

Final Report

RTÉ Orchestras

Ensuring a sustainable future

A report by Helen Boaden and Mediatique

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Views from past reviews of orchestras and related topics

“...public attendances at Symphony Concerts, and consequently the necessity for such public concerts, has become smaller and will continue to decline. Is it any part of the State’s duty to resuscitate a Victorian form of educational recreation[?]”

– Department of Finance memorandum (1937)

“The arts have been neglected in Irish education. The Arts Council has been aware that this was one factor hindering the effectiveness of the Council’s own work. This judgement was based on experience, but also reflected the conclusions of relevant reports over the last thirty years.”

– *The Place of the Arts in Irish Education* (1979)

“...the overall situation is little short of appalling (...). The majority of Irish primary school children leave school musically illiterate, with little vocal or aural training and with a repertoire of songs that is usually learned by rote.”

– *Deaf Ears* (1985)

“This study seeks to trace the development of official arts policy in independent Ireland and, thereby, demonstrates that this development has been marked more by a tendency to implement grand gestures towards the arts than to realise a comprehensive and cogent arts policy.”

– *Dreams and Responsibilities* (1990)

“Anything we propose must be overshadowed by the lack of action on the recommendations made in the Benson Report of 1979 [*The Place of the Arts in Irish Education*] and the ‘Deaf Ears?’ report of 1985. We would request that every person interested in the future of music in Ireland ... should re-read these reports and consider their comments”

– *PIANO Report* (1996)

“The NSO should be established by law under an independent Board answerable directly to the Minister for Arts, Culture and the Gaeltacht”

– *PIANO Report* (1996)

“In the absence of a broader range of orchestras, in effect it has fallen to the two RTÉ orchestras to provide almost the complete range of the state’s orchestral provision, certainly in the medium to larger scale of operation. Yet the evolution, the constitution and the legislative framework for the RTÉ orchestras has not prepared them to fully discharge all aspects of this role.”

– *Missing a Beat* (2010)

“The majority of [orchestra] costs are staff costs and it is not an area where efficiency gains can be easily achieved.”

– *NewERA report for the Department of Communications, Energy and Natural Resources* (2014)

Executive Summary

Introduction

- Helen Boaden and Mediatique were asked by RTÉ in November 2017 to review RTÉ's two orchestras – the RTÉ National Symphony Orchestra ('RTÉNSO') and the RTÉ Concert Orchestra ('RTÉCO') – and to provide recommendations for their future structure, activities and funding (the 'Review').
- The Review comes at a time of financial challenge for the public service broadcaster, as it continues to face pressures on its funding through the licence fee (compared to historical levels before the 2008 recession) and commercial revenue weakness exacerbated by significant shifts in consumer behaviour, changes in technology and intensifying competition (including from new, international entrants such as Amazon, Netflix, Spotify, Facebook and Apple).
- The authors recognise two further contextual issues – the pressure on public funding in other territories (Ireland is not alone) and the recently re-affirmed commitment by the Irish Government to the funding of arts and culture.
- We applied a three-pronged methodology to consider the orchestras and their future role – desk research and analysis, consumer research and interviews with a range of stakeholders.¹ We have focussed not only on the provision of orchestral services in Ireland but on a range of international cohorts.
- We also re-visited previous reviews of the orchestras and broader arts and culture (there have been many) and took note of views expressed by Government and Opposition members, some of them articulated following the announcement by RTÉ of the Review.

Cultural and market context

- Orchestral music is moderately popular in Ireland (coming third after pop and rock²), and consumed over a variety of media including radio, TV, physical media, live concerts and festivals. However, public consumption of Irish orchestral music, which is mainly delivered via radio and CD, may come under greater pressure in future as these media continue to lose reach among younger Irish consumers.
- Public Service Broadcasters, including RTÉ, originally created their own orchestras to satisfy high demand for broadcast orchestral music, in a manner that was cheaper and more flexible than hiring external orchestras for recordings.
- The nature of orchestral organisation – namely, the necessity of employing a sufficient number of highly skilled musicians – generates operating costs which are too high to be supported solely by a relatively small base of paying consumers.
- As a result, public money is vital to the viability of orchestral music in Ireland. Together, the licence fee (through RTÉ), Arts Council grants, and central and local government funding constitute around 75% of total market income. Commercial income (including that of RTÉ) accounts for only 22%. A small amount of residual income (3%) is generated from donations and charitable giving.
- RTÉ's orchestras are the only full-time, full-size professional orchestras in the Republic of Ireland. Non-RTÉ orchestral provision consists of a diverse array of smaller groups which operate on a retained, semi-professional, or voluntary basis (supplemented by visiting international orchestras). As such, RTÉ's orchestras heavily dominate the market for orchestral music in the Republic, accounting for more than 80% of total market income.
- There is strong support among Irish audiences for the existence of RTÉ's orchestras, and for public funding to ensure their provision. Support for public intervention for orchestral provision exists even among people who do not consume orchestral music, according to market research undertaken by RTÉ.³

International provision of orchestras

¹ We also received a number of useful unsolicited submissions, which have been considered in the course of the Review. Some of these were supplied to us on a confidential basis.

² RTÉ-Kantar audience research, December 2017.

³ See details of the RTÉ-Kantar audience research on this point at 2.72ff.

- The scale of orchestral provision in countries across Europe varies dramatically, determined by a range of factors including: money and access to finance; cultural factors; public policy; and convention. In all countries reviewed, public money of some description is the dominant funding source.
- With only one full-time professional symphony orchestra, Ireland's orchestral scene is very stretched compared to other European countries, most of which host a number of publicly funded and private symphony orchestras.
- Unlike most other European countries, the RTÉNSO is only supported by a single public funding stream – RTÉ – making it vulnerable to economic instability and leaving RTÉ with an unusually high level of cultural and financial responsibility.
- There are fewer musicians in the RTÉNSO compared to most other Public Service Broadcaster ('PSB') radio symphony orchestras⁴ and it is the only one in our cohort without a principal conductor (the RTÉCO is also without a principal conductor).
- Under-resourcing has had repercussions on the nature and quantity of work that the RTÉNSO and the RTÉCO are able to undertake, including overall number of events.
- In particular, regional touring and educational outreach have been stripped back in stark contrast to the case of other European PSB orchestras, where adequate provision for both regional and youth audiences is seen as fundamental to a successful PSB orchestral strategy.
- Likewise, there is a divergence between the RTÉ orchestras and those of other territories when it comes to broadcast outputs. Interviewees abroad emphasised that the ability to broadcast was critical to justifying the costs of producing orchestral performances.
- At a minimum, most European PSBs stipulate broadcast requirements (for example, the number of radio programme deliveries per year); this is not the case in Ireland.
- Populations in a dozen other European territories are more likely than people in Ireland to attend live music performances and some nations (Finland, Norway, Germany) are characterised by a higher degree of consumer commitment to orchestral (classical) music.
- These differences are likely to be linked to a range of factors, including poor provision of music education in many Irish schools, limited knowledge of the traditions of classical music, the cost of attending and the lack of significant music content on television and radio that might serve to promote awareness and consumption.
- We identified common ground in regard to funding pressures across multiple international territories. Virtually all PSBs in Europe have seen funding either frozen or reduced, according to a recent report sponsored by the European Broadcasting Union.

Current performance of RTÉ Orchestras

- Since 2008, the orchestras have suffered a drop in their total income, mitigated somewhat by their ability to grow commercial revenues over these years, for a net compound annual decline of 1.3%, compared to nearly 3% for RTÉ overall.
- Funding pressures have had an impact both on employment – the two orchestras are currently understaffed by historical standards – and on frequency of performances, with regional and educational performances in particular subject to cuts in recent years.
- These problems are compounded by a clear lack of consideration of the orchestras' roles within RTÉ, particularly in relation to their television and radio broadcast contributions.
- RTÉ's (and therefore the orchestras') income is unlikely to return to 2007-8 levels in the medium term, due to a weak outlook for TV and radio advertising sales and continued pressures on licence fee receipts. In any case, any incremental income (e.g., from reform of licence fee collection) would have many claimants, including the many areas of RTÉ that endured deeper budget cuts than the orchestras, such as drama programming, original content expenditure, technology and the TV division as a whole.

Previous reviews in Ireland and abroad

⁴ The RTÉNSO currently includes 68 musicians (and has 11 vacancies), Fully 87% of orchestras in our cohort had more than 70 members, and nearly 60% had more than 90.

- The *PIANO Report* of 1996, commissioned by Government, is particularly well known for first advocating the removal of the RTÉNSO from RTÉ and drawing up a blueprint for placing it under the care of an independent Board with financing (over time) to come directly from government.
- *Missing a Beat* (a report commissioned by the Arts Council in 2010) constituted an update on the *PIANO Report* and made further recommendations, especially in key areas such as audience development, financial and structural support for orchestras (and other performing groups and ensembles), and greater opportunities for emerging Irish talent.
- There have been comparable reviews – with various outcomes – in countries around the world, including Australia, Belgium, Canada, Denmark, France, Germany, the Netherlands and Switzerland.
- Whilst they do not serve as perfect examples for RTÉ to follow, given the unique nature of the Irish orchestral landscape, these international reviews highlight the degree to which PSB radio orchestras around the world are increasingly faced with an existential threat, requiring them to contemplate significant reforms.

Options for reform

- Our analysis of the Irish market suggests that orchestral music, while a minority taste, has an important place in Irish culture, and that there is a deep dependence within Ireland on the two orchestras that are currently operated and funded by RTÉ.
- Our international review, moreover, supports the view that orchestral music requires public funding and best achieves a role in cultural life if fully supported by broadcasters. However, Ireland's classical music market is relatively small compared to a number of other similarly sized territories (e.g., Norway and Finland).
- Without the two orchestras, there would indeed be a reduction in the amount of orchestra music available in the Republic; orchestral music provision would be dealt a blow in the absence of the RTÉNSO and the RTÉCO (or a variation of these organisations), with damaging implications for broader Irish culture.
- We are also mindful of Government's recent stated position on the need to support arts and culture, and indications that leaders would prefer an outcome whereby both orchestras are protected.
- Going further, many stakeholders we interviewed believe the simple maintenance of the status quo (current funding maintained for two wholly owned RTÉ orchestras) is not enough; they would prefer to see former levels of staffing and activity (touring, educational programmes) restored.
- However, our analysis confirms that even status-quo funding is untenable if left solely to RTÉ. Its financial constraints remain severe; even in the event that the licence fee is more efficiently collected, and potentially applied to all households, it will be some time before any additional income is available.
- Following several years of austerity – a time during which orchestras have been relatively protected compared to other programme areas – there are many other claims on any increased income (licence fee and commercial) that may become available to RTÉ over time. RTÉ will need to prioritise its expenditure plans accordingly, especially given the likely trend toward lower consumption of classical music (among younger demographics in particular) and pressures on broadcasting generally as a result of altered consumer preferences and the advent of new technologies.
- RTÉ already intends to increase its commitment to some of the programme areas starved of expenditure in recent periods and cannot afford both to meet this planned expenditure and to restore the orchestras to historical levels of staffing and activity.
- More broadly, commercial revenue does not on its own offer a viable solution, as important as it is for RTÉ to maximise this income category. The market would not sustain the costs of maintaining even one professional group, let alone two, as the experience in other territories also confirms. This is not to say that commercial revenues might not be higher in future; only that fully staffed orchestras cost more than any realistic commercial business could support.
- It is therefore difficult to envisage how both orchestras can be maintained even at current weakened levels of staffing and activity, let alone be brought up to historical strengths in terms of members, the appointment of new principal conductors, the resumption of active touring and an enhanced role in education – all desirable objectives.
- At the same time, having at least one orchestra controlled by RTÉ fulfils a number of public service objectives around the safeguarding of orchestral music, a role in education, regional presence and support for (minority) tastes in regard to the classical repertoire. This argues in favour of RTÉ maintaining the Concert Orchestra, and indeed returning it to historical levels of size and activity.

- We analysed a variety of specific options, ranging from outright closure of both orchestras, an amalgamation, closing one, and keeping both but securing alternative funding. We were tasked with recommending the best configuration of RTÉ's orchestras. We are unable to recommend the closure or merger of either the RTÉNSO or the RTÉCO on the basis of their importance to Irish cultural life. The status quo is equally untenable, however; and the RTÉNSO in particular faces a serious threat as a result of under-resourcing.
- Our emerging conclusion, therefore, is that having two orchestras is desirable, but safeguarding them is a question not only for RTÉ but for the wider constituents of cultural Ireland, including the Government.
- As Ireland has only one full-time professional symphony orchestra, the answer is simpler than in many countries. Without the RTÉNSO, there would be a major diminution in the nation's cultural and artistic life; given its importance, we recommend that the country's only symphony orchestra should become the responsibility of the nation not the public service broadcaster. This forms the cornerstone of the key recommendation arising from the Review.

Recommendations

- The National Symphony Orchestra should be a national cultural institution, in its own right or within the National Concert Hall ('NCH'). RTÉ should enter into a broadcasting relationship with the NSO ensuring it has regular exposure via RTÉ's TV, radio and online outlets. RTÉ should pay a fee in recognition of these broadcasting rights, with the remainder of the costs of NSO's operations (net of any commercial income) met by direct Government funding (of c€4m a year). This funding reflects our analysis of the costs of restoring the NSO to its historical levels of staffing and activity (regional performances and educational programmes).
- This approach is consistent with recommendations from past reviews (in particular the *PIANO Report* in 1996⁵) and with international experience (i.e., direct public funding of a truly 'national' symphony orchestra).
- The RTÉCO should continue to be part of RTÉ, functioning as a classic 'radio' or PSB orchestra, on the model of many such orchestras worldwide. It should be restored to its historical levels of staffing and activity and tasked with maximising commercial returns (without sacrificing integrity of repertoire) in addition to providing content to RTÉ TV, radio and online. The RTÉCO should be more formally integrated into the commissioning divisions of RTÉ, consistent with the re-structuring already announced.
- While operating independently, the NSO should continue to co-ordinate activities with the RTÉCO to ensure the two work on a complementary basis. This might be achieved by ensuring RTÉ is represented (as a minority) on any relevant board created to oversee the NSO and by creating committees for the regular sharing of information on programming, performances and commercial activities.
- We also believe that the intended hiatus of operations at the NCH might be an opportunity to develop a new relationship between the Hall and the two orchestras, ushering in a period during which touring and educational ambitions can be explored in alternative venues in Dublin and around the country. From 2022, when the NCH is again open, the NSO can regain its 'home'.
- We believe that this option would meet Government objectives around the safeguarding of the two orchestras, the role of these in Irish cultural life and the requirements and ambitions of a PSB orchestra fully integrated into the operations of RTÉ.
- The funding solution would permit both orchestras to return to historical levels of staffing and activity. The operating structure would permit RTÉ to re-energise its music output on radio, TV and online, and to resume its role as provider of both regional performances/events and educational programmes to foster greater awareness and support for music Ireland-wide.
- In the full report, we address some of the ways that RTÉ could optimise commercial revenues, both via the fully owned RTÉCO and via its partnership arrangements with the newly independent NSO. We also suggest some solutions to ensure that short-term issues around funding constraints and planning requirements, particularly in advance of the intended closure of the NCH for refurbishment, are addressed.
- We fully recognise that the decision to designate the NSO a national cultural institution and to establish a new funding mechanism is not for RTÉ to take. We argue that our recommendation for the two orchestras fully reflects the importance of orchestral provision to Irish cultural life, is consistent with international best

⁵ Its central recommendation – the NSO under direct Government sponsorship – was never enacted, among other reasons because of the difficulties of porting pensions and negotiating terms and conditions.

practice, resonates with the Government's own ambitions for arts and culture and delivers a sustainable funding model for the long term. It will be for Government to act.

- If, however, support is not forthcoming, we would regretfully suggest a poor second choice – the closure of one of the two orchestras – be adopted. We would recommend retaining the RTÉCO, as the logical 'radio' orchestra consistent with PSB objectives; we recognise, however, that RTÉ may elect instead to maintain the NSO and re-position its operating strategy. The decision would be for RTÉ.
- For the avoidance of doubt, we do not see how RTÉ can fulfil its fiduciary responsibilities to re-structure its operations, re-balance spending opportunities, address shifting consumer behaviours and preferences and reflect public service objectives in the round if it must continue to fund both orchestras.

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1. Introduction

Background and scope of work

- 1.1 Helen Boaden and Mediatique were asked by RTÉ in November 2017 to undertake a review of RTÉ's provision of orchestral services. RTÉ asked us to consider past and current provision, the broader context in which the orchestras operate in Ireland and useful international comparisons where relevant. We were also asked to consider how the broader market may evolve over time, how this might affect RTÉ and its relevant operations, and to recommend the optimal future configuration of the orchestras (the 'Review').
- 1.2 The RTÉ National Symphony ('RTÉNSO') and the RTÉ Concert Orchestra ('RTÉCO') are the only full-time, full-size professional orchestras in Ireland, having both been established by RTÉ in 1948. While there are other orchestras operating in the Republic on a smaller scale, and a significant number of concerts provided each year by visiting orchestras, the heavy reliance of Ireland on the RTÉ groups singles Ireland out among all other relevant countries reviewed by us.
- 1.3 We set out to understand and articulate the ambition, objectives and strategy of the two RTÉ orchestras, to establish the range of options open to RTÉ for their future operation and the implications of executing any given option from a financial, cultural and Public Service Broadcaster ('PSB') perspective. The review is informed by a detailed consideration of the market dynamics in the provision of orchestral (classical) music in Ireland and a review of relevant international benchmarks.
- 1.4 The Review was launched with due recognition of the Government policy in relation to support of the arts and culture, specifically via its ambitions laid out in Creative Ireland.⁶ Some of the undertakings of this policy have an impact on considerations around the future structure, governance and control of RTÉ's orchestras.
- 1.5 The objectives adopted by the Review in considering the appeal or otherwise of any given option were not unduly weighted to favour cost effectiveness although we have been aware throughout of the need, given current funding dynamics, for RTÉ to exercise financial restraint.
- 1.6 The Review was conducted in the light of RTÉ's statutory obligations, its stated objectives for the role of orchestras within its arts and culture strategy and the financial challenges it currently faces.
 - RTÉ is obliged under section 114(c) of the Broadcasting Act (2009) to "...establish and maintain orchestras, choirs and other cultural performing groups in connection with the services of RTÉ...."
 - In its five-year Strategy Review, RTÉ undertakes to "...ensure that performance of orchestral, choral and chamber music remains at the heart of the nation's cultural life."⁷
 - RTÉ, similarly to other public funded organisations, is facing a challenging funding environment – compounded in the case of RTÉ by its requirement to generate commercial revenues at a time when the media sector is facing both cyclical and structural dislocation. RTÉ has embarked on a multi-year cost-saving programme, including a root-and-branch internal restructuring and a voluntary redundancy plan. RTÉ is also currently undertaking its five-year review with the Broadcasting Authority of Ireland ('BAI'), under which it will establish its strategic and financial priorities out to 2022. This Review should be seen in this context and its conclusions are likely to influence elements of that wider process.⁸

⁶ <https://creative.ireland.ie/en>.

⁷ *Renewing RTÉ for the next generation*, RTÉ Strategy, 2018-2022, submitted to the Broadcasting Authority of Ireland, October 2017; draft version shared with the Review's authors.

⁸ The five-year BAI review is being conducted with the assistance of external consultants Communications Chambers. The BAI is also conducting an annual review of public service broadcasting and developing a new Broadcasting Services Strategy ('BSS') to inform its oversight of the media markets over the next five years. The BSS is being informed by an extensive market analysis commissioned from Mediatique, co-author of the present Review. We expect all three reviews/reports will conclude that RTÉ is facing financial challenges over the next few years and will need to prioritise spending appropriately.

- 1.7 The scope of the Review was set out in a formal Terms of Reference provided by RTÉ⁹, and specifically relates to the two orchestras; for the avoidance of doubt, we are not reviewing the RTÉ Contempo Quartet or either of the two choral groups – the RTÉ Philharmonic and the Cor na nÓg, the children’s choir.
- 1.8 We have been asked to cover, at a minimum, the needs of Irish audiences, the requirement to ensure quality and range of services, the state of governance and management oversight, financial operations and the potential for revenue generation.
- 1.9 This is not a statutory review by Government or the regulator. It does not form a formal part of the five-year review of RTÉ by the BAI, although it is likely to feed into the process under which the RTÉ’s five-year strategy is determined and agreed. It is not a judge-led inquiry into orchestral provision nor a complete and authoritative analysis of Irish culture, and the role of orchestral music within it.

Methodology

- 1.10 We used a range of data-gathering techniques, including interviews with relevant stakeholders, desk research, consumer research (including a survey conducted by RTÉ¹⁰), and an examination of previous reviews undertaken in Ireland and internationally (including instances where similar reviews and options analysis have been conducted).
- 1.11 A full list of interviewees is set out in the Appendices. These interviews with stakeholders were held on a confidential basis, to ensure those providing views and information could speak fully and freely.
- We met a range of individuals and organisations, including orchestra members, the players’ Union representatives and senior management (within the orchestras and more widely at RTÉ). We also met other stakeholders, including at the National Concert Hall (‘NCH’), the Arts Council and a number of other bodies. We contacted a number of local councils to solicit additional data.
- 1.12 While we did not seek out the views of Government or opposition spokespeople directly, we received unsolicited contributions from a number of politicians and took account, of course, of the many public pronouncements made on the topic of our Review by Ministers.
- 1.13 A number of individuals also contacted us in a private capacity, and we set down here our appreciation for these contributions. We also heard more formally from other stakeholders on an unsolicited basis, and we have taken comments from these parties on board in our Review.
- 1.14 Assisted by us, RTÉ conducted some bespoke consumer research, the results of which helped inform our understanding of the needs and preferences of Irish audiences. We also had the benefit of consumer research conducted on behalf of the NCH, and detailed data on internal operations from RTÉ. We were able to use the extensive publicly available information on RTÉ and on PSBs generally – e.g., from the BAI.
- 1.15 In selecting markets to include in our detailed international benchmarking exercise, we considered a number of factors, including: the size of the market; evidence of a tradition of orchestral (including classical) music; degree of commercial provision; structure of public funding (direct or indirect); the extent of provision by PSBs; the number of orchestras; concert attendance; and any data on relevant music sales.
- We also considered in greater detail markets where orchestral provision has been formally reviewed, and analysed outcomes of that process. This included cases where orchestras were either closed or merged, or where funding was consolidated or changed.

⁹ See press release at : <http://www.rte.ie/about/en/press-office/press-releases/2017/1109/918692-rte-to-review-provision-of-quality-sustainable-orchestral-servi/>.

¹⁰ RTÉ appointed Kantar Media to undertake a survey of 1,116 Irish adults in December 2017. The survey asked respondents about their current consumption of orchestral and other music, their awareness of the RTÉ orchestras and their views on public funding and provision of orchestral music in Ireland.

- In general, we have focussed on European markets (although considered two non-European cases – Canada and Australia – where fundamental reviews were held) and narrowed these down from a long list of about 30 territories to focus on the benchmark group used in the present document. To render the benchmarking as relevant as possible, we elected to focus in particular (although not exclusively) on the category of PSB-operated symphony orchestras, for which data sets were readily available.
- 1.16 It should be noted that there is no recognised figure for (or audit of) consumption and provision of orchestral music in Ireland (or indeed elsewhere). We have worked to create a data bank to inform our analysis and suggest that this may be of future use in other contexts. We point out, however, that our figures may differ from time to time from other (less strictly comparable) published figures.
- 1.17 We relied largely on publicly available information from RTÉ, with 2016 as the most recent available year. Following conversations with RTÉ, we are confident that information from 2017, when published, will not have a material impact on our assumptions, analysis and conclusions.

Report structure

- 1.18 The structure of this report reflects the key building blocks of our analysis:
- **Section 2** sets out the cultural and market context for this review, including an overview of current orchestral provision in Ireland and the role within this of the RTÉ orchestras;
 - **Section 3** sets out how Ireland compares with other international territories
 - **Section 4** sets out the current structure, strategy and performance of RTÉ's orchestras, including identifying the key operational and financial challenges facing the orchestras;
 - **Section 5** summarises the key findings from previous reviews of orchestral provision in Ireland, and reviews of orchestral funding and configuration in other international territories;
 - **Section 6** sets out the key options for reform of the RTÉ orchestras, and areas of potential change in internal strategy;
 - **Section 7** sets out our conclusions and recommendations for the future configuration, funding, operation and governance of the RTÉ orchestras; and
 - **Section 8** includes Appendices which provide further information on sources and assumptions underpinning our analysis.

2. Cultural and market context

Key points from Section 2:

- *Public Service Broadcasters, including RTÉ, originally created their own orchestras to satisfy high demand for broadcast orchestral music, in a manner that was cheaper and more flexible than hiring external orchestras for recordings.*
- *RTÉ's orchestras are the only full-time, full-size professional orchestras in Ireland. Non-RTÉ orchestral provision consists of a diverse array of smaller groups which operate on a retained, semi-professional or voluntary basis (supplemented by visiting international orchestras).*
- *As such, RTÉ's orchestras heavily dominate the market for orchestral music in Ireland, accounting for more than 80% of total market income.*
- *Orchestral music is moderately popular in Ireland, but the nature of its production – namely, the necessity of employing a sufficient number of highly skilled musicians – generates operating costs which are too high to be supported solely by a relatively small base of paying consumers. Commercial income (including RTÉ) accounts for only 22% of the Irish market.*
- *Moreover, public consumption of Irish orchestral music, which is mainly delivered via radio and CD, may come under greater pressure in future as these media continue to lose reach among younger Irish consumers.*
- *Public money is vital to the existence of orchestral music in Ireland. Together, the licence fee (through RTÉ), Arts Council grants, and central and local government funding constitute around 75% of total market income.*
- *There is strong support among Irish audiences for the existence of RTÉ's orchestras, and for public funding to ensure their provision. Support for public intervention for orchestral provision exists even among people who do not consume orchestral music.*

- 2.1. It is hard to overstate the importance of the symphony orchestras as a cornerstone of Western musical culture during the past 200 years. Arguably its high point was the late 19th century and early 20th century when Wagner and Mahler experimented with especially complex and challenging orchestral work which expanded the number of players required for a full-strength orchestra.
- 2.2. The first wave of public service broadcasters wanted their own radio symphony orchestras to democratise high culture, save on freelance and other costs and carry “the best of everything into the greatest number of homes” as the BBC’s founder, John Reith, put it in 1924.¹¹
- 2.3. Some PSBs also created smaller concert orchestras which delivered a more immediately accessible repertoire of classical, light, and eventually pop music. The musical flexibility of the concert orchestras enabled PSBs to keep up with changing taste in popular music.
 - Before the advent of cheap recorded music, both types of radio orchestra offered audiences a richness of music experience which they might never have encountered otherwise. Like impartial news, they were key to the public service mission to inform, educate and entertain.
 - And they were cost effective. Buying in and broadcasting external orchestras was expensive. Owning and programming their own ensembles was the most efficient way for PSBs to deliver high quality, live music to large audiences.
- 2.4. RTÉ’s orchestras are today Ireland’s only full-time, full-size professional orchestras and thus play a critical role in the country’s artistic life. They are the unique source of full-time orchestral employment for Ireland’s talented young musicians and as such are regarded by Ireland’s conservatories as critical for their students. They offer contemporary composers access to skilled musicians to interpret and shape their work.

¹¹ <http://downloads.bbc.co.uk/historyofthebbc/1920s.pdf>.

- 2.5. One of Ireland's most successful contemporary composers told us that the RTÉ orchestras had been his musical education, his “practical university”. He argues that even if the classical orchestral repertoire is a minority taste it must have a place in Irish culture, contributing to the education of the next generation of musicians and audiences. The RTÉ orchestras can also help make visible Ireland’s indigenous tradition of classical composition, as ‘Composing the Island’ in 2016 demonstrated.

Provision of orchestras in Ireland

- 2.6. As the home of the only two full-time, full-size professional orchestras, RTÉ is the primary custodian of orchestral music in Ireland.

“There are more than 350 performers in RTÉ’s music ensembles, of which 130 are full-time professional musicians. RTÉ is the single largest supporter and promoter of orchestral music in Ireland, presenting live performances ... and commissioning and performing new music.” (RTÉ Annual Report 2016)

- 2.7. Since its establishment as an Irish state broadcasting service in 1926, RTÉ have employed musicians to play for radio broadcasts. These were smaller ensembles of string players rather than full orchestras, although their numbers grew steadily over the years.
- 2.8. It was not until 1948 that the RTÉ National Symphony Orchestra and Concert Orchestra¹² were established as the orchestras we might recognise today. At the time, they comprised 82 musicians altogether: a 60-strong National Symphony Orchestra and 22 musicians in the Concert Orchestra.
- 2.9. In its current form the RTÉNSO is a 68-strong symphony orchestra, whose Friday night concert seasons – running from September to May at the National Concert Hall, Dublin – are a key fixture on the classical music scene (they are also broadcast live on RTÉ’s lyric fm radio station). Although the orchestra used to tour both internationally and nationally, these activities have been significantly curtailed due to RTÉ’s vulnerable financial situation.
- 2.10. The RTÉCO meanwhile is composed of 40 musicians and fulfils a similar function to concert orchestras as elsewhere, performing ‘lighter’ classical repertoire as well as more diverse repertoire to appeal to a larger audience base – for example, family concerts, accompanying pop concerts and film evenings.
- 2.11. Aside from the RTÉNSO and RTÉCO, RTÉ maintains several other performing groups,¹³ comprised of:
- RTÉ Contempo Quartet: Formed in Bucharest in 1995, the Contempo Quartet has performed all over the world and has been RTÉ’s Resident Quartet since Spring 2014. In 2016, it performed in 40 concerts across Ireland as well as a 1916 commemorative concert at the Wigmore Hall in London;
 - RTÉ Philharmonic Choir: Founded in 1985, the choir is comprised of volunteer singers who meet weekly to rehearse. The choir works independently and with the RTÉNSO, for example for 2016’s Good Friday performance of Bach’s St John’s Passion;
 - RTÉ Cór na nÓg: Founded in 1987, the Cór na nÓg is RTÉ’s children’s choir and is comprised of over 65 children aged 10 and above, performing on special occasions including New Year’s Day celebrations, a Christmas concert and a live broadcast on RTÉ One’s *A Nation’s Voice*.
- 2.12. The Broadcasting Act 2009 requires RTÉ to “...establish and maintain orchestras, choirs and other cultural performing groups in connection with the services of RTÉ...”¹⁴
- 2.13. Beyond RTÉ, Ireland is home to many other orchestral groups, although none has the scale of the RTÉNSO or RTÉCO.
- The largest is the Irish Chamber Orchestra. Based at the University of Limerick, the ICO consists of 22 retained musicians, augmented by freelancers where necessary, and has an established staff and

¹² Although at the time these were referred to as the Radio Éireann Symphony Orchestra and the Radio Éireann Light Orchestra respectively, they are renamed here for clarity.

