hip-hop)
GREY D	Vietnam (Pop)
Jung Kook	South Korea (K-pop)
Da LAB	Vietnam (Hip-hop)
Jimin	South Korea (K-pop)
BTS	South Korea (K-pop)
Madihu	Vietnam (R&B/Soul, Pop)
V	South Korea (K-pop)
Trung Trần	Vietnam (R&B/Soul, Pop)



Hozo International Music Festival is an annual super festival in Ho Chi Minh City.

In Vietnamese culture, Hò is a performance genre that has long existed in Vietnamese folk music and is also what has created a cultural identity of Vietnamese music.

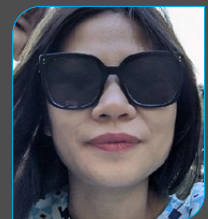
HOZO - HO DO MUSIC FESTIVAL started from such inspiration - to not only spread the music and Cultural Values of Vietnam in the usual way but also to bring Vietnamese Music and Culture to the World Level. In 2023 festival takes place in central Ho Chi Minh City, from 22th-24th December 2023

Hozo Music Industry Workshop is a side event gathering music producers, singers, writers, investors, marketers, researchers, industry partners, government officials to share insights, knowledge and discuss the development of music and culture industries

ABOUT THE VIETNAM CONTRIBUTING EDITORS

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Huong was formerly General Manager of Operations at Sony Music Entertainment Vietnam, and the ex-Branch Manager of The North cum Public Relations Manager of Vietnam Center for Protection of Music Copyright - VCPMC. With a proven track record in strategic operations, artist management, and licensing, Huong has played a pivotal role in shaping the success of country recognized releases.



Phuong Bui Ngoc

Former IFPIHK Representative in Vietnam and Head of Hozo Business Forum (2019-2022). 'PB' is a music industry expert with a proven track record in fostering collaborations, driving innovation, and advocating for intellectual property rights.



Section One

Creator Economy

From frontline stars like Harry Styles, Dua Lipa, Stormzy, and Ed Sheeran to heritage colossi like the Beatles, Rolling Stones and Elton John, the UK music industry has plenty of superstar-bracket musicians, as well as some of the most in-demand songwriters in the world.

But music's creator economy is about more than just the stars. The Musicians' Union estimated in early 2023 that there were around 37,000 musicians in the UK, with 32,000 of them in its membership.

Here are some of the key topics our interviewees talked about in relation to the health of this economy. →



Education, Education, Education

Over recent decades, there has been regular criticism of the dwindling amount of music education that British children receive in schools. However, the current British government announced some plans in January 2023 to try to reverse that trend.

It published a National Plan for Music Education, with the ambition that every child and young person should “learn to sing, play an instrument and create music together” and then have the opportunity to progress their musical interests and talents, including professionally.

The plan sets targets for how much classroom music teaching children get; their access to

instruments and opportunities to join choirs, orchestras and bands; opportunities to go to live performances of music; and opportunities to take music qualifications in their teenage years.

It is very early days for this plan: its success will depend on adequate funding and efficiency in putting it into practice, whether that be under the current or future governments. However, one area where our interviewees saw plenty of bright spots is the next stage: education and opportunities for children who do have musical talent.

“Early-stage talent development is really important,” said Annabella Coldrick (pictured),

CEO of the Music Managers Forum (MMF). She cited The BRIT School in Croydon, UD’s Talent House in Stratford and the East London Arts and Music Academy (ELAM) as three examples.

The BRIT School is a performing and creative arts school whose



alumni include Adele, Amy Winehouse and (more recently) Loyle Carner, Cat Burns and RAYE. According to the BPI, musicians who have attended the school have amassed more than 250m album sales globally.

However the school, which was founded in 1991 and is selective in its admissions (but free to attend) trains its students in all aspects of the creative arts. Many have gone on to work in other roles within the music, film, television and theatre industries.

In August 2023, the British government gave the green light for a new specialist creative school in Bradford in west Yorkshire, which the industry hopes will foster a new pipeline of talent. It is due to open in 2026 or 2027.

“It will fulfil a long-time ambition of the BPI, its label members and others to be able to create a specialist school outside London and the south east that will expand the talent pipeline across the UK and serve as a platform to make the music industry and other creative sectors even more inclusive and accessible, regardless of background,” said Sophie Jones of the BPI.

The Talent House opened in July 2022 as a hub in East London offering a mixture of recording studios, rehearsal spaces, workstations and teaching facilities. The £4.1m project had funding from Arts Council England and the Greater London Authority, and has a focus on Black music in particular – something that the organisation behind it, UD, said was underserved.

“We know that the specific training needs demanded of Black music are not met by music

education; there is a lack of strategic talent development in Black music, with many artists unable to achieve sustainable careers without subsidised intervention,” said UD CEO Pamela McCormick at the time.

Industry Funding Schemes

These are shining lights of UK music education, but they can only take in so many young musicians. However, there are other charities and initiatives funded by the music industry that aim to support musicians and music education projects around the country.

Youth Music is a charity that gives grants to smaller charities, arts venues, youth clubs, music education hubs and other entities to run music-making projects, as well as to individual musicians.

Its Trailblazer fund provides grants of between £2k and £30k, while its Catalyser fund is for more established organisations seeking between £30k and £300k. Meanwhile, its NextGen fund is specifically for young musicians and behind-the-scenes creatives to apply for grants of up to £2.5k to pursue their ideas.

Another well-respected entity is PRS Foundation, which is partially funded by collecting society PRS for Music – to the tune of more than £42m since it was founded in 2000. In 2022, the foundation supported 440 new music projects with grants.



Its funding for music creators includes an open fund that offers grants of up to £5k “to support the creation, performance and promotion of outstanding new music in any genre”. However, it has a range of other funding sources, contests and awards that also support emerging artists.

For artists who are further along in their careers, there is a separate tier of potential funding, including grants for composers and the PPL Momentum Music Fund, which offers grants of £5k-£15k for UK-based artists and groups.

It is a partnership between PRS Foundation, collecting society PPL, and two regional arts-funding bodies: Creative Wales and Arts

Council of Northern Ireland. In May 2023, the Foundation said that this fund has awarded more than £5.2m to 526 emerging artists in its first 10 years of operation, generating more than £22m for the UK’s music industry as a result of their subsequent success. A healthy more than 4x return on investment.

Other funds cited by our interviewees included the London Music Fund, established in 2011 as an independent charity with the Mayor of London as its patron. It focuses on ensuring that children in under-served communities have access to high-quality music education.

This fund has invested more than £4m since 2011 in projects across the capital, including 832 four-year scholarships. Its claimed reach is more than 12,000 young musicians directly, with another 50,000 benefitting from concerts, workshops and taster sessions.

The Mayor of London with the Greater London Authority also provide funding for skills bootcamps in the city, with music as one of the focal areas (others areas include green tech and digital skills).

Music Ally together with our delivery partners CLOCK have developed a programme of learning and development under this programme (more on this below).

There is a lot of positivity here, but several interviewees expressed the desire for these success stories to be built into a bigger, more structural program of investment in music education and young musicians. Something we’ll explore more in the conclusion’s look at a national music strategy.

Musicians and the Business of Music

One current talking point in the British music industry is about how much musicians should think and know about the business of music itself: their individual businesses as creators, but also the wider industry and its relationships with technology companies.



"It's incredibly important. I've heard repeatedly that courses don't tend to set people up for the business side of a career in music. And unfortunately, if you make naive decisions early on in your career, they can haunt you for the rest of your career," said Naomi Pohl (pictured above), general secretary of the Musicians' Union.

"I think it's key to educate people, music students, about the business side of things. And also about having a portfolio career, because as a musician you've got to be realistic about how you're going to make a living. You can't just say 'well, you know, I'm going to be famous'. You need a realistic plan," she added.

"It might be learning the skills to be a music teacher, because for most of our members, that's a crucial part of their portfolio career. You've got to be up to date with technology so that you can do home sessions. You've got to get out there and network, you've got to be aware of submitting your tax returns. You've got to know about things like [collecting societies] PRS and PPL."

This is work that the Musicians' Union is doing, alongside other bodies representing creators like The Ivors Academy (songwriters) and Featured Artists Coalition (artists). Tom Gray, chair of the Ivors Academy, said that he thinks there is plenty of work to be done, including supporting musicians

who are not au fait with the industry's workings.

"They need honest and fair support. There will always be musicians who are self-motivated to go out and find out how things work. And there will always be the ones who just can't get their heads around it," said Gray.

"We're constantly trying to do work to simplify the data and transparency side of the industry. People think they need to see things in simple visual terms, and that's true. But it's also important to be able to answer the 'why' questions like 'why am I being paid in that way?'"

"The industry has maintained very complex methods of working that are very simple in terms of the output, but very complex in terms of how they're actually being run. It's not very transparent, so figuring out how and why things are the way they are is very hard."

The practical side of learning is something that Denise Stanley, founder of the CLOCK skills development programme is passionate about. She has spent over a decade developing a methodology to support 'invisible skills' which are particularly prevalent in the creative industries where many roles have evolved without traditional academic training.

“A lot of people have worked in the creative industries their whole lives, and are extremely skilled at what they do, but have never had formal recognition of those skills by a university or college,” she explains. “This isn’t a problem if you stay in the same company your whole life, but it limits people unless you can identify transferable skills. That’s what CLOCK is about. Giving professional qualifications and recognising transferable skills in industries where they have been harder to identify. And also giving support in the form of a growing international network of peer mentors.”

The CLOCK programme is being implemented in countries ranging from Australia and Saudi Arabia to the UK and Netherlands; and Stanley is positive that the same approach could work in Vietnam. “Every country has skilled, talented people working across the creative industries. We use those networks to help support and develop the next generation, and this can happen alongside more traditional educational frameworks, says Stanley.

