



Australian Major Performing Art Group

Submission to

DFAT Review Soft Power:

Identifying ways to better leverage Australia's soft power assets and build effective partnerships to advance Australia's security and prosperity.

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Who we are

Australia's 'major performing arts' (MPA) companies inspire millions through theatre, circus, contemporary dance, classical ballet, classical music, opera, musicals and comedy. The Australian Major Performing Arts Group (AMPAG) is the umbrella group for these companies. (See a list of AMPAG members at [Appendix 1.](#))

The companies, all of which are not-for-profits, are designated 'major' because of their prominence and significance. They are often positioned as national or state flagship companies, bringing a level of respect and gravitas that can be particularly powerful in the right international diplomatic settings.

In addition to the majors, a diverse range of other performing arts companies also tour the globe, often working strategically with Australia Council support to nurture international audience and sector connections and offering their unique capacities to leverage people-to-people links.

On the world stage, Australian major performing arts companies regularly embark on an extensive range of high-profile and prestigious international engagements each year, showcasing the excellence of Australia's artistic practice through performance tours and festivals. These engagements offer strategic opportunities to contribute to Australia's international brand and, in turn, soft power.

Cultural diplomacy a strategy to advance Australia's soft power

Cultural diplomacy is founded on 'the exchange of ideas, information, values, systems, traditions, beliefs and other aspects of culture, with the intention of fostering mutual understanding'. Such interactions not only build trust, but help to align values to our own and contribute to Australia's soft power.

The performing arts draw people together in a relatively 'friendly', non-contested setting. They enable disparate groups to share experiences on an immediate and very human level with lasting impact. Music, dance and physical theatre can transcend language, while theatrical performance can take audiences on narrative journeys that build empathy and insights into unfamiliar situations and cultures.

The MPAs are involved in a range of international cultural engagements with variable levels of DFAT cooperation and coordination. (See [Appendix 2](#) for MPA international engagement examples.) Many MPAs appreciate the efficient, engaged approach adopted by the DFAT team in Canberra and key overseas Australian embassies that have supported successful multiyear approaches. However, with additional resources, more opportunities could be created to build the performing arts contribution to cultural diplomacy's contribution to in turn strengthen Australia's soft power.

AMPAG currently collects MPAs' international touring forecasts mid-year and at the end of the year for distribution to DFAT, Department of the Arts and the Australia Council. DFAT often invites arts organisations to brief diplomats before they head out to their new posts, and we welcome what are often very fruitful discussions. However, those conversations are predominantly existing performing arts international engagement activities that DFAT might leverage. There is an opportunity to improve cultural diplomacy impact through increasing the post's capacity to develop long-term country-specific joint strategies.

Overseas examples

Other nations take cultural diplomacy very seriously. China, for example, sees it as central to the way it engages internationally, and Australia needs to be able to respond and reciprocate.

The British Council's founding articles set out the belief that:

'The world will be a better, safer, more prosperous place if people and peoples have a 'friendly knowledge and understanding' of each other and that the United Kingdom's long-term influence, economic growth and security benefit greatly from that. Everything the British Council does going forward must and will be aligned with this mission to contribute to the best future for the UK in the world.'

This type of clear-eyed vision and program commitment in support of the role cultural diplomacy can play in strengthening a country's soft power is needed in Australia's new soft power strategy.

The UK Department of Culture, Media and Sport designed a program to commemorate the life and works of William Shakespeare, 400 years after his death. Through the Shakespeare Lives campaign, the GREAT¹ campaign partners and the British Council celebrated the influence of Shakespeare on culture, language and education across the world, and together with Volunteering Services Overseas, raised funds to support child literacy around the world. This included Malthouse's production *Shadow King* touring to the UK as part of this year-long strategic celebration. In the department's words,

'Sharing our favourite Shakespeare moments and inspiring the world with the magic of his creativity is surely cultural diplomacy at its best.' UK Department of Culture, Media and Sport.

Foreign cultural diplomacy and the arts

The performing arts have a vital role to play in advancing Australia's soft power. Through their contribution to cultural diplomacy, the performing arts offer unique opportunities to reflect Australia's values and identity as a stable, sophisticated and creative nation that is both culturally diverse and socially cohesive. Live performance is highly engaging, drawing people together for a shared emotional experience. In a world where rising populist nationalism has the potential to create distrust and hostility between cultures, the ability of the performing arts to create opportunities for person-to-person positive encounters develops people-to-people connections, understanding and respect.

International performing arts engagement provides the opportunity to:

- promote positive images of our multicultural community
- promote Australia's image as sophisticated and creative
- project Australian values and ideas
- offer forums for fostering people-to-people, business-to-business and government-to-government relationships
- create social opportunities to advance market access for Australian cultural exports
- promote Australian tourism and education
- offer strategic non-political engagement opportunities.

¹ The *GREAT Britain* campaign showcases the best of what the UK has to offer to inspire the world and encourage people to visit, do business, invest and study in the UK. It is the government's most ambitious international promotional campaign ever, uniting the efforts of the public and private sector to generate jobs and growth for Britain. The campaign has already secured confirmed economic returns of £1.9bn for the UK.

Forms of engagement

The performing arts engagement can be as contained as an individual artist, to international touring of some of our largest arts organisations, such as the state orchestras and our state and national ballet companies.

Soft power nurtured through arts engagement can take many forms, including:

Making and performing

- establishing formal MOUs between like organisations for collaboration/cooperation
- international collaborations, co-productions
- the international exchange of principal performers and creatives
- touring major works
- performing at leading international festivals, including prestigious invitations to open or close the festival

Exchange of knowledge and expertise and celebrating connections

- hosting social events linked to making and performing
- presenting workshops internationally
- participating as expert judges on internationally recognised competitions
- trade knowledge exchange through sharing arts administration, artist or creative expertise between Australian and foreign performing arts organisations and venues
- Australian or business brand association with inspiring creative work linked through sponsorship and social events pre- or post-performance, including the opportunity to meet and hear from leading artists and creatives associated with the work
- people-to-people relationships through international guest attendance at Australian conferences or industry events, and Australian participation in overseas industry conferences, festivals or events
- employment of a small number of leading foreign artistic talent within Australia's MPAs

Enrichment

- providing arts education to foreign school students
- linking people to Australians through live online events
- international citizens accessing performing arts-rich content via Australian organisations' websites and through international joint digital initiatives, such as *World Ballet Day*
- Social media engagement
- 'digital presence across multiple platforms incl foreign distribution performances as digital feature films

Marion Potts, former Artistic Director, Malthouse Theatre says,

'It's important that we be part of a bigger international conversation. We certainly have the talent and imagination to be working with partners from all over the world.'

