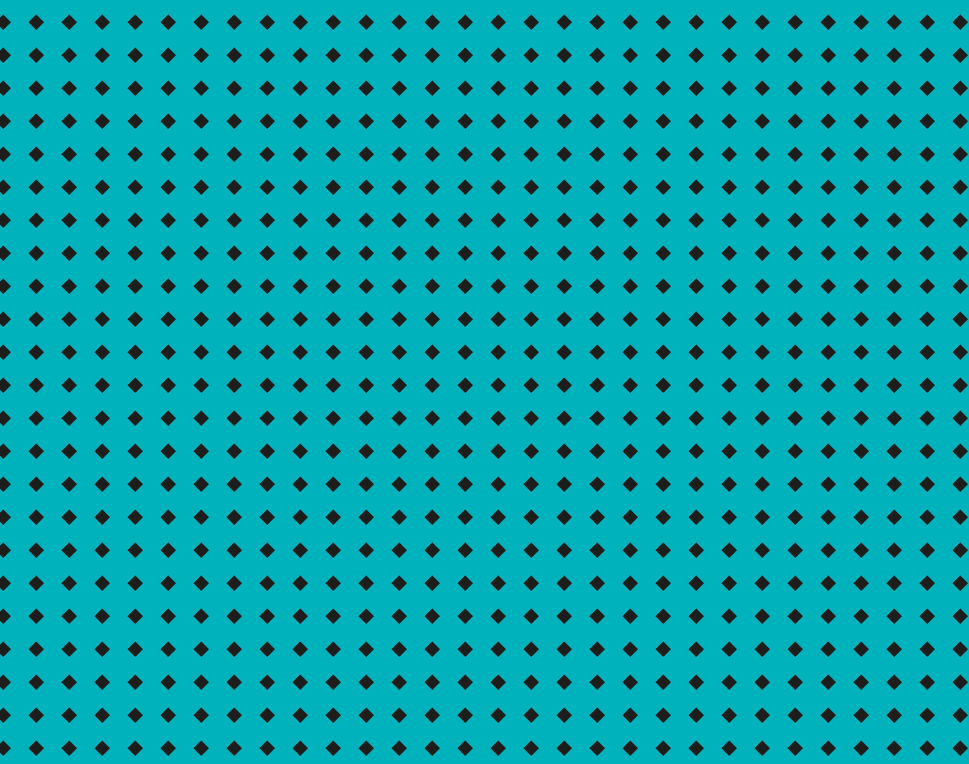




Scottish Music Industry Roadmap 2026–30

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Developed by



In partnership with



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Foreword

It recently marked 12 years since I started at the SMIA as an intern, and three years since I became CEO. In some ways the organisation today is almost unrecognisable from the one I joined. In others, it's an evolution of a core that's always been authentic.

When I think back to my first days, it was clear to me very quickly just how big a task the SMIA had on its hands as a sector development organisation for Scotland's music industry.

I remember walking into the office expecting to meet a team of colleagues. Instead, there was one member of staff. The office was a small room with one desk, a couch, a mini-fridge and a kettle. I remember thinking, "Surely this can't be where the Scottish Album of the Year Award is run from?" Something as important as Scotland's national music prize was being delivered from this tiny space. That was my first insight into something that's only become clearer over the years – not just for the SMIA, but for Scotland's music industry more broadly.

We often hear the phrase "Scottish music punches above its weight." What that really means is that, despite limited resources, we've managed to achieve a lot. Scotland has produced, and continues to produce, some of the world's most inspiring musical talent. But under the surface, it's important to consider: at what cost? What toll has this taken on those making it possible? And what opportunities have been lost as we've had to focus on keeping the lights on and cello-taping everything together, all while still trying to find ways to capture and share the magic of Scottish music – the soundtrack and the stories of our lives?

For too long, too many across our sector have had to focus on survival rather than development. Whilst "punching above our weight" sounds like a strength, it masks a systemic issue – that both entering and sustaining a career in Scotland's music industry is incredibly difficult, something that often requires privilege, resilience, networks or luck. That shouldn't be the case.

Over the last 12 years, I've been inspired by the collective and individual efforts to push Scotland's music industry forward. We've had no shortage of challenges – from Brexit to Covid to the cost-of-living crisis and strains on public funding – but what's remained constant is a belief in the value of our artistic output and a shared desire to build an industry that's more resilient, diverse, equitable and sustainable.

But what does that industry look like? And how do we build it?

The SMIA firmly believes that an authentic Scottish strategy is required to deliver for a distinctive and diverse Scottish music industry. And for that strategy to be effective, it has to be shaped and taken forward

with the people it aims to support. Scotland's music industry and cultural identity are shared, and shaping their future takes all of us.

Earlier this year we published the Scottish Music EDIA Manifesto and Action Framework, which should be read alongside this Roadmap. They provide an essential foundation for sector development, setting out shared values and principles alongside practical actions to advance equity, diversity, inclusion and accessibility. This means thinking about how we make decisions, how we behave and how we treat one another, particularly during times of change and uncertainty. If the Roadmap sets out what we want to achieve together, the Manifesto and Action Framework help us make sure the way we get there reflects the values we share.