¹³ These groups are explicitly excluded from the Terms of Reference of this review.

¹⁴ Section 114(c) of the Broadcasting Act (2009).

board. The ICO performs several concerts each year, appears at festivals and is contracted for opera performances. Funding comes primarily from the Arts Council, with commercial revenue and donations/legacies constituting the remainder.¹⁵

- The Irish Baroque Orchestra is the second largest non-RTÉ orchestra by income. Centred around nine principal musicians, it engages guest artists and singers where required by repertoire. Resident at the National Concert Hall in Dublin, the IBO gives several concerts each year and also collaborates with other artists and groups. It is supported by commercial income, its Friends scheme, donations and a small amount of revenue funding from Dublin City Council, although – as with the ICO – it is dependent on the Arts Council for most of its funding.

2.14. After the ICO and IBO, the Republic of Ireland has no further orchestras of a similar scale, whether in terms of income, number of performances, or composition.¹⁶ A mix of semi-professional, amateur, and youth groups comprises the remaining orchestral provision. Examples include:

- Hibernian Orchestra: An established voluntary orchestra based in Dublin, performing 3-5 concerts a year, including some in locations such as Kilkenny and Wexford.
- Camerata Ireland: Although based near Belfast and in receipt of Arts Council of Northern Ireland funding, Camerata Ireland performs island-wide, including at the NCH and the Drogheda International Classical Music series in recent years, and engages musicians throughout the island.
- Wexford Sinfonia: Professional, semi-professional, and amateur musicians – mostly from the South East and Dublin – come together for two concerts each season.
- Cork Orchestral Society: Promotes chamber and orchestral performances and festivals in the county, including the Cork Fleishmann Symphony Orchestra, Cork Concert Orchestra, and Cork School of Music Symphony Orchestra.
- Symphony Club of Waterford: Promotes concerts in Waterford, including by the RTÉNSO and the ICO.
- University orchestras, including those from the conservatories: Royal Irish Academy of Music Symphony Orchestra; Dublin Institute of Technology Symphony Orchestra; Cork Institute of Technology (Cork School of Music) Symphony Orchestra.

2.15. There is also a wealth of related groups which may not classify as “orchestral” but add substantial additional weight to the sector. These include, for example, opera companies, ballet companies, freelance and amateur ensemble groups, choirs and choral groups, as well as youth orchestras supported by the Irish Association of Youth Orchestras.

2.16. These groups, while not profiled in detail in this Review, provide vital services throughout the country, not least by boosting overall accessibility (and thereby exposure) to non-orchestral classical and contemporary music which, in turn, helps to strengthen the two RTÉ orchestras. As such, they form part of the ecosystem of orchestral provision within Ireland, even if indirectly. Notably, Irish National Opera has worked with both RTÉ orchestras in the past, and plans an ambitious programme for 2018, including a joint production with the Irish Chamber Orchestra of *The Marriage of Figaro*.

2.17. Irish audiences also have access to visiting orchestras from other countries. For the most part, international orchestras in Ireland perform at the National Concert Hall (‘NCH’). The NCH’s Spring Calendar shows the following international orchestras performing at the venue in the first half of 2018:

- Academy of St Martin in the Fields (January 2018; 1 performance)
- Johann Strauss Orchestra (January 2018; 1 performance)
- Czech Philharmonic (February 2018; 3 concerts)

¹⁵ Data on funding of orchestras, including from the Arts Council, are detailed further on in this section.

¹⁶ Ulster Orchestra, based in Northern Ireland, is accessible to audiences in the Republic.

- London Symphony Orchestra (April 2018; 1 performance)
- Bournemouth Symphony Orchestra (May 2018; 1 performance)
- Würth Philharmonic (May 2018; 1 performance)

2.18. The NCH is the only venue in Ireland promoting large international orchestras on a regular basis. It reports that it generally programmes six international orchestras for a given year and since 2012 has hosted the New York Philharmonic Orchestra, the Oslo Philharmonic and the Sao Paulo Symphony Orchestra, among others.

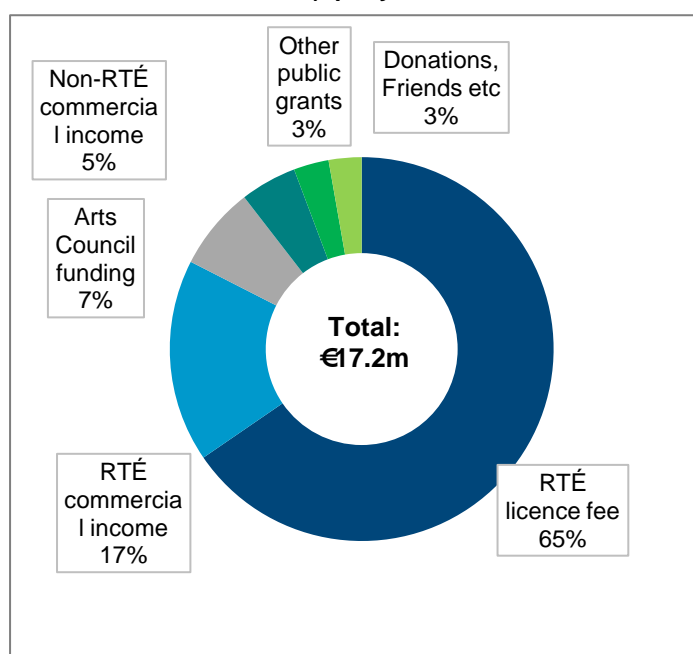
Funding of orchestras in Ireland

2.19. While RTÉ's orchestras are funded through a combination of licence fee and commercial revenue, all other Irish orchestral groups and festivals seek to secure funding from a combination (often all) of the following four revenue streams:

- Direct public funding, through local councils and the Department of Culture, Heritage and the Gaeltacht;
- Indirect public funding, through grants awarded by the Arts Council, Culture Ireland (which offers funding for touring), and other bodies such Music Network¹⁷;
- Commercial income – box office receipts, performance and recording fees, CD sales, sponsorship; and
- Voluntary contributions – donations and legacies, benefits in kind (e.g. free-of-charge facilities use) and “Friends” membership schemes.

2.20. We have estimated the total size of the Irish orchestral market, using various data sources to determine the breakdown of income by revenue stream.

Figure 1: Total orchestral funding (to non-educational orchestras and orchestral festivals), per year



Source: RTÉ, company/charity accounts, government/agency/council websites, Arts Council, Mediatique estimates.

Notes on methodology

- This chart represents a typical year based on data from – depending on data availability – an average of three years, or 2016, or the most recent year
- Where data was unavailable or incomplete, Mediatique estimates were used
- Excludes money awarded to or generated by Music Network, chamber music groups and festivals, youth orchestras, and ensembles not strictly classified as orchestral (such as Crash). With these sums included, the total would rise to around €20m
- Non-Irish orchestras at NCH excluded
- Educational institutions are excluded
- One-off infrastructure grants are excluded
- RTÉ orchestras data includes an apportionment of requisite central operating costs (e.g. HR, Finance)

¹⁷ Music Network helps bring music to local communities, and also works with Music Generation, the U2-backed programme to help provide music training to young people in Ireland.

- 2.21. RTÉ accounts for more than 80% of all funds available for Irish orchestral groups and festivals. By contrast, while the BBC spent £28.2m on its orchestras and performing groups in 2016, 41 non-BBC orchestras in the UK had a combined income of £117.5m (of which £56m was commercial income). While these data do not include all UK orchestras, they do indicate that the BBC plays a less dominant role in the UK than RTÉ plays in Ireland.¹⁸
- 2.22. RTÉ also contributes content and in-kind marketing support through its “supporting the Arts” initiative, offering promotional air-time on RTÉ radio and TV.¹⁹
- 2.23. The Arts Council plays a significant role in the Irish orchestral landscape through its funding of the Irish Chamber Orchestra and Irish Baroque Orchestra (€875k and €174.5k respectively in 2016), and through its support of smaller ensembles and festivals (usually on an *ad-hoc* basis).
- 2.24. City and county councils tend to distribute smaller grants (typically €5k or less, except for the largest festivals and groups), which are nonetheless vital sources of income for the ‘long tail’ of the orchestral market, ensuring continued plurality of provision. Alongside the Arts Council and RTÉ licence fee funding, the public sector, taken as a whole, accounts for 75% of total orchestral funding in Ireland.
- 2.25. While non-RTÉ groups can generate revenue through box-office receipts and performance fees, they are limited by frequency of performances, ticket pricing power (from €10-15 for smaller ensembles/festivals to €20-25 for larger groups, compared to more than €30 for the dearest RTÉNSO tickets), and the audience pulling power of their brands. Only performances by well-known international orchestras, such as those performing at the NCH’s International Concert Series, can command ticket prices of €50 and greater.
- 2.26. Corporate sponsorship, a significant source of income for orchestras in many other countries, is too low in Ireland to feature as a separate category and so is included within non-RTÉ commercial income.
- 2.27. Consequently, most non-RTÉ groups are heavily dependent on public funding, ‘Friends’ groups, donations, and benefits-in-kind.

Creative Ireland funding plans

- 2.28. The Government has announced an ambitious plan to fund arts and culture in the Republic, with a focus on youth education, cultural infrastructure (including refurbishment of the NCH) and other aspects of cultural life. There is no specific reference to the orchestral sector, although the plans to renovate the NCH include creating bespoke rehearsal space for the RTÉNSO.
- 2.29. The Creative Ireland initiative also includes funding for Culture Ireland, which in turn funds international touring by Irish artists and groups.

Venues for orchestral performance

- 2.30. Orchestral music is played in various performance venues across Ireland. The main orchestral venue is the NCH in Dublin; this sits alongside a range of other venues – both large and small – although very few of these are specifically focused on orchestral music.

National Concert Hall

- 2.31. The NCH is one of Ireland’s eight National Cultural Institutions²⁰ and as such is publicly funded directly from the Department of Culture, Heritage and the Gaeltacht. The concept for a national concert venue had been proposed by various politicians as early as the 1930s. It opened in 1981.

¹⁸ Association of British Orchestras, ‘The State of Britain’s Orchestras in 2016’. We explore other dynamics of international markets in our international review in Section 3.

¹⁹ “Each year, RTÉ supports many local and national arts events throughout Ireland through media partnerships and broad cultural content on Radio 1, 2fm, lyric fm, Raidió na Gaeltachta, RTÉ One and Two, across RTÉ.ie, and via RTÉ Orchestras, Quartet and Choirs.” - <http://www.rte.ie/about/en/supporting-the-arts/2013/0521/451717-about-rt-supporting-the-arts/>.

- 2.32. Currently it comprises a main concert hall with a capacity of 1200 and a secondary venue – the John Field Room – with a capacity of 250. There are plans to redevelop the site (the implications of which are considered in the context of our recommendations for the orchestras in Section 7 below).
- 2.33. The NCH hosts many musical residencies and is currently home to the RTÉNSO as well as a number of other classical music ensembles including the Irish Baroque Orchestra, Chamber Choir Ireland, Music Network and Music Generation.

Other venues

- 2.34. In addition to the NCH, there are a number of other venues across Ireland. These include purpose-built concert halls, county council-sponsored arts centres and smaller venues (including churches, pubs and university campuses) that present music – of whatever genre – on a regular basis.
- 2.35. We set out below a list of venues in Ireland with a seated capacity of more than 500. The venues below provide very little access to classical music – with only six regularly programming classical music of any form. Within that cohort, live orchestral music forms a smaller segment.

Figure 2: Island of Ireland venues with capacity over 500 and overview of the upcoming 2018 performance schedules

Name	Location	Capacity*	Main genre	Classical music? ²¹	Sample groups scheduled (<i>Orchestras in bold</i>)
3 Arena	Dublin	13,000	Pop	No	n/a
Bailey Allen Hall, NUI	Galway	1,000	Conferences	No	n/a
Bord Gáis Energy Theatre	Dublin	2,111	Ballet, opera, musicals	Yes	RTÉNSO (supporting <i>Tosca</i>) 'Disney in Concert' orchestra RTÉCO (supporting INO's <i>Aida</i>)
Cork City Hall	Cork	1,200	Conferences, theatre, concerts	Yes	Cork Concert Orchestra (with Neil Thomson) CSM Fleischmann Choir and Symphony Orchestra
Cork Opera House	Cork	1,000	Opera, theatre, concerts	Yes	Cork Opera House Concert Orchestra (2018 series)
Everyman Palace	Cork	650	Theatre, comedy, concerts	Yes	European Baroque Ensemble Irish National Opera
Gaiety Theatre	Dublin	1,145	Theatre	No	n/a
INEC Centre	Kerry	1,826	Country, folk, traditional	No	n/a
Leisureland	Galway	1,010	Family	No	n/a
National Concert Hall	Dublin	1,200	Classical	Yes	<i>See commentary on NCH above</i>
National Opera House	Wexford	855	Opera	Yes	Wexford Sinfonia Trish Clowes Quartet 4th County Wexford Youth Orchestra Festival
Olympia Theatre	Dublin	1,621	Pop	No	n/a
SSE Arena (Odyssey)	Belfast	8,700	Pop, entertainment	Yes	Cross Border Orchestra of Ireland

²⁰ The others are the National Archives of Ireland, the National Library of Ireland, the National Museum of Ireland, The National Gallery of Ireland, the Chester Beatty Library, the Irish Museum of Modern Art and the Crawford Art Gallery in Cork.

²¹ Only classical orchestral performances are included in this category – we therefore exclude ballet and opera, even though orchestras are involved. Note that some opera performances use recorded music.

Name	Location	Capacity*	Main genre	Classical music? ²¹	Sample groups scheduled (Orchestras in bold)
Arena)					Ulster Orchestra
The Helix	Dublin	1,210	Concerts	No	NSW PS Symphony Orchestra**
Town Hall Theatre Black Box	Galway	600	Theatre, comedy	Yes	n/a
Ulster Hall	Belfast	900	Pop, comedy, dance, theatre	Yes	Ulster Orchestra City of Belfast Youth Orchestra BBC Radio 3 concerts Studio Symphony Orchestra
University Concert Hall	Limerick	1,038	Classical, pop, traditional	Yes	Irish Chamber Orchestra (x2) Limerick Choral Union European Baroque Ensemble
Vicar Street	Dublin	1,050	Pop, rock	No	n/a
Waterford City Hall	Waterford	Data not available	Family	No	n/a
Waterfront Hall	Belfast	2,200	Pop, comedy, dance, theatre	No	n/a

Source: Mediatique; company programmes.

* Seated capacity only.

** New South Wales Primary Schools Symphony Orchestra is a youth orchestra from Australia.

Arts Centres

- 2.36. Since the Arts Act 2003, local authorities have sought to foster arts and culture within the community. Over the years, this has led to a series of capital grants from the Department of Culture, Heritage and the Gaeltacht to build and refurbish Arts Centres across the country.
- 2.37. Indeed, as part of the Government's Capital Investment Framework 2016-2021, a new €9m Capital Investment scheme for arts and culture centres was announced in January 2016, offering grants to pre-existing Arts Centres for refurbishment, expansion of facilities and community-led projects.
- 2.38. Whilst of great value to the local communities and likely to be of use to classical and contemporary musicians and ensembles, local Arts Centres provide little benefit to the orchestral sector as the majority of these venues are too small adequately to accommodate a full orchestra.

Churches, universities and other locations

- 2.39. Although not built for orchestral purposes, churches across Ireland have hosted orchestral concerts over the years. It can be logistically challenging for the RTÉNSO to perform in churches but this has been accomplished in the past; for example, during an Arts Council supported tour in 2013, organised by Wide Open Music performed in the Cathedral of the Assumption (Carlow) and St Peter's RC Church (Drogheda).
- 2.40. However, churches are much more likely to host choral music, chamber music or other classical ensembles, rather than a full orchestra. Over the period 1st January 2018 – 1st April 2018, a range of classical music, concertos contemporary classical, piano concerts and solos were scheduled to take place at Triskel Christchurch (Cork), St Werburgh's Church (Drogheda), St Peter's Church (running the Drogheda Classical Music series), St Iberius Church (Wexford) and St Ann's Church (Dublin).²²
- 2.41. Ireland's many cathedrals have also hosted classical music events – for example, St Canice's Cathedral (Kilkenny), Christ Church Cathedral (Waterford), and St Patrick's Cathedral (Dublin).

²² Journal of Music website listings.

- 2.42. University campuses have facilities able to accommodate orchestral and chamber music events. Examples include the University of Limerick's Concert Hall, the Good Shepherd Chapel at the Waterford Institute of Technology and the Emily Anderson Concert Hall at NUI Galway.
- 2.43. The Shaw Room at the National Gallery of Ireland also hosts classical music. In the past this has included some orchestral work, although for 2018 the focus is on chamber music in the form of the inaugural 'RIAM/NGI International Visiting Artists' series, presenting international soloists to a Dublin audience.
- 2.44. Whilst these many examples of alternative venues play a role in hosting orchestras, they cannot be relied upon to relieve the pressure on infrastructure caused by too few venues of suitable size and characteristics.

Festivals

- 2.45. Ireland has a thriving festival scene, ranging in size from Electric Picnic – Ireland's biggest music festival with an attendance of 55,000 – down to community arts and traditional arts festivals.
- 2.46. In 2017, the Arts Council sponsored 155 festivals in total. Grants ranged in size from €900 (Cork County Council's Fiction at the Friary) to €25,400 (Boyle Arts Festival). Of these, 37 were classified as 'Music' (36) or 'Opera' (1) festivals²³, with an average grant of €7,285.
- 2.47. However, few festivals are limited to classical music, let alone to orchestral music:
- New Music Dublin: A partnership of RTÉ, NCH and the Arts Council, New Music Dublin runs for four days in March and hosts a variety of classical music and orchestral concerts. The 2017 programme included performances from both RTÉ Orchestras, the Contempo Quartet and NCH resident Crash Ensemble as well as Kirkos, Kaleidoscope and the Quiet Music Ensemble. The 2018 programme also featured the Irish Chamber Orchestra.
 - Galway International Arts Festival: One of Ireland's biggest music and arts festivals, GIAF's 2017 programme included more than 200 events in 33 venues with over 210,000 people in attendance. It saw the RTÉCO perform twice ('A Night at the Proms' and 'with Jenny Greene').
 - West Cork Chamber Music Festival: run by West Cork Music since 1995, the West Cork Chamber Music Festival has become one of the leading chamber music events in Europe, attracting national and international soloists and ensembles to perform across West Cork. Chamber ensembles and orchestras involved in the 2018 programme include London Chamber Brass, Ensemble Dagda, Westland Baroque Ensemble, Camerata Øresund and Festival String.
 - Kilkenny Arts Festival: Running each August since 1974, the Kilkenny Arts Festival is a multi-disciplinary festival where classical music features. In 2017, the Irish Chamber Orchestra was heavily involved, as were Crash Ensemble.
 - Westport Festival of Chamber Music: Only four years old, the Westport Festival of Chamber Music covers a weekend in September. The 2017 festival presented six concerts from soloists across Ireland and the Navarra String Quartet.
 - Ortús Chamber Music Festival: A festival of chamber music for the city and country of Cork, performers at Ortús perform music from across the genre of classical music and tend to be emerging talent from Ireland's conservatories.
 - East Cork Early Music Festival: Running for three days in October, the East Cork Early Music Festival focuses on music composed before 1750. In 2017, Ensemble Dagda, the Cork Baroque Orchestra, CIT and Norway's Barokksolistene ensemble performed.

²³ We exclude 38 'Traditional arts' festivals, which usually feature a wealth of traditional music, as these are outside the remit of this report. All data here is sourced from the Arts Council.

- Midwinter Festival: Run by Music for Galway, the Midwinter Festival occurs over three days in January. The 2018 programme concentrated on the theme of “composers in love” and included concerts from soloists from across Ireland and the Contempo Quartet.
- Wexford Festival Opera: One of Ireland’s biggest cultural events, the festival is now in its 67th year. Although the focus is, of course, on opera, musicians from across Ireland take part in its events. The RTÉNSO ran a partnership with the festival from 1962 to 2000.

2.48. Additionally, the RTÉNSO takes part in many national events, for example the St Patrick’s Festival in Dublin, and the range of centennial 1916 celebrations that took place in 2016; equally, the RTÉCO’s participation in Electric Picnic demonstrates the unique role the group plays in championing popular music and reaching new audiences.

The importance of orchestral music in Ireland

2.49. Ireland has a rich musical tradition, producing world famous musical talent across a variety of genres. Music also plays a significantly important part in people’s lives in Ireland:

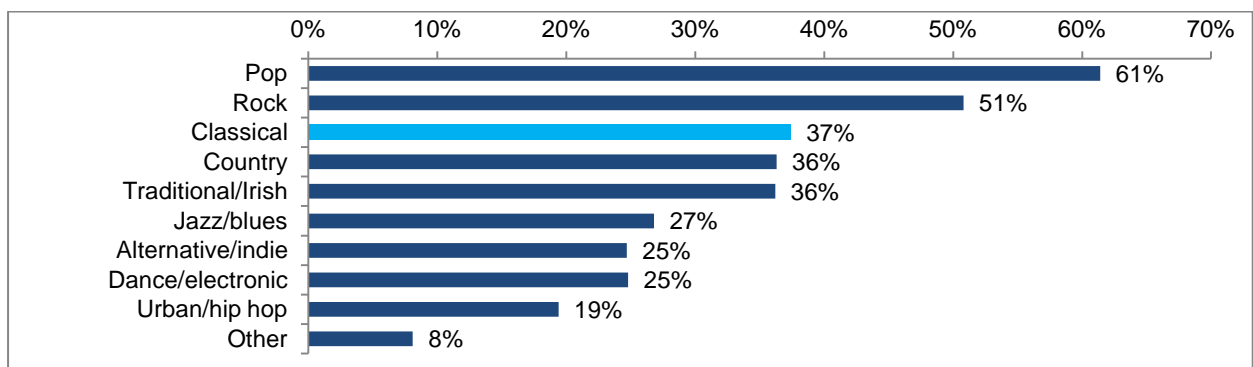
- Recent survey data from the NCH²⁴ found that 86% of people considered music an important part of their lives; this was ahead of TV, books, sports, films, cinema and theatre.
- More than 80% of those surveyed believed music is an important part of Ireland’s national identity and more than 75% an important part of Irish culture.
- Music is also an important part of daily life for many Irish adults, 89% of whom agree that listening to music is something they “routinely do”. Nine in 10 believe that music lifts their mood, while three quarters believe their life would be empty without music. Only 12% of Irish adults claim that music does not matter all that much to them.

2.50. Orchestral music forms part of the broad musical landscape in Ireland, sitting alongside traditional Irish music and other forms of popular and international music.

- The mainstay of orchestral music continues to be classical music, whether traditional or contemporary, although in practice orchestral music crosses a range of music genres and can refer to any musical genre played in an orchestral style.
- Orchestras typically play a combination of classical music, new music, film music, musicals, as well as accompanying choral recitals, operas and ballets.

2.51. When asked what types of music people listened to, the RTÉ-Kantar²⁵ survey revealed that classical rated relatively highly, although it is still a minority genre and rates well behind the most popular genres (pop and rock).

Figure 3: Music listening, by genre (“What types of music do you listen to?”)



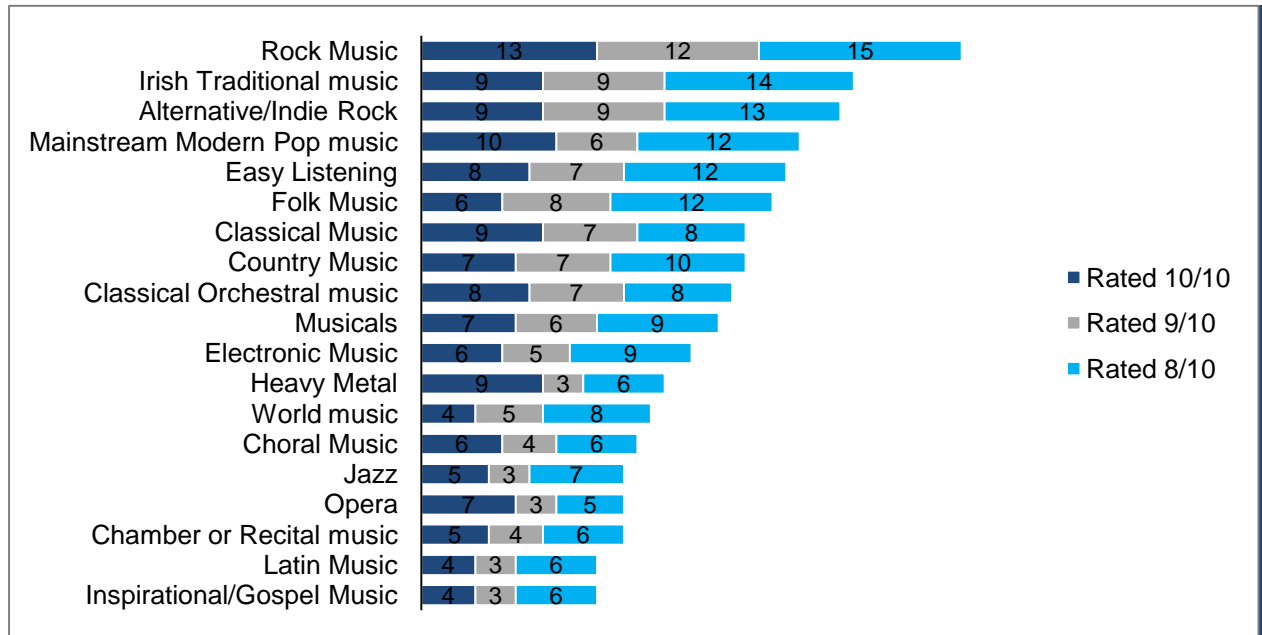
Source: RTÉ-Kantar survey, 2017.

²⁴ B&A Brand Essence Study on behalf of NCH, March 2016 (sample = 1,010 of adults 18+).

²⁵ RTÉ-Kantar audience research, December 2017 (sample = 1,116 adults 15+).

2.52. When asked to rate genres of music on a scale of 0-10, adults interrogated in the NCH survey revealed that rock music was their favourite, with 40% giving it a rating of 8 or higher. Just under a quarter gave a similar rating for classical music (24%) and classical orchestral (23%).

Figure 4: Popularity of musical genres among Irish adults



% of Irish adults that indicated they like selected music genres (“Can you indicate how much you like each genre using a 10-point scale where 10 is you like it a lot and 1 is you don’t like it at all?”)
 Source: NCH survey, March 2016.

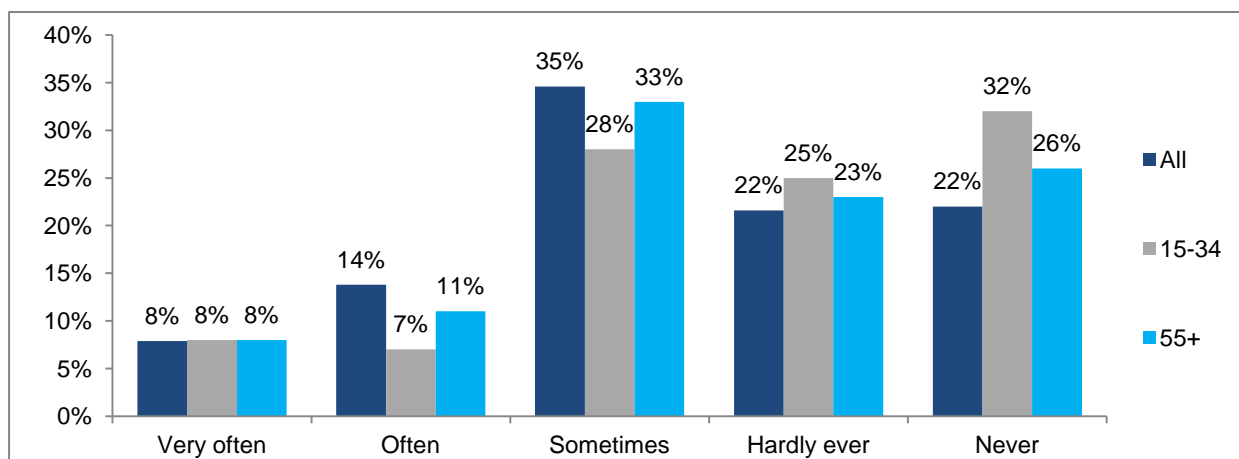
2.53. The relative popularity and importance of musical genres is primarily a product of personal taste; but it is also reflective of the availability and awareness of music on the radio, on physical media, online, at concerts and on other music platforms.

- Awareness of the RTÉ orchestras is high, with 64% of respondents in the RTÉ-Kantar survey having heard of the RTÉNSO and the RTÉCO.²⁶

2.54. Despite high levels of awareness of Irish orchestras, orchestral music is a minority interest in terms of listening. The RTÉ-Kantar survey revealed that only 22% of respondents regularly listen to orchestral music (listen “often” or “very often”) – the same percentage as those that never listen to it. This is even lower among younger age groups (see Figure 5 below).

²⁶ RTÉ=Kantar audience survey, December 2017.

Figure 5: Listening of orchestral music



(“Do you ever listen to orchestral music?”).
Source: RTÉ-Kantar survey, December 2017.

- 2.55. A notable proportion of respondents (37%) in the RTÉ-Kantar survey thought that “orchestras and orchestral music are for the elite of society” and only 39% of respondents thought that “orchestral music is for people like me”. This suggests that in future Irish orchestras could usefully attempt to engage more proactively and to make orchestral music more accessible and more relevant, potentially via increased touring or outreach.
- 2.56. Among those that ever listen to orchestral music, the most popular orchestral genres were film music (63%), musicals (49%), popular classical music (53%) and symphonies (35%); choral recitals, opera, new music and other classical music all scored less than 30%.

Consumption of orchestral music

- 2.57. Irish audiences are able to listen to orchestral music in a variety of ways – on radio and TV, via purchases of physical and online music, and via live concerts and festivals.
- 2.58. The RTÉ-Kantar survey revealed that Irish audiences engage with the RTÉNSO and RTÉCO in a number of ways – the most popular being radio listening (via lyric fm) and concert attendances. However, in almost all cases therefore, a majority of respondents do not engage with the RTÉNSO and RTÉCO at all.

Figure 6: Engagement with RTÉNSO and RTÉCO

	Weekly	Monthly	A couple of times a year	Less often	Never
Attended a concert	1.2%	1.6%	8.6%	23.7%	65.0%
Bought a CD or digital download	0.8%	1.9%	7.9%	18.6%	70.9%
Listened on RTÉ lyric fm	8.0%	8.2%	16.5%	18.1%	49.3%
An educational event	1.0%	1.3%	9.0%	22.9%	65.8%

(“How often, if at all, do you engage with the RTÉNSO and RTÉCO in the following ways?”).
Source: RTÉ-Kantar survey, December 2017.