Australia's soft power assets and challenges

The 28 major performing arts companies, as state or federal flagship companies supporting Australia's national arts framework, are strong positive Australian 'brands' that have existed for many years. For example, The Australian Ballet tour China next month, their ninth tour since they became the first international ballet company to visit China following the Cultural Revolution. As a result, the company has developed strong relationships with resident Chinese ballet companies, including developing exchange programs for dancers and those working behind the scenes whose presence has evoked our country-to-country friendship over many decades.

Senator the Hon Mitch Fifield, Minister for the Arts and Minister for Communications said on the announcement of the tour:

'This tour to China once again presents opportunities to showcase The Australian Ballet's position as a great cultural ambassador for Australia, highlighting the world-class skill and talent of their artists and productions and many cultural exchanges that have been initiated as a result of the company's long association with China.'

In all, The Australian Ballet has a high-profile history of international touring that has taken the company to 37 countries and 88 cities since it was founded in 1962.

The Sydney Symphony Orchestra also has a deep multiyear multi-layered engagement strategy in China which on numerous occasions has supported other government and business meetings and state events. This year the SSO, as the first Australian orchestra to tour Europe back in 1974, is embarking on a seven country, 12 concert tour of Europe- building on the legacy of long-term engagement.

(Appendix 2 includes a range of examples of performing arts cultural engagement and associated diplomacy opportunities.)

Over the last five to ten years, state-based MPA theatre companies have also gained increased international theatre recognition. Brexit is generating a renewed energised cultural interest in Australia; for example, the Malthouse Black Swan State Theatre Company's new production *Picnic at Hanging Rock* toured the UK in 2015 and was invited again in 2017. *The Financial Times* (UK) wrote:

'Most potent of all, however, is the political import of this splintered, slippery production, where a white, English school ma'am boasting of taming the wilderness and of Australia being "in a childish state" looks both arrogant and foolish..... the eerie, hallucinogenic feel of the piece suggests the disconcerting effect of a mystery that touches on all sorts of unwelcome truths about the past.'

The capacity for Australian performing arts organisations to make a lasting impact on their audiences overseas was summed up by Kim Beazley, who said at the opening night of STC's *Uncle Vanya* at the Kennedy Center, Washington DC:

'Sydney Theatre Company achieved more for Australian public diplomacy in three hours on the theatre tonight than I have in two years.'

Ben Brantley, sometimes referred to as the 'world's most feared theatre critic', wrote on *Uncle Vanya* in the *New York Times*:

'A gritty, spontaneous sounding vernacular... I consider the three hours I spent on Saturday night amongst the happiest of my theatre-going life.'

Taking The Australian Ballet to Paris, the birthplace of ballet, and gaining standing ovations says much about Australia's sophistication. Europe's *Le Figaro* wrote of The Australian Ballet's *Swan Lake*:

'...enthusiasm, youth and originality... put fire into the Lake.'

Le Journal de Dimanche wrote:

'Sophisticated and nearly athletic choreography' that 'draws from all sources.'

Chicago Tribune wrote of the Australian Chamber Orchestra's US tour:

'This is one of the most precise, cutting-edge virtuoso string ensembles to be found anywhere in the world.'

The *Planet Quebec*'s review of Circus Oz's tour to Canada:

'From the *Ground Up* is overflowing with goodwill, unleashes a thunderous energy, and makes the whole theatre burst into laughter with its amusing gags. Circus Oz is dynamite on stage.'

The performing arts demonstrate and embody our national attributes in authentic ways, creating a unique shared experience that is felt by audience members personally. They offer a powerful and lasting approach to telling our story and emoting who we are as Australians.

Advancing Australian trade

Developing a sophisticated firsthand view of Australia and its people can make a material difference to the advancement of other priorities.

National cultural branding impacts sponsors' capacity to position their brand in the foreign market.

Telstra's head of international business reported that the value of association with The Australian Ballet on tour in Europe was 'incalculable'. European clients attending as Telstra guests came along with low expectations of Australian culture. By the end, they were asking very different questions about Australia, how we operate and what other art happens. Their opinions of Australia's sophistication and potential were transformed.

Woodside has been a proud supporter of artistic and cultural activities and organisations, including West Australian Ballet, over an extended period of time. They report that:

'...being associated with the positive Australian "brand" by our customers around the world provides us with a point of difference, which at times can be a key consideration for securing long-term and reliable supply of a strategic commodity, like energy. We have, therefore, seen value in partnering with high-quality Australian artistic and cultural activities in target markets that project a modern, positive and sophisticated image of Australian values and society. In recent years, we have supported events of this nature in several countries, including Japan, Korea and Singapore.

'Woodside's support of West Australian Ballet's excellent program in Indonesia in 2016 provided the first opportunity to do so in what was then a potentially new and important market for the company. The touring dates in August 2016 coincided with a

period during which we were negotiating a long-term liquefied natural gas (LNG) supply agreement with Pertamina, Indonesia's national oil company. The opportunity to be associated with the touring program, including hosting our Pertamina guests at the performance in Jakarta, of such an iconic Australian artistic organisation in Indonesia, reinforced Woodside's brand as a premier company from Australia, and assisted with the building of closer business relationships. In June 2017, an agreement was finalised for Woodside to supply LNG to Pertamina for a period of at least 15 years.'

Woodside's experience with West Australian Ballet and other similar organisations in international markets underlines the substantial merit of using Australia's rich and diverse artistic and cultural assets to develop further a contemporary vision of Australia that is attractive globally.

Inspiring tourism

Projecting the values of Australia, sharing the diversity of our stories and revealing a sophisticated creatively vibrant country through riveting and emotional performances can also inspire people to visit Australia, to stay longer and spend more on cultural events when they do.

World Creative estimates that cultural and creative industries generated around 29.5 million jobs globally in 2015, and revenue of around US\$2,250 billion annually (see [Appendix 3](#)). In Australia, the cultural sector is a significant driver of national income, contributing \$50 billion towards GDP, with over \$4.2 billion from the arts.

Around 40% of all international visitors to Australia undertake an arts activity, and the arts can also be a key influencer in attracting tourists in the first place, projecting not simply our beautiful geography, but also igniting a desire to experience our lifestyle and meet our people. Tourism Research Australia reports increases in international tourism in 2016 across a range of activities:

'...with holiday visitors up 16%, nights up 12% and spending generated through visits to festivals and cultural events increasing by 16%⁵. The impact of arts tourism on the economy also extends beyond the purchase of a single ticket as it can stimulate related activities, such as flight and hotel bookings, food and other retail activities.'²

Opera Australia's international engagement has for many years been characterised by major international co-production with leading opera companies, such as Royal Opera House Covent Garden, Teatro alla Scala, The National Centre for Performing Arts, Beijing, Metropolitan Opera, and Canadian Opera Company. However, next month Opera Australia commence their inaugural multicity international tour of China with their production of *Madame Butterfly*.