This Roadmap has been developed over the last two years, but what it actually encapsulates is decades of experience across a wide range of individuals and organisations. It's been informed by engagement with our members, evidence gathered at the SMIA Summit across both 2024 and 2025, stakeholder feedback and research undertaken by colleagues from across the sector.

It's been the most complex but rewarding work I've ever been involved in, and it's without doubt one of the most important pieces of work the SMIA has delivered to date. There will be gaps, and there will undoubtedly be more to learn, but the eight national priorities give us a shared direction from which to keep developing our understanding and, crucially, to act.

Some of this action will require new investment, changes to policy and organisations agreeing how they can work together. Other activity can begin through the decisions people make in their own businesses, organisations and communities. You don't need to wait for the SMIA to initiate something to contribute to the priorities set out here. We want this Roadmap to encourage people to take initiative, build partnerships and recognise where their work can contribute to wider progress.

I'm massively grateful to everyone who has given their time, experience and perspective to help shape this work, and to the SMIA staff team and Company Board for the invaluable support and commitment they brought to this, and bring to our work every day.

I look forward to seeing how people take this Roadmap forward, to learning from what happens next and to the progress we can make together as a sector.

Robert Kilpatrick

CEO and Creative Director

Scottish Music Industry Association (SMIA)

1. Executive summary

The Scottish Music Industry Roadmap 2026–30 sets a shared national direction for the development of Scotland’s music industry. Produced by the Scottish Music Industry Association (SMIA), it provides a framework for coordinating policy, investment and practical action across the sector from October 2026 to December 2030.

Its vision is a stronger, fairer and more sustainable Scottish music industry in which talent can develop, careers and businesses can thrive, more of the value created by music is retained and reinvested in Scotland, and music is recognised as a national cultural, social and economic asset.

The Roadmap covers all genres and Scotland’s cities, towns, rural areas and islands. It encompasses music makers, the wider workforce, businesses, organisations and institutions across commercial, publicly funded, charitable, educational, community, voluntary and informal activity. “Scottish music” includes music made by people from or based in Scotland.

Music has artistic and cultural value in its own right. It also supports livelihoods, businesses, tourism, learning, participation and social connection. According to UK Music, the UK music industry contributed £8 billion in gross value added and generated £4.8 billion in export revenue in 2024. In Scotland, music tourism generated an estimated £937 million in direct and indirect spending in 2025, supporting 7,190 full-time-equivalent jobs.

Evidence gathered through SMIA member engagement and at the SMIA Summit in 2024 and 2025, together with stakeholder feedback and wider research, identifies persistent barriers to development. These include gaps in infrastructure and suitable investment, low pay and irregular income, unequal access to opportunities, and limited capacity to develop businesses and reach audiences. These pressures reinforce one another: financial uncertainty restricts the ability to employ people, develop talent, maintain activity and plan ahead. Despite these challenges, people, businesses and organisations across Scotland are achieving artistic and commercial success, reaching audiences at home and internationally, and creating opportunities for people to learn, work and participate in music. Their achievements, expertise and relationships should inform how existing activity is strengthened and gaps in provision are addressed.

Five change ambitions set the direction for eight connected national priorities. Their numbering does not indicate a ranking:

- 1. Strengthen Scotland’s Music Industry Infrastructure** – Protect and develop the physical, commercial, professional and institutional infrastructure that music depends on, addressing significant gaps and clarifying responsibility for action.
- 2. Increase Strategic Investment and Financial Resilience** – Increase and better direct investment, improve funding arrangements and the availability of suitable finance, and strengthen financial resilience. Diversification should complement adequate public investment.
- 3. Develop Scotland’s Music Workforce and Sustainable Careers** – Improve access to paid work, skills and professional development, and promote fair pay and working conditions, supporting entry, progression, returning to work and retention.
- 4. Strengthen Local and Grassroots Music Ecosystems** – Strengthen local music activity and the people, spaces and networks supporting it, with priorities and delivery shaped by communities and their circumstances.
- 5. Grow Resilient and Innovative Music Businesses** – Improve enterprise support, specialist expertise and suitable investment opportunities so music businesses can develop talent, generate income, innovate and retain more commercial value in Scotland.
- 6. Increase International Connectivity** – Strengthen access to international audiences, income, professional relationships and cultural exchange, supporting first opportunities and the development of established activity, including inward and outward connections.
- 7. Grow Audiences, Participation and Demand for Scottish Music** – Improve music discovery and opportunities to listen, attend and participate, addressing barriers to engagement and recognising participation’s cultural value in its own right.
- 8. Position Music as a National Asset** – Strengthen recognition of music’s cultural, social and economic contribution in policy objectives, investment and practical decisions across government and public bodies.

Equity, diversity, inclusion and accessibility, Fair Work and environmental sustainability should shape action across every priority. Delivery should reflect local circumstances, build on existing expertise and provision, and assign responsibilities to those with the relevant authority, capacity and resources.