Music Ally has worked alongside CLOCK to deliver music industry skills bootcamps in London for the past year, which have largely been aimed at those not currently in work or education. In our first bootcamp of 36 people aged 19 and over, 33 of them have gone on to find paid work in the industry.

Other interviewees said that it is important that artists are not overloaded: expected not just to understand every aspect of their business as a creator, but to handle it all themselves.

Christine Osazuwa, chief strategy officer at live music firm Shoobs, and founder of the

Measure of Music conference, said that focus is important.

“The business can be seen as too complex, but it needn’t be,” she said. “It is important to understand what you need to know and be able to do, then work out what you are already good at.”

As an example, she explained that if an artist is good at making video content and engaging with fans on social networks, that’s what they can focus on, while outsourcing other tasks that they aren’t as naturally talented at or interested in. Building a trusted team capable of doing that – whether they work for the artist or are external agencies and freelancers – is key.

Measuring the UK’s Creator Economy

Key to understanding music’s creator economy is measuring it. The BPI has regularly published stats in the last couple of years quantifying what it sees as success in the streaming economy for British artists.

In March 2023, it said that more than 2,000 artists generated more than 10m audio streams in the UK in 2022, while more than 200 passed the 100m mark. It compared that to 2007, when nearly 90% of artist album sales were achieved by 1,000 artists.

In April, it followed up with a report noting that 15 British artists had more than 2bn streams



worldwide in 2022, while 40 had more than 1bn. However, more than 1,800 British artists were streamed more than 10m times globally in 2022.

At a more grassroots level, 2023 also saw an initiative from charity Help Musicians and the Musicians' Union. They conducted the UK's first 'Musicians' Census' this year, publishing the results in September.

It surveyed nearly 6,000 musicians at all levels, finding that the average annual earnings from music work for these creators is £20.7k (c VND 630m). From music work' being a key part of that sentence, because many musicians supplement this income with other work.

The census raised some questions about the health of the creator economy, with 23% of respondents saying they do not earn enough to support themselves or their families, while 17% were in debt. It also highlighted some of the British music industry's challenges around diversity, equity and inclusion.

"It showed that there are pay gaps. There's a race pay gap, there's a disability pay gap, there's a gender pay gap. The high earning musicians are something like 76% male. Once you get

over 50k a year, the vast majority of those high-earning musicians are men," Pohl told us.

"It's still a male-dominated industry, so when you have a lot of men at the top making the decisions, it doesn't lead to a fully diverse industry. The same goes for race. Unless we've got global-majority musicians and decision-makers in key roles, then things aren't going to change. It's still too tokenistic."

Diversity and Inclusivity for Musicians

We will discuss diversity and inclusivity for people who work in the music industry (as non-musicians) in the next section of this report. But our interviewees had plenty to say about initiatives to support musicians.

Tom Gray talked about the work that The Ivors Academy has done to diversify the voices of songwriters in its governance and policymaking. Its senate is a group that meets in committees and advisory groups to make

recommendations to the organisation's board.

In 2021 it held elections for 40 music creators to join the senate, with an emphasis on ensuring the intake was as diverse as possible. 50% of those new senators identified as female, up 13% in the previous election in 2018. 40% were Black, Asian or from minority ethnic groups (up 32%) and 13% had a disability.

"We've massively widened the scope of people who feel they have a platform within the organisation," said Gray. "It's very open now and very mingled. You've got kid songwriters next to ageing composers next to people who are making very contemporary fusion."

"Inclusion is the really important thing. It's young and old; able and disabled; every shade of colour, every type of neurodiversity. Everybody's there, and everybody's got a different experience," he continued.

"That's getting baked into all the stuff we're doing now, and that's thrilling. It makes us as an organisation more confident that we are giving people what they actually want – because we have a far better litmus of what the entire community is about, rather than just what we're being told by a handful of people."

Annabella Coldrick, CEO of the Music Managers Forum (MMF) talked about diversity in another context: regional diversity.

The UK has had a number of strong music scenes around the country: Liverpool, Manchester, Cardiff, Sheffield, Birmingham,

Bristol and other cities have all had powerful scenes at one time or another.

However, Coldrick made the point that the music industry remains focused mainly in London, and that means its talent spotting and development may be skewed towards the capital too.

"It is important to remember that talent can come from anywhere," she said, stressing the need to look "far and wide" for new artists.

Naomi Pohl of the Musicians' Union said that: "You've got to have music education available to all, because otherwise you end up with a

narrowing of the talent pool. If it's something that you can only pursue if your parents are well off and can afford to pay for music lessons, obviously it's not going to be open to everybody."

"If you want a diverse, thriving music industry, you've got to have music education available to

everybody. So it does need to be in schools, it does need to be subsidised. But I think it needs to go beyond classroom music teaching. There needs to be instrumental music tuition as well."

Pohl is frustrated that in the UK it can be something of a "postcode lottery" where children in one area may have very good opportunities for music education, and those in another will not.

"It's got to be a national music service, with a proper structure for how people are paid, and what parents contribute, and what the subsidy level is. Otherwise it's just not fair on kids, and



it depends on where you're born, where you grow up, how much opportunity you have."

The View from Vietnam

Our interviewees from Vietnam talked about some of the initiatives that are supporting and breaking new talent there already. Lân Ngàn, for example, is a platform focusing on young Vietnamese artists who are experimenting with traditional materials.

"This platform not only provides a space for free artistic creation within the country but also aims to connect Vietnamese artists with international counterparts to promote cultural exchange and share experiences, ultimately bringing new traditional music products from Vietnam closer to international friends," said Hoàng Anh from the platform.

Vietnamese DJ Minh Trí (pictured below) cited Hanoi's Monsoon Music Festival, organised by famous producer and public figure Quoc Trung, while Trần Thanh Ly, director of SAA & Golden Apple Cor. praised grassroots organisations Cổ Động and Đài Phát Thanh as good examples.



"Building a close-knit community, where individuals serve both as consumers and creators, plays a significant role."

Diversity is not as pressing an issue in Vietnam as it is internationally, but artist AKI said that it is becoming more important, particularly as Vietnam seeks to keep up with international culture.

"However, for local culture, concepts like race, gender, etc are still relatively new and have not reached the complexity level of international standards," said AKI. "Supporting diversity is important, but it does not carry the same influence on the success of an artist with the domestic audience."

Hoàng Anh talked about how research is informing attitudes towards this topic, however. "Inequality still exists in how the Vietnamese people participate in cultural and artistic spaces, including factors related to income and marginalised groups. Cultural inclusion is essential for the mental well-being, happiness, and prosperity of communities and future generations."

Tackling these challenges involves similar measures to those seen in the UK: "Policy management, educational system restructuring, increased accessibility, and financial support from domestic funds, businesses, and international entities for intermediary organisations to create inclusive and interactive spaces for all groups."

Minh Trí suggested that the current barriers can also stimulate the

creativity of artists as they work to overcome them, while Trần Thanh Ly noted that another barrier to true diversity is “language and content that is not/appropriate for Vietnamese culture in particular and East Asian culture in general”.

As for the question about whether young artists need to understand the business of music, AKI was clear. “For artists aspiring to turn music into a career, understanding the basics of the music business is essential.”

Minh-Hung Tao, Vietnam country head for global industry body the IFPI, sees several benefits to artists understanding the business side of music. He said it helps them to launch their music more effectively, and then generate a stable income by maximising the economic value of their released works. He also said that if artists understand the policy side of the music business, their voices will carry more weight. “Speaking out on these matters can have a much greater impact than those solely focused on the business aspects of music.”

Tùng Lâm, artist manager at Space Speaker Label, said that the better informed artists are about the business, the easier they will find it to “protect their creativity and avoid conflicts with labels”.

Trí Minh warned against assuming that young Vietnamese artists are naive to business realities, however. “Today’s young musicians are well-equipped with a wealth of knowledge, especially with global connectivity through the internet. In my opinion, they are highly skilled and have a clear understanding of these issues.”

Recommendations: Creator Economy

- Explore what further support and funding the platforms and events mentioned by our Vietnamese interviewees need to take their next steps forward
- Conduct some research focusing on diversity and inclusivity in the Vietnamese music community, to understand which people may be under-represented currently
- Consider potential measures around a national music education strategy that gives children access to instruments, teaching and technology in schools and at home
- Support any existing initiatives that educate young musicians about the business of music, and develop new programmes in partnership with the industry
- Explore the potential for specialist schools for talented young musicians, perhaps funded by partnerships between the music industry and its key technology partners
- Measure Vietnam’s creator economy: consider conducting a census of musicians to understand their numbers and the challenges that they are facing

Section Two

Creative Entrepreneurship

British executives are at or near the top of all three major labels globally, which is one reflection of the UK industry's health. But not the only one. The UK also has a rich history of independent label entrepreneurs, and a thriving community of managers and management agencies.

There is a strong culture of 'learning by doing' with music entrepreneurs throwing themselves at challenges as they meet them, and building their skills through practical experience. However, the UK also has a growing amount of structural initiatives to support these businesses – although of course, there is always scope for improvement. →



Support from Representative Bodies

The UK community is fortunate to have two strong bodies representing managers and independent music companies respectively: the Music Managers Forum (MMF) and Association of Independent Music (AIM).

“It is a really great community and there are so many initiatives,” said Christine Osazuwa (pictured) of the support available to creative entrepreneurs in the UK. “The hard part sometimes is knowing where to start! But there is so much help out there.”



MMF members receive a weekly newsletter; get discounts on courses, conferences and events; and peer support. The body also holds an annual awards ceremony to celebrate artists and their managers who are

finding success, and it is also hosting an event in November 2023 to bring managers and live agents together to discuss that sector.