It is a valuable opportunity both to showcase the calibre of Opera Australia's (OA) productions and talent, and to enhance our nation's reputation for artistic and cultural excellence with the Middle Kingdom. It also supports the development of the OA brand in what is rapidly becoming one of the largest inbound tourism markets for OA, which has led to OA including Simplified Chinese surtitles for some performances in Australia across their seasons.

² ⁵ *International Visitors in Australia: Year ending March 2016*, Austrade, Tourism Research Australia; http://www.tra.gov.au/documents/ivs/ivs_one_pager_March2016_V2.pdf

Future possibilities and emerging opportunities to advance Australia's global influence and prosperity

There are many initiatives currently in development across the 29 MPAs (including Victorian Opera) as reported to DFAT with a range of discussions and collaborations in development in Asia, including Japan, Singapore, Indonesia, China, Hong Kong, Taiwan, South Korea, India as well as in North America, South America, New Zealand, the UK and Europe.

- **Multiyear joint strategies**

These involve developing and resourcing a combined strategy across a number of performing arts organisations that are naturally pursuing engagement in a region, (separate to a DFAT-led focus on country initiatives), across multiple years.

This could also include seeking expressions of interest to be a lead partner with DFAT in a long-term cooperative partnership in a targeted country, with the capacity to facilitate and support the entry of other arts and cultural organisations, and the pursuit of other commercial interests.

The Australian/Singapore government-to-government approach through the establishment of an MOU and the formal discussions that followed has recently led to the announcement of a partnership between Melbourne Symphony Orchestra and the Singapore Symphony Group. (See entry in [Appendix 2.](#))

- **Arts education**

Depending on the source, between 60 and 100 million Chinese children are learning a western musical instrument, and nine out of ten children in the top-tier Chinese schools are learning the piano or violin.³ It is estimated that the middle class in China will swell to some 850 million people in the next 15 years and China is developing one of the biggest markets in the world for western art forms.

Asia has a large youth population and following the same principle that underlies the people-to-people diplomacy leveraged through The New Colombo Plan's tertiary student exchange, Australia could support positive associations and interconnections by engaging Asian school students through an arts education initiative in partnership with major performing arts companies. This could also create potential synergies between school students involved in local MPA education programs and their foreign counterparts and deliver the benefits that an arts education provides to the developing child.

Musica Viva Australia reached some 263,641 students in Australia last year and has developed a music education application and online resources that have been rolled out to Australian schools in the previous five years. They have partnered with Premiere Performances Hong Kong (PPHK) for the past six years, to replicate Australia's successful 36-year-old program in their territory. Due to its interactive nature, the program has been particularly successful in a country that is used to more formal music and more formal music education.

Bell Shakespeare offers a renowned education program reaching on average 80,000 students and teachers around Australia annually. Its early 2000's in-schools' incursions in Singapore and Malaysia and more recently trial education workshops in Beijing were well received. However, Bell Shakespeare's principal remit is to engage Australian audiences and students. Therefore, while there is potential to build on this activity, the organisation is not funded to support this work, and currently have minimal resources to strategically progress the opportunities.

³ Ross, *Symphony of Millions: Taking stock of the Chinese music boom*, The New Yorker, Jul 07, 2008

Increasing foreign tertiary exchange students' access to Australian performing arts in partnership with the arts sector, could also increase positive cultural diplomacy outcomes, deepening their understanding beyond the confines of cultural engagement offered within the university.

- **Mentoring the art form in other countries**

In 2016, West Australian Ballet (WAB) launched the pilot *Knowledge Exchange Programme* (KEP) in Jakarta, Indonesia as the centrepiece of its international performance tour in partnership with Ballet i.d. In March 2017, WAB attended and performed at the Austrade in Jakarta Gala Dinner to celebrate successful partnerships and collaborations between Indonesia and Australia. Also, in 2017, the company extended the knowledge exchange program with two sets of activities:

- One Indonesian technical staff member and two Indonesian administrative staff members travelled to Perth, WA to work alongside WAB's team throughout the preparation for and opening of *Don Quixote* at His Majesty's Theatre, supported by the Australian Embassy in Jakarta.
- The Australian Japanese Foundation and WA Australia Japan Society supported the West Australian Ballet to establish a new *Knowledge Exchange Program* with Japan that enables aspiring Japanese dance students to gain access to advanced level coaching, including in preparation for competing in the Youth America Grand Prix, and gaining an insight into life at a professional ballet company. The project also supports the development of Australian–Japanese cultural relations and promotion of Australian artistic excellence by enabling the continued association of West Australian Ballet Artistic Director, Aurelien Scannella, with the prestigious ballet competition, the Youth America Grand Prix in Asia and its representatives. The next step in deepening engaging will be for WAB to tour to Japan.

- **Digital engagement**

The Australia Council for the Arts estimates the MPAs' total 2017 digital reach was approximately **62.8million** people.

Digital platforms include:

- broadcast radio and television
- content streaming
- visits to performing arts company websites
- social media
- distribution of CDs/Blu-ray and publications
- digital cinema screenings.

The Melbourne Symphony Orchestra recently announced it has secured a prestigious international TV distribution agreement with UNITEL, a world-leading producer and distributor of classical music for TV, DVD and Blu-ray, cinema and new media. MSO will sit alongside the Vienna Philharmonic and Berlin Philharmonic orchestras, the Royal Concertgebouw Orchestra, Orchestre de Paris and Staatskapelle Dresden.

Ernst Buchrucker, UNITEL Managing Director:

'This agreement is a mark of the quality of the MSO's artistic output, and we know that its performances will be applauded by viewers throughout Europe, America and Asia.'

Australian Minister for the Arts, Senator, the Hon Mitch Fifield, welcomed the news saying,

'UNITEL is home to some of the finest collections of classical music in the world and is a natural fit for the Melbourne Symphony Orchestra, which is one of Australia's arts leaders. Through this partnership, international audiences will be able to enjoy the MSO, putting a spotlight on Australia's significant cultural credentials.'

Education: Digital presentations for arts education to foreign school students is another opportunity. This can include a simultaneous digital presentation to Australia and international students subject to time zone alignment.

There is also potential to live-stream in-theatre performances from world-class venues, such as Sydney Opera House or Arts Centre Melbourne, including Q&As with the performers, and video conference workshops for teachers and/or students joining up to four locations or classes at a time.

New international art form platform: Malthouse is in early conversations with Young Vic in London to create a global production via digital platforms. The aim is for the platform to reach different communities across the world. While Malthouse is rich in the ideas and talent, they do not have the funds to finance the project, but it could present an opportunity for government to advance a digital platform to support Australia's soft power.

