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## Aufbruch Musik - German Music 2020

Foresight Brief No. 081

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<b>Sponsors:</b>	The Strecker Stiftung provided financial support Other organizations, companies and individuals provided non-financial resources	
<b>Type:</b>	A national foresight on the German music sector	
<b>Organizer:</b>	'Aufbruch Musik' is a group of nine people with ties in all areas of the music sector coming together from different organizations and institutions for the project. The group can be contacted via Barbara Haack <a href="mailto:hack@nmz.de">hack@nmz.de</a> Claus Harten <a href="mailto:harten@harten-breuning.de">harten@harten-breuning.de</a>	
<b>Duration:</b>	2005-2006	<b>Budget:</b> €20,000
		<b>Time Horizon:</b> 2020+

### Background

The music sector in Germany is going through major changes. Global technological and societal trends combined with major cuts in public spending for the cultural sector need to be faced. Right now these upcoming changes seem to be met by agitated melancholia instead of orchestrating these changes to a desired state of the future where music is established as an energy source for societal and personal development. The time to refer to the glorious German music transition rectifying public spending for 'high quality' music seems to be coming to an end. The border between different music lines has become more and more blurred.

### Music Actors 'Jiggle' their Sector

Music is an essential part of Germany, not only seen in a cultural sense for its society but also for sociological and economic reasons. To give a few numbers:

In Germany over 2,700 music and sound storage companies exist with nearly 80,000 permanent employees. They create a business volume of 14,500 Million. The mass media broadcasting and consumer electronics are not included in this number. In addition to the employees with permanent contract there is a traditionally high percentage of self-employment and short term contracts, probably 50% of the total job market. 13.5% of the German population over 14 years of age play a musical instrument (See Endnote 1).

#### A private initiative

The German Music foresight project is initiated by nine individual actors from different areas of the music sector. Though these individuals are of different disciplines and work in dif-

ferent areas and on different levels, they share, next to their love of music, at least one other thing: The opinion that the German music sector needs to start acting soon if it wants to be able to orchestrate the upcoming changes. This is even more important if the German music sector wants to remain as an important player an important player in the world music scene. Otherwise the condemnation into music world insignificance is a real threat. The group 'Aufbruch Musik' - Music Decampment - has decided to join forces in order to wake up the music society to reality and to launch them into the future.

Since this is a major change process the group decided to split this enterprise into two parts to:

- Keep its handling feasible and
- To be able to finance it.

The first part of the enterprise is the German Music foresight, which is the topic of this brief. The exercise is not financed with public money but financially by the Strecker Stiftung - a foundation.



The objectives of the German Music foresight are:

- to raise awareness that the music sector is in a process of fast transition while acting like a sleeping beauty
- to disclose how the global musical and societal trends are seen by music professionals and the music public,
- to make the people in the sector aware that they actively need to shape the process of change.

By achieving these objectives, the goal to initiate a second foresight process with an even broader and more active participation of the various actors will be achieved.

The objectives of the second foresight will be:

- to develop scenarios for the different music fields, to
- to engage the music public at a major music congress in Germany, and to
- to develop desirable visions for the different field of the music sector.

The music sector combines totally different fields. Examples of this are: the different music styles such as serious/classical music, opera, folk, jazz, pop, rock, music lay education, professional education, music literature, music therapy and others. Areas which are covered by this sector as well are the fields of music broadcasting – radio and television, music storage, music theatres, concert organization, music production and the manufacturing of music.

### A Classical Foresight Approach

The German music foresight is a foresight exercise in a classical, participatory sense.

In a preparatory phase, global trends have been collected based on a literature review and experts in the different fields of the music sector have adapted these trends onto their fields and outlined possible results of these trends in 2020 in a working paper.

The main phase of the foresight consisted of a survey. Based on the working paper two types of interviews were planned: Guided interviews with at least two experts from the more than 15 different music fields and standardized interviews. The standardized interviews have been made available to the

interviewees either as on-line or as a printed version (the full questionnaire in German is available under [www.foresight-musik.de](http://www.foresight-musik.de)). The music public was invited to participate in this survey by an open invitation via e-mail, by print music media and partially by personal invitation.