The MMF also runs an Accelerator programme for music managers, which started in 2018 with support from YouTube Music, Arts Council England, Creative Scotland and the Scottish Music Industry Association.

In its first five years, it distributed funding to 115 managers, who the MMF estimates

subsequently generated at least £9.4m in turnover for the artists they represented.

Diversity was key to this initiative. 42% of participants were women, and 43% from Black, Asian or ethnic minority backgrounds, while more than 50% were based outside London.

CEO Annabella Coldrick described the scheme as nurturing “a real and thriving community of super-skilled managers from all quarters of the UK”.

AIM, meanwhile, is the body that represents independent labels in the UK, having been founded 20 years ago. Over time, the body has widened its scope of membership to anyone who releases recordings either as part of a business or as an independent artist. It also has membership tiers for music distributors.

Like the MMF, AIM offers a mixture of training (including its AIM Academy webinars) and events. It runs its own annual AIM Independent Music Awards ceremony celebrating labels and artists; and runs annual conferences.

The latter include AIM Connected (which focuses on trends and technology), AIM Sync (dedicated to sync opportunities) and AIM Future Independents (a free, online conference focused on self-releasing artists, independent labels and managers).

Both bodies have also been prominent in their advocacy for their communities in the big debates of recent music industry history. For example, both submitted evidence to the UK's parliamentary inquiry into music streaming, with their ideas on how the models could be

reformed and improved. They are also both part of the music industry's efforts to come together and agree on principles for regulation of AI technologies.

Trade Missions and Exports

The UK may be the third biggest recorded-music market in the world, but it is also an outward-facing one, with a keen eye on continuing to grow the value of its music exports. That includes a number of initiatives focused on helping its creative entrepreneurs make the most of the streaming era's global market.

In November 2023, industry body UK Music published a report estimating that UK music exports generated £4bn in 2022 towards the country's economy. The industry has worked hard to facilitate this growth.



One example is the trade missions it regularly runs to other parts of the world. For example its annual LA Sync trade mission sees British music companies involved in the sync market spend five days in Los Angeles for a mix of panels, site visits and meetings. It has been running for 20 years.

Meanwhile, in August 2023 the industry ran a trade mission to Japan, with participants meeting a range of Japanese music companies, attending networking events and visiting the Summer Sonic Festival. These missions are open to the full gamut of creative entrepreneurs: managers, labels, publishers, distributors, festival bookers, promoters and more.

“What’s changed more recently is the sheer number of markets we now need to visit across multiple regions and continents. This reflects a worldwide recorded-music market that is now truly global, where every territory is a potential place for UK artists to build a fanbase, and where we have to compete harder to cut through,” said Sophie Jones of the BPI.

“Last year UK recorded music exports enjoyed double-digit year-on-year percentage growth in every region of the world, from the Middle East, where our numbers went up by nearly 60%, to North America, our biggest music exports region, where revenue increased by 28%, and Asia by 17%. That means that when we are deciding where to hold missions we are now pretty much looking at the entire map of the world.”

China, India, South Korea and Japan may be high on the industry’s agenda, but Jones said

that the BPI is also evaluating markets like south east Asia, Africa and Latin America, with plans to run trade missions there in the coming years.

In recent years, the BPI has supported trade missions to the UK from Australia, Japan and South Korea, and alongside PPL it was a supporter of the first African Music Summit conference in November, which was held in London.

“The BPI regularly speaks to and works alongside music export offices from around the world so when they are visiting the UK we can return the favour,” said Jones.

“We organise an event called Country Connections at conferences like The Great Escape, SXSW and SXSW Sydney, where international delegates are able to meet their counterparts from around the globe. The Hozo event in Vietnam is fascinating, and underlines how new markets – and potential partners for the UK music industry – are developing at pace.”

Making the Most of MEGS

The growth of British music exports is backed by two initiatives that are worthy of attention: MEGS and the International Showcase Fund.

MEGS (the Music Export Growth Scheme) launched in 2014 to support British artists who are gaining traction outside the UK. It is jointly funded by the music industry and the

government, with the latter recently tripling its funding of the scheme.

MEGS has invested around £5m in 330 British artists since 2014 over a series of rounds. For example the 21st round in 2022 distributed £500k to 28 artists.

According to the BPI, that year nearly two dozen British artists who'd received MEGS funding in the past hit the milestone of 100m annual audio streams. The body also says that the £5m of MEGS funding has generated more than £63m of UK music exports down the years: a return of investment of more than £13 for every £1 spent.

"Beyond these impressive stats, MEGS is delivering practical financial help in building artist careers when they most need it and at a time when the UK industry faces ever-rising competition in the global music market," said Sophie Jones of the BPI.

The funding is bespoke for each artist: it can cover tour support, or help with PR and marketing. "It covers pretty much every aspect of what it takes to build and sustain an international career for very-largely indie artists," said Jones.

Famous artists who received MEGS funding earlier in their careers include Wolf Alice, Rina Sawayama, Beabadoobee and Young Fathers. But Jones said that this is not just about the bigger stars. She pointed to Lucy Rose, who received funding a few years ago to support her tour to Vietnam. She offered another example.

"Just in October, for instance, singer songwriter Tom Speight, who may not be a household

name in the UK but is big in Brazil, was performing to sell-out audiences in Rio and Sao Paolo, where he has a substantial fanbase and has enjoyed a No.1 single," said Jones.

"That's thanks in part to MEGS funding an earlier tour of his there. It's that kind of vital artist support that may not get big headlines, but sums up what MEGS is ultimately about."

The International Showcase Fund is run by PRS Foundation, and offers grants of up to £5,500 for "international export opportunities" for UK-based artists and songwriters. They can use





PRS Foundation



Sam Fender

the funding, for example, to help their costs when playing at industry-focused (showcase) festivals, taking part in songwriting camps or visiting conferences elsewhere in the world.

Little Simz, Kate Tempest, Dave, Sam Fender, AJ Tracey and Wolf Alice are among the past recipients of funding from this scheme, on which PRS Foundation partners with PPL, the Department for Business and Trade, the Musicians' Union, British Underground, Arts Council England, Creative Scotland and Wales Arts International.

That in itself is an example of the patchwork of

supporters including industry and government that goes into these kinds of schemes.

Inclusivity and creative entrepreneurship

As with artists, there has been a growing amount of discussion about the need for more diversity, equity and inclusion within the music industry itself.

Umbrella industry body UK Music has published several Workforce Diversity Survey reports to understand the landscape. The latest was published in November 2022, and found that the percentage of women working in the industry had reached a new record of 52.9%, but a decrease in the percentage of industry employees who were Black, Asian or from ethnically diverse backgrounds.

Independent organisation Black Lives In Music has also been publishing research, in its case

focused on the experience of Black people working within the music industry. In 2021, its flagship report found that 73% of Black music professionals had experienced direct or indirect racism in the industry.

BLIM has since been working on an anti-racism code of practice for the industry, while running mentorship programmes for budding executives and musicians.

The UK is also launching a new body that will have oversight of the music and other creative industries. It is called the Creative Industries Independent Standards Authority (CIISA) and will tackle bullying and harassment – including that faced by women and non-white members of the industry. It is backed by music bodies including UK Music, the BPI, Help Musicians, the Musicians' Union, UK Music and Live.

“There’s got to be somewhere for people to go and report abuse,” said Naomi Pohl. “The idea



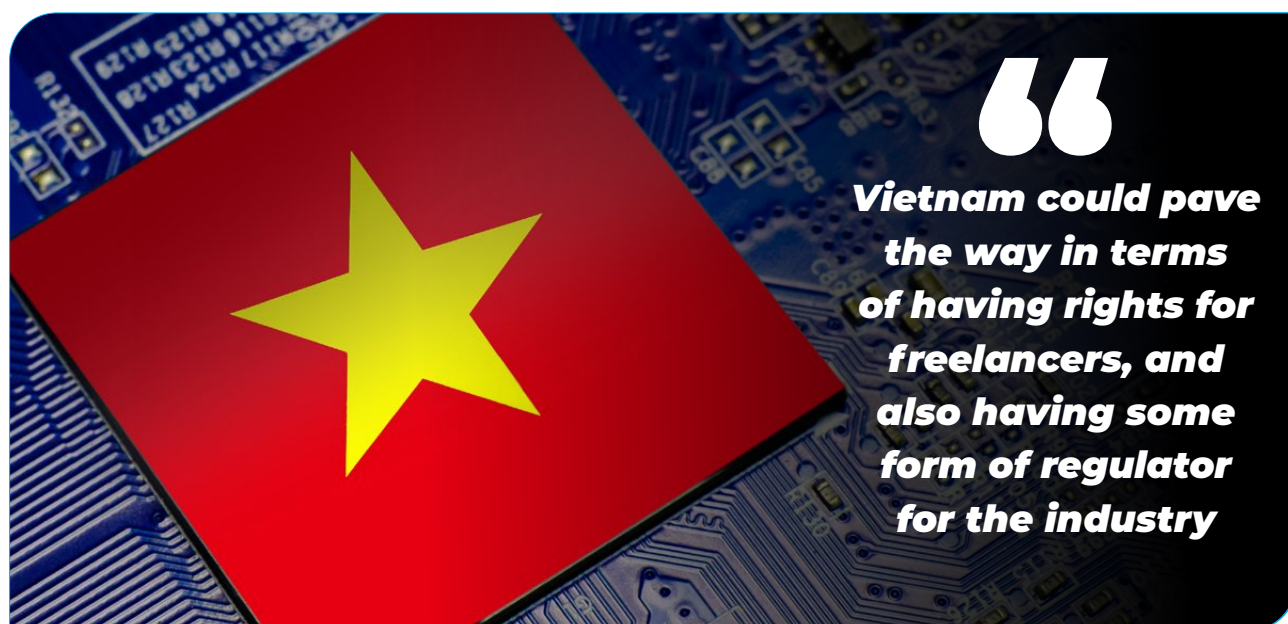
is if you’re a freelancer, and you don’t have an employer so there’s not a human resources policy or a process you can follow, you’ll be able to make a report directly to CIISA and they will investigate.”