The SMIA will coordinate a shared implementation programme with participating partners, supported by a Roadmap Advisory Group to be recruited in late 2026. The Group will advise and scrutinise; funding, delivery and organisational decisions remain with the bodies responsible. Annual plans will identify a manageable programme, setting out intended results, agreed responsibilities, resources, milestones and measures of progress. Delivery remains with agreed leads.

Significant new interventions in the shared programme will proceed only when the need and proposed response are supported by evidence, an appropriate lead has agreed responsibility, and sufficient resources are available. Work on policy changes, partnerships and securing resources can help establish these conditions. Action on a clearly evidenced need can begin while wider research continues.

People, businesses and organisations are also encouraged to use the priorities in their own plans, develop partnerships and initiate activity independently, without SMIA or Advisory Group approval, and without inclusion in the shared programme. The illustrative delivery opportunities offer starting points for development; they are not predetermined programmes or guarantees of funding.

Progress will be assessed through the success statements under each priority, considering who benefits and whether improvements can be sustained. Assessment will consider how funders, public bodies and music organisations use evidence to identify improvements to policy or support, develop investment proposals or agree next steps. It will distinguish this progress from decisions made, funding secured and practical improvements for people, businesses and communities. Annual public reports will explain results, delays and unresolved barriers. The SMIA will coordinate a final evaluation, published in March 2031, to inform future policy, investment and the next Roadmap.

Development of the Roadmap was supported by Creative Scotland through the SMIA's Multi-Year Funding, with UK Music contributing partnership support. An accompanying Evidence Base and Methodology publication is available to view and download on the SMIA website (smia.org.uk), setting out the sources, engagement process and limitations of the evidence. The figures above are discussed in Section 3, with source notes in Appendix A.

2. About the Roadmap

The Scottish Music Industry Roadmap 2026–30 is a shared national strategic framework for the development of Scotland's music industry. It sets a direction for change, identifies eight connected national priorities and provides a basis for coordinating policy, investment and practical action.

Purpose

The Roadmap exists to establish:

- A clearer national direction for the development of Scotland's music industry
- Stronger evidence to guide policy, investment and delivery decisions
- Clearer responsibility for progress across organisations and institutions (see glossary)
- Better alignment between existing activity, policy and investment
- A stronger case for increased and more strategic investment from public, private, philanthropic and other appropriate sources
- A framework for action, learning and accountability through to the end of 2030

Scope

"Scotland's music industry" is used broadly to include the people, businesses, organisations and institutions involved in creating, developing, performing, teaching, producing, distributing, promoting and experiencing music, and the infrastructure that supports this activity.

It covers all genres and Scotland's cities, towns, rural areas and islands, including commercial, publicly funded, charitable, educational, community, voluntary and informal activity, recognising their different purposes and ways of operating. Independent practitioners and commercial businesses and events operating without public funding are part of this scope.

The workforce includes people in employed, self-employed and freelance work, often combining occupations or income sources. "Freelance" describes a working arrangement that applies across many music occupations.

"Scottish music" is used inclusively to encompass music made by people from or based in Scotland, across genres, languages and traditions. Where research or support programmes use more specific definitions, their geographic coverage and any eligibility criteria should be stated clearly and reflect their purpose.

How the Roadmap was developed

The Roadmap has been developed by the Scottish Music Industry Association (SMIA), supported by Creative Scotland through the SMIA's Multi-Year Funding, with UK Music contributing partnership support.

Sector engagement, member evidence, structured discussions at the SMIA Summit, wider research and stakeholder validation informed the Roadmap. Section 9 describes the process and its limitations; the separate Evidence Base and Methodology publication provides fuller detail.

Using the Roadmap

The Roadmap is intended for people working in music and for the funders, public bodies, education providers and other partners whose decisions affect Scotland's music industry. It can be used to guide organisational planning, identify opportunities for joint work and inform policy and investment decisions.

People, businesses and organisations are encouraged to use the priorities to guide their own plans, initiate activity and develop partnerships. They can contribute to these priorities through their own work, independently of the shared annual implementation programme and without approval from the SMIA or Advisory Group.

Section 5 explains how to read the priorities. Section 7 sets out how the SMIA and participating partners will plan, lead, resource and review the shared programme; Section 8 explains how progress will be assessed.

Roadmap period

The Roadmap runs from publication in October 2026 to December 2030. Annual progress reports will provide public updates throughout this period. A final evaluation will be published in March 2031, informing future policy, investment and the development of the next Roadmap.

3. The case for change

Scotland has exceptional musical talent, cultural depth and creative ambition. Its music makers, skilled workforce, businesses, organisations and local networks create, develop and share music across genres and places, reaching audiences at home and internationally.

Music has artistic and cultural value in its own right. It also supports jobs and businesses, contributes to tourism and the appeal of places, and creates opportunities for learning, participation and social connection. Existing expertise, successful businesses, education providers and community activity provide a foundation for further development.