The survey served two purposes, on one side it revealed the thinking and feelings/fears of the music public and on the other side it stipulated reflection about the current and future situation in the music sector. The reflection of the situation by an interviewee is usually regarded as an unwanted side effect. In this case this side-effect is very welcomed in order to prepare the ground for more active involvement of the interviewee in the future process of change.

In the final phase the results of the surveys are used to draw first sketches of scenarios. These sketches are currently used to place the topic of “The long-term future of the German music sector” as the central theme for one of the next major music congresses in Germany. With these sketches the first part of the music foresight ends – though only to hand it off to a second foresight.

Though this second foresight is not part of this brief it will be explained very shortly to give an idea of the whole change process. The results of the first foresight will be explained thereafter.

The second, future music foresight, preparation already started, focuses more on the active part of the future shaping process. This implies the operational involvement of a broad range of actors of the different music fields to resemble the broad spectrum.

In the second foresight the scenario technique will be combined with the method of future work shops.

The purpose of the second foresight lays in the development of future visions for the single fields of the music sector, - and of course in developing a plan of action to initiate their implementation. The German music congress is generally attended by about 300 people representing the various kinds of musical institutions and organisations.

## No Surprises ... Just Revolutionary Change

General trends which apply to the German society and its economy like an aging society or an internationalization of top performer in the labour market have effects on the German music sector as well. Therefore, it is no surprise that the trends in the music sector are not radically new, in a general sense, but they will have revolutionary impact on some fields of the music sector. Some clear trends out of the following 13 categories have been detected:

- Globalisation – Migration,
- Education – Training
- Financing
- Quality and reception of music
- Music business and business strategies
- Working environment and job outline
- Lay music
- Associations
- Media
- Technology
- Health
- Orchestra – events – opera

- Cultural policy.

### Clear Trends

The results of the carried out survey demonstrate how diverse the opinions towards future developments can be. Nevertheless, some clear trends emerged. We will list some examples of those:

The demographic development will have a major effect on the municipal youth music schools who right now lean toward the age group of 3 to 21 year olds. The focus in the music schools lays on a solid education playing a musical instrument (including voice) and preparing to play classical, serious music. The decline in the absolute number of children and teenager will force the music schools to open up to other age groups, other groups of society and to new areas. This development is supported by the cut in financial support from the municipal government.

Due to different reasons, it is seen as very unlikely that a major group of young people can be attracted to serious music.

The financial support of traditional music institutions like opera, concert houses and music organisations through public spending will decline. Institutions not being able to cope with this situation will need to close. The number of music institutions will drop.

The job market for the musician will change even more towards a market where permanent employment is the exception and either contracts for single events or for a season will be the rule.

The music-programming of the German radio and television broadcasting under public law will not exclusively be designed under quality aspects.

It is expected that on a German, European and world-wide scale intellectual property in the music area will not be rewarded in an appropriate way.

### The Foundation Of Music Society Is Shaking!

In Germany the foundation of the high level music education is provided by the youth music schools. Of over 2000 music schools, about 980 of them are municipal youth music schools. They usually not only guarantee high quality teaching, they as well offer the opportunity to play conjointly with other musicians, in small ensembles, in orchestras for different age groups and very important, they provide the students with af-

fordable instruments on a loan basis. Very often the music schools function as an entrance to the world of classical music since mostly pieces of classical music are used in the lectures. In general, the schools have the objective to provide musical education not only for the mass of young people but also for the top performer. On average the municipal schools are borne by the community to 50%.

The music education system with the municipal youth music school as basis is seen as one of the reasons why Germany is still one of the leading countries in the music sector. If the municipal music schools close down the foundation of the high-class orchestras and wide-spread music institutions will be severely damaged.

The music schools need to find new financial and organizational concepts and new concepts of attracting and keeping students (regardless of the age).

### Self-Employment as the Rule

The reduction of opera and concert houses as well insecure financing of orchestras will result in fewer musicians holding permanent employee contracts. Possible effects of this could be: the pressure to deliver top performances will rise, the attractiveness of musician as a profession will decline and with this the performance level, and, consequently, Germany as an attractive country for top performer will shrink as well.

If it can (or should) not be avoided that self-employment becomes even more the rule than today, it is of urgent need to account for that in the music education as well.