Pohl suggested that while it has taken a long time for the UK to reach the point of creating such a

regulator, other countries – including Vietnam – could shortcut that journey. “Vietnam could pave the way in terms of having rights for freelancers, and also having some form of regulator for the industry.”

Why is this important? UK Music chief executive Jamie Njoku-Goodwin (pictured above) explained it well in the introduction to that body’s last report. “Boosting inclusion isn’t just a tick box exercise – it’s mission critical to the future success of our sector,” he wrote.

“Whether it’s businesses and organisations who need the broadest range of talent to draw on, or individuals who want to forge a successful



Vietnam could pave the way in terms of having rights for freelancers, and also having some form of regulator for the industry

career in our industry regardless of their background, it's in all our interests to make sure the music industry is genuinely open and accessible to all."

Christine Osazuwa referred to the UK Music stats in her interview for this report, pointing out that it is important to think not just about the overall makeup of the industry, but also about senior roles.

"Women and people of colour are over-represented in junior roles and internships, but this is not translating to roles further up the ladder," she said. Osazuwa noted that this is particularly frustrating given that London, the centre of the UK's music industry, is a very diverse city.

Powering Up the Industry's Diversity

One of the initiatives that Osazuwa praised was Power Up, which is another initiative run by PRS Foundation, together with industry veteran Ben Wynter.

Launched in 2021, it supports Black musicians and industry professionals, with an annual cohort. It has received more than 1,200 applications since launch, with the scheme expanding to 40 people in 2023.

Power Up has also seen more than £12.8m of grant support requested. The programme includes grants of up to £15k, masterclasses, mentoring, coaching, mental health and

wellbeing support, and access to a peer network. The programme's main partners in 2023 were YouTube Music, Spotify, Black Music Coalition and Beggars Group, with a range of industry bodies also listed as supporters.

Another positive patchwork, although Wynter called for more industry support in July 2023, referencing the music business's promises in 2020 following the murder of George Floyd, and the ensuing conversations about inequity and racism.

"We urge industry leaders to move beyond symbolic gestures and take concrete action to support this initiative and honour the promises they made in 2020," said Wynter.

Osazuwa said initiatives like Power Up and Keychange – the global movement focusing on gender equality – will be key for the British music industry's next shift: people stepping up into mid-level posts, and the pool from which the next generation of senior executives will ultimately be drawn.

"This will be important for Vietnam too," she said. "Work out where the industry is under-represented, and work from there to make sure that all areas have representation, and all opportunities can be followed up."

Osazuwa was also involved in an unofficial project in 2023 to bring more transparency to the topic of music industry salaries. It was an anonymous online survey sparked by a discussion about "concrete and actionable ways to help the industry given the lack of a union for music execs". People could fill in their details and then browse the results.

She also agreed with Annabella Coldrick that regional diversity is desirable, both in the UK and Vietnam alike. “It can be very London-centric,” she said of the latter. “It is important for a developing market like Vietnam to make sure it is supporting all regions too.”

The View from Vietnam

Our interviewees from Vietnam were united in their views that while creative entrepreneurs in the country are starting to think about international collaborations and expansion, it is not yet a pressing priority.

Artist AKI cited “budget constraints, recognition challenges, and the influence of international names on the Vietnamese audience, which may not be as strong as that of local artists” but added that collaboration with foreign artists is highly valued within several underground music communities, including punk, metal, EDM and hip-hop.

Trần Thanh Ly, director of SAA & GA Cor. agreed. “This is not currently the top priority for Vietnamese artists due to various factors such as economic conditions, language barriers, and strategic considerations. However, achieving success in the domestic market and aiming for collaboration and success in the global market is always a desire and goal for many Vietnamese artists.”

DJ Trí Minh pointed to existing success for Vietnamese artists in China and South Korea as evidence for the potential, while Tùng Lâm, artist manager at Space Speaker Label, said that while international collaboration “needs to be done and should be done”, it will be important to do it well. “Increasing coverage to international audiences, as South Korea has done, is effective only when your music can reach and convert international audiences into fans of Vietnamese artists.”

As for the wider health of Vietnam’s community of creative entrepreneurs, there was optimism, but also an acknowledgement of more work ahead to nurture this. “Vietnam is witnessing the emergence of an increasing number of individuals and organisations in the



fields of management, recording, and music business,” said AKI. “These entities maintain relatively good relationships and are very open in exchanging insights, knowledge, and relationships with each other.”

Trần Thanh Ly said that while these communities are emerging “a common observation is that these communities are somewhat nascent and not yet robust.”

She praised their enthusiasm, creativity, and quick learning abilities, but said that they now need support to go to the next level. “For sustainable and healthy development, besides strengthening the ‘internal’ capacities of organisations and individuals through education, training, and the exchange of professional knowledge and experience, these communities also greatly need support from the government level.”

One way to do this would be to build more infrastructure in terms of music business education. “With an education system that focuses mainly on traditional tools, the public education system has yet to establish comprehensive models for music business education, especially in management,” said Hoàng Anh of Len Ngan.

Trần Thanh Ly agreed. “At present, Vietnam lacks formal and systematic courses on music business, with primarily workshops being organized by certain organisations and labels,” she said. Tri Minh backed that up. “The information I have indicates that currently, at this time, there is no university in Vietnam that offers courses specifically on music management and business.”

Recommendations: Creative Entrepreneurship

- Develop schemes to support artists – initially in genres like punk, metal, hip-hop and EDM – to find international collaborators to work with on new music
- Identify the communities and initiatives supporting creative entrepreneurs in Vietnam’s music industry, and provide them more support and funding to grow and expand in ambition
- Build formal, structured music industry courses, backed by credible academic institutions, and work with the industry to ensure these courses are up to date and relevant
- Nurture bodies representing managers and independent music companies in Vietnam, with the resources to run training, conferences and other events
- Research which international markets may have most potential for trade missions, and consider a dedicated funding scheme for artists who have traction and/or opportunities abroad
- Explore how a CLOCK programme can be rolled out in Vietnam as a way to expose invisible skills or support vocational training

Section Three

Live Music

No sector in the music industry was hit harder by the Covid-19 pandemic than live music, with concerts and festivals cancelled and artists unable to tour.

It has been a bumpy road back for the sector, too: superstar acts are filling stadiums and arenas again, but lower down the live pyramid there have been concerns about rising costs, concertgoer confidence and threats to independent venues.

There are plenty of positives in the UK live music market, but also challenges – and lessons to be learned from how the industry is trying to tackle the latter. →



The importance of the grassroots circuit

The UK has plenty of large music venues, but the ace in its pack historically has been its circuit of smaller grassroots music venues (GMVs) where new artists and bands cut their teeth live.

According to the Music Venue Trust, the charity which supports this sector in the UK, there were 960 GMVs in 2022, which held more than 176,000 events and put on 1.6 million individual artist performances. It's a vital first step on the ladder towards bigger concerts, recording contracts and a wider audience.

"The strength of the UK is that it has a really well-developed local network. Most towns



and cities of any significance have got a choice of grassroots venues for music. In pubs it's licensed. And there'll be a graduation to theatres and bigger clubs

nearby," said Adam Webb (pictured), campaign manager at FanFair Alliance. "On that localised level, most people's live careers still start in that local and regional, and then building outwards. That's still really strong."

Naomi Pohl of the Musicians' Union agreed. "Grassroots music venues are really the key breeding ground for new talent. Live is still the way that most artists build up a fanbase," she said.

Things are changing. Webb pointed out that in the current era of streaming services and social

media, artists can “completely bypass paying their dues at grassroots venues”. For example, they may come to prominence on TikTok, have hit tracks, and progress immediately to playing mid-tier venues. The challenge there being that they will be learning their stagecraft in front of bigger audiences, rather than having time to hone it in the smaller venues.

Everyone agrees that this has historically been a strength for the UK, but they also agree that these venues are facing considerable challenges in 2023, and need more support from the music industry and government alike.

The Music Venue Trust’s statistics show that the average concert in a grassroots music venue in 2022 was 40% full, down from 51% in 2019, before the Covid-19 pandemic. The average number of events per venue has fallen from 4.2 to 3.5 over that same period.

These are challenges to their business models, but in the UK there are also some specific issues for venues relating to the property market, and to local regulations. 89% of these venues do not own their buildings, but rather pay rent to a landlord – and are thus at risk of closing down if those landlords decide they would rather sell or redevelop the property for other uses.

A number of venues have also been threatened with closure because of noise complaints and licensing issues, while rising energy costs have hit these businesses hard too. The Music Venue Trust estimates that in the last year, 78 venues closed

permanently for one or more of these reasons: a rate of more than one a week.

Losing these grassroots venues would harm the industry. “Part of the cycle of why the UK is so good is we’ve had regional scenes, and people have been inspired to come out of the audience and get on the stage,” said Adam Webb. He compared it to professional football, where playing fields are the baseline for future stars. “You need that to be viable at the bottom, and to have easy access to it.”

“It’s every bit as important to protect our grassroots venues,” agreed Colin Keenan (pictured below) of agency ATC Live. “You can’t have those festival headliners without the grassroots venues. There have been too many instances of developers building property near established venues, and the new residents try to shut down the longstanding venues over noise issues.”

An additional challenge is that since Covid-19 lockdowns have eased, there has been a rapid succession of superstar artist tours, with expensive ticket prices. That has had the opposite of a trickle-down effect, economically speaking.

“Developing artists and festivals are having a harder time unfortunately,” said Keenan. “There have been so many global superstars touring over the past couple of years and ticket prices have been hiked to a place where £100 is no longer deemed expensive for an arena show. As such, there’s less money trickling down to smaller festivals and artists.”