- **Access to vibrant audio-visual resources**

Many MPAs also build their presence through sharing rich audio-visual assets online, and a small number of organisations are involved in annual live streaming events connecting leading Australian performing arts companies' live performances and behind the scenes with their overseas peers, raising their profile and celebrating their work and the art form.

Examples include:

Digitally linked live community engagement: In 2014, a partnership initiative called **Big Dance** was formed, led by the Greater London Authority, People Dancing, Sydney Dance Company, Get Scotland Dancing, Arts Council England and the British Council. Over 2000 participants learnt the choreography commissioned for this event by Sydney Dance Company's Rafael Bonachela. Big Dance was performed and filmed at Sydney Opera House, Bega and Port Macquarie, with live satellite links to London and Glasgow. Now a biennial event, there were 42,000 participants in 2016 and this year Sydney Dance Company were involved again as a venue partner, with SDC Artistic Director, Rafael Bonachela as an ambassador.

World Ballet Day is an annual celebration of ballet held since 2014 in the first week of October. It is a collaboration between major ballet companies around the world, which stream live video of their behind-the-scenes preparations in their respective time zones. World Ballet Day LIVE 2018 returns Tuesday 2 October 2018 hosted by The Australian Ballet, Bolshoi Ballet and The Royal Ballet, Queensland Ballet and West Australian Ballet will also participate.

- **Influencers and networking**

Performing arts organisations are often accompanied on tour by some of their most loyal and active supporters. Many international tours attract private investment from significant donors who are highly influential not only in Australia but internationally. This has the potential for key influencers to contribute to Australian people-to-people priorities.

Barriers to engagement

The performing arts companies' first priority is to develop artistic excellence in the work they present and to advance the art form in Australia. International collaboration can play an essential part in that; however, in the case of the MPAs, they are not funded to deliver cultural diplomacy and do not have access to the Australia Council's international grant funding. That fund is reserved for smaller arts organisations with a priority to nurture the artistic vibrancy and sustainability for these organisations rather than to advance cultural diplomacy per se. Therefore, the MPAs must seek support elsewhere to cover the additional costs associated with international engagement and touring.

Funding international major performance engagements relies on multiple funding sources, including government, philanthropic, sponsorships and the company's reserves as well as contributions from host countries and revenue from ticket sales. This model is complex, often uncertain and requires a high level of service.

DFAT's cultural diplomacy fund, country-to-country foundations and individual consulate support are important ways in which government can leverage cultural diplomacy through the performing arts. We are also aware that companies are often encouraged to pursue the new foreign relationships only to discover funding is not available once the opportunity or initiative has been developed, and a 'warm' contact 'cools'.

The Department of Foreign Affairs and Trade provides support through a complex matrix of relatively small funds with different priorities, assessment processes and short time frames:

- the International Relations Grants Program, comprising highly competitive Cultural Diplomacy Grants that distribute a total of around \$500,000 annually, as well as funds of a similar size administered through various country or region-specific councils that can include cultural initiatives
- internal annual budget bids by diplomatic posts, with grants awarded to individual posts ranging from around \$7000 to 300,000 each year
- Austrade's export market development grants.
- country and country foundations.

Significant in-kind support can also be provided by posts on the ground — value-add from posts can include leveraging local knowledge and relationships to:

- facilitate effective social media strategies and traditional media interest
- build new local audiences in the country visited
- attract additional non-government financial support
- support the development of future cultural exchange and advancement.

Understandably, Australia's priority countries attract additional DFAT resources, including staffing to support outreach. However, the capacity of our established posts in other countries to positively impact cultural exchange is also greatly valued by visiting Australian arts organisations, and it is prudent to continue to enliven and refresh these relationships in rapidly changing times.

Many performing arts organisations welcome the opportunity to support with DFAT's annual country focus however they do to provide the same arts' development opportunities that multiyear strategies do. Building audiences and artistic relationships take time, and multiyear performing arts strategies can support the development of multilayered engagement with a particular territory.

Cultural diplomacy can be advanced opportunistically or strategically. It is somewhat limited by the unpredictable and modest level of government investment available both within the

embassies and via the cultural diplomacy fund. The fact that performing arts engagement planning is often reliant on funding, and vice versa, can lead to incompatible timeframes. Philanthropic and corporate sponsors are also valued supporters, but their level of support varies greatly.

Other financial and cultural barriers that can limit international engagement by performing arts companies include:

- international flights and accommodation to establish relationships and exchange
- costs of shipping freight, flights and accommodation
- time differences for Skype/phone meetings with international artists/companies
- In the Asia Pacific region additional costs can include on occasion, additional resources are needed to support cultural safety and to adjust the traditional western way of creating theatre to the form preferred by the collaborating international artist.
- foreign partners' hosting expectations

Addressing barriers– AMPAG recommendations

1. A cultural diplomacy strategy should be developed and resourced within the soft power strategy, supported by an organisation structure that has the capacity to attract and retain high-calibre personnel. Stability in the retention of effective staff in this area in recent years has generated additional value.
2. Increase investment in cultural diplomacy to support long-term complex engagement strategies beyond focus country initiatives.
3. Often large arts organisations need to plan international engagement over a long lead time (three to four years), yet funding is allocated over relatively short periods, once a proposal is relatively secure. Developing capacity for in principle or indicative support in the early planning enables a greater capacity for Australian representatives to enter discussions confidently, demonstrating capability and avoids stalling momentum.
4. While we do not want corporate sponsorship to be viewed as the answer to all our resourcing challenges, sponsors can be valuable partners who could be developed further. AMPAG recommends strengthening the post's capacity to generate greater synergies between corporate market positioning needs and the resourcing necessary to support successful deep cultural diplomacy.

Appendix 1: AMPAG members

Adelaide Symphony Orchestra	South Australia
Australian Brandenburg Orchestra	New South Wales
Australian Chamber Orchestra	New South Wales
Bangarra Dance Theatre	New South Wales
Bell Shakespeare	New South Wales
Belvoir	New South Wales
Black Swan State Theatre Company	Western Australia
Circus Oz	Victoria
Malthouse Theatre	Victoria
Melbourne Symphony Orchestra	Victoria
Melbourne Theatre Company	Victoria
Musica Viva Australia	New South Wales
Opera Australia	New South Wales
Opera Queensland	Queensland
Orchestra Victoria	Victoria
Queensland Ballet	Queensland
Queensland Symphony Orchestra	Queensland
Queensland Theatre Company	Queensland
State Opera South Australia	South Australia
State Theatre Company of South Australia	South Australia
Sydney Dance Company	New South Wales
Sydney Symphony	New South Wales
Sydney Theatre Company	New South Wales
The Australian Ballet	Victoria
Tasmanian Symphony Orchestra	Tasmania
West Australian Ballet	Western Australia
West Australian Opera	Western Australia
West Australian Symphony Orchestra	Western Australia

From 2018 Victorian Opera will join the MPA group

Select examples of MPA international engagement

1. Adelaide Symphony Orchestra

Nimble engagement responding to people-to-people connections

A group of eight ASO musicians visited China in August to perform *The Bush Concert* in the 34th China Harbin Summer Music Festival.