Scotland's music sector operates within a wider UK industry that contributed £8 billion in gross value added to the UK economy and generated £4.8 billion in export revenue in 2024.[1] In Scotland, UK Music estimates that music tourism generated £937 million in direct and indirect spending in 2025, supporting 7,190 full-time-equivalent jobs.[2]

Scotland's local authority instrumental music services provided lessons to more than 70,000 pupils in 2024/25, although only five local authorities could offer lessons to all interested pupils.[3]

The opportunity is to build on these strengths so that more people can make and experience music, more careers and businesses can develop, and more of the value generated by music can be retained and reinvested in Scotland.

The barriers to development

The SMIA's Annual Member Surveys across 2024–2026 and structured discussions at the SMIA Summits in 2024 and 2025 helped shape the Roadmap's priorities.

Analysis of the SMIA Summit 2025 roundtable discussions identified connected concerns across all four session topics: skills development, sustainability, local music activity and international development. Contributors described how limited time, money and organisational capacity restrict development, alongside gaps in commercial services, career progression and access to opportunities. They also identified strengths in community activity, professional relationships and collaboration.[4]

Alongside stakeholder validation and wider research, this evidence identifies recurring barriers:

- **Infrastructure:** Physical, commercial, professional and institutional infrastructure is fragile, unevenly distributed or missing in parts of the sector. Gaps in spaces, services, expertise and support systems restrict development.
- **Investment and financial resilience:** Gaps in funding and suitable finance restrict development. Short funding periods and uncertain income make it harder to maintain staffing and facilities or invest in development, while the timing of payments affects the ability to meet costs when they are due. Music Venue Trust's 2025 figures for Scotland show that only 33% of grassroots music venues reported a profit.[5]
- **Working conditions and careers:** Low pay, irregular income, unpaid work, late payment and limited paid opportunities make careers difficult to sustain. Unequal access to work, networks and development affects who can enter, remain and progress. In the UK-wide 2023 Musicians' Census, 44% of respondents identified the inability to make a sustainable income as a barrier to their music career.[6]
- **Local music activity:** Differences in local provision, transport, affordability and accessibility affect opportunities to make, work in and experience music. Cities, towns, rural areas and islands require responses that reflect their circumstances and existing strengths.
- **Business development:** Underdeveloped commercial infrastructure and barriers to suitable enterprise support restrict growth. Gaps in representation, including artist management and booking agents, specialist expertise and investment limit income and the retention of rights, skills and commercial decisions in Scotland. Robert Allan's 2024 PhD study identified gaps in publishing, record companies and distribution services.[7]
- **International development:** Costs, gaps in appropriate support and barriers to cross-border work restrict access to international audiences, income and professional relationships, both for those pursuing initial opportunities and those building on established activity.
- **Audiences and participation:** Barriers to discovery, cost, transport, accessibility and whether people feel represented or welcome affect listening, attendance and participation. Affordable, accessible opportunities are needed to experience and participate in the music people discover. The 2023 Scottish Household Survey recorded live-music attendance in the previous 12 months among 44% of adults in households with net annual income of £30,001 or more, compared with 19% in households with income up to £10,000.[8]
- **National recognition:** Decisions on policy, investment and infrastructure do not consistently reflect music's cultural, social and economic contribution.

How these pressures connect

These barriers reinforce one another. Recording facilities need to be complemented by the expertise and commercial relationships required to release, promote and earn income from music. Skills development needs to connect with paid opportunities and working conditions that enable people to remain in the sector.

The SMIA's 2026 Annual Member Survey shows how time and financial pressures can limit the development of business skills. Of its 97 respondents, 64 (66%) identified lack of time and 54 (56%) identified financial constraints as barriers to developing new business skills.[9]

Financial pressure limits businesses' and organisations' capacity to employ people, develop talent, reach audiences and maintain local activity. Unclear responsibility can make it harder to secure the policy changes, partnerships and investment needed. Progress often requires coordinated action across several priorities.

Why a national framework is needed

No single organisation holds all the powers, resources or expertise needed to address these challenges. Decisions across culture, enterprise, education, skills, planning, transport, broadcasting and international trade shape conditions for music. Responsibility sits across Scottish, UK and local institutions, businesses and sector organisations.

A shared national framework can connect existing work, identify gaps and direct policy and investment towards agreed needs. National policy and investment should address shared barriers, with local priorities and delivery shaped by people and organisations working in those communities. Together, this can strengthen music's place in wider decisions, protect activity at risk, develop existing strengths, clarify where joint action is required and address missing capacity.

Source notes [1]–[9], including definitions and limitations, are provided in Appendix A.

4. Vision and five change ambitions

Vision

A stronger, fairer and more sustainable Scottish music industry in which talent can develop, careers and businesses can thrive, more of the value created by music is retained and reinvested in Scotland, and music is recognised as a national cultural, social and economic asset.

People across Scotland should have fairer opportunities to make and experience music. Scottish music's artistic and cultural value should be recognised in its own right.

Five change ambitions

The five change ambitions describe the broad changes sought through the Roadmap. The eight national priorities organise the work needed to advance them.