Support for Grassroots Music Venues

Besides collating data on the size and struggles of the grassroots venues circuit, the Music Venue Trust has also taken a leading role in trying to support them.

Its initiatives have included the 'Own Our Venues' campaign, which aimed to raise £3.5m (VND 105bn) to buy the freeholds of nine venues, then rent them back to the operators at a reduced rate, while also contributing to their repairs and insurance costs.

The Trust set up an entity called Music Venue Properties to do this, and secured backing from Ed Sheeran, Amazon, Warner Music Group, Sony Music, Arts Council England, Help Musicians, Frank Turner and AEG Presents among other investors. MVP bought its first freehold, for the 100-capacity venue The Snug in Greater Manchester, in October 2023.

The Trust also launched a separate 'Pipeline Investment Fund' in 2022, offering grants of

up to £5k (VND 150m) to venues to support work – lights, sound, access, ventilation and minor building alterations for example – as well as staff development, training and building ties with local communities. 26 venues were awarded a total of more than £107k in grants in 2022.

The Trust's work has also seen the British government acknowledge the importance of the grassroots live circuit. In June 2023 the government increased its funding for a 'Supporting Grassroots Live Music' fund operated by Arts Council England. It will now get £5m in funding over the next two years, and in turn that saw Arts Council England contribute £500k to the 'Own Our Venues' campaign.

Colin Keenan is hoping for more of this. "Authorities need to see the true value in music and truly support it," he said. "Live music has been proven to have a positive impact on mental health, and for every £1 spent on gig tickets, there are multiple pounds spent in the surrounding area, so local economies receive a huge boost too."



The Snug, Manchester

As momentum has built, so the Music Venue Trust has started to win partnerships and commitments from the wider music industry. British band Enter Shikari are donating £1 from every ticket sold to their 2024 UK tour to the Pipeline Investment Fund, for example.

Arena venues owner ASM Global is going to match that, while supporting the Trust's work in other ways. And in October, Ticketmaster UK launched a month-long 'upsell' option for its ticket buyers to make a donation to the Trust.

Naomi Pohl thinks that this kind of support from the bigger venues is a very good idea. "The grassroots develop the talent which then goes on to make money for the bigger end of the industry, so I think that's a really positive idea, and quite an interesting model."

She is also impressed by another initiative in the UK: the Future Yard venue in Birkenhead, Liverpool. "They're an amazing music venue, but they're more than a venue. What's really great about what they do is they're a community project. Birkenhead is quite a deprived area, so they decided to set up a music venue, but they went out and talked to

the residents in the area and asked them about what they want in a space," she said.

"So it's a music venue, but it also does a lot of training and development of artists during the daytime. It's a community space. They've now got public funding and they're developing it further. It's a really interesting model to look at, because it's good for the venue, and it's good for the local community if it's not just closed during the day and open at night. It's a space that's accessible to the community during the day as well."

Encouraging the Next Generation of Concertgoers

Another area where the UK may have room for improvement is securing the next generation of concertgoers, in an 'attention economy' where children and teenagers have many possible sources of entertainment including games, social media and online video services.

Adam Webb suggested that the music industry could be taking this challenge more seriously, noting that most concerts don't admit under-16 year-olds unless they are with an adult. The rising price of concert tickets may also put teenagers off live music.

"I think it's important that kids can access venues as well: that they can afford to go.



When I take my kids to the football, West Ham cannot wait to throw £1 offers at them or get them into a shirt. They really put loads of effort to get kids in there,” said Webb.

“I’m not sure that music makes quite as much effort, given the strength of competition now, and the way that tastes have changed as well. It’s really important to put a lot of effort into that and make sure that live music is accessible, it’s affordable, and you’re getting kids [into live music] at quite a young, formative age.”

Webb cited with approval initiatives in Germany and Spain where young people have been given money to spend on cultural activities and products.

In Germany, this initiative is called ‘KulturPass’ [culture pass] and involved €200 (VND 5.25m) given to every 18 year-old to spend on anything from concerts and records to visiting independent cinemas and museums.

Spain’s government, meanwhile, launched its ‘Bono Cultural Jóven’ [Youth Culture Voucher] as a way to credit young people turning 18 with €400 of credit each. €200 can be spent on live arts, cultural heritage and audiovisual arts; €100 can be spent on physical products (books, magazines, games, records etc); and €100 can be spent on digital or online services, including music-streaming subscriptions.

In 2021, France also introduced a €300 culture pass for 18 year-olds, again to spend on concerts, art shows, theatre and more cultural activities.

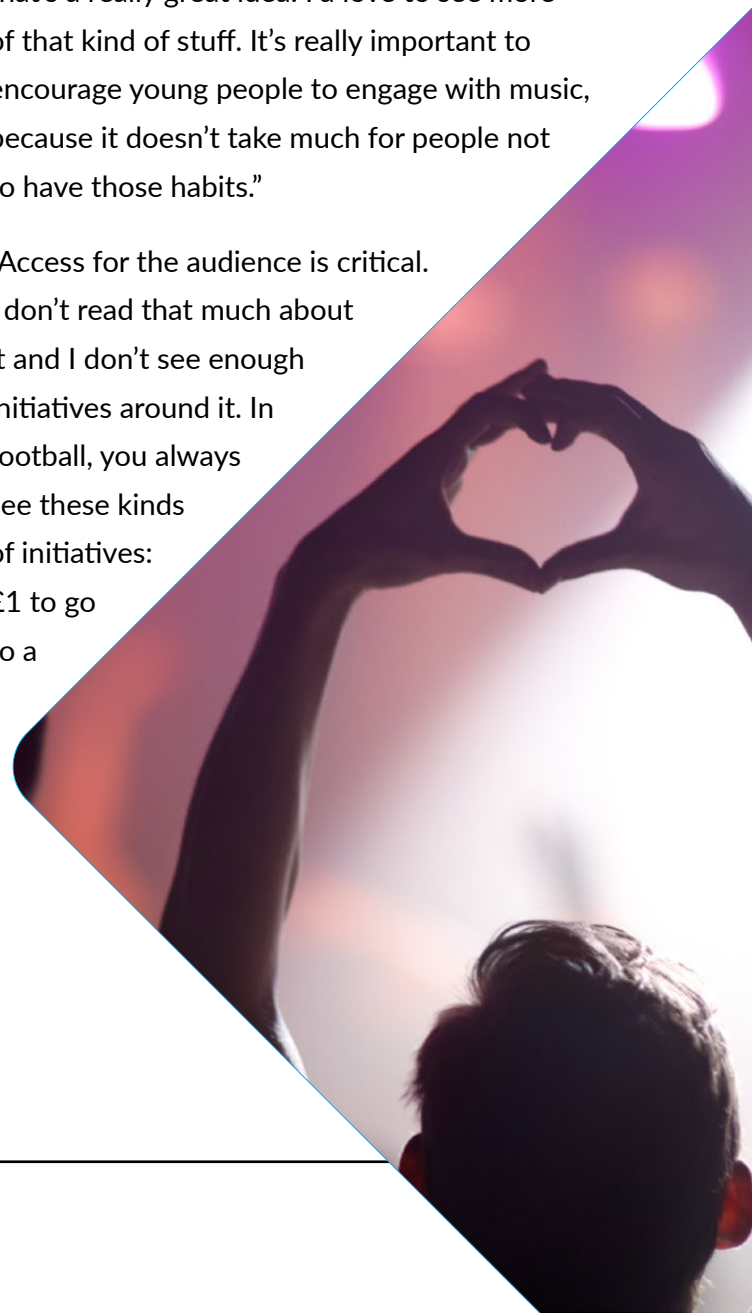
These were introduced in the wake of Covid-19 as a way to stimulate the creative industries,

but Italy has had its ‘18app’ initiative since 2016, gifting 18 year-olds with €500 to spend on cultural visits and products.

“I think that’s such a brilliant idea. Throwing loads of money at a venue doesn’t guarantee that anything of artistic merit’s going to take place in the venue. It’s not going to necessarily kickstart any economic activity,” said Adam Webb.

“But giving young people who were shut away for two years, giving them money that they’re going to go and spend, which means that somebody’s going to have to put some gigs on, that’s a really great idea. I’d love to see more of that kind of stuff. It’s really important to encourage young people to engage with music, because it doesn’t take much for people not to have those habits.”

“Access for the audience is critical. I don’t read that much about it and I don’t see enough initiatives around it. In football, you always see these kinds of initiatives: £1 to go to a



cup game or something, anything to bring young people in. You never see things [in music] like under-18s getting in half price. I totally appreciate there's costs, and everything's carefully priced. But it's so super-important that you've got younger audiences going in."

International Interest and Trigger Cities

Music streaming services are an important baseline for the live sector in 2023, with artists building their audiences on Digital Service Providers (DSPs) like Spotify or SoundCloud and then using the analytics they get back to plan where to tour – as well as to persuade promoters and venues that they're capable of filling rooms in those markets.

Colin Keenan of ATC Live suggested that this is an opportunity for Vietnamese artists, as well as those from other parts of the world. If they can build an audience in the UK through streaming, there is no reason why they can't also be ambitious to tour there.

"Breaking through was once only done through radio play and press, meaning there were gatekeepers to success, but that's changing more and more with the power of streaming and socials," he said.

"In our office alone, there are artists from eastern Europe, Scandinavia and further that

are selling thousands of tickets a night in the UK without a single play on national radio or being picked up by the national press."

Adam Webb agreed. "I guess at one point you might have said there's no way that somebody from Vietnam could become an international, global star. Well, obviously they can do it from Puerto Rico and South Korea now, so you could probably do it from Vietnam as well," he said.