The invitation was extended after China's Consul and Cultural Attaché, Mr Yang, enjoyed watching his wife Yafen perform in a Chinese New Year concert with the ASO.

The two performances showcased Australian talent in the form of the ASO musicians, Adelaide local Mark Ferguson, composer of the piece, and his wife Sarah Ferguson, who presented the show in Pin Yin. The ASO sees the trip as an opportunity to engage with the Chinese community and build cultural connections for future collaborations.

The Bush Concert is about the coming together of a community through music, while the performance itself is a real-life demonstration of the concept. The piece, developed around Australian content (flora and fauna), also draws attention to the environmental issues — in particular, drought — facing Australia. Based on the book by Australian author Helga Visser, *The Bush Concert* weaves the sounds of the Australian bush into Mark's enchanting musical score.

The Bush Concert was developed in 2015 for the ASO's Learning program, and in 2017, it was picked up by the Sydney Symphony Orchestra and broadcast to thousands of school children in NSW.

Harbin, like Adelaide, has been recognised by UNESCO as a Music City. The city has hosted the biennial Harbin Summer Music concert since 1958 (except during the Cultural Revolution), and China's oldest symphony orchestra and first music school were established here. The festival is sponsored by the Ministry of Culture of the People's Republic of China and Harbin Municipal Government.

2. Australian Chamber Orchestra in Europe, the UK and US

Showcasing excellence

As a touring orchestra, by 2017, the ACO had notched up 565 concerts in 271 cities across 45 countries on 58 international tours, and this year begins a three-year residency as *International Associate Ensemble* at Milton Court in partnership with the Barbican Centre. The ACO has established a solid connection with London, having toured to the city nearly twenty times over the last 25 years and this enables the ACO to strengthen their audience ties.

Richard Tognetti described the value of this opportunity:

'London is the world's cultural capital, and the Barbican Centre stands out as the city's most intrepid concert venue for its courageous programming and dedication to presenting truly imaginative productions across all art forms. To be invited to take residence as International Associate Ensemble at Milton Court in London, alongside such august company as the LA Philharmonic and the Jazz at Lincoln Center Orchestra, is an extraordinary honour and we greatly look forward to collaborating with the Barbican, who share our commitment to presenting concerts that aim to inspire, embolden and challenge audiences.'

The Barbican Centre's Head of Music Huw Humphreys said:

'The ACO's three concerts in March 2017 left a profound impression on us all, and we realised that the intimate atmosphere and extraordinary acoustics made Milton Court Concert Hall the perfect space for this ensemble. We are looking forward to working with the ACO on an annual residency, which will include a varied range of concerts featuring the ACO's characteristic eclectic mix of classical repertoire and contemporary programming as well as collaborations with Guildhall School musicians. *The Guardian* described the ACO as "one of the wonders of the musical world", and we are thrilled that our audiences will have the chance to experience this on a regular basis.'

The ACO has a strong affiliation with London, having given thirty concerts in the city since their London debut in 1982. This includes sold-out performances in each of the UK's major concert venues, including the Barbican Centre, Southbank Centre and Wigmore Hall, for which they have received five-star reviews from publications, including *The Times*, *The Guardian UK* and *The Telegraph*.

'Probably the greatest chamber orchestra around today.' *The Guardian (UK)*.

3. Melbourne Symphony Orchestra and the Singapore Symphony Group **Strategic government-to-government approach leading to multiyear partnership**

The recent announcement of a multiyear partnership between the two orchestras from 2019 to 2022 began with the relationship between Australia and Singapore being formalised with the signing of the Memorandum of Understanding on Cooperation in the Field of Arts and Culture in June 2015. This included the establishment of the Australia Singapore Arts Group to help identify and facilitate opportunities for cultural exchange and relationship building.

Minister Fifield said:

'This new connection with Singapore arose out of formal talks on arts and culture over the past three years. It gives Australian musicians the opportunity to collaborate with international peers and reach a broader audience in the region. Partnerships such as these are vital to strengthening and growing Australia's arts and culture sector.'

The partnership will lead to important collaborations, including joint orchestral performances and concerts in both countries with a mission to inspire and engage audiences worldwide, and to share music-making and knowledge between the two orchestras.

4. Bangarra in the US and France and India **Cultural exchange**

On the back of a critically acclaimed national tour, Bangarra Dance Theatre took its 16-member dance ensemble to New York and Paris in September/October 2016 as part of its 24th international tour.

In New York, the company performed *Spirit* — a collection of iconic works from their 27-year history — at the prestigious 13th annual *Fall for Dance Festival*, the only Australian company on the bill.

In their first standalone season in Paris, Bangarra performed *Ochres* at the Musée du Quai Branly — Jacques Chirac. The museum is known for its unique collection of over 3,500 works from the world's Indigenous cultures, including the spectacular painting transformation of the museum's rooftop by prominent Indigenous artist Lena Nyadbi from Warmun in Western Australia, which can be seen from the top of the Eiffel Tower.

The performances formed just one element of the company's residency at Musée du Quai Branly — Jacques Chirac, which also comprised public talks, workshops and screenings of Stephen Page's acclaimed directorial feature film debut *Spear*.

'Presenting our artistry and storytelling on the world stage is a highlight of the year for us. Bangarra is a passionate cultural ambassador for Australia, with a distinct and profound voice. Our ability to connect with audiences without the limitations of language enables us to share Indigenous history and grow artistic relationships between Australia and countries all over the world.' Stephen Page Artistic Director Bangarra.

Bangarra toured Europe in 2017 and is now preparing to travel to Japan and India in October and November 2018. The tour will include performances at Saitama Arts Theater in Japan and a multicity tour across India, including a major free outdoor event at the Qutub Minar in New Delhi.

In Bangarra's second visit to India, they will present *Spirit 2018*, showcasing the best of Bangarra's 29-year repertoire in a powerful celebration of culture. The company will present performances in Bangalore and Mumbai as well as a major free outdoor performance at the Qutub Minar in New Delhi, as part of the Australian Government's Australia Fest program.