Build the conditions in which music can thrive

Scotland should have stronger physical, commercial, professional and institutional infrastructure that supports music across the country. Existing strengths should be developed, essential infrastructure protected and significant gaps addressed. Investment should be guided by evidence, with clear responsibility for action.

Make music careers and businesses more sustainable

Scotland should become a better place to build and sustain a career or business in music, with fairer working conditions, more secure paid work and accessible professional development and enterprise support. This should reflect different roles, career stages and business models, helping people and businesses to develop, adapt and sustain their work.

Secure greater and more strategic investment in music

Scotland should secure more investment in music from public, private and philanthropic sources, and direct it towards the sector's most significant needs. Funding should support both music activity and the staffing, facilities and expertise required to deliver it. Longer-term commitments should give people and organisations greater stability to sustain their work and plan future development.

Connect Scottish music more effectively with audiences and the world

People should have greater opportunities to discover, experience and participate in Scottish music. Scotland-based music makers, businesses and organisations should be better able to reach audiences and markets, earn income and build lasting relationships across the UK and internationally, including through cultural exchange and creative collaboration.

Give music greater national weight

Music should be reflected more consistently in policy, investment and public decisions across culture, enterprise, education, tourism, international relations and other areas that affect its development. Its artistic and cultural importance should be recognised alongside its social and economic contributions, with explicit objectives and actions for music within relevant policies.

5. How to use the Roadmap

The five change ambitions set the direction; the eight connected national priorities organise the work. Their numbering does not indicate a ranking, and an activity may contribute to several priorities. Section 7 explains the shared implementation programme and how independently initiated activity can contribute.

Understanding the priority chapters

Each chapter sets out a national ambition, why it matters, Roadmap goals, illustrative delivery opportunities and what success could look like by 2030. The ambition describes the change Scotland needs. Goals describe what can realistically be progressed in 2026–30, taking account of authority, capacity and resources. Illustrative opportunities are examples of activity that organisations and partnerships could develop in response to the priorities, either through the shared implementation programme or within their own work.

Goals cover three kinds of work:

- **Foundation:** Developing evidence, agreeing responsibilities, building partnerships and preparing proposals that establish the basis for action.
- **Influence:** Working with those responsible for policy, funding and institutional decisions to secure changes that support the priorities.
- **Pilot and delivery:** Testing or implementing selected responses where evidence, ownership and resources are in place. This includes targeted policy and advocacy activity where appropriate.

These can progress alongside one another. The success statements provide a starting point for assessing progress.

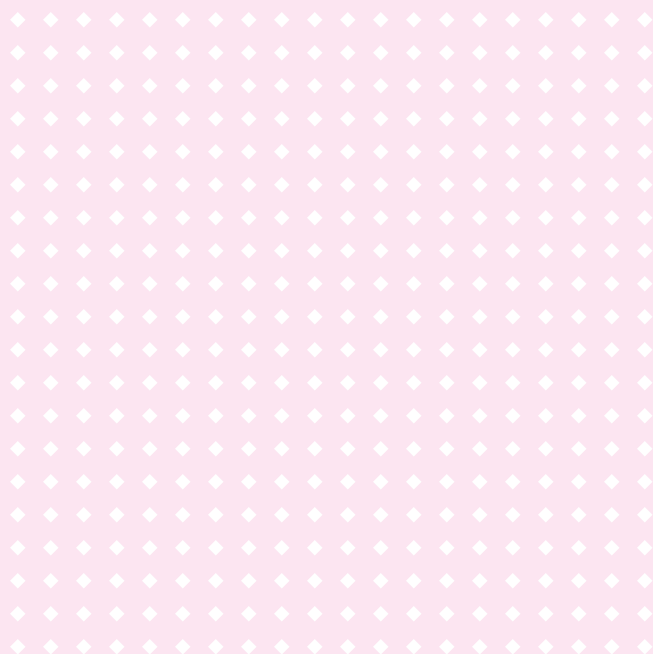
Principles shaping every priority

These principles should inform how activity is selected, designed, resourced, delivered and assessed.

- **EDIA by design:** Equity, diversity, inclusion and accessibility should be considered from the outset. Identify how barriers overlap, involve affected people in decisions and provide for the access requirements and costs that enable them to participate.
- **Fair Work:** Support fair pay, timely payment, security, opportunity, respect and safer working cultures. Workers should have clear ways to raise concerns, suggest improvements to working conditions and access trade union or other worker representation. Plans and budgets should support the working conditions expected of those delivering activity.