### Is Creativity a Synonym for Altruism?

The social situation of a major part of the German composers is alarmingly bad, despite growing revenue numbers in the music business. Composers need to earn an appropriate share of the revenue created with their products. The situation today is already bad; most of the composer cannot afford to live by their earnings as a composer. The results from the interviews show a clear trend that the situation is expected to get worse. Some signs for this are the current amendment to the German copyright law and endeavours on European level regarding this topic.

This development is seen as very critical in the music society. The apprehension is that more and more composers withdraw completely from this business, leaving composing as a hobby. This of course will have a negative effect on the amount and quality of product creation.

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## Music! What for?

Numerous physiological examinations prove the vegetative effects of music. The social background in which music is

perceived and the musical socialization are of important in the development of the individual and of society (See Endnote 2).

It can be expected that nearly all people listen to music of whatever type. 13.5% of German's society say they actively play an instrument; half of them 'only' play in private while the other half is organized in all kinds of music organizations - from church choirs to marching bands to orchestras and other instrumental ensembles.

If so many people are actively involved in music and even more seem to enjoy listening to it, why does the music sector seem to have a problem? It should not be a financial problem. In a society where for a mass concert the cheapest tickets cost is over €100 and the concerts are sold out in two hours, at least it should not be problem. On the other hand opera houses and music schools need to close down since they can not survive with a reduced financial budget due to cuts in public spending.

If these cuts in public spending cannot be avoided, why is it possible to support a major music festival, like the Bayreuth festival which is sold out year after year but receives €1.7 Million of public money? It seems that values need to be clarified.

### Visions for the Music sector

The music sector of Germany is in a state where the old structures do not fit with today's world anymore. Cuts in public spending, law changes, global trends heavily influencing the music scene, demographic changes, changing values; all this calls for changes in the structure and organisation of the sector itself. Though in order to alter the structures, the current situation and the pursued values and goals need to be clearly stated. Long-term strategies need to be developed.

The purpose of this German Foresight is to initiate this process of change.

Right now it does not seem clear whether the music sector is a sleeping beauty which can be awakened to the old glory (though probably based on other grounds) or if the music sector lives off the glorious old times with no power to cope with current developments and future demands. By confronting main actors of the music scene with the results of the carried out survey, the foresight organizing group's intention is to put one of the next music congresses under the theme of "Visions for the German music sector". The goal is to carry out the main elements of the planned second foresight, the development of joint visions and a plan of action, at this congress. When involving the participants of the music congress into these elements of the foresight process, actors of the whole music spectrum will be integrated.

### The music sector as a mirror of society

The German music sector can be seen as a mirror image of a highly-developed society. The music sector reflects needs, values and moral concepts of a society. Right now it is a blurred image, the traditional needs and values seem to dissolve and new ones will emerge which we have not clearly grasped.

The German Music foresight initiative achieved to start the necessary process of reflection about the music future. If the momentum can be kept and the second foresight is under way it will be very worthwhile for other actors of society to watch closely. The music society is a major part of our whole society but it might be small enough to discuss its needs and values, and to develop visions to dream and stream for.

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## Sources and References

**Endnote 1:** [www.miz.org/intern/uploads/statistik40.pdf](http://www.miz.org/intern/uploads/statistik40.pdf)

**Endnote 2:** [www.pyscontent.com/abstracts/hh/mtk/2000/03/-body-mtk11103134.html](http://www.pyscontent.com/abstracts/hh/mtk/2000/03/-body-mtk11103134.html)

- [www.foresight-musik.de](http://www.foresight-musik.de)
- [www.jmd-community.de](http://www.jmd-community.de)
- [www.miz.org/themenportale.html](http://www.miz.org/themenportale.html)

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**About the EFMN:** Policy Professionals dealing with RTD, Innovation and Economic Development increasingly recognize a need to base decisions on broadly based participative processes of deliberation and consultation with stakeholders. One of the most important tools they apply is FORESIGHT. The EFMN or European Foresight Monitoring Network supports policy professionals by monitoring and analyzing Foresight activities in the European Union, its neighbours and the world. The EFMN helps those involved in policy development to stay up to date on current practice in Foresight. It helps them to tap into a network of know-how and experience on issues related to the day to day design, management and execution of Foresight and Foresight related processes.