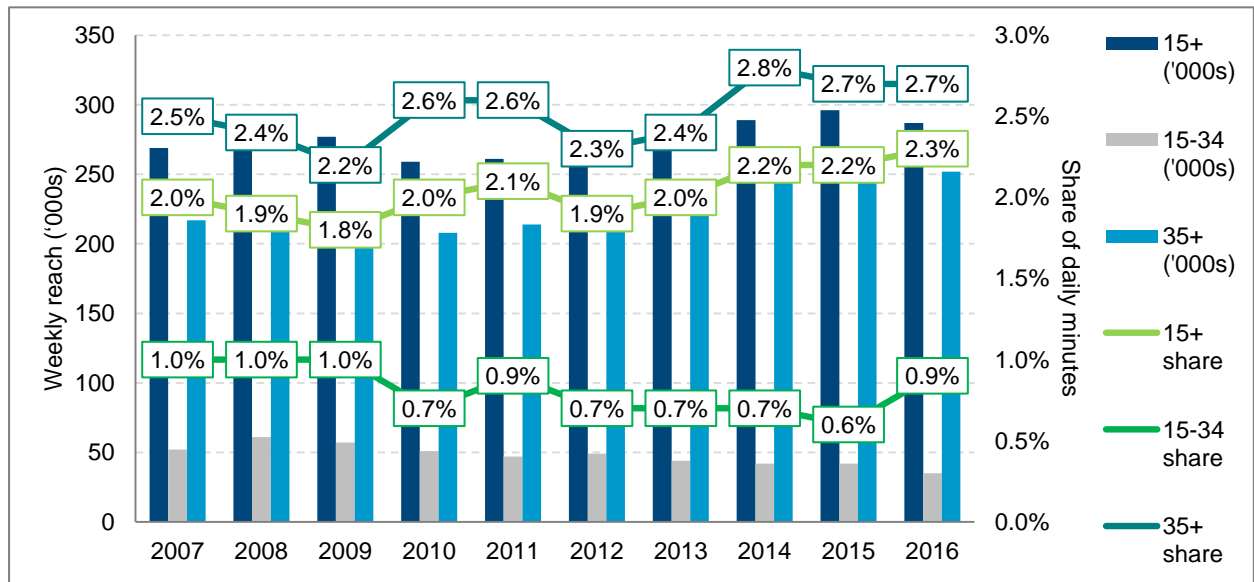
- 2.59. We provide further evidence of engagement with orchestral music specifically via radio and concert attendances below.

Radio

- 2.60. While it is difficult to gauge exactly how much orchestral music is consumed in Ireland via radio, lyric fm is a useful proxy thanks to its position as the only station consistently playing large volumes of orchestral music, even if its schedule includes significant amounts of other genres.

2.61. lyric fm is more popular among older than younger listeners, and as such has followed a similar pattern to mainstream stations such as Radio 1 (and indeed radio as a whole) over the past decade; that is, reach and share of daily listening minutes remain strong (and are increasing in lyric’s case) among the 35+ age-group, but have declined among under 35s. If we take lyric fm as a proxy, this would indicate that the popularity of orchestral music via radio overall – while still relatively low – has grown since 2007. Even so, it has lost ground with under-35s.

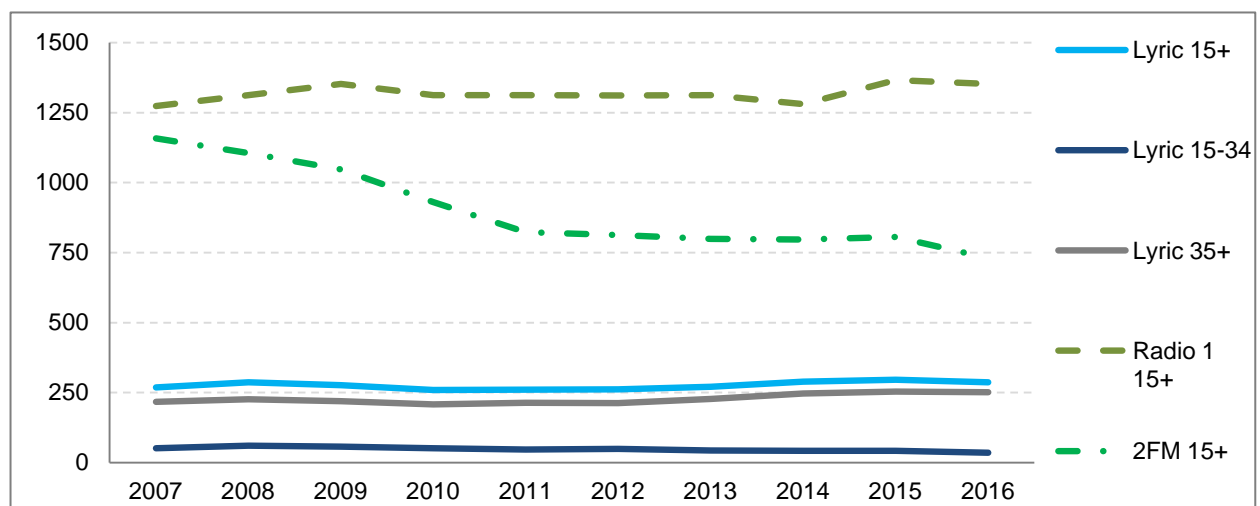
Figure 7: lyric fm share (%) and weekly reach ('000s), 2007-16



Source: JNLR.

2.62. While lyric fm has performed well overall since 2007, it still has lower reach and share than other national stations, suggesting that the national appeal of its programming (and thus orchestral music over radio) is quite limited. In 2016, lyric reached on average 287,000 adults (15+) each week, compared to 1,352,000 for Radio 1, 731,000 for 2FM, 820,000 for Today FM, and 691,000 for Newstalk. Selected station reach is summarised in the future below.

Figure 8: Weekly reach of selected radio stations, 2007-16 ('000s)

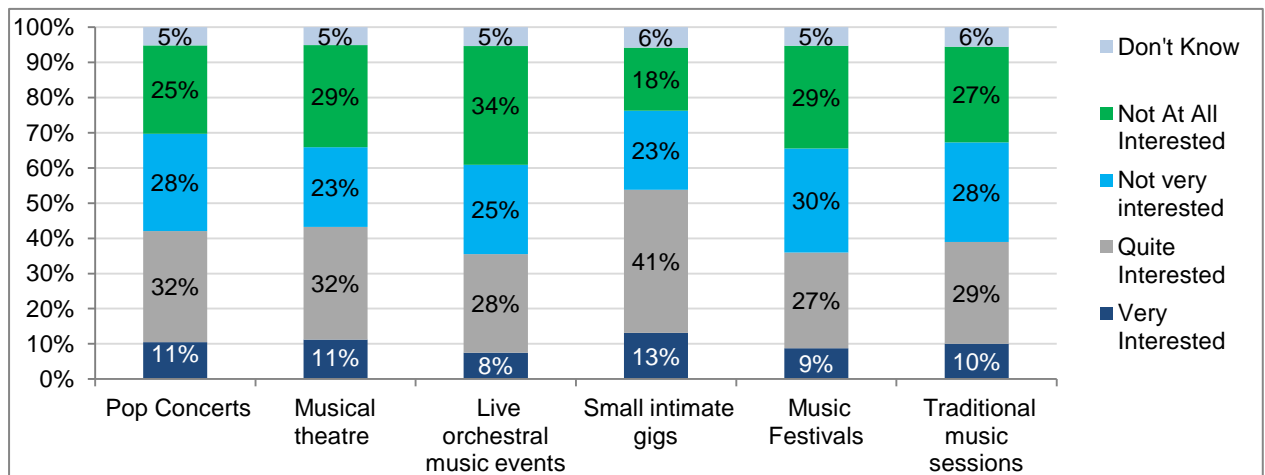


Source: JNLR.

Live concerts

2.63. The RTÉ-Kantar survey revealed that only 36% of respondents had any interest in attending live orchestral music events; although this is not dissimilar to levels of interest in other forms of live music, as summarised in the figure below.

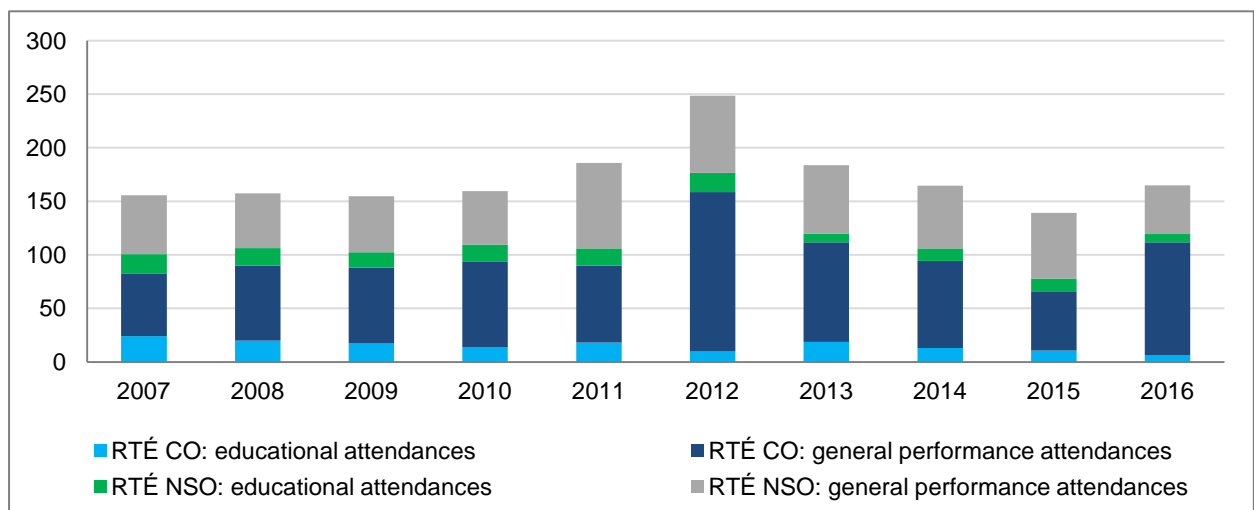
Figure 9: Interest in musical events



("How interested are you in the following types of musical events?").
 Source: RTÉ-Kantar survey, December 2017.

- 2.64. NCH survey data also confirms that a quarter of Irish adults (26%) go out to see music each month and half (49%) do so quarterly. Only 8% of Irish adults never attend live music performances. The most popular genres for live music attendance are traditional Irish music, Folk Music, Indie Rock and Chamber Music.
- 2.65. Given the importance of the RTÉNSO and RTÉCO in Irish orchestral provision, attendance levels at their performances gives a good indication of overall trendlines for orchestral concert attendance.
- Attendance at RTÉ orchestra performances was on an upwards trajectory until 2012 (in which year attendance was boosted by the Eurcharist Conference), and thereafter has been on a downward trend, reversing in in 2016 in response to specific performances relating to the 1916 commemorations.
 - Variations over time reflect both the number of performances and the underlying propensity of Irish audiences to attend specific orchestral concerts.

Figure 10: Attendance at RTÉNSO and RTÉCO performances and educational events



Source: RTÉ annual reports (000s/year).

- 2.66. The RTÉ-Kantar survey revealed that 65% of respondents had never seen the RTÉNSO or RTÉCO play – the main reasons being a lack of interest in orchestral music (30%), lack of orchestral events nearby (29%) and being too expensive (17%).

The overall music context

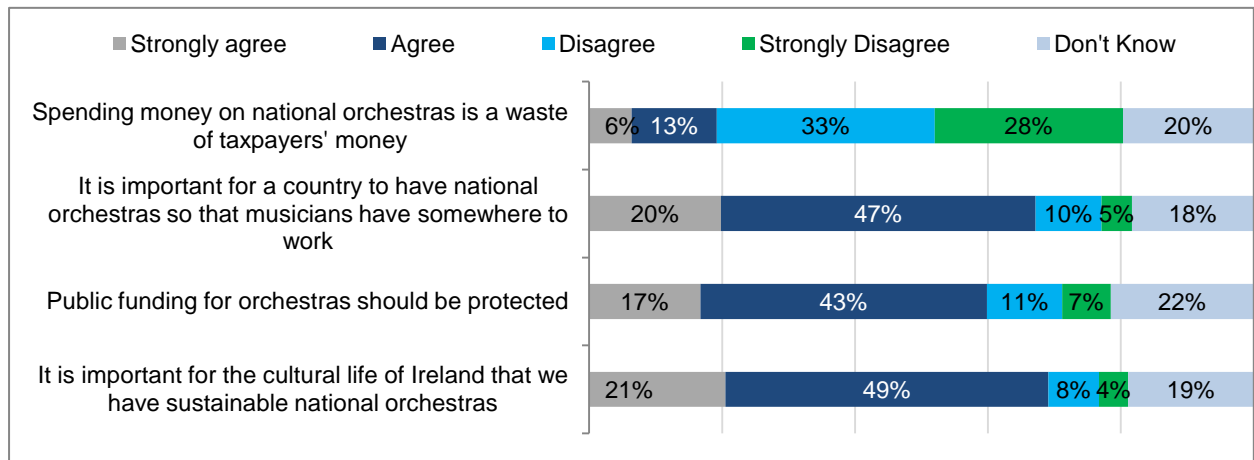
- 2.67. This consideration of the provision of orchestral music in Ireland takes place against a backdrop of significant change in the music sector; such change also forms a context for evaluating the ways in which audiences listen to orchestral music.
- Irish households are increasingly connected, with broadband penetration at a high level and download speeds increasing year-on-year – in turn allowing individuals to access internet-delivered services which are viable complements to, or substitutes for, traditional broadcast media.
 - Individuals are seeking more control over their media consumption experiences, increasingly seeking access to music content across multiple devices at home and on the move – anytime and anywhere.
 - Digital opportunities have proliferated, and this in turn has enabled new models and ushered in new approaches to professional music curation (podcasts, catch-up) and personal curation (subscription streaming, search, social, recommendation, playlists). These new models have been initiated in large part by recent entrants such as Spotify, Apple, Amazon and Netflix, which now compete with traditional broadcasters (TV and radio).
 - The radio market in particular faces challenges as a result of increasing connectivity and shifts in consumer preferences. Radio provision is part of a wider market for audio listening which now covers music and other audio content from a range of providers and models.
 - Sales of physical media are under intense challenge as consumer habits migrate from purchases of CDs to digital assets, streaming subscriptions or ad-funded online audio and video. The economics of digital media present some challenges to content owners, given that the marginal revenues on discrete purchases of digital assets or as a share of subscription/advertising income are very small.
- 2.68. In a context where the primary source of engagement with orchestral music in Ireland is radio (via lyric fm), this presents a particular challenge for maintaining engagement at current levels. These challenges are particularly acute among younger age groups, where new models of engagement with music are most pronounced.
- 2.69. Of course, digital models present greater opportunities for engaged audiences to access and recommend specific genres or artists. While this has some benefits for minority genres such as orchestral and classical music, it also risks minority genres being overwhelmed by the sheer volume of music content now available online. This is particularly relevant at a time when funding models for key distribution outlets (e.g., radio and CDs) are under significant pressure.
- 2.70. Attendance at orchestral events will always have to compete with other claims on leisure time, and with other music, sporting or artistic events or festivals. Attendance at orchestral events in particular will be influenced by awareness of events/orchestras, location (particularly where provision outside Dublin remains limited), overall perceptions of the value and appeal of orchestral music and willingness to pay.
- 2.71. There is likely to be a link between awareness and engagement with orchestral music generally, and subsequent attendance at orchestral events (and vice versa). As a result, pressures on music listening via traditional radio and physical media may have subsequent implications for the attendance levels at orchestra events over time. This presents a unique challenge for Irish orchestras. They will need to ensure that engaging Irish audiences (including younger and regional audiences) and maintaining awareness of their output remain key elements of their future strategies.

Public support for orchestral provision

- 2.72. There is very strong support among Irish audiences for the existence of Irish orchestras, and for public funding to ensure their provision, despite the fact that orchestral music is a minority taste. Significantly, support for public intervention for orchestral provision exists even among people who do not consume orchestral music.

2.73. The RTÉ-Kantar survey revealed that there is majority support for public intervention to fund orchestras. This largely reflects an accepted understanding that orchestras are a public good and contribute to the cultural fabric of Ireland.

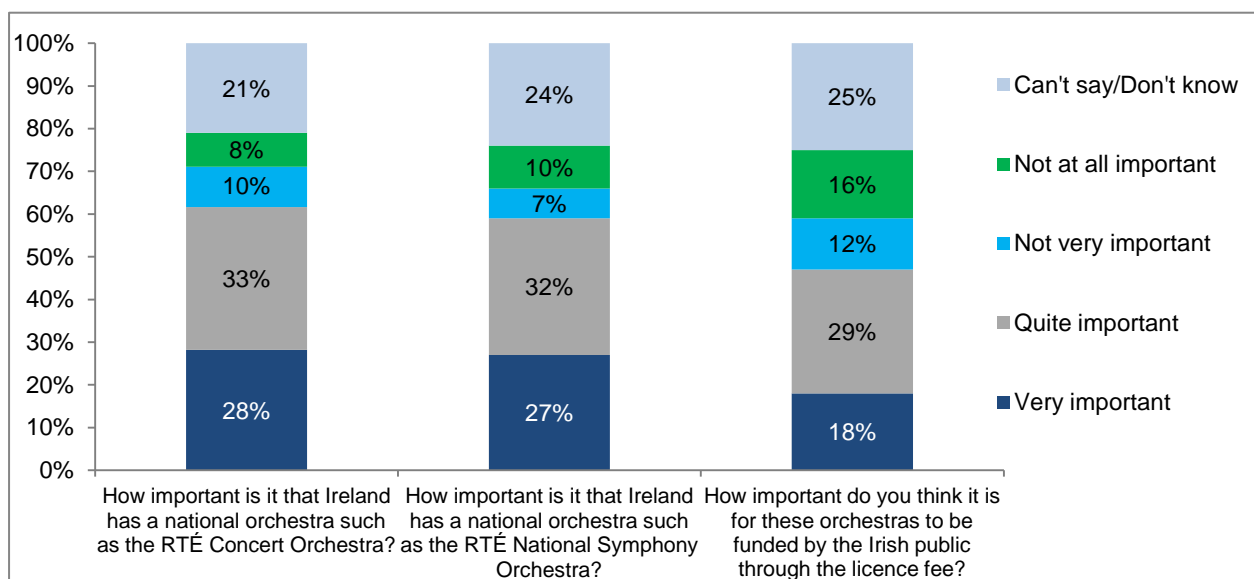
Figure 11: Support for orchestral provision and funding in Ireland



Source: RTÉ-Kantar survey, December 2017.

2.74. There is also very strong support for the RTÉNSO and RTÉCO specifically, even among Irish individuals who do not listen to orchestral music nor attend orchestral concerts.

Figure 12: Support for provision of RTÉNSO and RTÉCO in Ireland



Source: RTÉ-Kantar survey, December 2017.

2.75. These outcomes provide an important context for our consideration of the best configuration and funding of RTÉ's orchestras in the future.

- A majority of respondents believe that it is important for the RTÉCO and RTÉNSO to exist; with only a marginally greater degree of support for the RTÉCO than the RTÉNSO.
- A significant majority of respondents (77%, excluding 'don't knows') in the RTÉ-Kantar survey supported public funding for the orchestras; however, slightly less (63%, excluding 'don't knows') believed that the licence fee should be the funding mechanism for the RTÉ orchestras.

2.76. Such opinions are unlikely to be static, however; it may be the case that unless orchestras are able to engage more with younger audiences in the short term, support for orchestral provision and public support may ultimately find itself under pressure over time.

3. International provision of orchestras

Key points from Section 3:

- *The scale of orchestral provision in countries across Europe varies dramatically, determined by a range of factors including: money and access to finance; cultural factors; public policy; and convention.*
- *With only one full-time professional symphony orchestra, Ireland's orchestral scene is very stretched compared to other European countries, most of which host a number of publicly and privately funded symphony orchestras.*
- *Unlike most other European countries, the RTÉNSO is only supported by a single public funding stream – RTÉ – making it vulnerable to economic instability and leaving RTÉ with an unusually high level of cultural and financial responsibility.*
- *There are fewer musicians in the orchestra compared to most other PSB radio symphony orchestras and it is the only such symphony in our cohort without a principal conductor; the RTÉCO is also without a principal conductor currently.*
- *Under-resourcing has had repercussions on the nature and quantity of work the RTÉNSO and the RTÉCO are able to undertake, including overall number of events.*
- *In particular, regional touring and educational outreach have been stripped back in stark contrast to the case of other European PSB orchestras where adequate provision for both regional and youth audiences are seen as fundamental pillars of a successful PSB orchestral strategy.*
- *Likewise, there is a divergence between other orchestras and those operated by RTÉ when it comes to broadcasting activities. Interviewed stakeholders testified that the ability to broadcast was critical to justifying the costs of producing orchestral performances.*
- *At a minimum, most European PSBs stipulate broadcast requirements (for example, number of radio deliveries per year); this is not the case in Ireland.*
- *Populations in a dozen other European territories are more likely than people in Ireland to attend live music performances and some nations (Finland, Norway, Germany) are characterised by a higher degree of consumer commitment to orchestral (classical) music.*
- *These differences are likely linked to a range of factors, including poor provision music education in many Irish schools, limited knowledge of the traditions of classical music, the cost of attending and the lack of significant music content on television and radio that might serve to promote awareness and consumption.*
- *Virtually all PSBs in Europe have seen funding either frozen or reduced, according to a recent report sponsored by the European Broadcasting Union.*

- 3.1. Many PSBs, particularly in Europe, still operate musical groups including orchestras, choirs and other ensembles. However, these broadcasters often face financial constraints through a combination of pressures on licence fees (where relevant) and a challenging outlook for commercial income.²⁷
- 3.2. PSBs also face a challenge to maintain relevance in an era of increasing listener choice and availability of digital music – a context far removed not only from the historical period of the growth of radio orchestras after the Second World War but also from more recent periods when radio listening was high and commitment to live music heavily reliant on radio orchestras.
- 3.3. There are 102 performing groups operated by the European PSBs, of which 41 are symphony orchestras and 37 are choirs (including children's choirs and other vocal ensembles). The remaining 24 can be classified as concert orchestras, performing a 'lighter', more popular repertoire and participating frequently in radio and TV productions.
- 3.4. Concert orchestras vary widely in their scale and scope, often reflective of a given country's musical heritage. They range from traditional concert orchestras (such as the BBC Concert Orchestra) to big bands, folk ensembles and specialist orchestras including jazz orchestras and chamber orchestras. As

²⁷ For recent data on European PSB income and spending trends, see the press release and links to reports at: <https://www.ebu.ch/contents/news/2017/12/funding-of-public-service-media-2-new-reports.html>.

such, they represent a wide range of repertoire and will have unique responsibilities within a given country's orchestral ecosystem. By contrast, the European PSB radio symphony orchestras act as natural benchmarks against which the activity of RTÉ – as the sole provider of a full-time professional orchestra in Ireland – can be compared.²⁸

- 3.5. Comparing Ireland against the experience of other countries demonstrates just how reliant Ireland is on the RTÉ orchestras and how different Ireland is in this regard from the vast majority of comparable territories.²⁹
- 3.6. Below we examine the Irish orchestral sector against that of other European countries. Thereafter, we provide a more focused look at the performance of the RTÉNSO against other orchestras on various measures.

Country comparisons

Methodology and definitions

The benchmarking below relates only to full-time professional full symphony orchestras. There are, of course, many other forms of orchestras that exist and are not captured in the data. However, for the purposes of an accurate comparison, these groups and ensembles have been excluded.³⁰ For this reason, 'orchestra' in the section below should be read as short-hand for 'full-time professional symphony orchestra' unless otherwise stated. Europe has been chosen as the main cohort because of the broad similarities in both the historical-cultural tradition for classical music and the role played by the PSBs. Thus, the group consists of all countries in the EEA (i.e., the 28 EU member countries, plus Iceland, Liechtenstein, Norway and Switzerland). Northern Ireland, Scotland and Wales are represented as both individual nations (because of the degree of similarity with Ireland in terms of culture, language, and population size) but also as part of the UK, i.e., Scottish, Welsh and Northern Irish orchestras also count within the UK total.

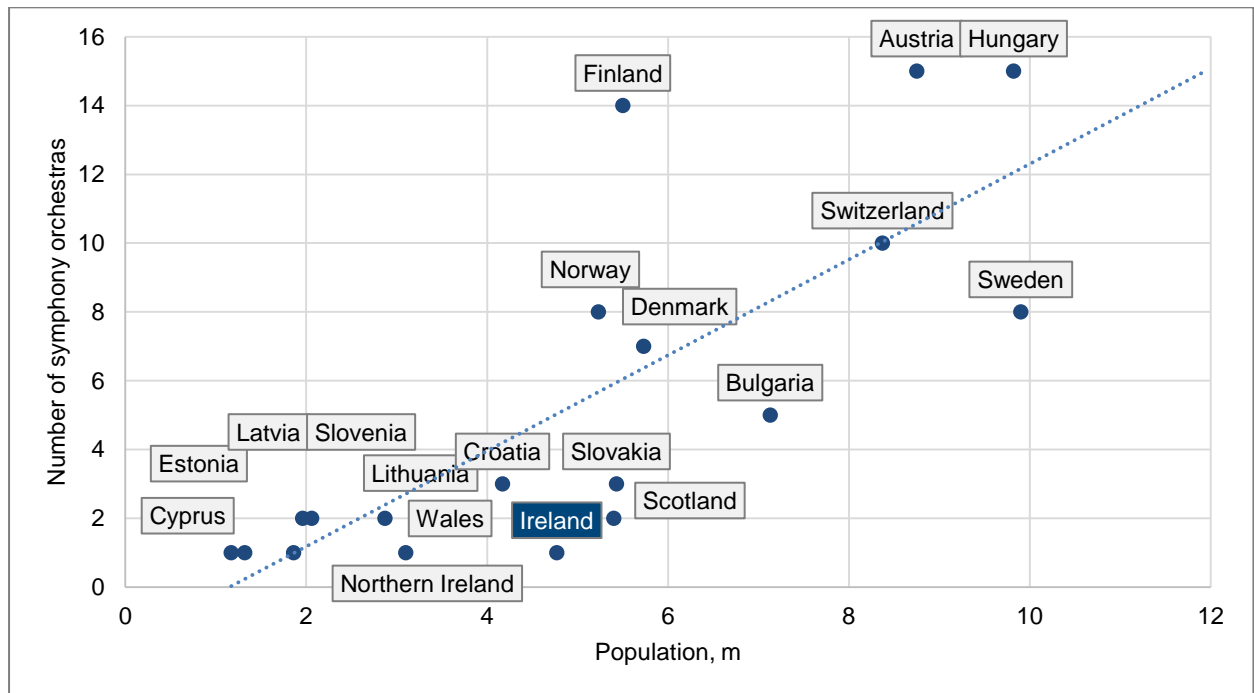
- 3.7. With the RTÉNSO as Ireland's only full-time symphony orchestra, Ireland is less well-provisioned than many other European countries. This partly reflects the relative size of Ireland, with larger nations simply able to afford greater orchestral provision. However, even among countries with populations of between 1m and 10m, Ireland is the largest country with only a single symphony orchestra, as the data in the graph below illustrates.

²⁸ It should be noted, however, that the experience of the concert orchestras on the continent, in terms of size and repertoire, are germane to the case of the RTÉCO. A key lesson here is the degree to which these smaller ensembles play an integral role in the broadcast output of their sponsoring PSB.

²⁹ There are other examples within the cohort group where there is only one full-time orchestra, namely: the Estonian National Symphony Orchestra, Sinfonieorkester Liechtenstein, Cyprus Symphony Orchestra, the BBC National Orchestra of Wales and the Ulster Orchestra. However, BBC NOW and the UO are backed by further BBC orchestras that do perform regionally and have a mandate to do so.

³⁰ Part-time orchestras, freelance/amateur orchestras and chamber orchestras are all excluded. This includes the various Concert Orchestras or Chamber Orchestras associated with national PSBs, including the RTÉ Concert Orchestra, or non-PSB related orchestras, such as the Irish Chamber Orchestra. We have included, however, the radio orchestras of Norway and Switzerland, which are labelled 'symphony' even though they are both of a 'concert' size. In the case of PSB-owned concert orchestras, these are nearly always fully integrated into the broadcast output of the relevant PSB.

Figure 13: Total symphony orchestras in European countries with population size between 1m – 10m (2018)

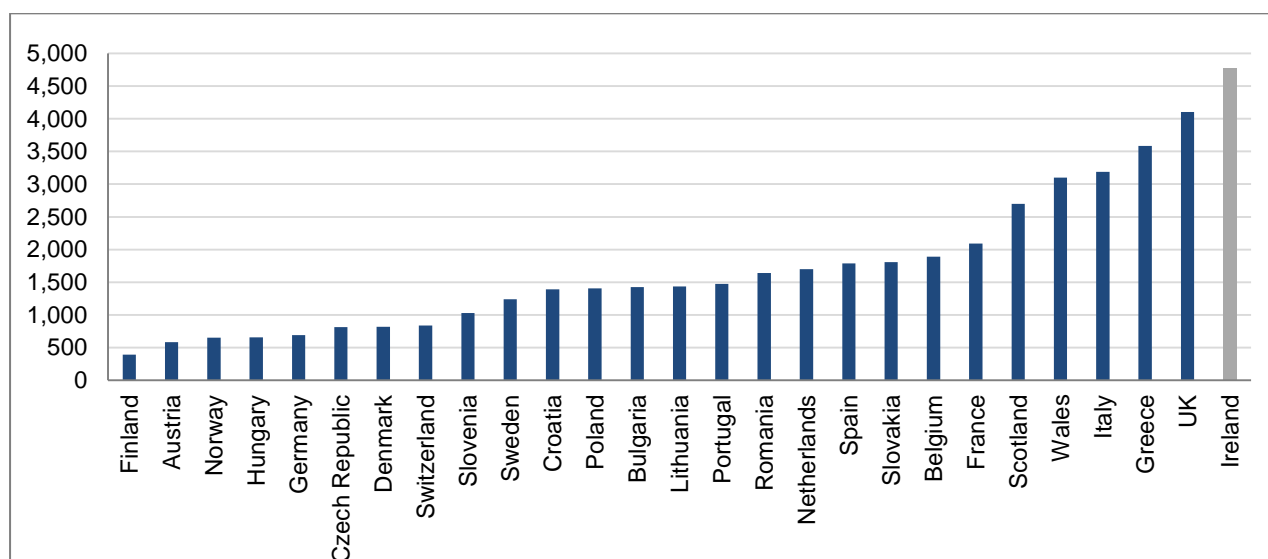


Source: Mediatique, World Bank.