There is also more scope for British artists to tour in Vietnam, and this is also being fuelled by music streaming. There is growing awareness in the UK (and indeed, in other western music markets) of the importance of 'trigger cities' in the streaming economy.

These are densely-populated, digitally-engaged cities with huge streaming audiences, whose listening can thus 'trigger' the recommendation algorithms of the DSPs to enable artists to find audiences elsewhere in the world. The theory was devised by analytics firm Chartmetrics in 2018, encouraging western labels to consider spending their marketing budgets in countries with trigger cities, even if the likely return in terms of revenues from those markets was small.

South East Asia is a key region for trigger cities, and this in turn is spurring more western artists to make touring the region a priority. In a recent report published by Music Ally on the topic of Trigger Cities, Vietnam was mentioned specifically as a country of interest.

"We're extremely curious about Vietnam as a country," said Ryan Peterson of Stellar Trigger Marketing, a company set up to help artists and

labels capitalise on these trends.

“I think over the next five years that will grow to be one of the world’s most important streaming markets, through all the same reasons that we consider the Philippines and Indonesia and I guess Southeast Asia generally to be so important. High density populations, really high internet connectivity. Mega-high content sharing rates, and an openness-slash-preference for English language music.”

Colin Keenan agreed. “It is a fascinating country with plenty of history and one that many artists would love to include in touring,” he said, offering his advice to Vietnamese promoters on how best to increase the number of British artists touring there.

“Speak to your counterparts domestically and abroad to discuss what artists are touring, when they’re touring and what is logistically possible. Speak to government bodies about whether there is any kind of financial or business support to bring in more acts. All you need to succeed in music is passion, enthusiasm and the ability to communicate – no matter where you are in the world.”

Collaborations could also be part of this, although much more work needs to be done.

Christine Osazuwa suggested that the British music industry has tended to be rather limited

when thinking about collaborations, focusing mainly on the US and other English-speaking markets. “There is some interest in Nigeria thanks to Afrobeats’ popularity, and in Europe and French-speaking areas, but in general the UK prioritises the US,” she said, expressing surprise that there is not much interest in the Asia region at the moment. But this may well change.

The View from Vietnam

There was plenty of positivity from our interviewees in Vietnam about the development of the country’s live-music industry.

Artist AKI said that major festivals including NTPMM, Hozo, Monsoon and Genfest have

been giving musicians more opportunities to showcase their talents, with these events growing in their scale and professionalism year-by-year.

“There are more high-quality programs with significant investment in arrangement and production that have been positively received by the audience,” agreed artist and journalist Nguyễn Mạnh

Hà. “Ticket prices are relatively high (around VND 6 million, or GBP £200 for VVIP) for a scale of 3,000 seats, indicating that many people are willing to spend money on quality programs.”



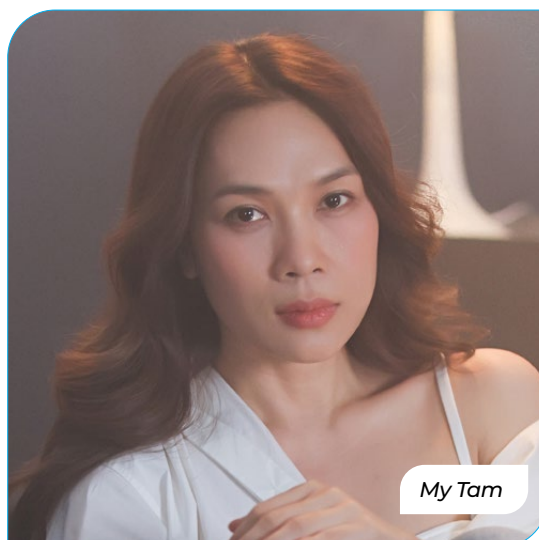
“There is now a group of young, talented artists capable of organising solo shows with an audience capacity of up to 10,000. Examples include My Tam, Hoàng Dung, and Vu,” they added.

Trần Thanh Ly, director of SAA & GA Cor., said that the strengths of Vietnam’s live sector include flexibility and a readiness to adapt, although tight budget constraints and a lack of infrastructure (“for example, event venues, international standard sound and lighting systems, and performance technology”) need to be worked on.

“After the Covid-19 pandemic, the live music performance industry in Vietnam has shown positive signs of recovery,” said journalist Đào Mai Trang.

“Large-scale performances by both domestic and international artists have emerged, with successful ticket sales. Medium and small-scale events are also taking place in various locations across the country, indicating a growing demand for live music appreciation. The audience segments are becoming more distinct.”

As for other improvements that could be made, Nguyễn Mạnh Hà noted that the licensing process is still quite strict. “Additionally, there may be unexpected incidents such as a power outage at the performance venue. Therefore, the organising unit needs to have strict and legally assured contracts.”



My Tam

They cited the recent tour by K-Pop stars Blackpink as a spur for further development, though. “Authorities recognised the significant role and impact of the performing arts industry on the economy. Hence, in the future, it is likely to create better conditions for international artists

coming to Vietnam.”

Vietnamese DJ Trí Minh is keen to see artists in the country continue to hone their live craft. “The skills of many Vietnamese artists in playing live music are still not optimal. They need to study more and have more opportunities for exchange.”

Meanwhile, it’s not just British venues that face challenges in complaints from local residents, it seems. “In Vietnam, due to psychological factors and habits, performances are usually organised within the city limits,” said Tùng Lâm, artist manager at Space Speaker Label. “Early music shutdown is necessary to avoid disturbing the residents around the venue.”

A lack of technology, equipment, and budget for stage construction were also cited as challenges, as well as concerns about ticket scalping (touting). Our interviewees had a wishlist of potential changes that could be driven by the authorities in Vietnam, both at a national and local level.

“Establish a clear and streamlined legal corridor and licensing process, and ensure strict

adherence to the regulations set forth,” advised Nguyễn Mạnh Hà. “The regulatory authorities should create conditions and a favourable environment for artists and organisers to operate within the legal framework.”

“Investing in infrastructure (building theatres, stadiums, etc.) that meets international standards, implementing policies to support performance licences, and fostering collaboration to promote domestic/local tourism along with businesses are essential steps,” added Trần Thanh Ly.

“A strategic vision is needed for the performance industry,” thought Đào Mai Trang. “Actively coordinating and supporting private organisers in terms of policies, taxes, communication, etc, to collectively promote the development of this industry rather than passively waiting for programs from external organisers as has been the case.”

Tùng Lâm is hopeful that strong signals in terms of Vietnamese music fans paying for music, listening on streaming services and attending live shows will encourage more international acts to visit the country. Đào Mai Trang backed that up, describing a “young and financially capable audience, willing to spend on attending concerts of their idols / artists”.

“In recent years, the participation of foreign artists in events or live concerts in Vietnam (such as Blackpink, Westlife, etc) has attracted significant interest and participation from the audience,” said Trần Thanh Ly. “Many programs sell out tickets within a few hours of release, indicating a very positive signal for the Vietnamese market.”

Recommendations: Live

- Focus investment on building live infrastructure: venues, sound and lighting systems and performance technology. Talk to local artists and also international teams about what they need
- Work on building a strong network of grassroots music venues, not just in the biggest cities but across the country, and consider how the government could support this
- Consider schemes to encourage younger people to attend concerts in a safe manner, with reduced prices and all-ages gigs. Or even a ‘culture pass’ scheme along the European model
- Re-examine the licensing process and regulations around live music, in partnership with the industry, to understand where they need tightening up – or loosening
- Research which Vietnamese artists have traction in specific countries through their streaming and social stats, and seek partners to help them tour there

Section Four

Digital – Music Meets Tech

The music industry is often described as having been a canary in the coalmine when it comes to digital disruption, having been the first creative industry to be widely affected by the emergence of filesharing technology in the late 1990s.

Since then, the industry has rebooted itself around streaming, but also around a deeper engagement with music-tech startups. One of which, Spotify, has grown into a giant still holding off the likes of Apple, Amazon and YouTube as the most popular subscription service.

The UK's music industry prides itself on working closely with a range of startups, but as with the other topics in this report, there are also plenty of opinions on how this could improve further. →



The Music Industry's Engagement with Tech Startups

A large part of the industry's relationships with tech startups is handled on a company-to-company basis. Labels have dedicated staff to identify and reach out to interesting-sounding startups, as well as field inbound enquiries from music-tech firms hoping for partnerships.

There are also some more structural initiatives to foster links between the music and tech worlds, however.

Labels body BPI began its 'Innovation Hub' in 2016, and then evolved it into a 'Music and Tech Springboard' membership in 2020

in partnership with Music Ally. This enabled startups and 'scaleups' (larger tech companies) to join a specialist free tier of membership of the body.

More than 120 companies have since taken up that offer, across sectors including web3, metaverse, AI, gaming, anti-piracy, fintech, health and wellness, educational technology and anti-fraud tech.

"We think of ourselves as A&R for music tech! We recruit startups with existing B2B or B2C SAAS or software solutions for the music industry, educating them on how the industry really works and connecting them with the right mentors or clients to deliver proofs of concept and test their ideas in the real world," said the BPI's Sophie Jones (pictured above).



Abbey Road Incubator

The BPI also provides insight sessions, training, online webinars and networking events to “help bridge the gap between what the industry wants, and those offering solutions”. It also has a due diligence process to assess the quality of the startups.

Incubators and Accelerators

Another way the music industry works with startups is through incubators, accelerators and investments. There are several examples of this in the UK.

One is Abbey Road Red. It is a startup incubator based at London’s famous Abbey Road Studios that has been running since 2015 that has

worked with startups who collectively have raised more than \$90m of funding, and have reached a collective valuation of more than \$350m.

Its most recent startups have included metaverse-focused Xone; musical pharmaceutical company MediMusic; AI music startup Daaci; and assistive lyric composition service BrainRap.