With contemporary movement forged from 65,000 years of culture, and stories and songlines drawn from all over Australia, the piece celebrates the spirit of the dingo, the ephemeral life of the moth, and throughout, Indigenous peoples' unbroken connection to the land. This is a true celebration of Australia's rich culture and history, fused with outstanding dance technique.

Further to these performances, the company will split into three groups to simultaneously travel across India to undertake a variety of regional community engagement opportunities and share their knowledge and stories with a range of Indigenous groups. Bangarra will travel to Purulia, home of the Chhau mask dance, Bhopal, the site of the Indira Gandhi Rashtriya Manav Sangrahalaya (National Museum of Humankind), and Aizawl in Northeast India to learn and experience a variety of traditional dances in a series of artistic collaborations with these communities.

In their fourth visit to Japan, they present *I.B.I.S* and *Spirit 2018*. Performances will be held at the Saitama Arts Theater and are the concluding highlight of the Australian Government's [Australia now](#) program.

Bangarra will tour to North America, including Canada in 2019, and back to Europe in 2020.

'For us, it's about learning from the countries we're visiting and acting in our capacity as Australia's cultural ambassadors. It's not just about performances on the stage, but workshops, film screenings and in some cases exhibitions.' Stephen Page Artistic Director Bangarra.

5. Bell Shakespeare in Asia Enrichment and Sharing skills

An Australian national touring company, Bell Shakespeare has taken its work internationally to New Zealand, UK, Japan, Singapore, Malaysia and more recently China. In the early 2000's the company piloted a series of student workshops in Singapore and Malaysia and more recently in Beijing. In 2016 they delivered a creative leadership presentation, developed in association with Heidrick & Struggles, to corporate leaders in

Hong Kong, Shanghai and Singapore. In addition, the company live-streamed Shakespeare workshops to schools in Seoul, Korea direct from the Sydney Opera House. In 2017, artistic residencies were delivered into schools in Singapore and Shanghai, alongside an expansion of Bell Shakespeare's leadership program across the region.

'There are substantial opportunities for Bell Shakespeare's education program throughout Asia. Shakespeare's universal themes lend themselves to cultural collaboration and with a globally regarded education program, we are perfectly placed to support students and teachers.' James Evans, Associate Director, Bell Shakespeare.

6. Belvoir in the UK

Showcasing excellence | Australian angles on the classics

Belvoir took its production of Ibsen's *The Wild Duck* to London's prestigious Barbican Centre in October/November 2014.

The show was met with great audience and critical acclaim, with 4- and 5-star reviews in prestigious publications such as *The Times*, *The Financial Times*, *The Daily Telegraph* and the *London Evening Standard*.

'In each [review] the freshness of the Australian voice and the distinctiveness of our theatrical offering was noted. This production clearly contributed to the perception of Australia as an intellectually rich, forward-thinking nation.' Belvoir.

This initiative has spawned further high-quality engagement, with Belvoir taking Australian directors and writers to the UK to restage its productions with UK actors in association with UK companies: *Medea* in association with the Gate in 2015 and *Seventeen* in association with the Lyric Hammersmith now. In both instances, playwright Anne Louise Sarks has conducted masterclasses. However, Belvoir's financial support for this engagement created a significant strain on the organisation.

7. Black Swan State Theatre Company collaborates with the National Theatre of China

Cross-cultural insights | Sharing skills

In August 2016, Black Swan State Theatre Company presented a two-week season of *The Caucasian Chalk Circle* developed in collaboration with The National Theatre of China, bringing together Chinese and Australian designers and Western Australian actors in a unique production with cross-cultural opportunities.

The Caucasian Chalk Circle, a Bertolt Brecht play originally based on an old Chinese fable, was Black Swan's first international collaboration.

'It is a Chinese fable, adapted and written by a German playwright, brought to life in English by a Chinese director using a mixture of Western and Chinese techniques for an audience in Perth!' Dr Wang Xiaoying, National Theatre of China Vice President and the play's director.

According to Natalie Jenkins, Black Swan's Executive Director,

'One of Black Swan's goals is to establish global collaborations, breaking down the isolation of Perth and Western Australia. China makes sense as it shares our time zone and there is a significant trading relationship between us. The Black Swan Board seeks, through strategic projects, to engage new audiences, and our collaboration with the National Theatre of China acknowledges the large Mandarin-speaking community in Perth. The collaboration provides audiences from both backgrounds insight into each other's culture through theatre.'

8. Circus Oz in South Korea

Sharing skills

Recognised with the 2013 Governor of Victoria Export Award, Circus Oz has toured to 28 countries across five continents, performing its uniquely Australian form of contemporary circus to over our million people of all ages and cultural backgrounds.

In 2016 Circus Oz led a two-week masterclass program at the Seoul Street Arts Creation Centre (SSACC) in South Korea. The invitation followed a presentation on contemporary circus by Mike Finch, former Circus Oz Artistic Director, delivered in South Korea the previous year. On a reclaimed industrial estate, SSACC offers a venue to create artworks for the streets, foster artists to be active on the streets, and discuss street culture. Opened in 2015, works created there will be catalysts for street art around the country, including Seoul.

This initial Circus Oz program was delivered by Sue Broadway, a Circus Oz company member and highly experienced performer and director of circus and physical theatre. Across the two weeks she worked with 12 students from a range of arts backgrounds. They included martial artists, theatre performers and dancers, with masterclasses mainly focused on aerial training. Following this residency, Circus Oz delivered a second intensive training program in 2017, deepening this engagement with over 10 students.

This relationship has now led to Circus Oz being an inaugural member of the Circus Asia Network (CAN), which brings together organisations in Japan, South Korea, Taiwan and China with a shared mission to develop contemporary circus in Asia through information sharing and skills exchange.

9. Malthouse Theatre in China and the UK

Repositioning Australian cultural collaboration | Reciprocal engagement and exchange |

Edinburgh critics and audiences were treated to an innovative production of *Picnic at Hanging Rock* — a collaboration between Malthouse and Black Swan State Theatre Company (Perth) initially in 2015, with a return season in 2017. Performances in Edinburgh sold out as audiences and critics reacted enthusiastically to a mythical story deeply rooted in the Australian landscape that explores the coming to terms with an ancient land and the guilt of a colonial past.

The Scotsman called it:

'An explosion of theatrical power as fierce as it is contemplative and so original that no-one who sees it is likely to forget it.'

Next year, Malthouse have a co-production with the Lyric Hammersmith (London) and the Royal Lyceum (Edinburgh) for a production under current Malthouse Artistic Director Matthew Lutton. The company is hoping to partner with major large-scale venues in Manchester and New York to present an Indigenous work currently in development, from 2020.