- 3.8. As shown, Ireland is less well-provisioned than countries of a similar size (Finland, Norway, Slovakia, Croatia). It sits between Wales (one orchestra but smaller population) and Scotland (two orchestras but larger population). However, unlike Ireland, Wales and Scotland are also covered by the three other BBC orchestras serving the whole of the UK.
- 3.9. As the single full-time professional symphony orchestra in the country, the RTÉNSO is responsible for serving the entire population of 4.77m people. This is compounded by RTÉ's public service responsibilities to serve the island of Ireland. When provision is adjusted for population, the starkness of the Irish situation among the cohort group becomes apparent.³¹

³¹ In the graph below, those countries with populations under two million have been removed; these are Liechtenstein, Iceland, Malta, Luxembourg, Cyprus, Estonia, Northern Ireland and Latvia. All, bar Iceland, have a single full-time professional symphony orchestra which, because of their small population sizes, skews the data.

Figure 14: Number of people (000s) served per symphony orchestra (2016)



Source: Mediatique; excludes countries with populations under two million.³²

- 3.10. Generally, the countries with the best orchestral provision tend to be ones with multiple 'streams' of access to funding and broad public support for orchestras and the ecosystems around them.

Figure 15: Total publicly funded symphony orchestras and provision of public funding

Country	Total publicly funded orchestras	Streams of funding available		
		Licence fee/ other PSB?	Direct government?*	Local government?
Austria	15	✓	✓	✓
Belgium	5	✓	✓	✓
Bulgaria	2	✓	✓	
Croatia	3	✓	✓	✓
Cyprus	1		✓	
Czech Republic	11	✓	✓	✓
Denmark	7	✓	✓	✓
Estonia	1	✓		
Finland	14	✓	✓	✓
France	26	✓	✓	✓
Germany	120	✓	✓	✓
Greece	3	✓	✓	
Hungary	15	✓	✓	✓
Iceland	1		✓	✓
Ireland	1	✓		
Italy	15	✓	✓	✓
Latvia	2	✓	✓	
Liechtenstein	1		✓	✓
Lithuania	1		✓	✓
Luxembourg	1		✓	✓

³² Wales and Scotland shown separately from the UK for comparison purposes only. Orchestras based in the UK regions also address the rest of the UK; equally orchestras with a headquarters in England address a UK-wide audience.

Country	Total publicly funded orchestras	Streams of funding available		
		Licence fee/ other PSB?	Direct government?*	Local government?
Malta	1		✓	
Netherlands	10	✓	✓	✓
Norway	8	✓	✓	✓
Poland	21	✓	✓	✓
Portugal	7		✓	✓
Romania	8	✓	✓	✓
Slovakia	2	✓	✓	✓
Slovenia	2	✓	✓	
Spain	26	✓	✓	✓
Sweden	8	✓		✓
Switzerland	6	✓	✓	✓
UK**	16	✓	✓	✓
- Northern Ireland	1	✓	✓	✓
- Scotland	2	✓	✓	✓
- Wales	1	✓	✓	✓

Source: Mediatique, orchestra reports. * Includes funding through Arts Council or similar institutions. ** Northern Ireland, Scotland and Wales shown separately from the UK for comparison purposes only. Orchestras based in the UK regions also address the rest of the UK; equally orchestras with a headquarters in England address a UK-wide audience.

- 3.11. It is notable that the RTÉNSO is supported by a single stream of public funding, RTÉ, which makes it more inherently vulnerable to stressors in that funding stream than its comparators in other countries – where, for example, local authority funders step up when PSB funding comes under pressure.³³
- 3.12. To date, neither central nor local government has ever directly funded a full-time, professional orchestra in Ireland. This leaves RTÉ with an unusually high level of cultural and financial responsibility. The approach of the Irish state contrasts with many of Ireland's European neighbours of similar size, which invest heavily in orchestras, concert halls and musical education.
- Denmark, for example, has a range of orchestras including five in the regions which are funded by a combination of local and government subsidy. DR, the Danish public service broadcaster, runs the Danish National Symphony Orchestra.³⁴
 - Norway too has a range of directly publicly funded orchestras as well as one owned by the Norwegian Broadcasting Corporation, which focusses on work by Norwegian composers and artists.
 - Finland probably best represents how public funding can foster creativity and grow a small country's global artistic reputation. Its public service broadcaster, YLE, runs the Finnish Radio Symphony Orchestra but local and national government invest money in other musical endeavours. The country has outstanding musical education, good physical infrastructure and an openness to a wide range of Finnish music from its powerful Folk tradition to Heavy Metal. Finland has a proportionately high

³³ This was the case in the Ulster Orchestra in 2014 where Belfast City Council offered €100,000 and free use of Ulster Hall (a benefit-in-kind worth approximately £160,000 per annum) to relieve the orchestra's bankruptcy fears after it stated its public funding had been cut by 28% over the previous four years (the equivalent of £1m) <https://www.thestradd.com/northern-irelands-ulster-orchestra-faces-imminent-closure-warns-chairman/4150.article>.

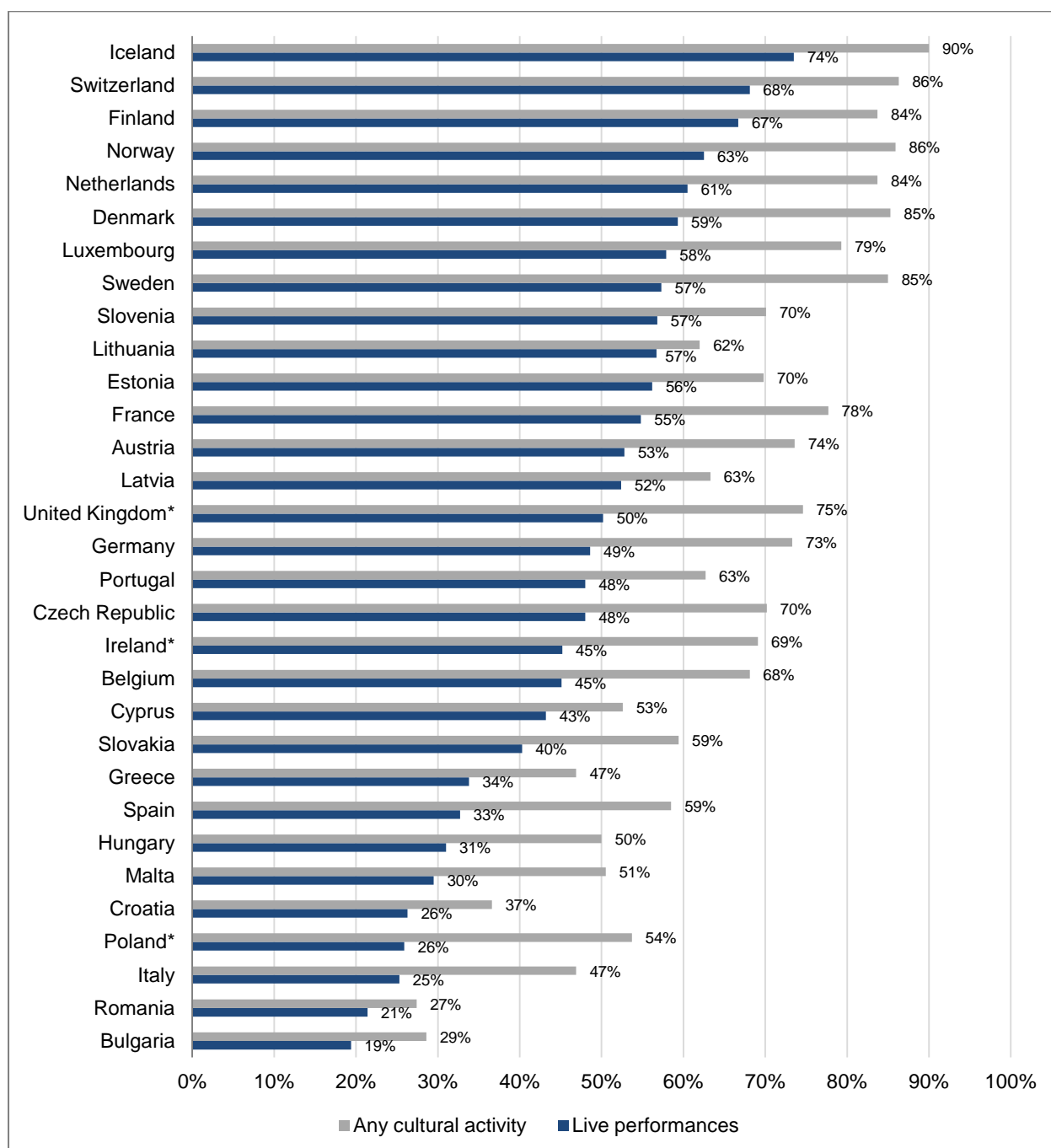
³⁴ The Danish government announced in 2018 that the licence fee would be abolished from 2019 and DR's budget cut by c20%. It is unclear at this juncture what this might mean for the funding of the PSB orchestra.

number of composers and musicians in classical and contemporary music. It also exports a very high number of outstanding Principal Conductors to orchestras around the world.³⁵

- 3.13. One of the biggest indicators of the strength of the orchestral sector in a given country is the extent and durability of cultural traditions, and the role played by classical and orchestral music both now and in the past.
- The best example of the effect this can have on the level of symphony orchestral provision is Germany, where 120 full-time professional symphony orchestras play regularly, all of which receive at least some form of public funding (whether through public broadcaster ARD for 12 PSB orchestras, or via local/county councils or directly from government).
 - Indeed, Federal Culture Minister Monika Grütters recently announced a €5.4m fund for all publicly funded orchestras to promote 'orchestral innovation' with initiatives that might normally be economically unviable.³⁶
- 3.14. There are no international or EU-level audits on audience engagement with orchestral music. Indeed, there is very little by way of data on orchestral music at all. However, it is possible to make inferences from an analysis of cultural participation and frequency of cultural participation among European populations.

³⁵ There has been traffic in the opposite direction too: Hannu Lintu was principal guest conductor of RTÉNSO in 2010-11, before taking up the role of principal guest conductor at the Finnish Radio Symphony Orchestra (from 2012) and then chief conductor (from 2013).

³⁶ See: <https://orchestra-innovation.blog/2017/07/07/german-minister-allocates-54-million-euros-for-orchestra-innovation/>

Figure 16: Participation in cultural activities in the last 12 months by country (2015)

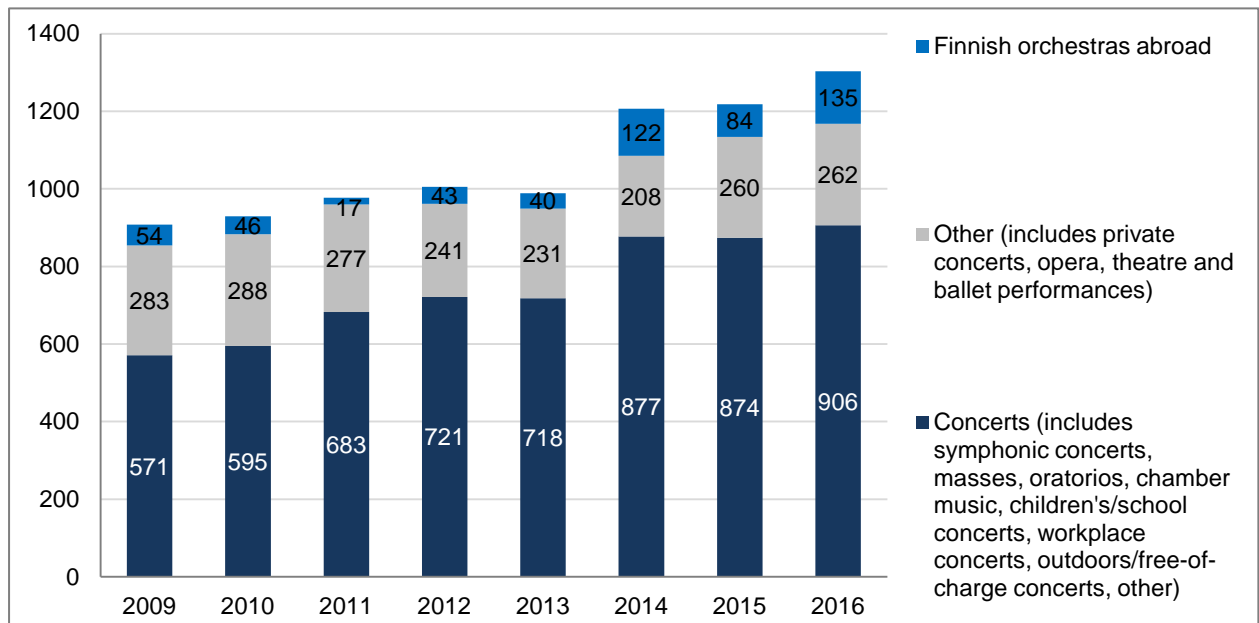
Source: Eurostat Cultural Participation 2015.

Indicates the percentage of adults that participated in a given cultural activity at least once in the previous year. Live performances include theatre, concerts, ballet and opera. Any cultural activity includes live performances, cinema, historical monuments, museums, art galleries and archaeological sites.

* Eurostat reports "lower reliability of data"; included to give scale.

- 3.15. It is notable that the countries with the most extensive orchestral provisioning (Switzerland, Finland, Norway) rank highly in terms of overall cultural participation. The data suggests that overall participation – and thereby strength of engagement from local audiences – are good indicators of the health of the orchestral sector.
- 3.16. While information from European markets is patchy, the Association of Finnish Symphony Orchestras has collated more granular data from that market. Recent analysis reveals that total audiences for orchestral music have actually increased in Finland; from 854,003 attendances in 2009 to 1,168,147 in 2016.

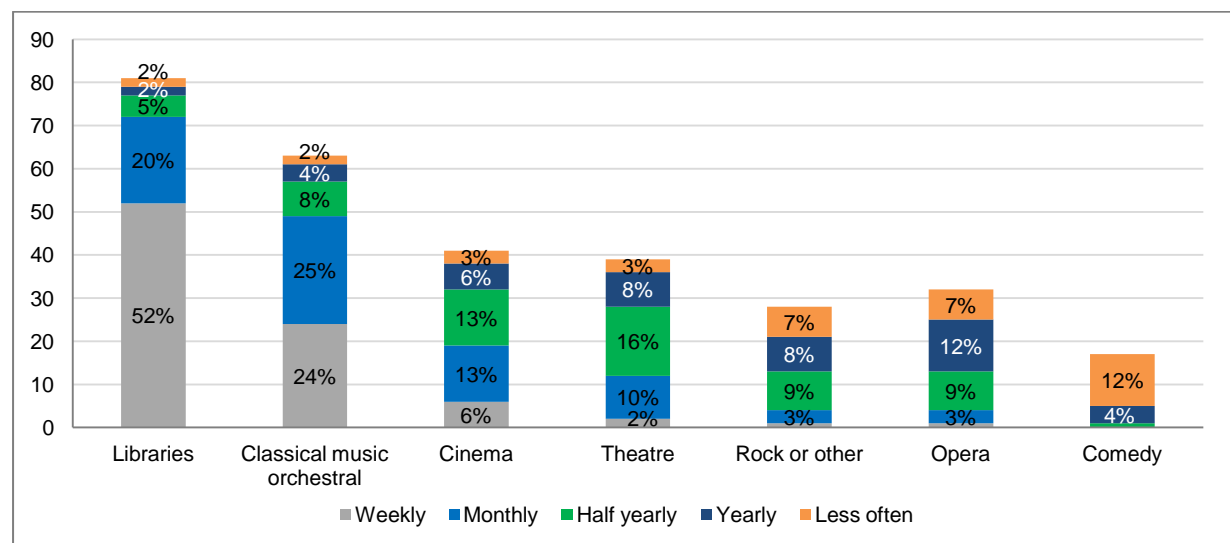
Figure 17: Number of people (000s) attending orchestral concerts in Finland (2009 - 2016)



Source: SUOSIO Association of Finnish Orchestras Facts and Figures 2016.

- 3.17. Among Finnish concert goers, nearly 50% reported attending a ‘classical music orchestral’ concert on a monthly basis, with almost half of the cohort (24% overall) reporting they attend weekly.

Figure 18: Frequency of attendance in cultural activities among Finnish concert goers (2015)



(“How often do you attend the following cultural activities?”).

Source: Innolink Research Audience Survey 2015.

- 3.18. Even among non-concert goers, 5% of respondents reported going to a classical music orchestral concert more than once a year, and over 52% answered ‘yes’ or ‘maybe’ when asked if they were likely to attend a classical musical concert in the future.³⁷
- 3.19. In all, a comparison of the European orchestral sector as a whole provides key insights into the factors that determine the scale of orchestral provision in a given country:³⁸

³⁷ Audience Survey: Non-concert goers (2015), Association of Finnish Symphony Orchestras & Innolink Research.

³⁸ We found a very limited correlation between GDP per capita and orchestral funding; many countries with high GDP per capita (Switzerland, Norway, Ireland, Denmark) have fewer orchestras than others with lower GDP per capita (e.g., Spain, France, Italy). This suggests that there are other factors at play here.

- *Money and access to finance:*
Scale and breadth of public funding (direct government, local authority or via PSBs), overall box office health and ticket sales, CD sales and downloads and the level of sponsorship (either corporate or individual giving);
- *Cultural factors:*
Strength of musical tradition in the country for orchestral genres and other genres, the cultural relevance of the orchestras in public life;
- *Public policy:*
Efficacy of governmental, local authority and Arts Council-type institutions in maintaining the health and growth of the sector, the level of public funding and the accountability of the national PSBs in maintaining minority genres;
- *Convention:*
In many ways the intersection of all three of the above, the historical precedents set in relation to orchestral provisioning, the historical role of classical music in public life, and the general attitude of audiences towards orchestras, i.e. the strength of feeling in keeping orchestras alive.

Orchestra comparisons

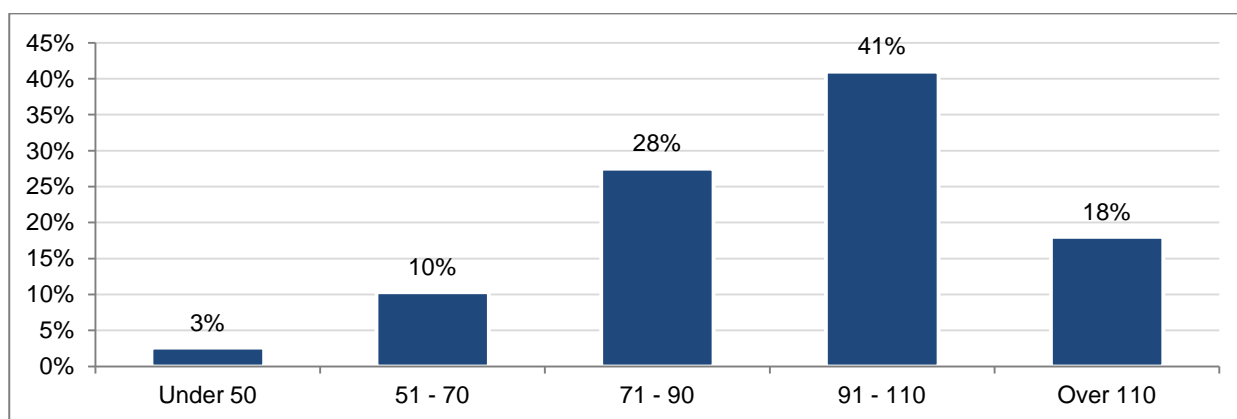
Methodology and definitions

For the comparison of orchestras, the PSB radio symphony orchestra was used for each country. Countries without a dedicated PSB radio symphony orchestra were excluded: Cyprus, Iceland, Luxembourg, Malta and Portugal. In countries with more than one PSB radio symphony orchestra, they were all included. PSB concert orchestras and chamber orchestras are excluded. A full list of the cohort is presented in the Appendices. Data were gathered from orchestra websites, reports and programmes. The information on the 2017/18 season is taken directly from published programmes (where available). Where data is not available orchestras have been excluded from graphs and these are labelled where applicable.

Note that we provide more granular information on both RTÉ orchestras (including structure, organisation, strategy, broadcasting profile, performances, touring, educational output, recording output, staff issues and broad funding) in section 4.

- 3.20. In comparing the work of the RTÉNSO against other orchestras, we find there are structural disparities that have had major consequences for the quantity and nature of the work the orchestra is able to perform.
- 3.21. When compared to other European orchestras, the RTÉNSO looks under-resourced, which in part reflects the number of positions currently vacant within the orchestra. Its current number of full-time musicians (68) makes it one of the smallest in Europe.

Figure 19: Number of full-time musicians in benchmark orchestras (2018)



Source: Mediatique, orchestra reports. Excludes Hungarian Radio Symphony Orchestra and Polish National Radio Symphony Orchestra as data not available.

- 3.22. Of the comparator group here ³⁹, the RTÉNSO is fifth from the bottom with only the Ulster Orchestra (63), Munich Radio Orchestra (61), Norwegian Radio Symphony Orchestra (54) and Switzerland's Orchestra della Svizzera Italiana (46) below it. With the exception of Norway, each of those orchestras comes from a country that supports multiple PSB radio symphony orchestras ⁴⁰, thus perhaps relieving some of the need to be a large and multi-faceted symphony orchestra.
- 3.23. The majority of orchestras (87%) employed 71 or more full-time professional musicians, with an average of 95. Some of the Western European orchestras (such as the SWR Symphony Orchestra ⁴¹ in Germany and the Orchestre Philharmonique de Radio France) employ more than 140 people (172 and 141 respectively).
- 3.24. A similar situation can be observed in terms of principal conductors. Many PSB radio orchestras rely on a cadre of conductors and related roles: the BBC Scottish Symphony Orchestra hosts six positions including principal conductor, principal guest conductor, artist-in-association, associate guest conductor, conductor emeritus and conductor laureate. With the RTÉNSO in the middle of its second season without one, it continues to be the only European PSB radio orchestra lacking a principal conductor. ⁴²
- 3.25. One of the key elements that came through from interviews with stakeholders, particularly those involved in European orchestras, was the importance of these leadership roles.
- Conductors can aid orchestras far beyond rehearsals. They can bring prestige and relevance to an orchestra and, particularly for PSB orchestras, spend time doing critical outreach work with media appearances, interviews and personal branding.
 - For example, Hannu Lintu, principal conductor of the Finnish Radio Symphony Orchestra (and previously principal guest conductor of the RTÉNSO) regularly appears in interviews across all of YLE's radio, television and online platforms.
- 3.26. The same also applies to musicians. Better provisioned orchestras are able to perform a wider remit, and it is clear from the European data that RTÉ lags behind in terms of:
- Overall number of performances and appearances;
 - Regional touring;

³⁹ Main comparator group excluding the Hungarian Radio Symphony Orchestra and the Polish National Radio Symphony Orchestra due to the lack of reliable data on these two orchestras.

⁴⁰ Northern Ireland's Ulster Orchestra has access to the BBC orchestras which regularly tour in the region, Germany has 12 PSB radio orchestras and over 100 regional publicly-funded professional symphony orchestras, and Switzerland's Orchestra della Svizzera Italiana is also supported by SRG SSR's other regional orchestra, Orchestre de la Suisse Romande.

⁴¹ The current size reflects that the orchestra is the product of a recent merger, in September 2016, of the Stuttgart Radio Symphony Orchestra and the SWR Sinfonieorchester Baden-Baden and Freiburg.

⁴² Nathalie Stultzman has been principal guest conductor at the RTÉNSO since September 2017. Theo Currentzis has been the principal guest conductor at the SWR Symphony Orchestra since 2011 and, following an announcement in April 2017, will become the orchestra's first chief conductor from the 2018-19 season onwards.

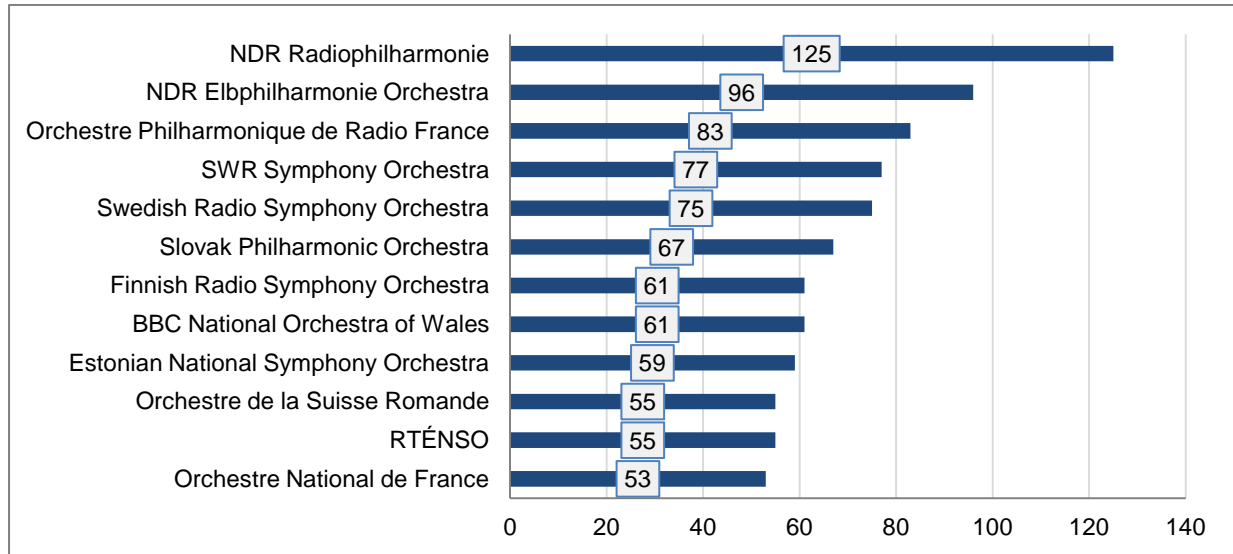
- International touring;
- Broadcast output (including live and non-live radio appearances, TV production and online streaming);
- Educational outreach.⁴³

Performance schedule

- 3.27. The RTÉNSO concert schedule for 2016 comprised 55 concerts in the entire year. Of these, 52 took place within Dublin. The main season comprises Friday night concerts and a range of further concerts.
- 3.28. Compared to the output of many other orchestras, the RTÉNSO performs significantly less. For example, the most prolific orchestra in the comparator group is NDR's Radiophilharmonie Orchestra, which will have performed 125 main season concerts by the end of the 2017/18 season. RTÉ's 55 concerts puts it at position 10, tied with Orchestre de la Suisse Romande.

⁴³ We look in further detail at RTÉ's orchestral output in Section 4, where we also consider the RTÉCO. In the remainder of this section, we compare international outcomes against RTÉNSO, our prime comparator.

Figure 20: Top twelve European orchestras in benchmark group by number of concerts in main season 2017/18



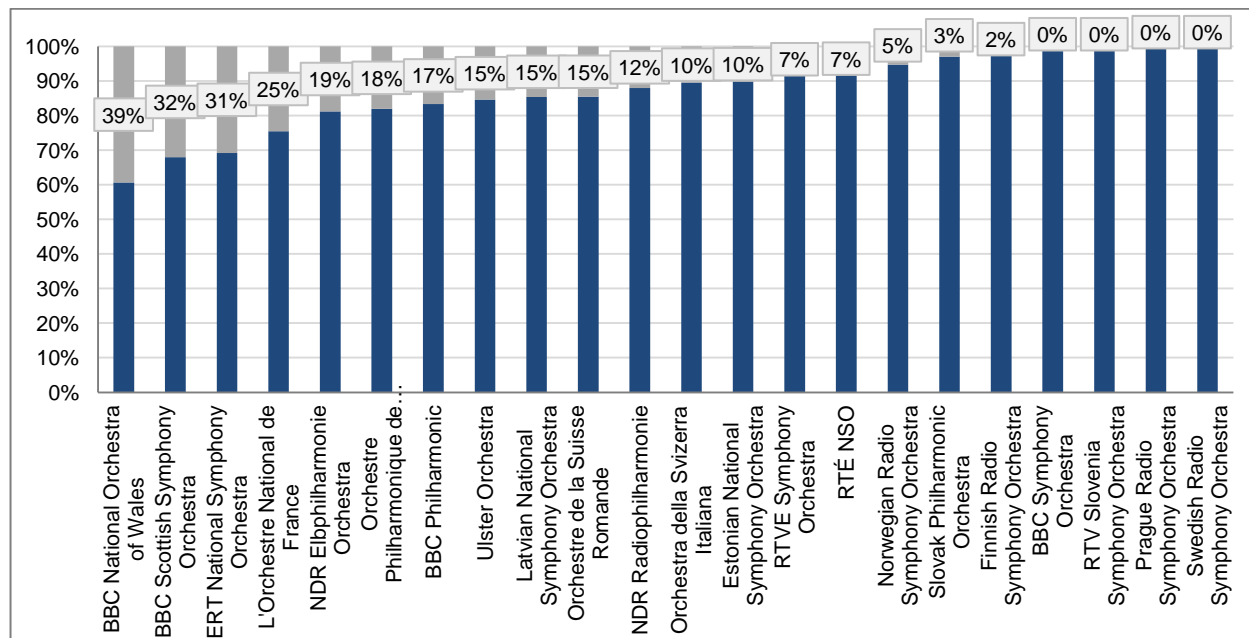
Source: Mediatique, orchestra reports.⁴⁴

3.29. The data above includes only concerts taking place within the main season (i.e. excluding any summer concert series) and so does not represent all concerts and additional activities.

Regional concerts and national touring

3.30. One of the fundamental differences between the RTÉNSO and other PSB orchestras across Europe is that the RTÉNSO has diminished its commitments to regional touring.

Figure 21: Breakdown of regional to ‘hometown’ performances, main season 2017/18, for available orchestras



⁴⁴ There is no historical data for a number of large European orchestras; for this reason, we have had to exclude: Bulgarian National Radio Symphony Orchestra, Bavarian Radio Symphony Orchestra, Danish National Symphony Orchestra, German Radio Philharmonic Saarbrücken Kaiserslautern, HR Symphony Orchestra, Hungarian Radio Symphony Orchestra, MDR Leipzig Radio Symphony Orchestra, Munich Radio Orchestra, National Radio Orchestra of Romania, RAI National Symphony Orchestra, Polish National Radio Symphony Orchestra, Polish Radio Symphony Orchestra, SWR Symphony Orchestra, and WDR Symphony Orchestra Cologne. Many of these are likely to have performed at least as often, and probably more, than the RTÉNSO in their main season.