- **Environmental sustainability:** Address environmental impacts in decisions about buildings, equipment, travel, touring, events and procurement, including energy use and resilience to climate impacts. Expectations and support should reflect each partner's responsibilities and capacity.
- **Place-sensitive delivery:** Shape responses with local people and organisations, reflecting the circumstances of cities, towns, rural areas and islands. Planning should recognise connections across local-authority boundaries and the routes through which people access music opportunities.
- **Sector intelligence:** Use evidence to inform specific decisions, building on existing national, local and sector research. Identify important gaps and limitations, and develop information that can be updated and used to assess change over time.
- **Partnership and role clarity:** Agree the purpose of collaboration, responsibilities and how decisions will be made. Build on existing expertise and effective provision. Any additional responsibilities should be matched to the authority, capacity and resources required to fulfil them.
- **UK-wide policy and programmes:** Distinguish Scottish, UK and local responsibilities, and work with the institutions that hold the relevant powers. Use shared expertise and partnerships to influence UK-wide decisions affecting music in Scotland and improve access to relevant programmes.
- **Accountability:** Make commitments, responsibilities, resources and progress visible. Reporting should distinguish between work undertaken and the changes it produces, and explain unresolved barriers, dependencies and any changes to plans.

Section 7 sets out prioritisation, delivery conditions, responsibilities and accountability. Section 8 explains measurement and evaluation.



THE ROADMAP AT A GLANCE

VISION

A stronger, fairer and more sustainable Scottish music industry in which talent can develop, careers and businesses can thrive, more of the value created by music is retained and reinvested in Scotland, and music is recognised as a national cultural, social and economic asset.

FIVE CHANGE AMBITIONS

The changes sought:

Build the conditions in which music can thrive

Make music careers and businesses more sustainable

Secure greater and more strategic investment in music

Connect Scottish music more effectively with audiences and the world

Give music greater national weight

EIGHT NATIONAL PRIORITIES

The connected areas of work that advance the ambitions:

1. Strengthen Scotland's Music Industry Infrastructure

2. Increase Strategic Investment and Financial Resilience

3. Develop Scotland's Music Workforce and Sustainable Careers

4. Strengthen Local and Grassroots Music Ecosystems

5. Grow Resilient and Innovative Music

6. Increase International Connectivity Businesses

7. Grow Audiences, Participation and Demand for Scottish Music

8. Position Music as a National Asset

All eight priorities remain active through 2030. Their numbering does not indicate a ranking.

6. Eight national priorities

Priority 1: Strengthen Scotland's Music Industry Infrastructure

National ambition

Scotland should be a place where artists, workers, businesses and communities can access the physical, commercial, professional and institutional infrastructure they need for music to thrive.

By 2030, Scotland should be better able to identify, protect, strengthen and invest in the infrastructure its music industry depends on. This should include clearer evidence about significant gaps and risks, clearer responsibility for addressing them and stronger routes from identified need to policy, investment and action.

The ambition is a more strategic approach to strengthening the systems around Scottish music, moving beyond repeatedly responding to individual infrastructure problems.

Why this matters

Music infrastructure extends beyond venues and physical spaces. It includes the commercial, professional and institutional systems that enable music activity to develop and continue over time.

This can include:

- Venues, festivals, rehearsal spaces, studios and community facilities, across different scales and operating models
- Labels, managers, publishers, promoters and other music businesses
- Production and technical suppliers, including sound, lighting, staging and event logistics
- Specialist professional services
- Professional-development and support organisations
- Data and sector intelligence
- Music discovery and public-service media
- Planning, licensing, transport and local support
- Institutional relationships and investment
- Informal/grassroots networks and communities

These connected forms of infrastructure enable music development. Spaces and technical suppliers support creation and performance. Music businesses develop talent, manage rights and connect music with audiences and markets. Professional services, media, support organisations and institutions provide expertise, visibility, resources and access to opportunities.

Gaps or weaknesses in these connections can restrict development. Recording facilities, for example, need complementary expertise and commercial relationships to release, promote and earn income from recorded music. Infrastructure planning should consider how these functions work together.

Physical infrastructure requires attention to ownership and operation, capital and running costs, accessibility, and maintaining and renewing buildings and equipment. Investment decisions should reflect these needs alongside energy efficiency and resilience to climate impacts.

Roadmap goals

Foundation

- Build a stronger national evidence base on Scotland's music infrastructure from existing national and local evidence. Identify strategically important gaps and establish how information can be maintained and shared.
- Clarify where responsibilities sit across government, funders, local authorities, enterprise and skills bodies, sector organisations and UK-wide institutions.
- Use the Roadmap's prioritisation criteria to identify infrastructure gaps and risks requiring greatest attention. Develop the evidence, partnerships and investment proposals needed to address them.

In applying these criteria, recognise local knowledge and the cultural and community value of infrastructure, including informal and grassroots activity that may be harder to capture through existing data.

Influence

- Strengthen recognition of music infrastructure across cultural, economic, planning, regeneration, skills and place-based policy, including through engagement between sector organisations, people and organisations involved in grassroots and community music, and local elected members.
- Bring relevant public bodies, funders and sector organisations together to agree how priority infrastructure gaps and risks should be addressed, who needs to act and what support is required.
- Ensure Scotland's music-infrastructure needs are represented within relevant UK-wide policy and investment decisions.

Pilot and delivery

- Progress a limited number of interventions during the Roadmap period where an infrastructure need is prioritised through the Roadmap's criteria, credible ownership is in place and appropriate resources are secured.

Where these conditions are met, action doesn't need to wait for the wider national evidence base to be completed.