10. Queensland Ballet

Developing an ambitious international outlook

Queensland Ballet is taking its acclaimed production of *A Midsummer Night's Dream* to China this November. The four-city tour begins in Queensland's Sister State of Shanghai, at the Shanghai City Theatre, followed by performances in Suzhou, Beijing and Xi'an.

Queensland Ballet will also participate in events hosted by the China International Import Expo and the Department of Foreign Affairs and Trade.

The Queensland Premier, Annastacia Palaszczuk said:

'I commend Queensland Ballet's efforts to support cultural diplomacy, deepen the appreciation of Australian art in China and further strengthen Queensland's ties with the Asia Pacific.'

Queensland Ballet is driving significant growth in the company's size, its reputation and ambition. Queensland Ballet Artistic Director Li Cunxin said:

'We certainly have global aspirations as a ballet company and this is the next step in us achieving that aim as we present the work of Liam Scarlett, who is himself an internationally acclaimed choreographer. His production of *A Midsummer Night's Dream* is captivating, transcends cultural barriers and highlights the wonderful versatility and technical ability of our dancers.'

Queensland Ballet place significant focus on international cultural exchanges recognising the benefits that exchanges make not only to artists themselves but also in strengthening relationships internationally. This year so far QB dancers have been involved with foreign festival events or dance companies in Europe, South America, Asia and North America.

Liam Scarlett, Artist in Residence with The Royal Ballet is also Artistic Associate with QB. This interconnection supports a deepening of cross company relationships and helps to advance QB's global aspirations.

QB is currently involved in a few international co-productions including with Norwegian Ballet (*The Firebird*), Royal New Zealand Ballet (*A Midsummer Night's Dream*), Royal Winnipeg Ballet (*La Fille Mal Gardee*), and Texas Ballet Theater (new work for next year)

11. Opera Q Company

International collaboration

Opera Q is beginning a new collaboration to create a new work with the Icelandic Opera Company. The work is expected to premiere in 2021. The artistic team comprises an Australian director and librettist and an Icelandic designer and composer. The artistic team meet regularly via Skype to build their relationship, as they begin this ambitious, creative journey. Although not new to international collaborations, this is the first time Opera Q has collaborated with colleagues in Iceland.

12. Sydney Dance Company

International partnerships and reviews

A co-production between the Sydney Dance Company and Germany's Dresden Frankfurt Dance Company, *Lux Tenebris* had its European premiere in Frankfurt with performances from 8 September and then in Dresden from 29 September, after premiering in Sydney in February 2016.

'The collaboration represents a bridge of art communication, not only with another country, but also with another continent.' Jacopo Godani, Artistic Director of Dresden Frankfurt Dance Company.

In 2017, Sydney Dance Company toured New York, Boston, Swarthmore and Amherst with their trilogy *Frame of Mind*, *Raw Models* and *Wildebears*.

'I don't know if there is such a thing as a distinctly Australian sensibility as it relates to dance, but if there is, then Gabrielle Nankivelli's *Wildebears* defines it...

'The Sydney Dance Company is not merely good, it's great... They give abundantly of themselves on stage without affectation or pretension. In every way that I can think of, this is the model of what a contemporary dance ensemble should be.' *Bachtrack*.

'Kinetic energy, explosive energy and supreme creativity marked the opening night performance of the Sydney Dance Company at New York's Joyce Theatre.' *Weekly Times*.

In 2018, SDC's international touring has included South America, Europe:

'Intriguing, beautiful, technically stunning and with unexpected twists that are full of contrasts.' *El Espectador (Chile) on South American Tour 2018*.

13. Sydney Symphony Orchestra in China

Cultural bridge-building | Showcasing excellence | Enhancing Australia's diplomatic, economic and business ties

In 2017 Sydney Symphony Orchestra (SSO) performed in Shanghai and Beijing in support of the Federal Government's global celebrations of the 45th Anniversary of Australia China diplomatic relations.

In June 2016, in the South China city of Guangzhou, an ensemble of 20 musicians from the SSO held a day of musical workshops and rehearsals with the talented students at the Xinghai Conservatory of Music as part of a program with the City of Sydney.

The workshop was part of the City of Sydney's week-long schedule of activities in Guangzhou to celebrate the 30th anniversary of the sister-city relationship between Sydney and Guangzhou. The SSO opened the City of Sydney's program with a special gala concert attended by City of Sydney Lord Mayor Clover Moore and Mr Chen Jianhua, Chairman of Guangzhou's People's Congress.

The orchestra has toured China four times and was named the winner of the Australian Government's inaugural Australia–China Achievement Award in the arts category in 2014. It has shared a Memorandum of Understanding with the Xinghai Conservatory since 2012.

'We see music as a vehicle to bring people from different nations closer. Our activities in Guangzhou were a testament to this, with our gala concert featuring our concertmaster Andrew Haveron joined by violin professor Li Xu from the Xinghai Conservatory of Music, in Bach's Double Violin Concerto. Our workshops with students from the Xinghai Conservatory saw a day of cross-cultural communication through music — an extremely inspiring experience for all involved.' Sydney Symphony Orchestra Managing Director.

'The SSO's thoughtful long-term approach to China — underpinned by effective partnerships with musical institutions and performance venues, well-executed outreach, and a focus on identifying what will interest Chinese audiences — continues to be a model of how major Australian performing arts groups can make an impact in China.' From the Australian diplomatic post in China.

14. Sydney Theatre Company in the US

Showcasing excellence | Australian angles on the classics

Sydney Theatre Company's *The Present* played on Broadway NY until mid-March 2017, starring Cate Blanchett and Richard Roxburgh. *The Present* — Andrew Upton's adaptation of Anton Chekhov's first play, *Platonov* — marks the Broadway debut for the company, although several other STC productions have played in New York, including *Hedda Gabler*, *A Streetcar Named Desire*, *The Maids* and Upton's adaptation of Chekhov's *Uncle Vanya*.

'Cate Blanchett and Richard Roxburgh have a combustible chemistry. You won't take your eyes off them!' *Entertainment Weekly*.

'(Cate Blanchett's) presence in *The Present* makes it an instant event on Broadway, but the play and production are more than worthy, thank you very much. What's more, the excellence of the entire acting company of 13 makes it abundantly clear why the US producers went to the expense of importing them from Australia.' Steve Suskin, *The Huffington Post*.

15. Tasmanian Symphony Orchestra

Regional to regional connections

TSO as Australia's only regionally based orchestra, already collaborating with a regional orchestra in China in Tasmania's sister province of Fujian. TSO has played in Xiamen and hosted Chinese orchestra members in both to Hobart and Launceston.

The Tasmania Symphony Orchestra is sending a delegation to Xiamen and Shanghai to meet with the XPO and Shanghai Symphony in October with funding support from DFAT Australia – China Council. This visit will include exploratory discussions on a variety of potential exchange opportunities as well as co-commissions and the China's possible involvement in TSO's conductor and composer training programs and other professional development activities.