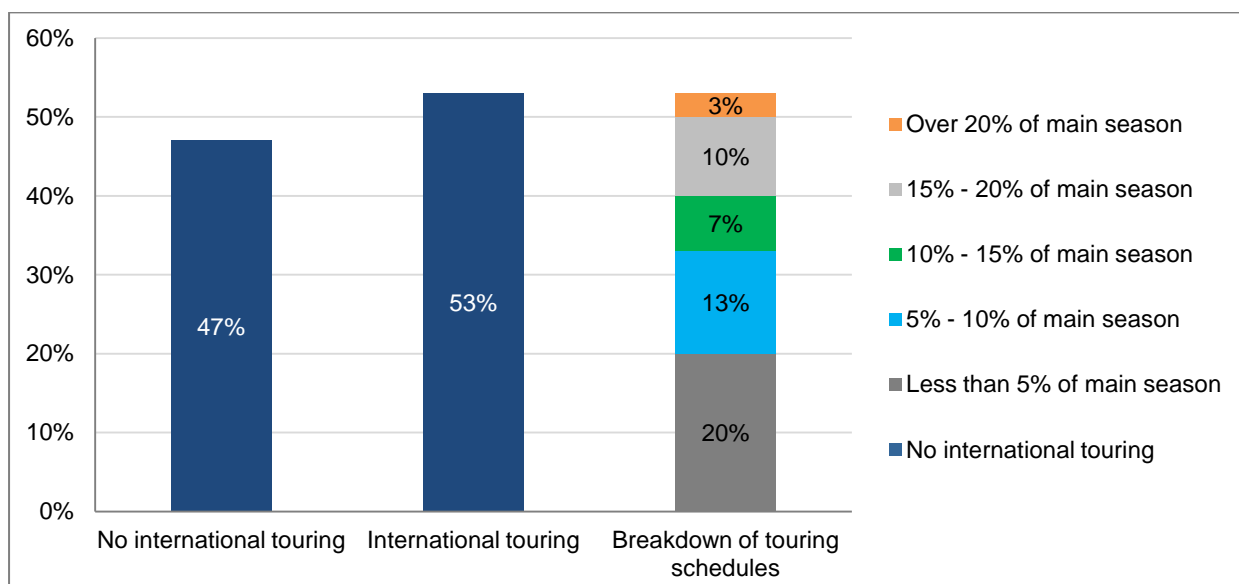
Source: Mediatique, orchestra programmes. 'Hometown' performances include performances taking place within any venue located in the same city as the orchestra's own/usual concert hall.

- 3.31. For many orchestras, the responsibility to tour is enshrined in national legislation or as part of its public service commitments.
- One of the main arguments used by the Australian Broadcasting Corporation (ABC) when they divested all six of their state symphony orchestras⁴⁵ in 2006 was the need to serve all Australians regionally. As the necessity for a broadcast orchestra reduced, ABC and the orchestras no longer needed to spend as much time recording, when audiences could be better served by performing more concerts in their respective regions.
 - Indeed, a similar argument has been made by the BBC National Orchestra of Wales, who allocate over 25% of their schedule to regional concerts.

International touring

- 3.32. The role of international touring should be taken with slightly more nuance; a number of PSB radio symphony orchestras find they cannot reconcile non-national touring with their public service mandate. Having said that, many orchestras across Europe include a degree of 'international' travel within their main season (as shown below); RTÉNSO, by contrast, had one international tour outside the main season (China) in 2017.

Figure 22: Percentage of comparator orchestras performing internationally during the 2017/18 main season



Source: Mediatique, orchestra programmes.⁴⁶

- 3.33. Around 53% of the orchestras analysed will perform internationally during their main 2017/18 season. For the majority (60%), this takes up less than 10% of their main season schedule.

Broadcast obligations

- 3.34. There is very little data in terms of how much broadcast output a given radio symphony orchestra creates annually. However, anecdotal evidence from our stakeholder interviews provides a high-level indication of what this looks like across a range of countries.

⁴⁵ Comprising the Adelaide Symphony Orchestra, Melbourne Symphony Orchestra, the Queensland Orchestra, Sydney Symphony, Tasmanian Symphony Orchestra and Western Australian Symphony Orchestra.

⁴⁶ Data unavailable for following orchestras: Bulgarian National Radio Symphony Orchestra, Croatian Radio-Television Symphony Orchestra, Danish National Symphony Orchestra, Hungarian Radio Symphony Orchestra, MDR Leipzig Radio Symphony Orchestra, National Radio Symphony Orchestra of Romania, Polish Radio Symphony Orchestra, Radio Philharmonic Orchestra, RAI National Symphony Orchestra and WDR Symphony Orchestra Cologne.

- Every single performance from the Norwegian Radio Symphony Orchestra (KORK) is broadcast on at least one platform: radio, TV or online. Indeed, they have a rule stating if they cannot broadcast it, they cannot justify doing it on the basis that it is their role is to serve all Norwegians.
 - Likewise, KORK worked hard to make themselves available and useful to other parts of NRK (Norway's PSB and KORK's parent company). Often faced with TV producers saying it was cheaper to use external orchestras, they showed how the internal orchestra could share fees (such as paying conductors, rights clearance, etc) and do not face the same travel, accommodation and peripheral costs faced by external orchestras, even if external supply appears superficially cheaper.
 - The situation is similar in Finland where 100% of the Finnish Radio Symphony Orchestra's concerts are broadcast on radio and online, with up to 80% broadcast on television.
 - The BBC Philharmonic – as with the other BBC Performing Groups – have defined targets for the number of radio deliveries required for Radio 3. In practice, they often exceed this as the production of radio deliveries during touring (both regionally and internationally) can be used to help fund tours that are otherwise commercially unviable.
- 3.35. In our discussions with other orchestras, those with flexible concert orchestras were very pro-actively using them on television programmes from Children's to Sport to Entertainment. They worked hand in glove with their content commissioners. They were also devising concerts devoted to film or to gaming but were clear that the music was the starting point for these endeavours. None of them wanted their concert orchestras to be "just a backing band". There was excitement about reinventing orchestral music for new generations through clear and focussed creative strategies.
- 3.36. In comparison to these territories, RTÉ broadcasts relatively little from the RTÉ orchestras on lyric fm and even less on television.⁴⁷
- 3.37. RTÉ participates in the European Broadcasting Union ('EBU') content sharing programme and contributes many concerts annually; however, it orders far more than it provides. While the use of EBU material by a PSB is not in itself an indicator of under-use of internal orchestral performances, it may indicate a lack of coordination between orchestra and commissioners in terms of determining broadcast output.⁴⁸

Educational output

- 3.38. It can be difficult to track the true quantity of educational outreach for youth audiences and schools that orchestras do in a given year, as these include school visits, concert attendance by school groups, interviews or masterclasses with individual – or small groups of – musicians, rehearsal visits, and, of course, special concerts for schoolchildren, not all of which is adequately tracked and audited.
- 3.39. However, as with broadcast obligations, many stakeholders confirmed to us that orchestras across Europe have set targets and key performance indicators linked to the amount of educational outreach they perform. Indeed, it is not unusual for non-PSB orchestras to have funding contingent on fulfilling these responsibilities.
- 3.40. Currently, across Europe there are a range of methodologies and practices for orchestras to address musical education in their country. Most often, PSB performing groups (including the orchestras) have played a vital role in reaching out to younger audiences; however, this is not always the case.
- For example, Radio France's two orchestras (l'Orchestre National de France and l'Orchestre Philharmonique de Radio France) signed an agreement with the Ministry of Education, the Ministry of Culture and Communications and the three academies of Paris, Creteil and Versailles to run an annual educational programme from September to June each year. The 2017/18 'Scolaires' season has 264 events programmed, encompassing evening concerts, day-time rehearsal concerts,

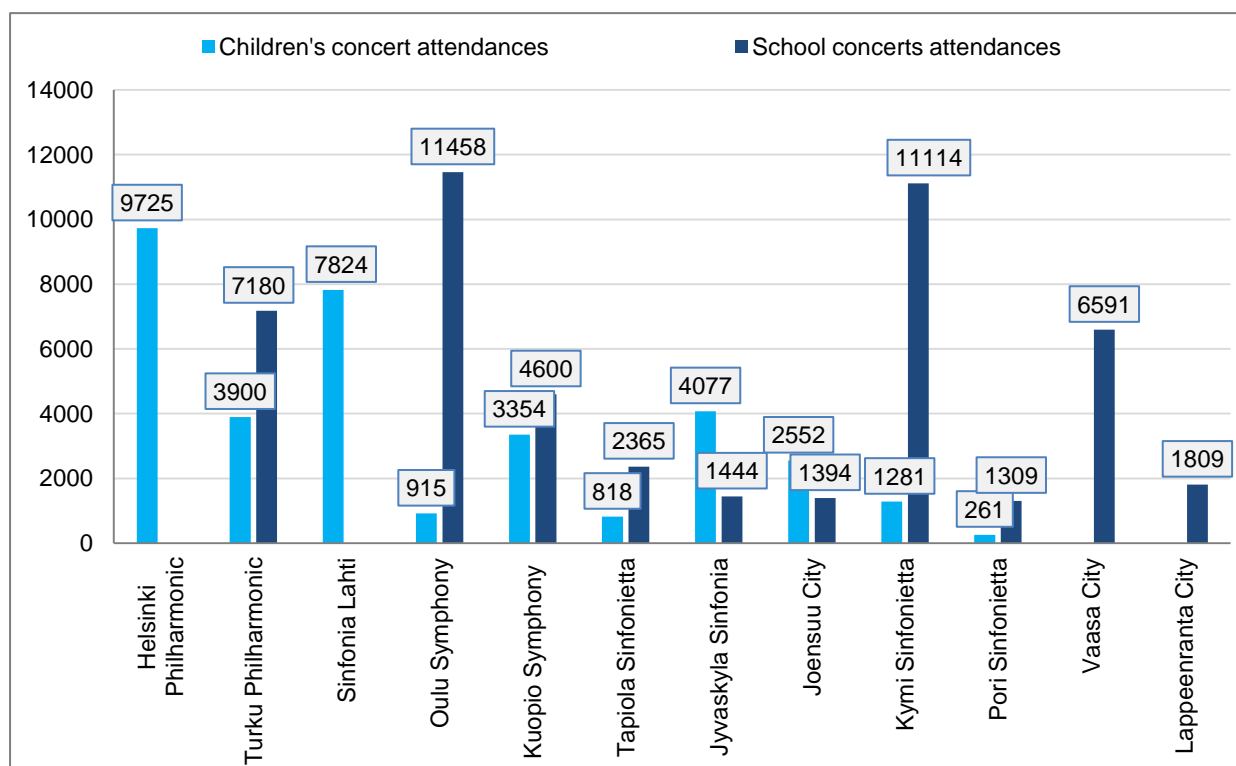
⁴⁷ We look in greater detail at RTÉ's broadcast output in Section 4, below.

⁴⁸ We return to RTÉ's use of EBU content in Section 4, below. We note that lyric fm is required to fill more airtime than could ever be provided by the RTÉ orchestras alone.

workshops within the Radio departments and musician masterclasses, as well as a range of shorter activities aimed at younger children. Radio France reports their last season reached over 50,000 children between the ages of 3 – 18 years old.

- By contrast, and perhaps most surprisingly, the Finnish Radio Symphony Orchestra does very little by way of educational outreach as it is not mandated to do so. However, the infrastructure at city and county level in Finland means this potential gap in provision is covered by the local orchestras which collectively, in 2016, performed 98 children's concerts in venues across the country and 284 concerts for primary and post-primary children in schools.⁴⁹ This equates to over 95,000 Finnish schoolchildren served in 2016.

Figure 23: Total attendances at children's concerts and school concerts by Finnish orchestras (2016)



Source: SUOSIO Association of Finnish Orchestras Facts and Figures 2016.

- 3.41. Between the two examples of France and Finland are a range of other strategies for PSB orchestras in the role of music education. It is clear that these are necessarily shaped by the rest of the music landscape in a given country, including educational policies.
- 3.42. Over the past four decades, the Arts Council has commissioned several reports on the adequacy or otherwise of Irish music education⁵⁰, addressing the role of RTÉ's orchestras in promoting the sector.
- 3.43. There has been much progress made on this front. Driven by Music Network, the programmes and pilots introduced to develop music education in Ireland present a key opportunity for RTÉ orchestras to re-engage with schools and youth audiences, not only to fulfil their public service mission but to cultivate future generations of orchestral audiences.
- 3.44. Our analysis in this section, concentrating as we do on comparisons with Ireland, may appear to paint a positive picture of orchestral health in the rest of Europe. It is important, therefore, to stress that orchestras everywhere have increasingly struggled to retain audiences and to stay afloat financially.

⁴⁹ The Finnish National Opera Orchestra also organised a concert for 950 children during this time-frame.

⁵⁰ Two (*The Place of the Arts in Irish Education* by Ciarán Benson, 1979 and *Deaf Ears* by Donald Herron, 1985) are summarised in the Appendices.

- 3.45. This is particularly true of the PSB orchestras, where falling audiences have emboldened numerous governments to target them for cuts and closures. Equally, Ireland has a host of other (non-orchestral) music traditions, many of which are well supported by healthy audiences and by public funding.

4. Current structure and performance of RTÉ's orchestras

Key points from Section 4:

- Since 2008, the orchestras have suffered a drop in their total income, mitigated somewhat by their ability to grow commercial revenues over these years.
- Funding pressures have had an impact both on employment – the two orchestras are currently understaffed – and on frequency of performances, with regional and educational performances in particular seeing cuts in recent years.
- These problems are compounded by a lack of consideration of the orchestras' roles within RTÉ, particularly in relation to their television and radio broadcasting contributions.
- The orchestras have been left in an unsustainable position of stagnation, lacking the resources and strategic planning needed to effectively fulfil a public service role.
- RTÉ's (and therefore the orchestras') income is unlikely to return to 2007-8 levels in the medium term, thanks to a weak outlook for TV and radio advertising sales and continued pressures on licence fee receipts. In any case, incremental income (e.g., from reform of licence fee collection) would have many claimants, including the many areas of RTÉ which endured deeper budget cuts than the orchestras, such as drama programming, original content expenditure, technology and the TV division as a whole.

- 4.1. RTÉ's two orchestras are part of the performing groups division, which includes the Contempo Quartet and two choral groups (RTÉ Philharmonic Choir and the children's Cór na nÓg).

Current structure and governance

- 4.2. Each of the RTÉ orchestras has its own general manager (although the RTÉCO post is filled on an interim basis), and a number of administrative roles, including planning, marketing and library services. There are several shared administrative positions across the two orchestras, including Finance and Human Resources ('HR'), and a current Head of Orchestras (filled part time by the head of lyric fm). There are a number of management and administrative vacancies currently and [redacted].
- The RTÉNSO has 68 full-time players currently, with 11 vacancies, well below its historical level of c90. The RTÉCO has five vacancies, and a current complement of 40 players, compared to a historical level of 45. Neither has a full-time principal conductor (although there are plans to recruit in this area currently).
 - RTÉ has instituted a voluntary redundancy scheme, for which several members of the orchestras have applied. The offers to these individuals have been suspended pending the findings of this Review.
- 4.3. Under the planned re-structuring of RTÉ, there are two key operating divisions related to the orchestras – Content and Audiences – with the orchestra Head reporting to the Director of Content. A new position, that of Head of Arts and Culture, is in the process of being filled. There is an intention to ensure clear communication lines between Audiences (responsible for determining expenditure on a genre basis in line with audience needs) and Content (responsible for making and/or commissioning programmes).
- 4.4. Under the current Strategy Review (the results of which have not yet been published), RTÉ has identified a number of priority areas, of which arts and culture is one. Orchestras fall within this strand.
- 4.5. The orchestras do not appear to be fully integrated into the planning and strategy of RTÉ and this has been both negative (lack of attention of senior management, little sense of co-ordination with commissioning editors) and positive (greater degree of autonomy). Owing in large part to the (unavoidably) high proportion of total costs associated with staffing, the orchestras have seen their funding decline by less than many other content areas of RTÉ – for instance, drama, entertainment and kids).⁵¹

⁵¹ See paragraph 4.49.

- 4.6. lyric fm has no obligation to broadcast the orchestras' concerts. In any event, to fill the lyric fm schedule, RTÉ is obliged to secure a significant number of concerts from other orchestras internationally, via arrangements with the EBU, to supplement the relatively few concerts available in house. There is very limited use of RTÉ orchestral services by other RTÉ stations and channels.
- 4.7. The RTÉNSO performs a classical repertoire, with some more popular pieces (of late, orchestra members report a trend toward popular and away from 'serious' classical); the RTÉCO has a varied mix of musical genres. Both have worked with Irish Opera, and the RTÉCO has performed at Electric Picnic, working for example with 2FM DJ Jenny Greene in a concert of 90s club music.
- 4.8. The orchestras are meant to work closely with the NCH to agree performance schedule and to avoid any potential clashes (for instance, with performances by visiting international orchestras), although this has not always been the case.⁵² RTÉ pays the NCH a facilities fee and a share of box office receipts.
- 4.9. Obligations of the orchestras are contained in the Annual Statement of Performance Commitments ('ASPC') and published in the RTÉ annual report. In the past, metrics included commitments around new music and education, but have coalesced in recent years to a simple threshold or target of concert attendees. Curiously for orchestras operated by a PSB, there are no reach or viewing metrics included, nor have there ever been, in the ASPC. A historical comparison of these measures is included in the Appendices.

Current strategy and clarity of purpose

- 4.10. Despite recent periods of creative ambition and clarity, RTÉ musicians complain that currently there is no sense of direction for either orchestra. We agree that it is hard to discern a strong and distinctive artistic vision for the orchestras.
- 4.11. Its absence risks confusing audiences about the repertoire and brand values of each orchestra. It also results in players becoming weary and cynical despite their evident care for their work.
- Those in the RTÉNSO, for example, complained of feeling creatively disempowered and demoralised.
 - RTÉCO staff were more optimistic and emboldened by their vital part in Electric Picnic. However, they all wanted a stronger sense of what they were for and who they were serving.
- 4.12. As we have seen, most radio orchestras in Europe have deep connections with their broadcasting parent companies. They were created for broadcasting and it remains the most effective and efficient way for them to reach relatively large audiences and take them on journeys of exploration and pleasure.
- The well-funded BBC, for example, has five orchestras, including a Concert Orchestra, a Chorus and the BBC Singers. They provide material predominantly for broadcast on Radio 3 or Radio 2 for the Concert Orchestra.
 - The Concert Orchestra also provides the music for Strictly Come Dancing and other TV shows. The orchestras provide over 350 deliveries a year for Radio 3 some of which is newly commissioned. The Controller of Radio 3 argues that live music of the same breadth and quality would be unavailable to buy and what was available, would cost more.
 - The PSB orchestras in many other international territories are likewise intricately tied in to the output of the broadcasting parent.⁵³
- 4.13. Neither of RTÉ's orchestras has anything like a secure broadcast home. Lyric fm broadcasts seven hours a week of RTÉ orchestras including a weekly Friday concert by the RTÉSO. However, other concerts are sometimes not even recorded because of a lack of engineering staff, following cutbacks since the recession.

⁵² Management reports improvements in communications between the orchestra management and the NCH in recent periods.

⁵³ See Section 3, above, for further details on the activities of PSB orchestras in international territories.

- 4.14. This unusual separation of the radio orchestras from broadcasting is reflected in their ASPCs, which have nothing to do with the orchestras' on-air performance.
- 4.15. Until the cutbacks at RTÉ after 2008, the orchestras toured Ireland widely and contributed to educational events. Both activities were an important part of their public service mission of exposing audiences of every age to live orchestral music. Today, these activities are much reduced in frequency, adding to the lack of vision and purpose for the orchestras.
- 4.16. There have been damaging operational consequences to the absence of an artistic vision for the orchestras. It has led to self-defeating competition between them with little sharing of information about future plans with each other or even with lyric fm. There have also been problems in communication between the NCH and the RTÉNSO over shared planning, though we were told that this had eased recently. Another consequence had been the development of a highly charged, inward and mistrustful culture in the orchestras which many people described to us and which in itself does not foster creative ambition.

Current composition and output

Broadcast output

- 4.17. lyric fm broadcasts around 135.5 hours of classical music per week, of which 120 hours (71% of total broadcast hours) are orchestral music. RTÉ's orchestras are responsible for a small portion of this output: in November 2017, they featured for around seven hours per week on the station (6% of lyric's total orchestral hours and 4% of its total broadcast hours).⁵⁴ Management estimates that around 70% of RTÉNSO and 20% of RTÉCO performances are recorded each year; the lack of dedicated sound engineers, leaving the orchestras to compete for central RTÉ resources, is cited as a major impediment to increasing recording frequency.
- 4.18. The remaining orchestral hours on lyric fm are filled with recordings from other orchestras, including those associated with EBU, whose content is available for a (very economical) fee. In 2016, RTÉ made 42 offers of recordings to the EBU and ordered around 1,100 concerts (one of the highest numbers of orders from a single broadcaster). While it may appear that RTÉ is overly dependent on EBU material, it is important to note that lyric fm's extensive schedule of classical music could never be wholly delivered by its own orchestras, even at full strength and with all performances recorded and/or broadcast.
- 4.19. The RTÉNSO rarely appears on television. The RTÉCO appears on several RTÉ programmes throughout the year, although this is dependent on broadcasting needs and scheduling; there are few guarantees of television appearances throughout the year for either orchestra.

Figure 24: Summary of TV and radio broadcasts for the RTÉNSO and RTÉCO

RTÉ National Symphony Orchestra TV and radio broadcasts	<ul style="list-style-type: none"> ▪ Many RTÉNSO performances are broadcast live on lyric fm, including the Friday subscription concerts during the September-May main season, the New Year's Day concert, and Tuesday lunchtime concerts in June and July. ▪ Other RTÉNSO broadcasts include performances which are recorded and then broadcast at a later date – such as performances in the New Music Dublin Festival – and specific studio broadcasts, such as those for 'Classic Drive' with Lorcan Murray. ▪ The Easter Sunday concert is televised live on RTÉ One and broadcast on RTÉ Radio 1.
RTÉ Concert Orchestra TV and radio broadcasts	<ul style="list-style-type: none"> ▪ As befits its role as a cross-genre ensemble, the RTÉCO has diverse distribution channels within RTÉ. ▪ Across 2016 and 2017, the orchestra appeared on twenty radio shows broadcast by lyric fm, Radio 1, and 2FM, including regular slots with Niall Carroll in August and Electric Picnic coverage on 2FM.

⁵⁴ RTÉ were unable to provide data for a longer period.

- Over the same period, the RTÉCO made fourteen TV appearances across both RTÉ One and RTÉ2; the Late Late Show was the most frequent user of the orchestras services, with four performances over the two years.

Public performances and attendances

- 4.20. From our conversations with orchestra players and staff, there is a clear view that a reduction in the number of public performances has had a detrimental impact on public value and orchestral competence. Budget cuts and a lack of planning, scheduling, and coordination were suggested most frequently as causes of this decline in public performances. The number of performances has also been affected by a range of internal management issues, including gaps in senior positions.
- 4.21. Data from RTÉ confirm that total RTÉNSO and RTÉCO performances have declined since 2007, and significantly so since 2013. While the number of RTÉNSO performances has fallen every year since 2010, it only dropped below its 2007-8 level in 2016. The RTÉCO has followed a more varied path, although it too has been giving fewer concerts in recent years than at any time in the past decade.

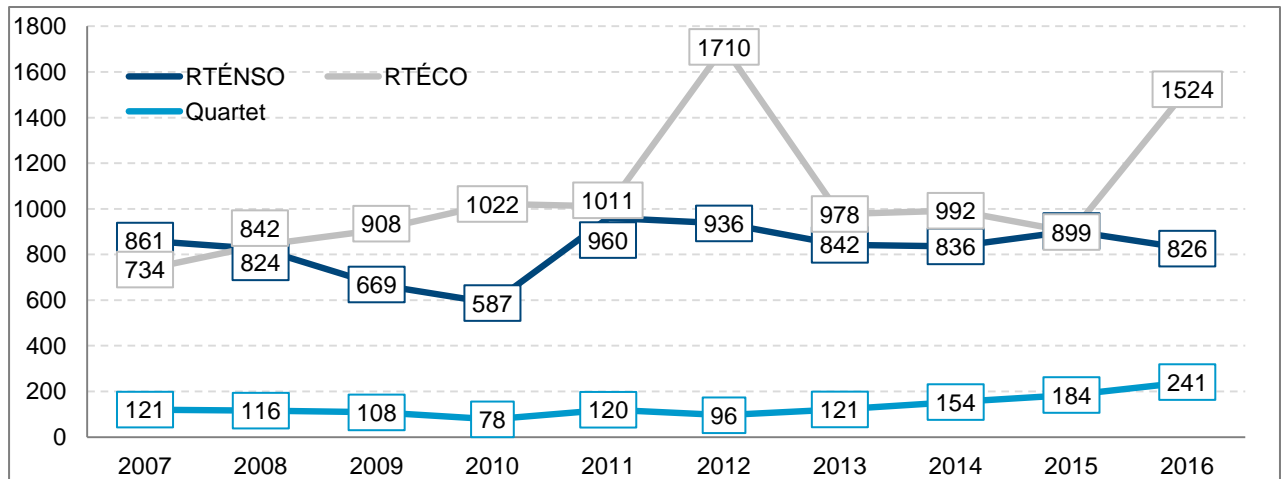
Figure 25: RTÉ Orchestras and Quartet total performances and attendances, 2007-16

	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016
Quartet performances	30	30	30	30	20	23	19	30	33	40
RTÉCO performances	80	83	78	78	71	87	95	82	61	69
RTÉNSO performances	64	62	78	85	83	77	76	70	68	55
Quartet attendances (000s)	4	3	3	2	2	2	2	5	6	10
RTÉCO attendances (000s)	59	70	71	80	72	149*	93	81	55	105*
RTÉNSO attendances (000s)	55	51	52	50	80	72	64	59	61	45

Source: RTÉ. Excludes educational events; includes regional performances. *Several RTÉCO performances in 2016, such as the Christmas Ball, Electric Picnic and 3Arena with Jenny Greene, attracted above average levels of attendance. In 2012, the Eurcharist Congress (RTÉCO) attracted an audience of 70,000 and contributed towards a significant rise in attendances that year.

- 4.22. While the number of total performances given by the two orchestras has fallen, attendances have fared better, with the number of attendees at each performance rising across the board. However, since 2011/12 the total attendance has become more closely correlated with number of performances, particularly for the RTÉNSO and Quartet where the relationship is nearly linear – that is, RTÉNSO attendance has been dropping in line with its number of performances, with the reverse true for the Quartet. If the number of RTÉNSO performances continues to drop, it is likely that the live audience would fall at a similar rate (although a “floor” of loyal, repeat attendees may help weaken the correlation).

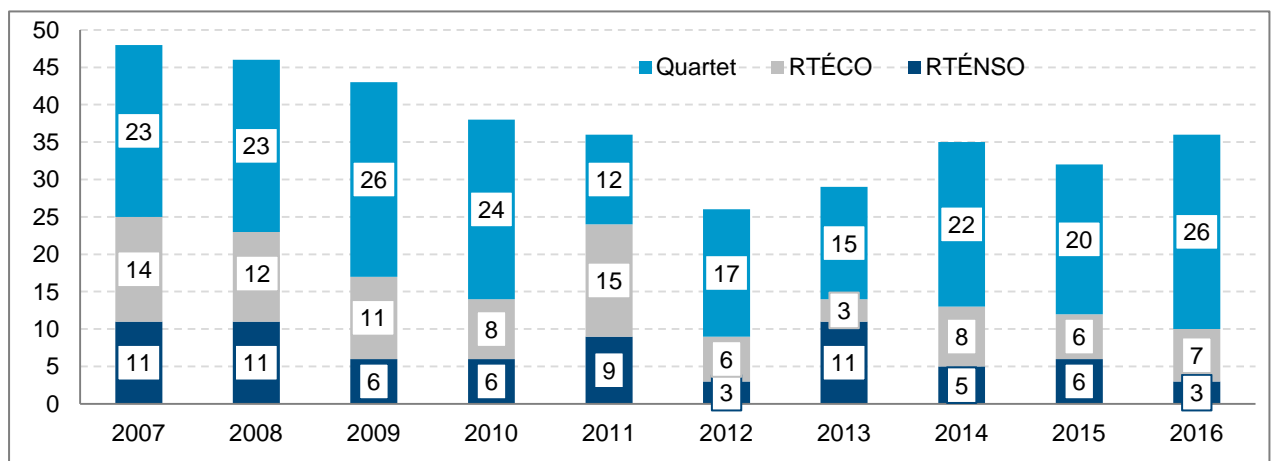
Figure 26: RTÉ Orchestras and Quartet average attendance per performance, 2007-16



Source: RTÉ. See notes for figure 25 regarding 2012 and 2016.

4.23. Perhaps most notable – both from our conversations with stakeholders and RTÉ’s data – has been the steep reduction in regional (i.e. non-Dublin) performances given by both the RTÉNSO and RTÉCO. The Quartet is now playing a far larger proportion of all RTÉ regional performances, suggesting that budget cuts have been a significant contributor to this trend.

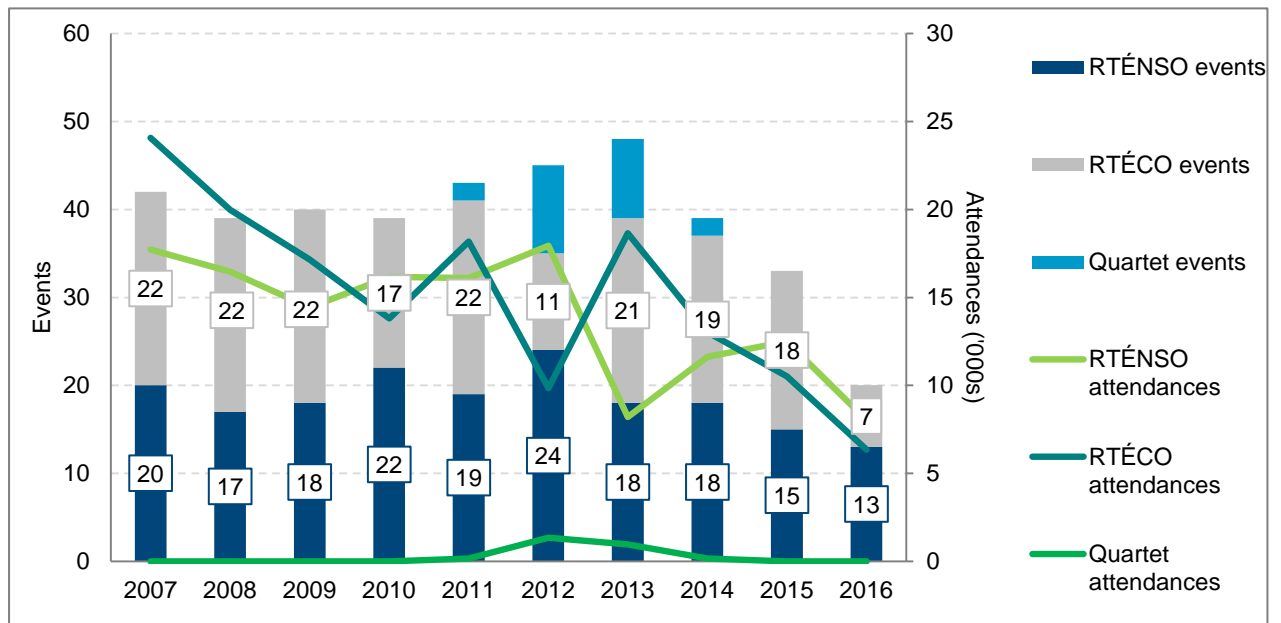
Figure 27: RTÉ Orchestras and Quartet regional performances, 2007-16



Source: RTÉ. Excludes educational events.