Illustrative delivery opportunities

Illustrative opportunities, rather than current commitments, include:

- More comprehensive infrastructure mapping, building on existing work
- Place-based ecosystem profiling
- Mechanisms for identifying infrastructure at risk
- Targeted interventions to protect and strengthen existing infrastructure
- Investment to develop missing commercial or professional infrastructure

What success could look like by 2030

- Public bodies, funders and sector organisations use evidence about existing provision, access, gaps and risks across Scotland's physical, commercial, professional and institutional music infrastructure to inform policy, investment and support decisions.
- Proposals to address priority infrastructure gaps and risks set out what needs to change, who would benefit and the policy decisions, investment or other support required.
- For joint action, participating organisations have agreed who will lead, what each will contribute and how any outstanding decisions or resource needs will be addressed.
- Roadmap evidence and collaboration have contributed to identifiable changes that protect or strengthen existing infrastructure, or address significant gaps in access to spaces, services, expertise and support.

Priority 2: Increase Strategic Investment and Financial Resilience

National ambition

Scotland's music industry should attract the scale, diversity and coordination of investment appropriate to its cultural, social and economic importance. Organisations and those responsible for music infrastructure should be better able to plan, adapt and sustain their work over the long term.

The ambition is to increase and diversify investment in music and improve how existing resources are distributed, coordinated and used. This includes making the case for adequate, sustained public funding and arrangements that give people and organisations greater confidence to plan.

Why this matters

Music is financed through a fragmented mix of:

- Scottish Government cultural funding
- National Lottery cultural funding
- Local government
- Enterprise and economic-development support
- UK-wide programmes
- Commercial income
- Sponsorship
- Philanthropy
- Other public and private investment

Existing evidence is not yet sufficient to show how these sources interact, where significant gaps exist or where financial fragility restricts the sector's ability to plan and develop.

The amount of funding matters, but so do eligibility, distribution, duration and payment arrangements. Funding activity without adequately covering the people, facilities and operating costs needed to deliver it can undermine the capacity on which that activity depends.

Financial resilience also depends on the ability to understand, access and use appropriate finance: to plan expenditure, manage cash flow and make informed investment decisions. Different activities require different forms of support, and diversification must complement adequate public investment.

Roadmap goals

Foundation

- Establish a shared evidence baseline showing where investment in Scottish music comes from, who controls it, who receives it, what it supports and how it is distributed across Scotland.
- Identify the most significant investment gaps affecting the sector and delivery of the Roadmap, including unmet demand, barriers to access and gaps in support for individuals, core organisational capacity and capital needs.
- Develop and actively pursue stronger investment proposals around priority needs, identifying the intended benefit, the type and scale of resource required, potential funding partners and who is responsible for taking each proposal forward.

The baseline should build on existing evidence and include music education and youth music. It should show what each funding stream supports and who benefits, such as learners and participants, music workers or businesses. It should support analysis and future comparison without treating current funding levels as sufficient.

Influence

- Strengthen recognition of music as both a cultural and economic investment priority, and make the case for increased and sustained public investment.
- Work with public funders to clarify funding responsibilities, eligibility, allocation and who existing support reaches, and address gaps between cultural, local-government and enterprise support.
- Improve music's ability to access and benefit from enterprise, place-based, UK-wide, private and philanthropic investment, including by addressing barriers to existing provision.
- Encourage funding arrangements that recognise staffing and operating costs and set realistic expectations of what the funding and other available income can achieve. Promote greater certainty about the amount, duration and timing of support.

Pilot and delivery

- Test a limited number of approaches to increasing, coordinating or diversifying investment where there is evidence of a credible opportunity and appropriate partners and resources are in place.

New mechanisms should demonstrate how they improve access, fill gaps or add benefit compared with improving existing provision in Scotland and across the UK. The form of finance should suit the activity and its capacity to generate income.

Illustrative delivery opportunities

Illustrative opportunities, rather than predetermined commitments, include:

- Public funders, enterprise agencies or private partners aligning their funding or combining resources to address an agreed music-sector priority
- A costed proposal for additional investment in Scotland's music sector, setting out what it would fund, who would benefit and the outcomes expected
- Co-investment and match-funding models
- New private or philanthropic partnerships
- Targeted support to strengthen organisational resilience
- Financial planning and cash-flow support, alongside work with funders and enterprise agencies to develop investment opportunities that reflect the sector's needs
- Adapting or extending effective existing programmes to address gaps in Scottish provision

What success could look like by 2030

- Funders, policymakers and sector organisations draw on Roadmap evidence when reviewing investment needs and considering funding levels, eligibility, allocation and duration.
- Proposals for additional investment or better use of existing funding are being considered by relevant funders and partners, with feedback helping to clarify their potential and what would be needed to take them forward.
- Work with funders and support bodies has identified practical options for improving the availability and accessibility of suitable funding and investment for music makers, businesses and organisations. This includes opportunities through enterprise, place-based, UK-wide, private and philanthropic sources.
- Funding arrangements better reflect the staffing and operating costs involved in delivery, with expectations matched to available resources and greater certainty to support longer-term planning.
- Organisations and businesses receiving financial planning or business support are better able to anticipate income shortfalls, manage payment commitments and plan future activity.
- Scotland's longer-term investment case for music is supported by proposals setting out the needs to be addressed, additional benefits expected, type and scale of resources required and potential funding partners.