The Australian Ballet in China

Showcasing excellence | Sharing skills | Enhancing Australia's diplomatic, economic and business ties

The Australian Ballet's five-year strategic plan sets goals that include performing regularly in key cultural centres around the world and achieving recognition as the pre-eminent ballet company in the Asia Pacific region.

In 2015, a tour of China provided an exceptional platform for the company to demonstrate Australian excellence in the arts to a significant international audience in Beijing and Shanghai.

The tour reached 10,000 people in the theatres, 755 through community engagement activities, 84,000 through a historical exhibition in the Shanghai Grant Theatre foyer and many more via media coverage in China and Australia as well as digital content accessed globally.

The company worked closely with the Australian Ambassador to China and Consul General in Shanghai, who hosted pre-performance events to which they invited their networks. The Victorian Minister for the Arts also utilised the tour to bring a delegation of Victorian arts leaders to Shanghai and hosted counterparts in Shanghai to the pre-performance Consulate event.

The Australian Ballet works with international choreographers, répétiteurs, costume and set designers, and engages in international dancer exchanges. Last year it worked on a co-

production of *Alice's Adventures in Wonderland* with National Ballet of Japan, which premiered Australia in Melbourne, before moving to Sydney and Tokyo.

'Each tour is an opportunity to demonstrate Australia's talent, position Australia as a sophisticated and cultural nation, create opportunities for business and government to build relationships, share skills and strengthen relationships within the arts sector to mutual benefit.' The Australian Ballet.

16. West Australian Symphony Orchestra in the United Arab Emirates and China **Cultural bridge building | Education | Showcasing excellence**

In October 2016, the West Australian Symphony Orchestra (WASO) embarked on a three-stage international tour with performances in Abu Dhabi, Beijing and Shanghai. WASO was the first Australian major performing arts company to tour to the United Arab Emirates and Australia's first representation at the prestigious Beijing Music Festival. The project involved a tour party of 107 people, including 89 WASO musicians. The visit represented a milestone in the *Symphony Cultural Bridge Project* — an historic three-way partnership between WASO, the China Philharmonic Orchestra (CPO) and Australia China Business Council (WA).

In Abu Dhabi, the orchestra was invited to perform an all-Wagner program in the opening concert of the Abu Dhabi Classics Season. Guests at the event included His Excellency Sheikh Nahyan bin Mubarak Al Nayhan, Minister of Culture and Knowledge Development, His Excellency Mohamed Khalifa Al Mubarak, Chairman, Abu Dhabi Tourism and Culture Authority (TCA Abu Dhabi), His Excellency Zaki Nusseibeh, Cultural Advisor at Ministry of Presidential Affairs, along with numerous foreign ambassadors and dignitaries.

In China, WASO presented two educational programs on the opening day of the Beijing Music Festival with the company's Education Chamber Orchestra (EChO) and Brass Quintet performing for students at two leading Chinese schools in Beijing. On the final leg of the tour, WASO performed in the Shanghai Symphony Concert Hall with a program including an iconic work of Australian music, Peter Sculthorpe's *Kakadu*.

WASO will build on this initial engagement during their return visit in 2018.

'This tour enables us to forge exciting new relationships in China and the United Arab Emirates that have broad implications for our nations. These alliances are significant, and we are proud they have been established and nurtured through an artistic connection.' Former WASO Chairman Janet Holmes à Court.

A Multipolar Creative World

Creators are Key Contributors to the World Economy



Global CCI Markets

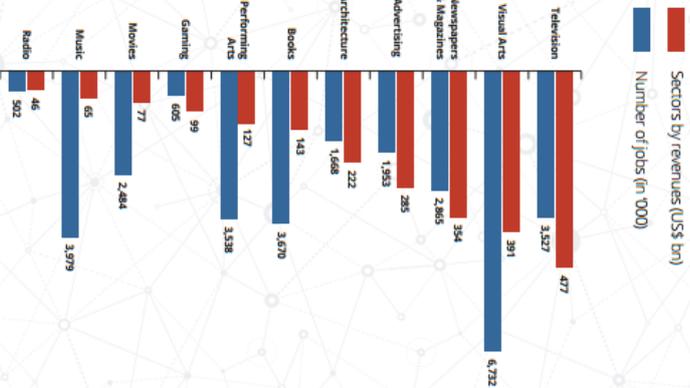
US \$2,250 billion



Global CCI Employment

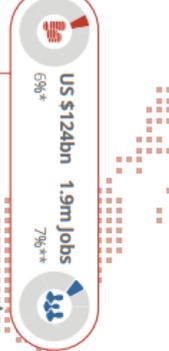
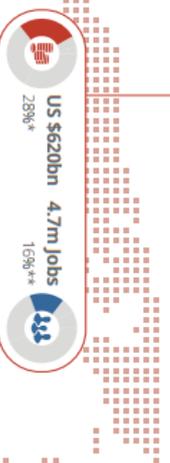
29.5m Jobs

Global CCI Contributions by Sector:



North America

- ▶ The third largest CCI market but N°1 in the consumption of digital content
- ▶ N°1 in Movies and TV content by sales
- ▶ A leader in Performing Arts
- ▶ Strong live music market

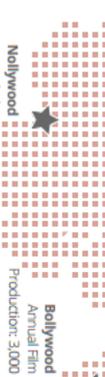


Latin America & Caribbean
TV is king in this region and generates one third of all CCI revenues

- ▶ Argentina and Colombia are in the world top 5 exporters of TV programs
- ▶ Film is a key industry in Argentina, Brazil & Mexico
- ▶ Over 400 films produced there per year

Europe

- ▶ The second largest CCI market and N°1 in advertising
- ▶ A unique concentration of heritage monuments, over 5,500 art schools, 7 of the worlds most visited museums
- ▶ Industry leaders: Universal Music Group, Publicis, WPP, Pearson, Axel Springer, Vivendi, Ubisoft, Hachette



Japan
Yomiuri Shinbun newspaper sells 10m copies a day



Africa & Middle East

- ▶ A cultural mosaic spurred by linguistic diversity, fast growing, young and connected population
- ▶ African music fuels popular music in Europe and Americas
- ▶ TV is Africa's n°1 CCI
- ▶ The film industry is growing fast

Asia-Pacific
Number one CCI market with the largest consumer base and a booming middle class

- ▶ N°1 in Gaming
- ▶ N°1 in Architecture
- ▶ N°2 in Movies

Source: Cultural Times - The First Global Map of Cultural and Creative Industries, ET, December 2015 / * % of global CCI revenues ** % of global CCI jobs