4.24. The orchestras’ educational outreach activities have also suffered significantly since 2007; both the number of events and total attendances have more than halved for the two orchestras combined. Although 2016 was a particularly poor year and distorts the figures somewhat, the downward trend had already been established, especially in attendances.

Figure 28: RTÉ Orchestras and Quartet educational outreach events and attendances, 2007-16



Source: RTÉ.

Commercial recording output

- 4.25. RTÉ's orchestras have a long history of producing commercial recordings. The Naxos website lists sixteen RTÉNSO CDs in its catalogue, Amazon sells thirty-seven CDs by or featuring the RTÉNSO, while Spotify offers fifty-one RTÉNSO albums, the majority of which were recorded by Naxos/Marco Polo in the 1990s and early 2000s. The RTÉCO has twenty-four albums on Spotify, thirty-seven CDs on the Naxos website, and fifty-four CDs on Amazon.⁵⁵
- 4.26. Both orchestras continue to schedule recording days – eighteen for the RTÉCO and nineteen for the RTÉNSO across 2016-17. While the RTÉCO has been engaged for a diverse array of recordings, from film soundtracks to a promo for the RTÉ Player, the RTÉNSO has recorded almost exclusively for the lyric fm record label over the past two years (with two exceptions – Disney and Naxos).

Operational issues – staff vacancies

- 4.27. Orchestras all have a certain number of vacancies. Some symphonic repertoire (such as Mahler's 8th Symphony, which uses 120 musicians) force even full-strength orchestras to augment their numbers with outside musicians. They also augment when they have inevitable gaps caused by short-term illness, long-term sickness (the physical strain of long-term professional playing is significant) or delayed recruitment. Gaps are temporarily filled by freelance musicians.
- 4.28. Today, RTÉ's orchestras have a combined vacancy rate of 16, which is high. Eleven of those vacancies are in the RTÉNSO. Orchestras are living creative entities which need intimacy between their different sections to deliver consistently good work. This is difficult when parts of the orchestra are in flux.
- 4.29. This flux has been unintentionally exacerbated by RTÉ's decision to agree to include its musicians in its voluntary redundancy scheme – an inclusion sought by the players' trade union. This increases the likelihood of the random, permanent closure of musical roles which are essential for a fully functioning orchestra. In law, redundancy is about the closure of posts and roles, not about the departure of the individual within a role.

⁵⁵ Data correct as of 23/01/2018. Figures may change as albums are added and removed from catalogues.

- 14 members of the orchestras and [redacted] have applied for voluntary redundancy.
 - RTÉ has now suspended their inclusion in the Exit Scheme, awaiting the outcome of this Review. However, it is not clear whether the original commitment to let them go will be legally binding.
- 4.30. Neither orchestra has a Principal Conductor although the RTÉNSO is actively trying to recruit one. This leaves both of them creatively adrift.
- 4.31. All external orchestra managers we spoke to emphasised the importance of a good Principal Conductor who is trusted by musicians and audiences. He or she develops the orchestra's character, self-confidence, ambition and ultimate professional reputation. Principal Conductors who communicate well with the general public add huge extra value. Some European PSBs have built TV and radio series around their Principal Conductor.
- 4.32. One large PSB told us it paid €140,000 per annum plus top-ups for special concerts to their Principal Conductor. Others said this would be a low figure for this critical role. Rising stars might accept less money from RTÉ but every conductor wants to know the orchestra's creative direction of travel. As one experienced manager said to us, "name me a successful orchestra not led by a clear artistic vision."
- 4.33. The RTÉ orchestras have a 36% vacancy rate in Management and Administration (5 unfilled roles plus [redacted]). We were told that this results in hand-to-mouth planning with little time for effective coordination or communication.
- 4.34. The current high vacancy rate, the absence of two Principal Conductors and the uncertainty over the Exit Scheme with its potentially damaging impact on the make-up of the orchestras all serve to demonstrate that the current situation is unsustainable even as a medium-term holding operation.

Operational issues – staff terms and conditions

- 4.35. RTÉ's musicians have their own Terms and Conditions. They were developed partly to protect the health and well-being of players so they have time to practise, rehearse together and rest. As RTÉ has faced further tightening of its finances, some of the Terms and Conditions agreed in 1999 between the broadcaster and SIPTU (to which the Musicians Union of Ireland is affiliated) now look like road blocks to the ability of the orchestras to develop deeper relationships with their audiences.
- 4.36. In particular, the provisions covering performance away from base (Dublin) were cited to us by both musicians and management as getting in the way of either orchestra going out on the road in their own country to perform concerts or do educational engagements.
- 4.37. With the financial crash of 2008, RTÉ reduced the frequency of regional tours which often included an educational element. It could no longer afford the subsistence payments to musicians which were triggered when they worked very long days.
- 4.38. To avoid these extra payments, the broadcaster limited the orchestras to the Ten-Hour Day touring provision in their contracts: they must travel, rehearse, perform and travel back within ten hours. Time is calculated from the time of departure from base to time of return to base. In practice, the Ten-Hour Day effectively precludes the orchestras visiting much of Ireland.
- 4.39. Yet we found genuine enthusiasm among musicians for touring and for their former education work. Managers and Unions should capitalise on this enthusiasm to build more flexibility into the musicians' contracts over touring and education.
- 4.40. Beyond the formal Terms and Conditions, custom and practice has developed which adds extra complexity to planning the musicians' time. This is not unusual with orchestras. At least one major PSB has recently reviewed its musicians' Terms and Conditions with a view to modernising them. Against its own expectations, it concluded that the contracts were largely fit for purpose but custom and practice were not and needed to be overhauled.

- 4.41. Whatever the outcome of the current Review, RTÉ should consider reviewing the operational custom and practice of its orchestras as it seeks greater flexibility over the Ten-Hour Day. We make this point in section 6: Options for reform, below.⁵⁶

Funding model and financial issues

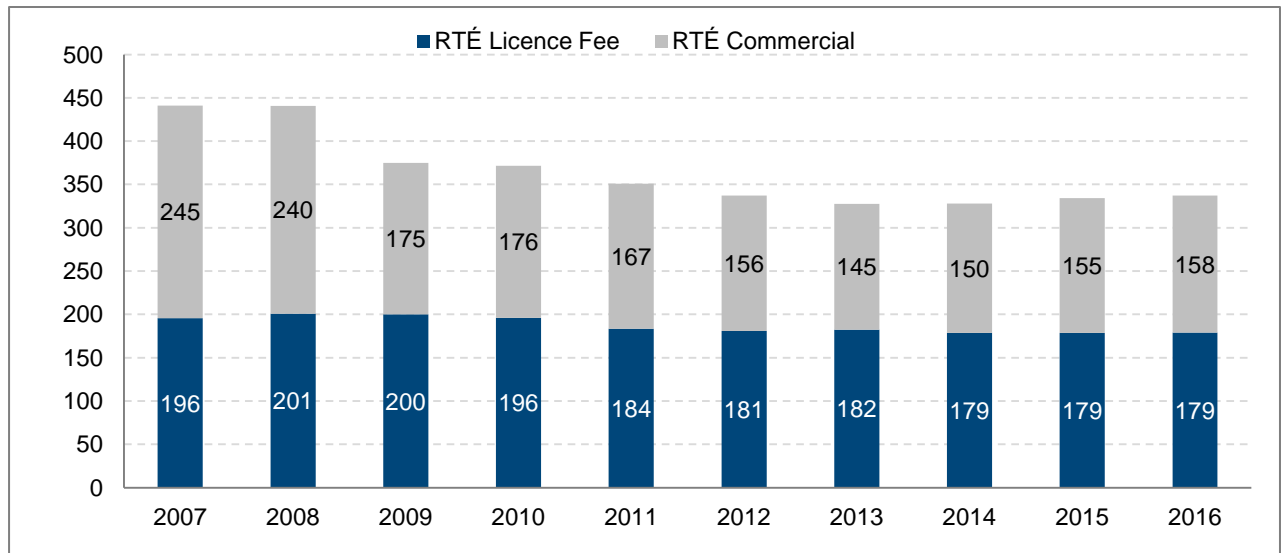
- 4.42. In 2016, RTÉ's Orchestras, Quartet and Choirs had combined operating costs of €15.6m, which were funded by two revenue sources, commercial income (19%) and licence fee contributions (81%).⁵⁷ Under the current model, RTÉ will centrally pay for any costs which the groups incur above their commercial incomes. These central payments are labelled "licence fee revenue attribution" in RTÉ's annual report, and – in recognition that public money is necessary to support services which are not self-sustaining – the difference between the gross cost of providing the service and the commercial income generated is recorded as the "Net cost of public-service".
- 4.43. The split between commercial income and licence fee contributions is budgeted based on forecast commercial revenue; any budgetary oversteps are met centrally by RTÉ (and any undershooting leaves more money to pay for other services).
- 4.44. Both orchestras generate far higher levels of commercial revenue than any non-RTÉ orchestras in Ireland, with the RTÉNSO making just over €1m and the RTÉCO bringing in over €1.7m in 2016 through a combination of recording fees, orchestra hire, programme sales, and box office receipts. By comparison, the Irish Chamber Orchestra, with around €330k of commercial income in 2016/17, was the best-performing non-RTÉ ensemble.
- 4.45. Given the structural position of the market – demand for live and recorded music is relatively low compared to other art forms and genres, and the cost of producing that music is high (primarily due to the requirement to employ a sufficient number of qualified musicians) – the commercial revenues generated by RTÉ's two orchestras are never likely to be able to fully cover their costs.⁵⁸ This dynamic is recognised by governments and PSBs throughout Europe, who contribute through various means to their national orchestras' finances (as we saw in detail Section 3: International provision of orchestras).
- 4.46. RTÉ's income has suffered significantly over the past decade, with an improvement in commercial revenue (and to a lesser extent licence fee income) from 2014 unable to lift the organisation's income back to 2007-8 levels.

⁵⁶ See paragraph 6.60.

⁵⁷ RTÉ Annual Report 2016.

⁵⁸ lyric fm – which broadcasts mainly classical/orchestral music – is in a similar position: in 2016 commercial income covered just under 8% of the cost of providing the service.

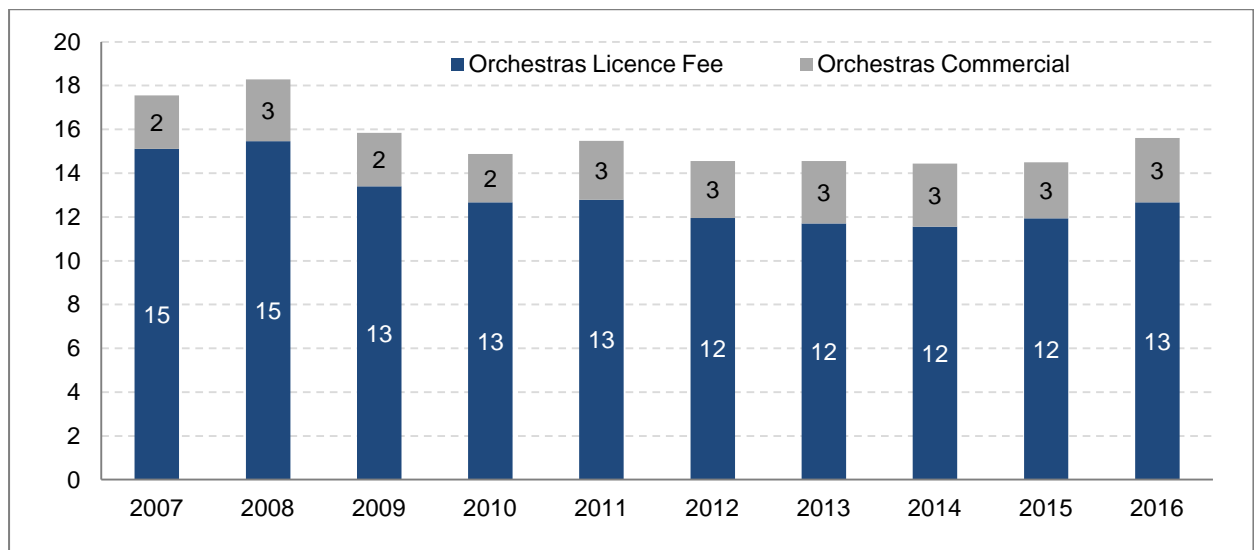
Figure 29: RTÉ group income by revenue stream, 2007-16 (€m)



Source: RTÉ Annual Reports.

4.47. These financial challenges flowed down to the performing groups, which have seen a cut in total income from a high of €18.3m in 2008 to €15.6m in 2016, with a low of €14.4m in 2014.

Figure 30: RTÉ orchestral income by revenue stream, 2007-16 (€m)

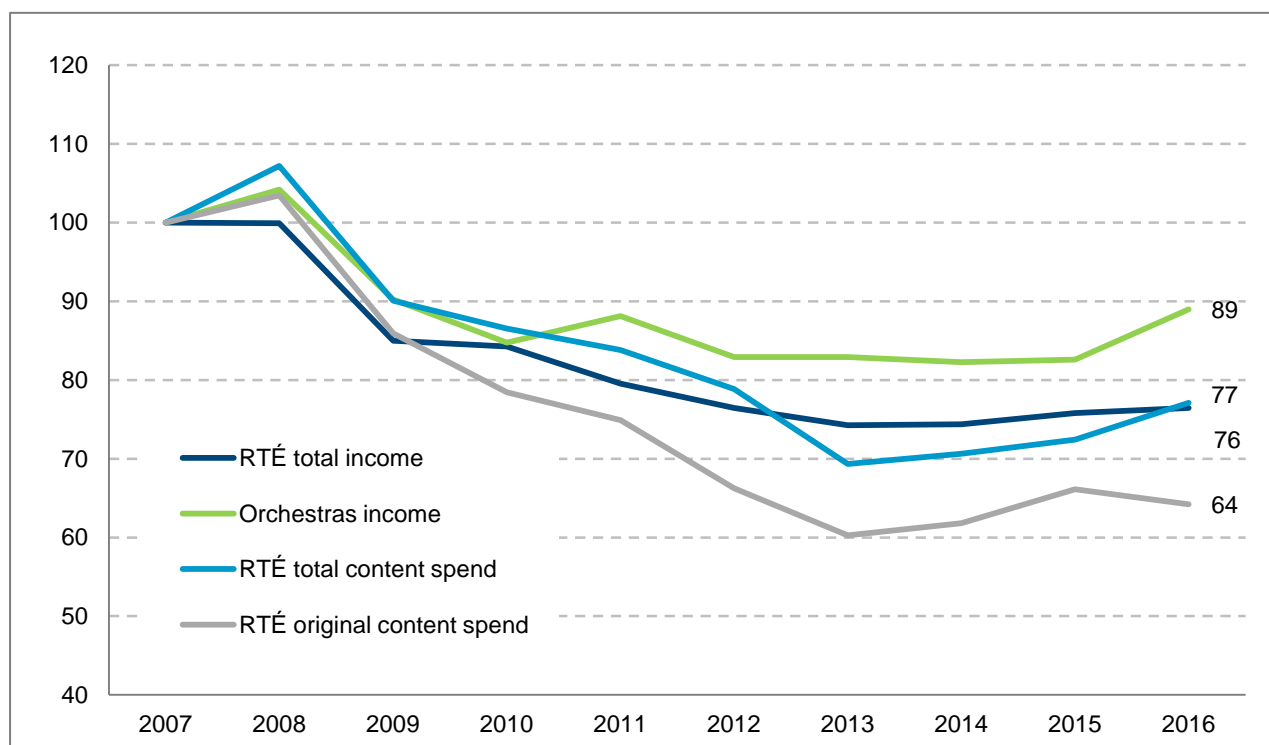


Source: RTÉ Annual Reports.

4.48. While the financial impact on the orchestras division has been significant, RTÉ as a whole and many of its expenditure categories have experienced deeper cuts. As the chart below shows, the orchestras managed to stabilise their income after an initially steep drop, while RTÉ’s income and its content expenditure suffered further cuts into the early 2010s. This divergence is due, at least in part, to two factors:

- The orchestras were able to increase their commercial income over the period (at a compound annual growth rate of 2.1% from 2007-16);

- The nature of their cost base and funding model necessitates a high number of salaried individuals for quality output, so there are limited non-staff costs that can be cut and restrictions on how far staff costs can fall before the output is seriously affected.⁵⁹

Figure 31: RTÉ group income, selected expenditure, and Orchestras income, 2007-16 (2007=100)


Source: RTÉ Annual Reports.

- 4.49. When compared to other parts of RTÉ, including public service genres in TV and radio, the orchestras have seen their funding relatively protected.

Figure 32: RTÉ group income and selected expenditure, 2007 and 2016

Category	2007 (€m)	2016 (€m)	CAGR
RTÉ group	441.2	337.3	-2.9%
Orchestras	17.6	15.6	-1.3%
Total TV	242.9	184	-3.0%
Total Radio	69.2	56.5	-2.2%
Total content	316.2	243.8	-2.9%
Original content	174.9	112.3	-4.8%
Drama	40	21.8	-6.5%
Religious	4.6	2.4	-6.9%
Factual	43.6	29.1	-4.4%
Young people's	16	5.9	-10.5%

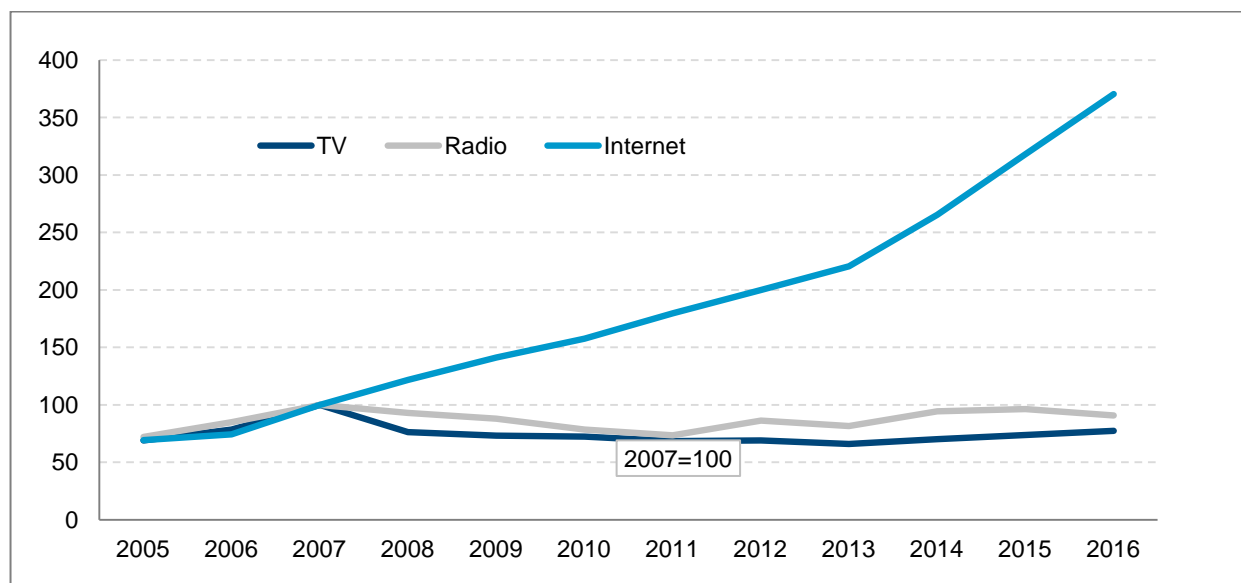
Source: RTÉ Annual Reports.

- 4.50. Despite moderate revenue growth since 2014, RTÉ is unlikely to see its revenue fully recover to 2007-8 levels in the medium term.

⁵⁹ Staff related costs (excluding fees) accounted for 74% of total operating costs in 2016 (source: RTÉ). A 2014 review of RTÉ by NewERA for the Department of Communications, Energy and Natural Resources found that, '...the majority of [orchestra] costs are staff costs and it is not an area where efficiency gains can be easily achieved': <https://www.dccae.gov.ie/en-ie/communications/publications/Documents/71/NewERA%20Review%20of%20RT%C3%89.pdf>.

- The outlook for TV and radio advertising sales – which began to be substituted for digital advertising with increasing vigour during the recession – is challenged, while licence fee collection continues to be hampered by evasion and the number of homes claiming no TV set (thus exempt from payment).

Figure 33: Irish advertising market revenues (2005-16) – rebased to 100



Source: ZenithOptimedia. Nominal values.

- Political will to broaden the definitions underpinning the licence fee or change the collection method may increase this form of income over the medium term, although there will be many claims on any incremental revenue derived from a reformed licence fee and any money that does flow through to RTÉ is unlikely to be enough to return total income to pre-recession levels.
- 4.51. Ultimately, the financial pressures facing RTÉ as a whole have left the orchestras in an unsustainable position: they are unable to foster sufficient commercial demand for their output (and as the only major orchestras in Ireland they have a unique responsibility – or burden – to drive demand for orchestral music throughout the whole country); nor do they have the resources required to fulfil their public service mandate adequately.
- 4.52. We expect the current one-year and five-year reviews of PSB funding, and in particular the analysis of RTÉ's position, will support our view that RTÉ's financial challenges remain acute, and that it will need to make difficult choices around its funding commitments in the short to medium term.⁶⁰
- 4.53. It is revealing that the Oireachtas Committee on Communications has recommended changes to the collection of the licence fee and other measures aimed at improving funding of Public Service Media in recognition of structural and financial challenges facing key PSB players.⁶¹ However, these proposed reforms to licence fee collection and other measures are unlikely to be completed until 2019-20 at the earliest.
- 4.54. Recognising both that the position of the orchestras is unsustainable and that RTÉ's financial outlook is unlikely to improve sufficiently in the near to medium term, further work is needed to establish a sustainable operating model for the future. The available options are considered in Section 6 below. We turn first to a consideration of the reviews that have been held in Ireland and internationally.

⁶⁰ The annual review and the five-year review are currently being completed by the BAI with the support of external consultants. The BAI is also currently producing its own market review (the "Broadcasting Services Strategy"), informed by a research report provided by Mediatique, co-authors of the present Review.

⁶¹ https://data.oireachtas.ie/ie/oireachtas/committee/dail/32/joint_committee_on_communications_climate_action_and_environment/reports/2017/2017-11-28_report-on-the-future-funding-of-public-service-broadcasting_en.pdf.

5. Other reviews of orchestral provision in Ireland and elsewhere

Key points from Section 5:

- The *PIANO Report* of 1996, commissioned by Government, is particularly well known for first advocating the removal of RTÉNSO from RTÉ and drawing up a blueprint for placing it under the care of an independent Board with financing (over time) to come directly from government.
- *Missing a Beat* (a report commissioned by the Arts Council in 2010) constituted an update on the *PIANO Report*, and made further recommendations, especially in key areas such as: audience development; financial and structural support for orchestras (and other performing groups and ensembles); and greater opportunities for emerging Irish talent.
- There have been comparable reviews in countries around the world, including Australia, Belgium, Canada, Denmark, France, Germany, the Netherlands and Switzerland. Various outcomes have resulted.
- Whilst they do not serve as perfect examples for RTÉ to follow, given the unique nature of the Irish orchestral landscape, they highlight the degree to which PSB radio orchestras around the world are increasingly faced with an existential threat, requiring them to contemplate significant reforms.

5.1. There have been several reviews of orchestral provision in Ireland over the years, as well as a number of formal reviews of orchestral funding and configuration in many international territories. We have summarised the key lessons from these reviews in this section.

Previous reviews of orchestral provision in Ireland

- 5.2. As mandated in the Arts Act 2003, the Arts Council regularly supplies the government – via the Department of Culture, Heritage and the Gaeltacht – with up-to-date information on the state of the arts and culture sector and policy recommendations for the industry.
- 5.3. Between them, the Arts Council and the Department have commissioned and published two significant reviews pertaining directly to the orchestral sector in Ireland in the past two decades: the Department's *PIANO Report* (1996) and the Arts Council's *Missing a Beat* (2010).⁶²
- 5.4. Both provide a high level of detail on the contemporary landscape for Irish classical and orchestral music and, particularly pertinent for this review; both define what a healthy orchestral sector might look like specifically in an Irish context.
- 5.5. We summarise below the two main reviews of orchestral provision in Ireland – the *PIANO Report* and *Missing a Beat*; summaries of other relevant reviews are included in the Appendices.

Provision and Institutional Arrangements Now for Orchestras and Ensembles (PIANO Report)

- 5.6. Completed in 1996 after a long process of information-gathering, the report was set up to review the roles of RTÉ's Performing Groups, to make programming recommendations, particularly in relation to commissioning and to review the provision, resourcing and future possibilities for orchestras in the island of Ireland.
- 5.7. The report called for the RTÉNSO to be divested from RTÉ and formally recognised as a National Institution of primary cultural importance with legislation drawn up to ensure its continued existence.
- 5.8. It was envisaged that an independent Board of governors would oversee the orchestra's management, with nominees from RTÉ providing a strong link between broadcaster and Board. Their first priority would

⁶² The Arts Council has published reviews relating to relevant aspects of the sector, not least: *The Place of the Arts in Irish Education* (1979), *Audiences, Acquisitions and Amateurs* (1983), *The Public and the Arts* (2006) and *Sounds New* (2006). These are summarised in the Appendices.

be to restore the orchestra to 93 full-time musicians and increase the number of named roles within the orchestra itself.

- 5.9. *PIANO* anticipated a funding arrangement agreed between RTÉ and the government such that the licence fee continued to be the RTÉNSO's primary source of funding in the medium-term but, long-term, direct governmental funding would supersede it as a more appropriate mechanism.
- 5.10. As national institutions with public service remits, both RTÉ and the NSO would have particular responsibilities to the general public: RTÉ should agree to broadcast a significant proportion of the Orchestra's output on radio and television, and the NSO should boost significantly its touring schedule, both nationally and internationally.
- 5.11. With regard to the RTÉCO, Vanbrugh String Quartet, National Chamber Choir, Philharmonic Choir, Cór na nÓg and Chorus, *PIANO* recommended that they should stay within RTÉ albeit with much more tightly focused strategies and streamlined management. The departure of the NSO would relieve some of the funding and administrative pressures on the remaining Performing Groups, allowing them to align more coherently with RTÉ's own broadcasting and public service objectives. This would involve raising the profile of the Groups, streamlining of ensemble management and bolstering the role of national touring and, for some, international touring.
- 5.12. The report likewise recommended more funding for commissions from the Arts Council, which had previously seen this as outside its remit, as well as increased funding for arts infrastructure, venues (particularly in the North West and South West) and in music education.

Missing a Beat: Bridging Ireland's Orchestral Gaps: A Review of Orchestral Provision in Ireland

- 5.13. Written by Fergus Sheil in 2010, the review provides a full overview of orchestral activity in Ireland and makes recommendations as to how the sector can be protected, using both international case studies as examples of good practice and an analysis of current Irish provision to develop a coherent and long-term strategy for ensuring the survival of key operators and the sector as a whole.
- 5.14. The report demonstrates that, compared to the rest of Europe, orchestral provision in Ireland is relatively sparse. Indeed, this is also true of the infrastructure that surrounds orchestral provision, including music education in primary and post-primary schools and the condition of key venues in Dublin and regionally. The report also identified lack of funding from local authorities for local orchestras.
- 5.15. Professional training for musicians is further compromised by a lack of critical mass and the fragmentation of services meaning fewer Irish composers, conductors and players in the pipeline and greater difficulty in retaining players within the country.
- 5.16. Through case studies, the report showed that national and regional touring is often a core feature of publicly-funded orchestras' work (usually a prerequisite for public funding), education and outreach is a key activity either for self-promotion or within a wider framework of music education and arts accessibility policy, and finally, that public funding for orchestras is usually much more diversified, coming directly from government, from licence fee funding via PSBs but also from local authorities and city councils – most usually a blend of all three.
- 5.17. The report made many recommendations for the consideration of the Arts Council to strengthen the viability of the orchestral sector in Ireland including:
 - Developing the professional orchestra sector, particularly outside Dublin, to promote a broader range of orchestral activity throughout the country;
 - Encouraging and facilitating more meaningful relationships between orchestras and their audiences through education and outreach work;
 - Promoting Irish orchestras through new media (podcasting, streaming, social media) and through facilitating commercial recordings;

- Developing music education and training facilities both with primary and post-primary schools and at higher education levels, and the provision of training and mentoring schemes for emerging conductors;
- Supporting Irish repertoire through commissioning grants and composer initiatives;
- Working with other stakeholders to harness existing resources, create synergies and maximise the effect of policy interventions; and
- Mandating the Arts Council to adopt a leadership role in relation to the threats facing the orchestral sector.

Lessons from previous reviews in Ireland

- 5.18. The broad similarities between the two previously published reports paint a picture of consensus on the state of the Irish orchestral sector and potential remedies.
- *An improved pipeline for emerging Irish talent:* encompassing greater access to bursaries and grants to facilitate professional development, a coordinated approach from existing orchestras to provide professional opportunities for talented musicians (e.g. solos, conductor training, commissions from emerging composers), increased support for performances (particularly of contemporary Irish repertoire), and increased commissioning grants to foster the next generation of Irish classical and orchestral music;
 - *Bringing RTÉ orchestras back up to full-strength:* revitalizing the orchestras with additional musicians and a clear strategy to set out its public service remit, including the restoration of regional touring (and a concomitant renewed focus on regional audience development), codified broadcast obligations across RTÉ platforms (including radio, TV and online) to ensure visibility and nation-wide accessibility, the implementation of outreach work, particularly in currently underserved communities (outside Dublin) and in target groups (youth audiences) and possibly a degree of international touring;
 - *More support (financial and lateral) for the broader orchestral sector:* greater financial support for the creation and performance of Irish repertoire, incentives to contribute to audience development both at the local level (where local ensembles and groups are well-placed to expand the work they currently do) but also nationally and internationally, and finally, capital grants for venues and Arts Centres to ensure the longevity of local and national infrastructure for performance venues and touring;
 - *Audience development and outreach (particularly regionally):* including targeting children and young people through improved music education and access at primary and post-primary level, but also ensuring greater access to orchestras and orchestral music for the nation (focusing on currently underserved populations outside Dublin), a renewed commitment from the orchestras to serve regional audiences and to develop regional outreach schemes; and
 - *Clarified role for – and greater commitment from – the Arts Council and local authorities:* a commitment from the Arts Council to support orchestral music, via financial aid (in bursaries, commissioning grants, outreach grants and performance subsidies) for orchestras and musicians across the country and through greater engagement with the sector as a whole, and for local authorities to be empowered in developing their arts and culture responsibilities further through event support, continued capital grants and other strategies.