AI Music (which Apple acquired in 2022), Audio, LifeScore and Vochlea are among the other startups to have gone through the Abbey Road Red programme, which is part of the studios owned by major label Universal Music Group.

The other two major labels have been partners for the (non-UK) Techstars Music accelerator, which recently announced that it

was closing down. In both cases, the programmes do not just offer investment for the startups, but play a key role in introducing them to music rightsholders and to artists.

Sony Music has also worked with the UK's Digital Catapult to launch an accelerator aimed at Black startup founders. The FutureScope Black Founders Programme announced its first cohort in August 2023, with 10 startups taking part. They ranged across areas including merch, sonic branding, recommendations and NFTs.

There have also been initiatives launched by independent music companies to deepen their engagement with startups. One example is AEI Ventures, an offshoot from electronic music company AEI Media. It was created in April 2023 as a way for the company to invest in founders and startups from the music and hospitality sectors, with a particular emphasis on people from "historically excluded or marginalised backgrounds".

Management company ie:music has also explored this strategy, launching an ie:ventures arm in 2020 that would invest in startups in areas including D2C, e-commerce, CRM, ticketing, data transparency, digital distribution, AI and education. It aimed to have a dozen startups in its portfolio by the end of that year.

A different approach was Marathon Labs, an accelerator launched by independent music company Marathon Artists in 2016, which held further cohorts in 2018, 2020 and 2022. It worked with an average of six startups each



time around specific themes: 'value creation' being the 2022 edition's focus; 'music discovery' for 2020; 'monetisation' in 2018 and so on.

Accelerators are good, but experts note that they are necessarily limited in their scope. "Accelerators are excellent

structural ways in ways in which founders and entrepreneurs can engage with the industry. But the scale of these kinds of offerings is small compared to the significant size of this market," warned Jeremy Silver (pictured), CEO of Digital Catapult.

Room for Improvement

Not everyone is so impressed with how the music industry deals with startups, however.

"There is a strong interest in music among software developers and vice versa. Innovation is at a high level, but there is often an ignorance around the ability to use existing content and what rights apply," said Jeremy Silver.

"There is also often a lack of accessibility to the market. The major labels and publishers do not make it easy for interesting new startups which have the capability to enrich the sector. The lack of access is often exacerbated as a problem by the lack of equitable deals and licence terms," he continued.

"The industry has always required its startup partners to have deep pockets and for those

pockets to be reached into by the industry in order to buy a seat at the table.”

Tom Fiddian, head of AI and data economy programmes at Innovate UK, was another interviewee who accepted that there can be barriers for startups wanting to work with music rightsholders.

“To be successful as a startup in this sector, you’ve got to be close to or in contact with an owner of value, be it a record label, a venue or some established incumbent company. You can’t really come from the outside to disrupt without having any of those relationships,” he said.

“If you’re hot, and you’re something that is of interest, I think there’s a good landscape out there. If you’re something that may be seen as too disruptive, that may taint your traction, not only with that one group of the incumbents, which of course it would be, but maybe other parts of the support ecosystem.”

Fiddian thinks that there is a need for startups to come in already educated about how the music industry works, and how its key stakeholders intersect.

“The policy framework and the ways of working of the music industry are as complex, I would say, as the health sector. But everybody knows them: nobody just rocks up and says ‘I can change the health sector’. People outside the music sector do think that they can come in, they understand that there is some inefficiency, and they think they can just come in and solve it,” he said.

“So I would say you need to understand how the sector is shaped. You’ve got a whole load of digital innovators who are looking for a problem to solve or a sector to land in. There’s more that can be done to educate them about policies and cultural-value supply chain constructs, before they put too much effort into a space. In music certainly that seems to be an ongoing



problem where people get to a certain position where someone says ‘no that will never work in this sector’. And they probably should have been told that a long time before!”



Government-backed Music / Tech Initiatives

The UK has several initiatives designed to foster innovation with the creative industries, including music.

There is the Digital Catapult, which works with the UK government and other organisations, as well as with industry bodies who are looking for startups in their area.

There is also Innovate UK, described as the UK’s innovation agency, whose work aims to help businesses grow, thrive and find partnerships within the various sectors that can use their technology.

A recent example of its work was announced in October 2023. It’s a ‘Creative Catalyst: AI in the Music Industry’ funding competition. It will invest up to £1m (VND 30.1bn) in “collaborative innovation projects” with a focus on AI products and services across the whole music industry, including live, recorded music and publishing.

The contest sought projects with a total cost of between £100k and £250k, providing up to 50% of the cost for large organisations, 60% for medium-sized organisations and up to 70% for micro or small organisations. It was focused specifically on the UK: projects must carry out all of their project work in the UK, and be intended to exploit the results in the UK too. Applicants must also be UK-registered businesses collaborating with other UK-registered organisations.

“We have quite a joined-up mechanism at the moment with infrastructure. The support mechanisms across publicly-funded as well as trade organisations, I think that is working relatively well. The UK has got a pretty strong support infrastructure with a number of key individuals who are talking to each other,” said Fiddian.

“We’re not working on any sort of formal structure. It’s an informal structure that seems to have evolved to provide good support.”

Jeremy Silver said that there is scope for the government to offer more support, specifically for innovation around the business of music.

“Arts funding bodies such as the Arts Council are active, but invariably focus more on live

performance than on helping the commercial aspects of the industry,” he said.

“Innovation is supported by bodies like InnovateUK and Digital Catapult, but the scale of investment into music related technology innovation is still very low compared to what has been offered in screen based industries.”

Jeremy Silver also sees barriers for Vietnamese startups who want to work with the British music industry, but also suggested that work could be done to surmount these challenges and forge those relationships.

“There are very few ways for startups from Vietnam to meet British music companies. Many of those companies are international in nature and might initially respond by sending requests for engagement from Vietnamese companies back to their representative in territory operations.

“Those that do not have those kind of international presences might be more interested,” he said.

How could this be changed? “There would be an important task to do to research what kinds of offerings and capabilities Vietnamese companies might have to offer. Then some work would be needed to explore whether there was a potential fit, before creating a programme to bring teams together,” suggested Silver.

“Organisations like Digital Catapult and Music Ally would be well placed to collaborate on offering some of that work. But it would be necessary to do that before embarking on organising any missions or similar.”

Digital Skills

One topic that is front of mind for the British music industry in 2023 – and, indeed, the global music business too – is what new skills and knowledge it will need to have in-house to be fully prepared for the next wave of innovation and disruption caused by technology. Artificial intelligence looms very large here.

“Clearly the most urgent thing for the music industry to work out, while it is confronting the use of generative AI in the marketplace, is to work out how to use it itself,” said Jeremy Silver of the Digital Catapult.

“Beyond that there is a massive global digital skills shortage in all aspects of audio-visual production, technology application and development in the creative industries and in music in particular.”

Christine Osazuwa, who is a data scientist herself originally, talked about the importance of being able to understand the numbers. “Having the skills so that you are able to work with the wealth of data the DSPs and social media platforms can provide, and capitalise on that. Seeing behind the headline data to fully understand your audience,” she said.

For Osazuwa, this is a question of control: ensuring that artists’ teams have ownership of their audience data, rather than relying solely on the platforms in the middle, and then being vulnerable to any change in their whims

around how much data to share.

Tom Fiddian agreed that AI is a priority, but suggested that the music industry should also be taking a longer-term, more strategic view about how to be best prepared for any new technology that impacts it in the future.

“Data scientists and AI specialists in the near term, but I do think to be self-sustaining it needs some futurists. People who can think about what does 6G actually bring us? What does low-latency high-bandwidth networks actually mean?” he said.

“They do exist, but they don’t seem to be front and centre. The same policy experts will be put forward, and they will have to talk about ‘piracy is bad’. Maybe they’ll talk about tech, they’ll talk about visas for touring bands and things like that. But no one’s going ‘oh right, in 10 years’ time we think this is going to be the most impactful thing for us.”

The industry is putting thought into its future however. Sophie Jones of the BPI said digital skills are in its thinking when it comes to music education.

“We are currently in discussions across our music education network including The BRIT School, ELAM and the BPI’s new creative school launching in Bradford, about modules in innovation and entrepreneurship that could drive significant value down the talent pipeline,” she said.

The View from Vietnam

Vietnam is an exciting market for tech startups, including around areas like gaming and web3. There is already activity bringing these companies together with the music industry.

“The Vietnamese music industry is collaborating with the tech sector and startups in gaming, NFTs, and live streaming,” said Lynn Hoàng of Binance Vietnam.

“Challenges include fair compensation for artists, intellectual property protection, tech literacy, sustainable collaboration models, infrastructure, and market size. Improvements





In Vietnam, the music market is still in its infancy... startup/technology companies will need a lot of time and effort to understand the dynamics

are needed in these areas to enhance these partnerships.”

Trần Thanh Ly, director of SAA & GA Cor., noted that there are some initiatives relating to gaming and NFTs. “But a specialised business model that combines music with a startup or technology company from Vietnam is not yet established or officially launched or promoted.”

Lynn Hoàng sees potential for the Vietnamese government to help nurture these kinds of relationships further in the future.

“Encouraging the growth of tech startups in the music sector through funding and regulatory support can stimulate innovation and provide platforms for artists to showcase their work,” said Hoàng, adding that investment in digital infrastructure and strong intellectual property protection will also be necessary.

“Initiatives to enhance tech literacy among musicians can empower them to leverage digital platforms effectively,” added Hoàng.

“Certainly, the Government will play a crucial role in building a healthy digital economy within

and around the music industry,” agreed Trần Thanh Ly. “The government can enhance its efforts by consulting and collaborating with organisations and individuals both domestically and internationally. This collaboration is particularly important concerning the strategic development vision, platform technologies, management policies and support policies.”