Lessons from reviews of orchestral provision in other countries

- 5.19. Other territories have not been immune to the pressures Ireland is facing and have had to address similar issues of funding, sustainability, and the role of broadcasters as custodians of major orchestras in their own ways.
- 5.20. A summary of the outcomes of recent reviews into PSB/radio orchestras in other countries can be found below.

Figure 34: Notable PSB/radio orchestra reviews

Country	Radio orchestras (PSB owner/funder)	Reviews and outcomes
Australia	None	<p>1994-2001: After several reviews, ABC's six regional orchestras were partially divested – they became wholly owned subsidiaries of ABC and retained strong broadcasting links, but gained financial, artistic and administrative independence.</p> <p>2005-6: The six state orchestras became fully independent, financed through a combination of state and federal government funding (through the respective arts councils), commercial income, donations, and sponsorship.</p>
Belgium	Brussels Philharmonic (VRT). Formerly BRT Philharmonic/VRT Radio Orkest	1991: RTFB disbanded its Nouvel Orchestre de la RTFB due to financial pressures. Before 1978, Belgium had one PSB with several orchestras; in that year, PSB governance was devolved to the language communities – Flemish, French and German.
Canada	None	CBC had several regional orchestras until federal government cuts in the 1980s. Vancouver remained, changing its name to the CBC Radio Orchestra (2000); it subsequently closed in 2008.
Denmark	Danish National Symphony Orchestra (DR)	<p>2014: DR announced that the Danish National Chamber Orchestra would disband in 2015. The National Symphony Orchestra would continue. (DR also maintains choirs and a big band.)</p> <p>The Danish National Chamber Orchestra relaunched in 2015 after a crowdfunding campaign raised donations from corporations and private individuals.⁶³ It remains a privately-funded orchestra.</p> <p>2017: Budgetary pressures prompted another governmental review of DR's use of public funding. The review found divesting all performing groups and the Concert Hall would have a detrimental effect on classical music provision in Denmark and recommended all were to remain with DR.</p> <p>2018: Government announced the planned abolition of the licence fee and a 20% cut in DR's budget (no details provided on the implications for the performing groups)</p>
France	<p>1. L'Orchestre National de France (Radio France)</p> <p>2. L'Orchestre Philharmonique de Radio France (RF)</p>	<p>2015: Budgetary pressures and a report from the Cour des comptes prompted talks of a merger of the two radio orchestras.</p> <p>Players and unions successfully resisted the move.</p> <p>2018: Speculation has again arisen on the prospect of a merger</p>
Germany	<p>1. Germany Radio Philharmonic Orchestra (SR/SWR)</p> <p>2. NDR Elbphilharmonie Orchestra (NDR)</p> <p>3. NDR Radiophilharmonie (NDR)</p> <p>4. Several other regional orchestras</p>	<p>2016: Amalgamation of Stuttgart Radio Symphony Orchestra and SWR Sinfonieorchester Baden-Baden and Freiburg, following budgetary pressures at SWR (which funded them both). The merged orchestra is called SWR Symphonieorchester.</p> <p>2007: Fusion of the two orchestras in Saarbrücken (SR) and Kaiserslauten (SWR) into a single ensemble – the German Radio Philharmonic Orchestra (SR&SWR), which plays at both locations.</p>
Netherlands	Radio Philharmonic Orchestra (Publieke Omroep, via Muziekcentrum van de Omroep (MCO))	<p>2010: Government proposed ending MCO's funding (and thus orchestras). Public opposition prevented this, but funding was cut by 60%.</p> <p>2013: As a result, Radio Kamer Filharmonie closed (it was itself a merger of the Radio Chamber Orchestra and Radio Symphony Orchestra (2005)). At the same time, the Metropole Orkest lost its PSB affiliation and was instructed to generate 50% of its income from commercial</p>

⁶³ Tom Service, 'Danish National Chamber Orchestra fights cuts by crowdfunding', *The Guardian*, 25/01/15, <https://www.theguardian.com/music/tomserviceblog/2015/jan/27/danish-national-chamber-orchestra-fights-cuts-crowdfunding>

Country	Radio orchestras (PSB owner/funder)	Reviews and outcomes
		sources; the rest would come directly from the government. The Radio Philharmonic Orchestra remains within the MCO (as does the Groot Omroepkoor – the radio choir).
Switzerland	1. Orchestra della Svizzera italiana (RSI) 2. Orchestre de la Suisse Romande (RTS)	2016: RSI announced that it was withdrawing some funding from OSI (from 2012 to 2016 its contribution had already dropped from around 45% to 25% of OSI's annual funding; further cuts were expected during 2017 ⁶⁴), leading to speculation that the orchestra may face closure. The orchestra is still performing and there has been little further public commentary on its status.

Source: orchestra websites and review documents, press reports, interviews with broadcasters.

- 5.21. Outcomes in these territories have included closure, corporatisation, consolidation and retaining the status quo. While examining the processes that other countries have undergone is useful, and in particular our interviews with representatives from other broadcasters have been instructive in considering the merits of different options, the solution RTÉ chooses must be one that is appropriate for Ireland and not simply an approach slavishly transplanted from another country.
- 5.22. All broadcasters have had to consider the place and role of the orchestras in their country. Ireland is in the rare position of having its only major orchestras under the control of the PSB, with no private or government-supported orchestras of a similar scale in existence. The closure of one orchestra, or a significant reduction in musical output, would have a disproportionately large effect on national orchestral provision compared to many other countries.
- 5.23. Furthermore, the underwhelming evidence of private support for existing RTÉ and non-RTÉ orchestras in Ireland (either through private individuals' ticket purchases and charitable contributions, recording fees, or corporate sponsorship) suggests that the private sphere alone could not be a sustainable custodian for the future. This is not an uncommon position: even in some countries where major orchestras have been divested from the PSBs, such as Australia and the Netherlands, the now 'private' orchestras still receive significant annual funds from central or local government.

⁶⁴ 'Orchestra della Svizzera italiana faces closure due to funding cuts', as detailed in various press articles, including in *The Strad*, 23/11/16, <https://www.thestrad.com/4204.article>.

6. Options for reform

Key points from Section 6:

- *Our review of the Irish market suggests that orchestral music, while a minority taste, has an important place in Irish culture, and that there is a deep dependence within Ireland on the two orchestras that are currently operated and funded by RTÉ.*
- *Our international review supports the view that orchestral music requires public funding and best achieves a role in cultural life if fully supported by broadcasters.*
- *Our analysis confirms that even status-quo funding is untenable if left solely to RTÉ. Its financial constraints remain severe.*
- *It is therefore difficult to envisage how both orchestras can be maintained even at current weakened levels of staffing and activity, let alone be brought up to historical strengths in terms of members, the appointment of new principal conductors, the resumption of active touring and an enhanced role in education – all desirable objectives.*
- *At the same time, having at least one orchestra controlled by RTÉ fulfils a number of public service objectives around the safeguarding of orchestral music, a role in education, regional presence and support for (minority) tastes in regard to classical repertoire.*
- *We consider a range of options for reform, including: the closure of both orchestras; a merger of the two; the closure of either the RTÉNSO or the RTÉCO; and the retention of both under either existing or new funding arrangements.*
- *Our emerging conclusion is that two orchestras are desirable but safeguarding them is a question not limited to RTÉ but for the wider constituents of cultural Ireland, including the Government.*

- 6.1 Our analysis of the Irish market suggests that orchestral music, while a minority taste, has an important place in Irish culture, and that there is a deep dependence within Ireland on the two orchestras that are currently operated and funded by RTÉ.
- Without them, there would be a serious reduction in the amount of orchestra music available in the Republic; indeed, there is every reason to believe that orchestral music provision would be dealt a mortal blow in the absence of the RTÉNSO and the RTÉCO (or a variation of these organisations), with damaging implications for broader Irish culture.
 - Ireland's classical musical legacy would almost certainly sink from view completely and its best musical talent would have to leave the country to practise their profession elsewhere. There would simply be less great music from the past and the present, which would benefit no one.
 - Going further, many believe the simple maintenance of the status quo (current funding for two wholly owned RTÉ orchestras) is not enough; they would prefer to see former levels of staffing and activity (touring, educational programmes) restored.
- 6.2 However, our analysis confirms that even status-quo funding is untenable. RTÉ's financial constraints are unlikely to be lessened in the short to medium term. Even in the event that the licence fee is more efficiently collected, and potentially applied to all households, it will be some time before any additional income is available.
- 6.3 Moreover, following several years of austerity – a time during which orchestras have been relatively protected – there are many other claims on any increased income (licence fee and commercial) that may become available to RTÉ over time. RTÉ will need to prioritise its expenditure plans accordingly, especially given the likely trend toward lower consumption of classical music (among younger demographics in particular) and pressures on broadcasting generally as a result of altered consumer preferences and the advent of new technologies.
- 6.4 RTÉ already intends to increase its commitment to some of the programme areas starved of expenditure in recent periods and cannot afford both to meet this planned expenditure and restore the orchestras to historical levels of staffing and activity. Its current business plan requires at least [redacted] in costs

savings from the orchestras' joint budget. Achieving this target via an uplift in commercial revenues would require a 75% increase from present levels.

- More broadly in the context of orchestral provision, commercial revenue does not on its own represent a viable solution, as important as it is for RTÉ to maximise this category. It is worth recalling (based on our market review and international benchmarking) that there is no basis for proposing that the orchestras be funded wholly through commercial revenues; even with a change in programming strategy, greater co-ordination with the broadcast arm of RTÉ and keener promotion, the market on its own would not sustain the costs of maintaining even one professional group, let alone two.
- There are no relevant examples, moreover, in any other country where classical orchestral music is sustained without public funds (or, as in the case of the US, significant charitable contributions).
- This is not to say that commercial revenues might not be higher in future; only that fully staffed orchestras cost more than any realistic commercial business could support.

6.5 It is therefore difficult to envisage how both orchestras can be maintained even at current weakened levels of staffing and activity, let alone be brought up to historical strengths in terms of members, the appointment of new principal conductors, the resumption of active touring and an enhanced role in education – all desirable objectives.

6.6 Our aim in this Review is to determine a means of placing the RTÉ orchestras on a firmer financial footing and safeguard – indeed augment – their role in providing orchestral (particularly classical) music well into the future. This objective informs our range of options as discussed in the remainder of this section.

Options for organisational change

6.7 We have considered a range of options for the administration of the orchestras, number of performances, extent of regional and educational activities as well as some variations in funding as appropriate. These options are being considered against key requirements in the Terms of Reference, namely: the impact on audience delivery, the effect on broadcast outcomes, the financial and operational implications and overall impact on governance.⁶⁵

6.8 The main options for reform are (including extreme cases):

- a) A closure of both orchestras;
- b) An amalgamation of the RTÉNSO and the RTÉCO;
- c) Closure of either the RTÉNSO or the RTÉCO; and
- d) Retention of both the RTÉNSO and the RTÉCO, under existing or new funding arrangements.

6.9 We believe at the outset that there is a role for RTÉ as a broadcaster of orchestral music even in options where the PSB is no longer operating the orchestra in question. The future of orchestral music, both for the symphony and concert variations, needs nurturing within the broadcast (and digital) output of RTÉ, both to maximise its impact and to meet its public service objectives and ambitions within its commitment to arts and culture.

Closure of both orchestras

⁶⁵ A summary of the main assumptions used in our analysis of the financial implications is set out in the Appendices. Note that we compare all options against the actual expenditure (and regional/educational activities) of 2016, the last year for which public figures are available. We understand that RTÉ already increased the number of performances in 2017 compared to 2016, although this remains below the historic highs of the pre-recession period.

- 6.10 The most extreme option under consideration is the closure of both orchestras, saving €10m annually from the licence fee (before accounting for any central costs, such as management positions shared across the orchestras).
- 6.11 While the savings would be significant and could be spent to achieve other key objectives of RTÉ, the impact on public service outcomes, the decline in breadth and extent of audience delivery, the sustainability of professional musicianship and indeed the drastic effect this would have on the very fabric of Irish cultural life make such a move inadvisable.
- 6.12 Moreover, RTÉ is obliged by statute to maintain “orchestras, choirs and other cultural performing groups in connection with the services of RTÉ.” While it might be argued that a single orchestra might fulfil this condition, the loss of both would clearly not be compliant, and nor would we propose to RTÉ to seek a change in the Act on this front.

Amalgamation of the RTÉNSO and the RTÉCO

- 6.13 In 2017 an exercise was undertaken in RTÉ to look at the possibilities of amalgamating both orchestras into a single orchestra – named the RTÉNSO – which would have the ability to play both classical repertoire and more popular concert-style material. The proposal targeted a potential net saving of [redacted] per year.⁶⁶ Management explains this proposal as follows:
- “The proposed restructuring of the RTÉ Orchestral division set out in September 2017 was submitted in the context of RTÉ’s ongoing financial difficulties and the restructuring taking place organisation-wide under a voluntary exit programme (VEP 2017) as part of RTÉ’s Five Year Strategy.*
- This proposal would enable those who wanted to exit [under the voluntary scheme] to leave and facilitate the achievement of RTÉ’s corporate savings targets. It was acknowledged that the proposals would be difficult, particularly from a human and editorial perspective and would not be considered were it not for RTÉ’s on-going very difficult financial position. The priority however was to protect orchestral output for future generations in Ireland.”⁶⁷*
- 6.14 While there are some precedents for merging orchestras, there is no credible case study of putting together two groups with widely different repertoires and styles.
- 6.15 In the most relevant recent case where two orchestras were merged into one, the merger – between the Stuttgart Radio Symphony Orchestra and Sinfonieorchester Baden Baden and Freiburg – was between two symphony orchestras with similar programming and audience focus, albeit with distinct styles and specialisms. In this case, there were no forced redundancies and it is expected that the single orchestra (now at 172 members, far in excess of industry norms) will only reach a running-rate staffing level following natural attrition.
- 6.16 The single orchestra proposition across concert and symphony formats requires a core number of members able and willing to “swing” to significantly different playing styles but also capable of delivering a more commercial output (including, for example, working with contemporary popular groups and artists, playing film music, and providing music to light entertainment programmes more regularly on RTÉ). We heard from both orchestra members and from orchestra managers in other countries regarding the difficulties of merging two distinct categories of orchestra.
- 6.17 It is unclear, moreover, that the current vacancies and proposed voluntary redundancy programmes are consistent with the emergence of a balanced group capable of fulfilling both RTÉCO and RTÉNSO roles.

⁶⁶ As the proposed savings were primarily to be achieved across the direct operating costs of the two orchestras, our options analysis uses these costs as a starting point. Costs associated with the Choirs, Quartet, or shared functions (such as HR or Finance) are not considered, nor are central RTÉ costs (such as insurance) which are currently apportioned to each RTÉ division; any increase or decrease in these costs as a result of following one of the options proposed in this review would be subject to further internal analysis by RTÉ.

⁶⁷ Provided in correspondence with RTÉ management.

- 6.18 As a consequence of both theoretical and practical doubts, we exclude an amalgamation option at this stage, although we have retained the cost savings implied by a merger as a guide to how effective on cost grounds the remaining options may prove.

Closure of the RTÉNSO or the RTÉCO

- 6.19 As we detail in our overview of Irish and international orchestral provision, there is a long history of direct ownership and operation of orchestras by PSBs. The longevity of such arrangements is a product of legislative obligations and convention, but also the practical synergies that such arrangements can yield compared to the costs of securing orchestral services from third parties on a freelance basis.
- 6.20 Some of these practical advantages persist even today and would generate even greater synergies were there to be a strengthened emphasis on commercial revenue generation alongside the public service ambitions and objectives of a PSB orchestra.
- 6.21 We therefore cannot see the advantages of closing the RTÉCO given the close relationship a PSB ought to have with a concert orchestra. Indeed, in any scenario where the RTÉCO is retained we believe it needs to be brought back to historical funding levels, closely incorporated into RTÉ's arts and culture strategy, central to the broadcast output and able to generate (by focussing on a range of genres beyond popular classic music) both increased audiences and significant incremental commercial revenues for RTÉ.
- 6.22 This, combined with a renewed emphasis on education, would bring the RTÉCO into line with the situation in several territories in our international comparison group – notably, Norway, where the PSB orchestra is of a size (54) and remit (a range of genres, from light classical to jazz to show music) that makes it one of purest examples of a “radio” performing group among our comparators. Other relevant examples include the BBC Concert Orchestra in the UK and groups in Germany (Cologne) and Italy.
- 6.23 While we believe the RTÉNSO also deserves to be re-calibrated, our assessment of the financial pressures facing RTÉ makes us conclude that with current funding constraints RTÉ cannot justify funding the two orchestras at a level consistent with their previous size and activities.
- 6.24 If forced to choose between the two, we believe that the RTÉNSO would need to be sacrificed (as the orchestra with less direct relevance to a public-service broadcasting owner). Focussing uniquely on the concert variant would allow RTÉ to restore staffing and activities levels at the RTÉCO, and to ensure that other public service demands on RTÉ are better met in a time of significant financial constraint. In this scenario, around €6m of licence fee funding would be freed up to be used elsewhere.
- 6.25 We concede that RTÉ may elect, if obliged to choose between the two, to keep the RTÉNSO and close the RTÉCO (indeed, the amalgamation plan developed internally was effectively positioned as being the retention of the RTÉNSO with changes to its programming remit). We believe that there is less logic to such an outcome when viewed exclusively through the prism of RTÉ rather than in the context of wider Irish orchestra provision.
- 6.26 However, an outcome where RTÉ is forced to close one orchestra, although consistent with RTÉ's fiduciary responsibilities to control costs and prioritise expenditure, would have damaging implications for overall orchestral provision in Ireland given the current custodial role played by RTÉ. The risk would be to leave Ireland with an outcome at variance with public sentiment regarding the importance of orchestral provision. The closure option strikes us, therefore, as a poor second choice.

Retention of the RTÉNSO and the RTÉCO

- 6.27 Our discussions with stakeholders confirmed the importance of retaining orchestral provision in Ireland. The closure of either or both orchestras would leave a significant gap in Irish cultural life and place Ireland out of step with almost every other European nation.

- 6.28 However, to say that the survival of the orchestras is a crucial objective is not the same as saying that the current ownership and funding mechanism should remain intact. When considering the options available to secure a future for orchestral provision, it would be illogical not to include different means of administration and funding if these proved more capable of meeting the objectives on a basis acceptable to RTÉ, Government and the wider stakeholder groups.
- 6.29 With this in mind, and for the sake of completeness, we have looked at three sub-scenarios for retention of the two orchestras:
- a) The status quo (both orchestras funded at current levels by RTÉ);
 - b) A restoration of staffing and activity to historical levels (both orchestras still operated by RTÉ);
 - c) A co-governance option (with RTÉ keeping the RTÉCO and the RTÉNSO constituted as an independent institution).
- 6.30 Our starting position when considering options for retaining both orchestras is to accept that the financial constraints facing RTÉ are material and the sustainable funding of both the RTÉNSO and the RTÉCO by RTÉ on its own cannot be guaranteed on the current basis. Thus, by definition, nor would RTÉ be able to fund an option whereby both orchestras are retained by RTÉ and restored to historical levels of staffing and activity. This makes sub-options a) and b) untenable in our view.
- 6.31 This leaves option c), whereby the NSO would be reconfigured as an independent institution. A consensus is emerging, supported by our financial assessment, that the NSO needs a firmer base than RTÉ can provide on its own. We have considered, therefore, that the best option among the many we have reviewed is for the RTÉCO to remain within RTÉ and for the NSO to find a new home, *albeit* one secured by a broadcast output deal with RTÉ.
- This would allow RTÉ to restore the RTÉCO, characteristically associated with public service broadcasting, to its historical staffing and activity levels, and to assist the NSO by agreeing a formal arrangement where the performances and other activities of the NSO would be distributed via RTÉ's TV, radio and online platforms. This, in turn, would permit the NSO to recover to historical staffing and activity levels. Both orchestras would also be able to move quickly to appoint principal conductors.
 - Internally, RTÉ would be obliged to have a core, agreed strategy for the RTÉCO and for the relationship with the newly independent NSO. At the same time, orchestra management would be empowered to deliver on this agreed strategy. This might go some way to addressing some of the concerns currently about lack of strategy, objectives and co-ordination between the two groups.
- 6.32 We suggest that the NSO might be a cultural institution in its own right, with a direct governance link to the Department of Culture, Heritage and the Gaeltacht (either incorporated into the NCH or with its own status). The NSO could be funded separately funded via direct state grants and a contribution from RTÉ (in recognition of the right to broadcast the orchestra's output). The tradition of direct funding is a well-established one in Europe, with c360 symphony orchestras in our comparator group funded in this way, compared to c40 such orchestras funded via the relevant PSB. This structure would be consistent with the Government's broad plans, under Creative Ireland, to fund arts and culture, including cultural infrastructure.⁶⁸
- 6.33 Such a direct funding solution would ease some of the financial pressures facing RTÉ, while enabling both the NSO and the RTÉCO to secure a sustainable funding solution for full-strength operations, and for each of them to develop and then execute a clear, ambitious strategy over the longer term.
- We have analysed the current costs of the orchestras and calculated the quantum of additional funds required to bring both the RTÉCO and the NSO up to historical staffing levels, to appoint principal

⁶⁸ There appears to be significant Government support for investments in cultural infrastructure but little obvious commitment to ensuring the production of content to be performed in upgraded venues. The NCH, as home to a newly constituted, truly national Symphony Orchestra, would be a logical extension of the ambitions of the Creative Ireland initiative.

conductors and to resume touring and educational programmes. The cost associated with the increased number of permanent employees is offset to some degree by a reduced reliance on freelancers for performances.⁶⁹ We have also proposed an increased marketing budget for both orchestras (to a total of €150,000 for the NSO and €200,000 for the RTÉCO) to justify a 10% enhancement in each orchestra's commercial revenue. We have also incorporated the cost of a full-time dedicated sound engineer. A full table of assumptions is given in the Appendices.

- RTÉ might pay an amount for the broadcasting rights associated with a reinvigorated NSO, which we propose be set at €3.5m initially (i.e., likely to be in excess of the 'market' value of these rights). The direct grant from Government, after accounting for commercial revenues, would be approximately €4m per year. In future, any out-performance on the commercial front might be shared equally between Government and RTÉ (thereby reducing RTÉ's commitment over time to a level more consistent with an arms-length broadcasting contract).
- In this recommended option, RTÉ saves around €2.5m a year, compared to the costs of the status-quo orchestras. Moreover, in this scenario, both orchestras are maintained, and staffing and activity levels restored.
- The total funding for the two orchestras under this option would come to €14.6m (a €1.9m increase on RTÉ's 2016 expenditure), with 51% coming from the licence fee via RTÉ, 28% directly from the government, and 21% from commercial revenue.

6.34 The planned two-year closure of the NCH, associated with its planned renovation, might in fact be an opportunity rather than an impediment to a newly independent NSO. The orchestra may explore a range of alternative venues in Dublin and travel around the country more regularly during this transitional period. Thereafter, the NSO could return to its 'home' in Dublin but maintain a touring programme regionally.

6.35 An NSO returned to its historical levels of staffing and activity meets a number of key Government objectives around arts and culture, a regional presence and integration into skills development and education. Over time, the newly invigorated NSO, no longer subject to the varying financial pressures periodically placed on RTÉ, might emerge as well as a prime conveyor of Irishness abroad.

6.36 This outcome implies a number of practical considerations, however.

- A scenario where the NSO is independent of RTÉ, whether as a distinct cultural institution in its own right or as part of the NCH, does not mean the connections between the broadcaster and the national orchestra are severed. There would need to remain careful co-ordination between RTÉ and the NSO and in all dealings with the NCH (whatever status might be agreed) to ensure co-ordination of programming, performances and broadcasting.
- This may require, for example, an oversight body on which RTÉ is represented (as a minority), responsible for the operations of the independent NSO. The broadcasting contract would be fixed for multiple years to ensure funding security and would need to be kept out of the regular cycles of funding review by the BAI.
- While the precise mechanisms are beyond our scope, we would caution against funnelling these contributions through the Arts Council, which is already a key funder of non-RTÉ orchestral music. The significant funding of the NSO would risk unbalancing the Arts Council's overall remit.

6.37 We remind readers that a different status for the RTÉNSO was the principal recommendation of the *PIANO Report* in 1996. In that review, it was considered appropriate for the initial funding to come from RTÉ, with a plan over time to replace this with direct funding from Government. An independent status for the NSO looked sensible, even if we can understand the reasons – among them the lack of portability of pensions and concerns about the loss of RTÉ custodianship – that pre-empted that outcome twenty years ago.

⁶⁹ Based on conversations with management, we also account for a reduction in some of the RTÉCO's non-staff cost lines, which could be achieved through better planning and procurement.

- 6.38 It is important to consider that our review has no locus to deliver Government funding of the orchestras; our only role is to recommend a strategy for RTÉ. We believe that our preferred option is the best for all stakeholders, and has the appeal of maintaining both orchestras, restoring staffing and activity levels and providing a means of ensuring close co-operation on the broadcasting and performance fronts.
- 6.39 If, however, the independent status and funding arrangements recommended here are not acceptable to Government, then RTÉ (consistent with its funding constraints) may then have to accept the second-best option of closing one of the two orchestras or merging them. International experience suggests the latter approach is ill-advised while the first would risk perpetuating the poor outlook for orchestral provision that has so concerned stakeholders.

Summary of options

- 6.40 Our evaluation of the potential options presents a number of stark challenges for RTÉ and public policy.
- Maintaining two full-time orchestras on a basis that ensures they are fit for purpose and can deliver fully on their broader public service objectives, is not compatible with addressing RTÉ's current funding challenges.
 - However, any option that requires the closure of the one or more orchestras would have significant implications for the music ecology in Ireland.
- 6.41 We summarise our evaluation of the various funding and ownership options in the table below, which illustrates the potential trade-off between a sustainable funding solution and the delivery of full-strength national orchestral output.
- 6.42 This table compares all options with the state of funding in 2016, which was as follows:
- RTÉNSO expenditure - €7.17m, of which 14% was covered through commercial revenue and 86% through licence fee attribution;
 - RTÉCO expenditure - €5.46m, of which 32% was commercial and 68% from licence fee;
 - RTÉNSO and RTÉCO expenditure - €12.64m, of which 22% was commercial and 78% from the licence fee. (Central costs, such as shared management positions, are not included in any of these figures.)

Figure 35: Summary of options for the future of the orchestras

Scenario	NSO budget change	CO budget change	Total spend*	Change in licence fee funding	Licence fee funding	Government funding	Broader impacts
Merger of RTÉNSO and RTÉCO	(€3.1m)		€9.5m	(€2m)	€7.95m	-	Reduction in orchestral output, fewer employment opportunities for talented musicians, fewer opportunities to see quality orchestras.
Closure of both RTÉNSO and RTÉCO	(€7.2m)	(€5.5m)	0 (excl. central costs)	(€9.9m)	0 (excl. central costs)	-	The number of full-time, full-strength, high-quality symphony and concert orchestras in Ireland reduces to zero. Crisis in Irish orchestral provision and public service delivery
Closure of RTÉNSO; RTÉCO is fully funded	(€7.2m)	€0.4m	€5.8m	(€6m)	€3.9m	-	End of top quality symphonic music in Ireland – tours by international orchestras the only remaining option for consumers. Exodus of talented musicians from Ireland; fewer incentives for aspiring musicians. PSB delivery reduced to RTÉCO only.
Closure of	€1.4m	(€5.5m)	€8.6m	(€2.4m)	€7.5m	-	Symphony music in Ireland is

RTÉCO; RTÉSNO is fully funded							protected and promoted. The broader reach and appeal of the RTÉCO is lost, threatening future engagement with orchestral music by non-traditional audiences. PSB delivery reduced to RTÉSNO only.
Retention of RTÉSNO and RTÉCO (current funding)	0	0	€12.6m	0	€9.9m	-	Will the current (reduced) frequency and quality of performances be sustainable? Educational and regional performances will remain reduced, disadvantaging large portions of Ireland. Negative cultural impact is lower than closure; positive impact sub-optimal for PSB delivery.
Retention of RTÉSNO and RTÉCO (fully funded)	€1.4m	€0.4m	€14.4m	€1.5m	€11.4m	-	Orchestras begin to grow their cultural presence and their regional presence is assured. Questions remain over their custody within RTÉ – will their management, coordination, and ambition remain in stagnation? Moreover, there is no basis on which to secure sustainable funding, without significant implications for the rest of RTÉ's public service undertakings.
Retention of RTÉSNO and RTÉCO (fully funded): RTÉSNO divested, RTÉCO remains in RTÉ	€1.6m**	€0.4m	€14.6m	(€2.5m)	€7.4m	€4.1m	As above, but NSO's organisational independence and assumption of responsibility for its own future allows freedom of direction. Government involvement ensures wider stakeholder support, but also potentially leaves the NSO at the whim of future Gov't spending decisions. RTÉCO revitalised with a clearer role in RTÉ's broadcasting strategy. PSB delivery safeguarded across both orchestras

Source: RTÉ, Mediatique analysis. Central costs are not considered in any of the options. Parentheses indicate negative numbers.

* The difference between total spend on the orchestras and the sum of licence fee and government funding is the commercial revenue generated by the orchestras. ** Includes cost of replicating the current management structure, such as HR and Finance positions; excludes any new costs associated with divestiture from RTÉ, such as board members.

Changes to internal practice

6.43 We believe that this Review also permits a consideration at RTÉ of how best to reform internal practice notwithstanding large-scale changes to the orchestras.

Agreement on strategy and co-operation

6.44 Whatever organisational option is ultimately agreed, RTÉ and relevant stakeholders must ensure at least the following conditions are met:

- A formalised mission statement and strategy for both orchestras is agreed within RTÉ and any external party, and vigorously pursued; this may require, depending on the option, an agreed forum in

which strategy is decided and implemented, even if the orchestras have separate funding and governance structures;

- Orchestra management is empowered to work to the objectives of an agreed strategy;
- A broadcasting strategy is enacted that ensures close co-operation between the commissioning arm of RTÉ and the orchestras – across TV, radio and online – so that the orchestras are fundamentally central to RTÉ's arts and culture mandate; even in the event that the two orchestras operate independently, the broadcasting links must be co-ordinated, and any supply arrangement between RTÉ and a separate orchestra must be extensive, deep and detailed; and
- Close co-operation between the NCH and the orchestras is established, however the latter are governed, to ensure co-ordination of repertoire and performances.

6.45 The delivery of such conditions will ultimately enable to orchestras to operate on a more sustainable and effective basis, with a higher profile and an emphasis on delivering quality output.

Audience engagement

6.46 To address a general lack of engagement with classical music, particularly among the young and in regions outside the large cities, any ongoing strategy must include the ability of the orchestras to resume touring within Ireland (and perhaps, over time, abroad) and to be fully engaged in educational programmes.

6.47 To be optimally realised, any successful strategy would require consideration of how to ensure younger audiences in particular, whether in concert halls, on radio, on TV or online, become habituated to consuming orchestral music, classical and other. The strategy would be aimed at reversing the underlying trend of declining audiences for the classical repertoire.

6.48 It is conceivable that a closer relationship between RTÉ commissioners and the orchestra(s) can help to reverse these consumption trends, providing more relevant opportunities to build the orchestra brands through RTÉ's extensive reach and ratings. TV and radio are the obvious avenues (for instance, through TV channels RTÉ One, RTÉ2 and RTÉJr and radio stations lyric fm and RTÉ1).

6.49 The programming might include more direct broadcast of performances; at present, around 30% of the RTÉNSO concerts are not recorded, rising to 80% for the RTÉCO.⁷⁰ But there is scope to incorporate orchestral output in music, lifestyle and light entertainment content as well. Co-operation should also extend to the online sector, as RTÉ continues to explore a new 'digital first' strategy. There is currently no obvious forum for this co-operation to blossom, although the appointment of a new Head of Arts and Culture, provided she or he is given lines of communication with both the Content and Audiences divisions, may provide a source of improvement.

6.50 Again, such options would enhance the profile of the orchestras, allowing a greater emphasis on quality and reputation; in turn, this creates longer-term benefits for audience engagement and enhances the orchestras' ability to attract and retain talented performers.

Commercial return

6.51 In line with the situation in every territory we reviewed, generating commercial revenues (e.g., from ticket sales, recordings, performance contracts with third parties) is challenging. Moreover, audiences for classical music in most (although not all) markets is relatively static (and trending older). Throughout the world, orchestras have explored a range of strategic responses, including a pivot toward more popular

⁷⁰ This arises because of internal pressures on the use of sound engineers. It may be preferable for the orchestras to have a dedicated sound engineer (and producer) if the options discussed in this report are to be fully realised. The costs of a full-time engineer have been included in the modelling we have undertaken to support the options analysis. We were told by one senior RTÉ manager that one engineer will not be enough; this will be a matter for management on the ground.

repertoire, innovative (thematic) programming and co-operation with guest artists (including from annex genres such as rock, rap, folk and jazz).

- 6.52 A change to the performance strategy (and mix of genres) may deliver a means of increasing audience traction on multiple platforms, and so contribute to higher awareness and conceivably incremental revenues. The Electric Picnic series has been an unqualified success in terms of ticket sales, and we are aware of plans to mount additional concerts of this kind. The events of the 2016 centennial, which included a role for both orchestras, show how forward planning and innovations in content around themes (artistic anniversaries, other political and socio-cultural commemoration) can bear fruit.
- 6.53 The amplifying effect of broadcasting and online distribution is critical here. There can be a virtuous cycle of higher profile on media platforms, increased audience awareness and higher commercial revenues through ticket sales, advertising and sponsorship.
- 6.54 The orchestras would also benefit from an increase in marketing expenditure and a more aggressive campaign to win sponsorship support. Two orchestras with clear mandates, governance structures and funding should be able to deliver better financial outcomes.
- 6.55 We would suggest as one condition of the new structure that RTÉ agree sensible performance indicators for orchestral provision. These should include audience appreciation measures on a reliable and consistent basis, viewing opportunities (and potentially share) and commercial targets alongside cost controls.
- 6.56 All the key options for reform suggested in this Review include a call for greater co-operation (across broadcast and performance venues) as well as between performing groups, and the setting of objectives and a coherent strategy which line management is empowered to execute.
- 6.57 Both the NSO and the RTÉCO might in this way maximise commercial revenues. For RTÉ, this would reduce the burden on the licence fee, as RTÉ would benefit from an out-performance of the RTÉCO. At the NSO, improving commercial revenues might reduce the level of direct state funding and/or the quantum of RTÉ's contribution via its broadcasting arrangements.

Short-term operational issues

- 6.58 We concede that there are important short-term issues that must be dealt with by RTÉ, including the implications of the current (suspended) redundancy programme, poor morale, the need to address the vacancy rate and the required appointment of principal conductors.
- 6.59 RTÉ also needs to consider the short-term issues around programming and the relationship with the NCH as the latter moves toward its refurbishment-related hiatus.
- 6.60 RTÉ might also take the opportunity to review administrative functions and engage with the orchestras on terms and conditions and on the outcome of the redundancy programme as it relates to the performing groups. Both contracts and customs and practices should be reviewed, ensuring both that they are fair to musicians and do not impede touring and educational programmes.
- 6.61 RTÉ may need short-term direct funding to address the immediate challenges, as our recommendations will take time to execute and the organisation has already identified the need to cut costs at the orchestras to meet its broader business plan objectives. We underline that we are not being asked for (nor are we providing) guidance on short-term management challenges and the specifics of the immediate requirements on HR, scheduling, programming and funding.

7. Recommendations

- 7.1 In reviewing the current provision of orchestral music in Ireland, we recognise the importance of the RTÉNSO and the RTÉCO to Irish cultural life, and the degree of support for the public funding of orchestral provision, even among those who do not listen to orchestral music.
- 7.2 In an international context, the reliance of Irish orchestral output on RTÉ funding is stark. Equally, direct public funding of orchestras is the norm not the exception in most European countries.
- 7.3 In forming a set of recommendations for the future governance and operation of the RTÉ orchestras, we have had to accept that the status-quo arrangements have rendered neither the RTÉNSO nor the RTÉCO fit for purpose. Both have significant staffing issues and funding pressures that reflect the overall challenged financial context that RTÉ faces. We have also borne in mind the areas of consensus arising from previous reviews of Irish orchestral provision, and the views of stakeholders and the Government (the latter as expressed in public pronouncements in recent weeks and in the context of Government broader policy on arts and culture).
- 7.4 We were tasked with recommending the best configuration of RTÉ's orchestras. We are unable to recommend the closure of either the RTÉNSO or the RTÉCO, or their merger, on the basis of their importance to Irish cultural life. The status quo is equally untenable, however; and the status of the RTÉNSO in particular faces a serious threat arising from under-resourcing.
- 7.5 As Ireland has only one full-time professional symphony orchestra, the answer is simpler than in many countries. Without the RTÉNSO in particular, there would be a major diminution in the nation's cultural and artistic life; given its importance, we recommend that the country's only symphony orchestra should become the responsibility of the nation not the public service broadcaster. This forms the cornerstone of the recommendations arising from this Review, which we set out below.

Recommendations: a new funding and governance model for the orchestras

- 7.6 The NSO should be a national cultural institution, in its own right or within the NCH.⁷¹ RTÉ should enter into a broadcasting relationship with the NSO ensuring it has regular exposure via RTÉ's TV, radio and outline outlets. RTÉ should pay a fee in recognition of these broadcasting rights, with the remainder of the costs of NSO's operations (net of any commercial income) met by direct Government funding (of €4m a year).
- This funding reflects our analysis of the costs of restoring the NSO to its historical levels of staffing and activity (regional performances and educational programmes).
 - This approach is consistent with recommendations from past reviews (in particular the *PIANO Report* in 1996) and with international experience (i.e., direct public funding of a truly 'national' orchestra).
- 7.7 The RTÉCO should continue to be part of RTÉ, functioning as a classic "radio" or PSB orchestra, on the model of many such orchestras worldwide. It should be restored to its historical levels of staffing and activity and tasked with maximising commercial returns (without sacrificing integrity of repertoire) in addition to providing content to RTÉ TV, radio and online. The RTÉCO should be more formally integrated into the commissioning and production arms of RTÉ, consistent with the re-structuring already announced.
- 7.8 While operating independently, the NSO should continue to co-ordinate activities with the RTÉCO to ensure that the two work together on a complementary basis. This might be achieved by ensuring RTÉ is

⁷¹ It is beyond our remit to specify precise oversight structures and other elements of governance, which would be for RTÉ and the Government to determine. We note that the *PIANO Report* provides significant detail on this issue.

represented (as a minority) on any relevant board created to oversee the NSO and by creating committees for the regular sharing of information on programming, performances and commercial activities.

- 7.9 We also believe that the intended hiatus of operations at the NCH might be an opportunity to formalise and develop a new relationship between the Hall and the two orchestras, ushering in a period during which touring and educational ambitions can be explored in alternative venues in Dublin and around the country. From 2022, when the NCH is again open, the NSO can regain its 'home'.
- 7.10 We believe that this option would meet Government objectives around the safeguarding of the two orchestras, the role of these in Irish cultural life and the requirements and ambitions of a PSB orchestra fully integrated into the operations of RTÉ.
- 7.11 The funding solution would permit both orchestras to return to historical levels of staffing and activity. The operating structure would permit RTÉ to re-energise the music output on radio, TV and online, and to resume its role as provider of regional performances and events and of educational programmes to foster greater awareness and support for music Ireland-wide.
- 7.12 In Section 6, we addressed some of the ways that RTÉ could optimise commercial revenues, both via the fully owned RTÉCO and via its partnership arrangements with the newly independent NSO. We also proposed some solutions to ensure that short-term issues around funding constraints and planning requirements, particularly in advance of the intended closure of the NCH for refurbishment, are addressed.
- 7.13 We fully recognise that the decision to designate the NSO a national cultural institution and to establish a new funding mechanism is not for RTÉ to take. We argue that our recommendation for the two orchestras fully reflects the importance of orchestral provision to Irish cultural life, is consistent with international best practice, resonates with the Government's own ambitions for arts and culture and delivers a sustainable funding model for the long term. It will be for Government to act.
- 7.14 If, however, support is not forthcoming, we would regretfully suggest our second choice – the closure of one of the two orchestras – be adopted. In this context, we believe that the RTÉCO is a more logical orchestra for a PSB; we concede, however, that RTÉ may wish to retain the NSO (with a change to its structure and strategy) in recognition of wider issues in orchestra provision in Ireland.
- 7.15 For the avoidance of doubt, we do not see how RTÉ can fulfil its fiduciary responsibilities to re-structure its operations, re-balance spending opportunities, address shifting consumer behaviours and preferences and reflect public service objectives in the round if it must continue to fund both orchestras.

8. Appendices

The following appendices include a range of supporting information and documents that formed part of this Review:

- *RTÉ Annual Statement of Performance Commitments for RTÉ Performing Groups, 2007-2017*
- *Summaries of previous Arts Council reviews*
- *PSB Radio Symphony Orchestras included in international orchestral benchmarking*
- *Organisations interviewed and submissions received*
- *Options analysis – financial assumptions*

RTÉ Annual Statement of Performance Commitments for RTÉ Performing Groups, 2007-2017

RTÉ is obliged to publish an *Annual Statement of Performance Commitments* as one of the three reporting requirements under the *Broadcasting Act 2009*. The ASPC is a continuation of the *Statement of Commitments* requirement first set out in the *Public Service Broadcasting Charter* in 2004.

For clarity, the tables below refer to measures in 2007 and 2008 under the new phrasing and assume they can be treated as the same. There may be further ASPCs that have implications for RTÉ's Performing Groups (particularly those around lyric fm or Arts & Culture programming more generally) but these have been excluded below as they are not directly related to the Orchestras.

2007 Performance Measures and Outcomes			
ASPC Measure	Targets	Commitment achieved?	Target on previous year
RTÉ Performing Groups will give a total of 195 public performances. These performances will include:	RTÉ RTÉNSO - 64 performances	Yes	Lower
	RTÉ RTÉNSO w/ Phil Choir - 3 performances	Yes	Lower
	RTÉ RTÉCO - 77 performances	Yes	Same
	RTÉ Vanbrugh Quartet - 30 performances	Yes	Higher
	Cór na nÓg - 9 performances	No	New
	Guest ensembles - 6 performances	Yes	Lower
The RTÉ Performing Groups will also engage in a total of 84 education-related performances, workshops and talks and be involved in Television, Radio and recordings	Engage in 84 educational performances, workshops, talks	Yes	Higher

2008 Performance Measures and Outcomes			
ASPC Measure	Target	Commitment achieved?	Target on previous year
RTÉ Performing Groups will give a total of 190 public performances. These performances will include:	RTÉ RTÉNSO - 62 performances	Yes	Lower
	RTÉ RTÉNSO w/ Phil Choir - 6 performances	Yes	Higher
	RTÉ RTÉCO - 80 performances	Yes	Higher
	RTÉ Vanbrugh Quartet - 30 performances	Yes	Same
	Cór na nÓg - 9 performances	No	Same
	Guest ensembles - 3 performances	Yes	Lower
The RTÉ Performing Groups will also engage in a total of 84 education-related performances, workshops and talks and be involved in Television, Radio and recordings	Engage in 84 educational performances, workshops, talks	Yes	Same

2009 Performance Measures and Outcomes			
ASPC Measure	Target	Commitment achieved?	Target on previous year

During 2009 the RTÉ Performing Groups committed to give a total of 190 public performances. These Performances will include:	RTÉ RTÉNSO - 63 performances	No	Higher
	RTÉ RTÉNSO w/ Phil Choir - 5 performances	Yes	Lower
	RTÉ RTÉCO - 80 performances	No	Same
	RTÉ Vanbrugh Quartet - 30 performances	Yes	Same
	Cór na nÓg - 9 performances	Yes	Same
	Guest ensembles - 3 performances	No	Same
The RTÉ Performing Groups will also engage in a total of 84 education-related performances, workshops and talks and be involved in Television, Radio and recordings	Engage in 84 educational performances, workshops, talks	No	Same

2010 Performance Measures and Outcomes			
ASPC Measure	Target	Commitment achieved?	Target on previous year
Deliver a range of music performances to entertain and educate	184 Public Performances by Performing Groups	Yes	Lower
Deliver a range of music performances to entertain and educate	77 educational performances, talks and workshops by Performing Groups	No	Lower
Undertake education and outreach initiatives	12 free classical music concerts by RTÉ Vanbrugh Quartet	Yes	New
Performing Groups to be the leading provider of live music of quality and diversity in their field	Performing Groups audience at 2009 levels of 165,000	Yes	New

2011 Performance Measures and Outcomes			
ASPC Measure	Target	Commitment achieved?	Target on previous year
Deliver a range of music performances to entertain and educate	180 Public Performances by Performing Groups	Yes	Lower
	77 educational performances, talks and workshops by Performing Groups	Yes	Same
Undertake education and outreach initiatives	Six workshops comprising choral workshops for teachers/choral directors and sounding out workshops for adults	No	New
RTÉ Performing Groups to be the leading provider of live music of quality and diversity in their field	Maintain Performing Groups audiences at 2010 levels of over 165,000	Yes	Same

Develop new avenues to connect with audiences across the whole island of Ireland and facilitate interaction with RTÉ	Develop smaller ensemble programmes, within existing resources, in order to build new audiences (5 RTÉNSO and 2 RTÉCO initiatives)	Yes	<i>New</i>
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2012 Performance Measures and Outcomes			
ASPC Measure	Target	Commitment achieved?	Target on previous year
Deliver a range of music performances to entertain and educate	180 Public Performances by Performing Groups	Yes	<i>Same</i>
	75 educational performances, talks and workshops by Performing Groups	Yes	<i>Lower</i>
	7 initiatives to continue to develop smaller ensemble programmes to build new audiences for Performing Groups	No	<i>Same</i>
RTÉ Performing Groups to be the leading provider of live music of quality and diversity in their field	Maintain Performing Groups audience at over 170,000	Yes	<i>Higher</i>
Foster creativity, new ideas and cultural expression, through supporting cultural events, including minority interests, developing new talent (presenters, musicians, artists, programme makers and content creators), showing leadership within the creative industries and commissioning and premiering new work	6 new encounters for musicians and audiences from RTÉ Performing Groups plus new initiatives, formats and programme styles	Yes	<i>New</i>
Maintain and grow collaborative partnerships with key industry bodies, stakeholders, regulators, broadcasters and with EBU and other European bodies, as appropriate	RTÉ Performing Groups will continue to explore opportunities for partnerships and collaborations	Yes	<i>New</i>

2013 Performance Measures and Outcomes			
ASPC Measure	Target	Commitment achieved?	Target on previous year
To offer Irish music lovers the highest quality live music experiences and help new music lovers to find the RTÉ Orchestras and Choirs through live and quality broadcast music	Continue to deliver over 180 performances	Yes	<i>Same</i>
	Maintain audience at over 190,000	Yes	<i>Higher</i>
RTÉ Orchestras and Choirs to foster creativity, new ideas and cultural expression by investing in new commissions, supporting Irish Artists as soloists and conductors and developing new collaborative partnerships	Commission new music and premier new works	Yes	<i>New</i>
	Support Irish artists	Yes	<i>New</i>
	Work in partnerships with organisations/individuals	Yes	<i>New</i>
	Deliver educational/outreach initiatives	Yes	<i>New</i>

2014 Performance Measures and Outcomes			
ASPC Measure	Target	Commitment achieved?	Target compared to previous year
Offer Irish music lovers the highest quality live music experiences	Maintain audience at over 190,000	No	Same

2015 Performance Measures and Outcomes			
ASPC Measure	Target	Commitment achieved?	Target on previous year
Offer Irish music lovers the highest quality live music experiences	Maintain audience at over 180,000	No	Lower

2016 Performance Measures and Outcomes			
ASPC Measure	Target	Commitment achieved?	Target on previous year
Offer Irish music lovers the highest quality live music experiences	Maintain audience at 164,000	No	Lower

2017 Performance Measures and Outcomes			
ASPC Measure	Target	Commitment achieved?	Target on previous year
Offer Irish music lovers the highest quality live music experiences	Rebuild number of audience attendances to 170,000	N/A	Higher

Summaries of previous Arts Council reviews*The Place of the Arts in Irish Education*

Published: 1979

Author: Benson, C.

This was the first comprehensive review of existing arts provision in education. The previous decade had seen rapid development in the Irish education system but arts education has not greatly benefitted from this. The role it plays in classrooms is still peripheral, undermined by a lack of funding, no clear policy encouragement and many issues at the level of the individual school; for example, a lack of adequately trained primary school teachers. Equally, discontinuity between primary and post-primary curricula make the experience of continuing lessons difficult for individuals. Again, a lack of clear policy surrounding the role of post-primary arts education was identified: is it for preparing pupils going on to third-level education or to prepare students for their working/leisure lives once they leave secondary education? The gap in access between female and male children grows at post-primary level. The report suggests these are all areas where policy changes could make fundamental improvements. The Department of Education 'is a cause of the present neglect of the arts' and the report recommends the immediate setting up of a planning committee for the development of an arts policy in both primary and post-primary schools. It is suggested the Arts Council could also contribute to such a policy through its knowledge of arts in Ireland, supplying information to schools and colleges, implementing its own schemes to introduce art and artists to young people, initiating grants and other forms of aid to the further development of arts education and arts-in-education and to liaise with other organisations to promote an appreciation and practice of the arts among young people and adults.

Audiences, Acquisitions and Amateurs

Published: 1983

Author: Sinnott, R. & Kavanagh, D.

This study to analyse the audiences for arts within Ireland was based on fieldwork and surveys conducted in 1981. Sixty per cent of the population had attended at least one arts event of some description in the previous year, including 9% for at least one performance of classical music. However, middle-class, Dublin-based people aged between 35 and 49 years old were much more likely to have attended an arts event in the previous year, particularly for classical music. The main reasons given for non-attendance were the cost of tickets, geographical inaccessibility, and having no interest in art. The report uses the data to demonstrate that low levels of attendance are not due to structural constraints (i.e. cost or accessibility factors) but rather 'the cultural factor' of the individual's orientation towards the arts. Similar trends are spotted with the purchasing of arts goods (for example, 10% of those surveyed bought classical music recordings in the past year) and participation in amateur arts activities. However, while the 60% attendance figure appears positive, the authors caution against complacency as the data shows low levels of attendance for individual categories (e.g., music) and low attendance when compared internationally (e.g., against US data). One sign of health may be that younger generations are more likely than their parents to participate in arts events, and that, broadly, individual attitudes towards arts are the biggest drivers of behaviour. This implicates the Arts Council, which should consider the current educational and outreach requirements placed on its grant recipients and what further policies it could implement to reach underserved regions, peoples and genres.

Deaf Ears: A Report on the Provision of Music Education in Irish Schools

Published: 1985

Author: Herron, D.

A report covered music education provision in the country at primary and post-primary level. 'The majority of Irish primary school children leave school musically illiterate ... they have no worthwhile basis from which to ... avail of music as a subject at post-primary level'. The report demonstrated the effects of the lack of clear rationale for music education in primary schools and the subsequent lack of the human and material resources needed to implement music education policies. Equally, vulnerabilities of music education *in toto* were identified, as it is not compulsory in post-primary schools; less than 50% provide it for Junior Cycle. Boys are more deprived than girls due to nature of single-sex schools in the country. Three clear factors emerge: (1) the need and desire to get music education at primary school level 'right', (2) the problems caused by inadequate music education of most

primary school teachers themselves, and (3) the remoteness of the introduction of a nationwide policy of high quality in-service education, for economic reasons.

Dreams and Responsibilities: The State and the Arts in Independent Ireland

Published: 1990

Author: Kennedy, B. P.

The study traces the development of official arts policy in Ireland and demonstrates the ‘tendency to implement grand gestures towards the arts’ rather than a comprehensive arts policy. Public funding provision for the arts only emerged in the 1940s and 1950s with RTÉ and the Arts Council (which would not support the setting up of RTÉ and would continue to see RTÉ’s activity as outside its purview). This was through the determined and sustained efforts of individual politicians working against both political opponents and in the face of little public support. After the creation of the Arts Council, there was no formal structured plan for developing the arts sector and funding tended to go to individual one-off projects rather than future-looking infrastructure or audience development projects. Likewise, there had not been systematic funding outside of Dublin leading to an imbalanced artistic landscape. However, as the economy boomed in the 1970s and 1980s, audiences for the arts grew and so too did the political will to respond to public demands for greater government investment. As in other European countries, the dual argument that the arts are a public good and provide a good return on investment led to increased budgets for the Arts Council to disperse according to its newly codified aims of education, improved access in the regions and commissions in contemporary Irish arts. Equally, the role of the Arts Council within Government grew such that it now represented the main adviser on the arts to Government and would advise on policy hereafter.

Sounds New: Review of Supports to Contemporary Music in Ireland

Published: 2006

Author: Graham Devlin Associates

The review examines the efficacy of Arts Council funding for contemporary music and analyses where significant gaps in provision still exist; the aim was to deduce the sector’s developmental needs and a strategy for how the Arts Council might assist in its development. The report summarises the landscape of the contemporary music sector and shows that it ranges from individual composers/performers to ensembles, chamber groups, festivals and orchestras. The Arts Council awarded €565,000 to seven organisations dedicated to contemporary music in 2005, with over half going to the Contemporary Music Centre and a further €3m to organisations whose work includes (but is not exclusively) contemporary music. Stakeholders felt more could be done to facilitate performance opportunities but were generally pleased with Arts Council input. The report details international case studies for developing stronger state support for contemporary music including through: a dedicated fund for commissions (as in Holland); local authority and city funding for professional orchestras (as in Holland, Finland and Norway), extensive educational support for performers and composers (Finland and Norway), better financial support, residencies and bursaries (England and Scotland) and purpose-built concert halls (Holland, England). Further specific policy recommendations were made to raise the sector’s profile and re-engage the public with contemporary music. Above all, the need for a broad and cogent strategy on contemporary music and its place in Irish life remained the main priority.

The Public and the Arts

Published: 2006

Author: Hibernian Consulting

The report was commissioned to provide data on the behaviours and attitudes of Irish people in terms of arts and arts events. It is a follow-up study to a similar survey conducted in 1994. Since then, arts funding has grown at a rate well above inflation, the general health of the macro-economic landscape has boosted event attendance and the ‘reach’ of the arts has been extended by wider social and community programmes as well as the policies of the Arts Council and the greater involvement in arts funding of local government. Attitudes towards arts are generally favourable: four out of five people say arts education is as important as science education; almost nine out of ten believe the arts play an important and valuable role in modern society; and seven out of ten say arts funding should be safeguarded in times of economic recession. The top priority for targeted arts funding was for programmes and facilities dedicated to working for and with children and young people. In terms of attendance, 85% attended at least one event in the previous 12 months with 7% at a classical music concert or recital. Listening/watching data was also high with 96% respondents having watched or listened to an arts performance

via media such as CDs, DVDs, etc. (10% listened to a classical music concert, and 9% watched one). A significant improvement from the 1994 data was on the issue of whether people experienced difficulty accessing or attending arts activities. In 1994, 73% responded they did have difficulty taking part; by 2006 this had fallen to just 17% of respondents. The report does not make policy recommendations but demonstrates the broad public backing for arts initiatives and governmental spend on arts activities, and indeed, for certain genres of spending over others: there is much more public support for funding for children's and young people's initiatives over supporting individual artists.

PSB Radio Symphony Orchestras included in international orchestral benchmarking

Orchestra	Country
ORF Vienna Radio Symphony Orchestra (RSO Wien)	Austria
Brussels Philharmonic	Belgium
Bulgarian National Radio Symphony Orchestra	Bulgaria
Croatian Radio-Television Symphony Orchestra (Simfonijski orkestar Hrvatske radiotelevizije)	Croatia
Prague Radio Symphony Orchestra (Symfonický orchestr Českého rozhlasu)	Czech Republic
Danish National Symphony Orchestra (DR SymfoniOrkestret)	Denmark
Estonian National Symphony Orchestra (Eesti Riiklik Sümfooniaorkester)	Estonia
Finnish Radio Symphony Orchestra (Radion sinfoniaorkesteri)	Finland
Orchestre National de France	France
Orchestre Philharmonique de Radio France	France
German Radio Philharmonic Saarbrücken Kaiserslautern (Deutsche Radio Philharmonie Saarbrücken Kaiserslautern)	Germany
HR Symphony Orchestra (HR-Sinfonieorchester)	Germany
MDR Leipzig Radio Symphony Orchestra (MDR Sinfonieorchester)	Germany
Munich Radio Orchestra (Münchner Rundfunkorchester)	Germany
NDR Elbphilharmonie Orchester	Germany
NDR Radiophilharmonie	Germany
Radio Symphony Orchestra Berlin (Rundfunk-Sinfonieorchester Berlin)	Germany
SWR Symphony Orchestra (SWR Symphonieorchester)	Germany
Bavarian Radio Symphony Orchestra (Symphonieorchester des Bayerischen Rundfunks)	Germany
WDR Symphony Orchestra Cologne (WDR Sinfonieorchester Köln)	Germany
ERT National Symphony Orchestra	Greece
Hungarian Radio Symphony Orchestra (Magyar Rádió Szimfonikus Zenekara)	Hungary
RTÉ National Symphony Orchestra	Ireland
RAI National Symphony Orchestra (Orchestra Sinfonica Nazionale della RAI)	Italy
Latvian National Symphony Orchestra (Latvijas Nacionālais simfoniskais orķestris)	Latvia
Radio Philharmonic Orchestra (Radio Filharmonisch Orkest)	Netherlands
Norwegian Radio Symphony Orchestra (Kringkastingsorkestret)	Norway
Polish National Radio Symphony Orchestra (NOSPR)	Poland
Polish Radio Symphony Orchestra (Polska Orkiestra Radiowa)	Poland
National Radio Orchestra of Romania (Orchestra Națională Radio)	Romania
Slovak Philharmonic Orchestra (Slovenská Filharmónia)	Slovakia
RTV Slovenia Symphony Orchestra (Simfonični Orkester RTV Slovenija)	Slovenia
RTVE Symphony Orchestra (Orquesta Sinfonica RTVE)	Spain
Swedish Radio Symphony Orchestra (Sveriges Radios Symfoniörkester)	Sweden
Orchestra della Svizzera Italiana	Switzerland
Orchestre de la Suisse Romande	Switzerland
BBC Philharmonic	UK
BBC Symphony Orchestra	UK
Ulster Orchestra	Northern Ireland
BBC Scottish Symphony Orchestra	Scotland
BBC National Orchestra of Wales	Wales

Organisations interviewed and submissions received

We spoke to a wide range of players in the Irish market to gauge views on current and future developments and outcomes, as well as international stakeholders. Face-to-face and telephone interviews were undertaken from December 2017 – January 2018.

A list of the organisations interviewed (or submissions received) is set out below.

Organisation	Representative
RTÉ	Dee Forbes Rory Coveney Aodán Ó Dubhghaill Jim Jennings Sinead Casey Moya Doherty Anthony Long Gareth Hudson Andrew Smith Sheila Gallagher Niamh Killeen John O’Kane Fearghal Ó Ceallacháin David Agnew
NCH	Maura McGrath Simon Taylor
SIPTU/MUI	Shirley Bradshaw Graham Macken
Arts Council	Niall Doyle Liz Meaney
Dublin Institute of Technology	Orla McDonagh
Royal Irish Academy of Music	Deborah Kelleher
Royal Irish Academy of Music	Professor James Cavanagh
Contemporary Music Centre	Evonne Ferguson
Irish Chamber Orchestra	Gerry Keenan
Music for Galway	Anna Lardi Fogarty
University of Limerick	Mel Mercier
Irish National Opera	Fergus Sheil
Music Network	Sharon Rollston
BBC Radio	Bob Shennan
BBC Radio 3	Alan Davey
BBC Philharmonic	Simon Webb
BBC NOW (National Orchestra of Wales)	Michael Garvey
EBU	Graham Dixon
Norwegian Radio Symphony Orchestra (NRK)	Rolf Lennart Stensø
Finnish Radio Symphony Orchestra	Tuula Sarotie
Danish Radio Symphony Orchestra	Kim Bohr
Voice of Irish Orchestras	John Swift
Vision for Irish Orchestras	John Smith
Chorus Ireland	David Brophy
Composer	Bill Whelan

Options analysis: financial assumptions

	NSO current funding	NSO "fully funded"	CO current funding	CO "fully funded"
Permanent players	68	89	40	45
Education officer	0	1	0	1
Sound engineer	0	1 (shared)	0	1 (shared)
Regional performances	3	13	7	16
Educational events*	13	23	7	22
[redacted]	[redacted]			
[redacted]	[redacted]			
[redacted]	[redacted]			
[redacted]	[redacted]			
Total expenditure on freelancers/augmentation	€780kk	€350kk	€740k	€250k
[redacted]	[redacted]	[redacted]	[redacted]	[redacted]
Marketing investment	€0.5k	€150k	€19k	€200k
Cost per regional performance	€25k		€15k	
RTÉ-NSO broadcast output agreement	-	€3.5m	-	
Commercial revenue increase from marketing investment	-	10%	-	10%

Source: RTÉ, Mediatique analysis. 'Current funding' assumptions are based on 2016 data, except total expenditure on freelancers/augmentation, which uses 2017 data provided by RTÉ. *Educational events conducted together with general Dublin/regional performances, so no extra cost is assumed.