As in the UK, our Vietnamese interviewees are keen for tech startups to make every effort possible to familiarise themselves with the complexities of the music industry before trying to work with it.

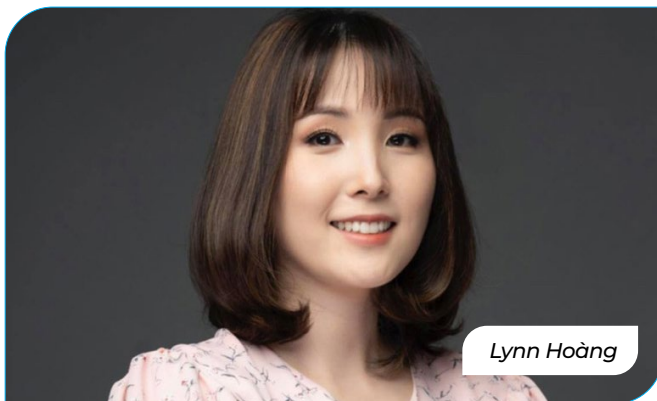
“The music industry is an extremely unique field: although the core of the entire industry relies on copyrights, copyright laws only reflect a very, very small part of the industry’s actual operation,” said Minh-Hung Tao, Vietnam country head for global industry body the IFPI.

“Especially in Vietnam, the music market is still in its infancy, and besides the legal regulations, there are almost very few ‘standards’ and the practices are highly diverse and constantly changing. Therefore, startup/technology

companies will need a lot of time and effort to understand the dynamics and rules of this industry before entering the game.”

“Creating a forum for regular communication among companies and individuals active in the music industry to share practical knowledge and experiences (even at a basic level) would be very beneficial for the onboarding process of startups/technology companies.”

Lynn Hoàng agreed on the need for startups and tech developers to educate themselves about the music industry before engaging with it.



Her suggestions included “industry-specific workshops and seminars to educate tech developers about the music business” as well as more collaborations between tech incubators and music industry professionals, and online resources with guides, articles and courses on the music industry’s intricacies.

“Establishing incubator programs that specialise in music-tech, where developers can learn while working on real projects,” was another of Hoàng’s ideas, alongside organising networking events for tech developers and music experts, and “encouraging government support or funding for programs that bridge the gap between tech and music”.

Recommendations: Digital

- The Vietnamese industry could consider setting up a BPI Springboard-style initiative to forge links between startups and labels, and also with musicians
- Establish music-tech incubator programs where startups can be mentored by experts (from tech and music alike) and potentially raise funding from rightsholders too
- Consider educational content and schemes to teach startups about the complexities of the music industry before (or at least early in the process of) engaging with it
- Launch competition / pitch-style mechanisms for startups to showcase their services and technologies, whether these be industry-run, government-led or a combination of the two
- Conduct research to understand where the gaps are in the Vietnamese industry’s digital skillset – now but also for the decade ahead

Conclusion

There are lots of positives, and some interesting challenges to learn from the UK's music industry.

A few more points came up in several interviews conducted for this report. The first concerned the debates about the streaming economy, where the UK has been the centre of global attention for its parliamentary inquiry into the economics of streaming. →

The Music Industry's Engagement with Tech Startups

The debate aired some of the tensions within the industry: for example between representatives of artists and songwriters on one side, and labels and publishers on the other.

Those arguments have continued since, in a series of 'working groups' organised by the UK's Intellectual Property Office to bring experts together to thrash out the issues. One thing everyone agrees on is that this process has been important.

"The select committee inquiry was incredible because they spoke to every stakeholder group in the music industry. I was joking that it was the best thing on TV during the lockdowns! I think all the music industry representatives were completely focused on watching all those sessions, which was great," said Naomi Pohl of the Musicians' Union.

"Many of us who are sat around these tables have sometimes entrenched and opposing views, but even in an environment like this much can still be achieved," said the BPI's Sophie Jones, referring to the working groups. She stressed the importance of unity, when possible.

"It is important that we align and work closely together where we can to grow British music: the international market is becoming increasingly hypercompetitive, and while it may be healthy and right that we have passionate industry debate about how we support our creators and the creative process, this cannot be at the expense of future talent or the success of British music and its global prospects."

Pohl suggested that countries like Vietnam can take the lessons learned from this process and implement changes at an earlier stage in their music industries' growth.

A second point that came out of our interviews was the importance of measuring that growth.

In this report, we have mentioned a number of studies that have generated data on the British music industry's size, its demographics, its export value and other metrics.

Sometimes this data highlights problems that need to be addressed, but sometimes it provides the industry with important ammunition when it is lobbying policymakers for new regulations, or expanded funding for industry initiatives.

"Having detailed, accurate data is invaluable when we are putting the industry's case to government and when we debate amongst ourselves. It is crucial that we can make our points to policymakers based on solid evidence," said Sophie Jones of the BPI.



It is important that we align and work closely together where we can to grow British music: the international market is becoming increasingly hypercompetitive...

A National Music Strategy

The final point raised by several interviewees is something that is not happening yet in either the UK or in Vietnam, but which both music economies feel would be hugely beneficial to the music industry's future growth.

This is the desire for a 'national music strategy' from the government: something that draws together the threads of every policy that impacts music, as well as the funding that is available, for a top-down strategy focused on growth. →

“At the moment, music [as a policy bracket] in the UK is in: Business & Enterprise; Science & Innovation; Culture; Education; Health; Communities & Planning. Music is in all of those departments, and yet there is no integration of any of those policies,” said Tom Gray (pictured) of the Ivors Academy.



“A national music strategy would provide a structured framework for sustained investment, growth, and innovation in the UK’s music sector,” it said. “It would guide initiatives aimed at stimulating economic growth, preserving our musical heritage, and enhancing quality of life through music.”

This call was also made by the parliamentary committee on culture, media and sport in a follow-up report from its streaming economics inquiry in 2023.

“Parts of everybody’s budgets across all of these departments are already dealing with a lot of these things. Why don’t we just get all of that money from all of those different budgets and put it in one place and then funnel it out? Rather than this ridiculous piecemeal thing.”

“The current approach to cultural policymaking by Government is too scatter-gun to be effective, particular in comparison to other successful countries with whom we are competing for market share,” it claimed.

Gray is far from alone in this call.

“We recommend that the Government take a more strategic approach to policymaking regarding cultural production and the creative industries. Responsibilities are dispersed across too many departments, which has created

In 2023, UK Music published its ‘A Manifesto for Music’ report and made this a central plank in its recommendations.



UK Music’s ‘Manifesto for Music’



not criminalised; whether it's music being used to cure loneliness or treat dementia in the old; or just emotional regulation, it's an absolute resource for creating healthier, happier environments. And should be understood as such."

Gray also returned to the theme of measurement, whether that be of music's economic, health or social benefits, as being key to launching any such strategy.

persistent issues, including in international trade, visas and the ongoing skills shortage."

The arguments for a national music strategy rely on seeing music not just as an industry that can be measured in economic terms, including exports, but as a much wider important cultural force and benefit.

"Government needs to understand that this isn't just a sectoral fight. It's a societal fight, and a society that fails to protect its musicians probably is failing in lots of other ways too. Because we are agents of community," he said.

"These are people who are really poorly paid, who you don't have to pay a lot of money to, who if they're doing more stuff in more communities more often, will make people healthier and happier and more resilient."

"Whether it be creating places where young people can commune safely and where they're

"The first thing you're gonna need is make all of this measurable. Start from the position of: everything we're gonna do is gonna be measured," he said. "Let's measure it in terms of trade, let's measure it in terms of wellbeing benefit. Let's measure it in terms of enterprise. Let's measure how many people are coming in and out of the centre of town."

Naomi Pohl suggested that any such strategy can also include some bold moves to support the country's community of musicians.

"If I was starting from scratch again with the music industry, I would put forward some form of universal basic income for artists," she said. "Our members earn so badly that there's always a risk of people just leaving the business. If you make £20,000 a year from music, how can you survive, especially at the moment with the rising costs of accommodation, travel and energy?"

“So if you could give artists 10 grand (VND 301m) a year or something as a basic income, and then what they earn is on top of that, people start to be able to make a living that pays the bills.”

She also said that for any government in any country, investment in music and its creators will be matched by the energy of that community to make the most of its opportunities.

“If you really support and fund the infrastructure that the music industry needs, I think the possibilities are endless,” she said. “Musicians are creative and inventive and innovative and resourceful. So there is the potential for the music industry to grow.”

Interestingly, our Vietnamese interviewees have also been thinking about the need for joined-up strategy at a policy level.

“The music industry is part of the overall cultural industry that Vietnam and UNESCO prioritize for construction and development from 2020 to 2030,” said Trần Thanh Ly, director of SAA & GA Cor. “

“This comprehensive plan includes various aspects, from building and developing supportive policies to education, training human resources, and other macro and micro-level development policies,” she continued.

“To create conditions for the government to implement this plan in the best and most cohesive way, we need to focus on fundamental and core issues. First and foremost, we should collaboratively construct a proposed strategic development plan for the



Vietnamese music industry in stages.”

IFPI Vietnam’s Minh-Hung Tao said that the government there should focus on improving all aspects of authorial and related rights around music.

“Research and enhance the enforcement system of rights quickly and efficiently,” was one of his suggestions. “Support the collection and distribution of copyright fees for all users as stipulated by law,” was another.

“Moreover, since the music industry is a complex, diverse, and rapidly changing field, parallel with technology advancements, it is not easy for the government to grasp the needs of businesses if these enterprises are not interconnected and proactively voice their concerns and desires,” he added.

“Having an association representing the common interests of businesses is crucial to provide the government with comprehensive and complete information about the concerns and common needs of the industry. Tight and continuous coordination with the government throughout the implementation of these goals is also essential.”

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