Priority 3: Develop Scotland's Music Workforce and Sustainable Careers

National ambition

Scotland should be a place where people from all backgrounds can enter, develop and sustain fulfilling careers in music, with fairer working conditions, more secure paid work, stronger progression routes and support that reflects different roles, circumstances and career stages. Professional development should reflect the freelance, portfolio and non-linear nature of many music careers.

Why this matters

Scotland's music workforce includes:

- Performers, DJs, songwriters and composers
- Producers and recording, mixing and mastering engineers
- Live sound, lighting, stage and production crews
- Artist, tour and production managers
- Booking agents, promoters and programmers
- Venue, festival and event staff
- Record label, music publishing and distribution professionals
- Marketing, PR, digital content and audience-development specialists
- Broadcasters, journalists, presenters and music curators
- Rights, royalties and music-licensing specialists
- Educators, tutors and community music practitioners
- Instrument makers, repairers and technicians
- Music-technology developers and specialists
- Business, administration, finance, legal and other professional-services staff
- Researchers, policy and sector-development professionals

Music careers are frequently:

- Freelance
- Portfolio-based, combining several roles or sources of income
- Non-linear, involving changes of direction, career breaks and periods of development
- Insecure
- Dependent on informal networks and access to opportunity

Low pay, irregular income, unpaid work and late payment can prevent skilled people from sustaining careers. Support must also reach those progressing beyond entry level or returning after a career break.

Travel and accommodation costs can restrict access to work, training and professional networks, particularly for rural and island workers and those connecting with opportunities outside Scotland. Disabled workers can face additional costs and difficulty securing timely access support.

Skills, working conditions and access to paid opportunities affect who can enter, remain and progress in music, and the sustainability of its workforce.

Sustainable careers take different forms across roles and genres, including employed, freelance and portfolio work. Support should reflect professional ambitions, develop new entrants and help Scotland retain experienced practitioners, leaders and specialist expertise.

Roadmap goals

Foundation

- Build on existing research to strengthen Scotland's music-workforce evidence, covering roles, working patterns, pay, skills needs and barriers across places and career stages. Identify and address evidence gaps so less visible roles and working arrangements are represented.
- Use the Roadmap's prioritisation criteria to identify the workforce barriers requiring greatest attention across entry, progression, returning to work and retention, distinguishing skills needs from a lack of paid opportunities or adequate working conditions.
- Develop credible proposals and partnerships to address priority workforce needs, identifying who would take action, what resources are required and the improvements sought in access to paid work, career progression or working conditions.

Influence

- Strengthen Fair Work expectations and practice across publicly supported and commercial music, including fair pay, clear contracts, timely payment and working environments free from bullying, harassment and discrimination. Workers should have clear ways to raise concerns, suggest improvements to working conditions and access trade union or other worker representation.
- Improve alignment between music-industry needs and education, skills and professional-development provision through sustained partnerships between educators and industry, clearer careers information and practical experience of music work.
- Ensure workforce, skills and professional-development policy better reflects freelance, portfolio and non-linear careers, including the needs of people progressing at mid-career or returning after a break. Work with relevant Scottish and UK bodies to address barriers associated with irregular income and access to social protection or disability-related support.

6. Eight national priorities (CONT.)

- Address unequal barriers to entry and progression by involving workers from underrepresented backgrounds in shaping responses and tackling financial, geographic and other barriers to equitable access and participation.

Employers and others who hire or engage music professionals, alongside funders, trade unions and sector bodies, each have a role in improving working conditions. Funding and delivery plans should recognise the staffing, time and resources needed to implement better working practices.

Pilot and delivery

Subject to appropriate investment and delivery capacity, test a limited number of interventions addressing the most strongly evidenced workforce needs.

Illustrative delivery opportunities

Illustrative opportunities, rather than predetermined commitments, include:

- Paid entry routes and work placements
- Specialist skills development
- Professional, business, entrepreneurial and career-development support designed around freelance and portfolio working
- Mentoring, including support for mid-career progression and returning to work
- Leadership development
- Practical guidance on pay, contracts, rights and professional standards
- Networking and development opportunities with provision for travel, access and participation needs
- Careers information and practical projects connecting schools, colleges, universities and community learning with music professionals

What success could look like by 2030

- Funders, educators and sector bodies use evidence about music workers' roles, working conditions and barriers to identify priorities for support and review existing provision across different places and career stages.
- Fair pay, clear contracts, timely payment and safer working practices are more widely adopted across music.
- Young people and other prospective entrants better understand the range of music careers and how to pursue them.
- Education and training providers use workforce evidence and input from the music sector to identify how courses and professional-development support could better help people enter music work, develop their careers, return after a break and sustain a career in Scotland.
- Targeted support developed with people from backgrounds currently underrepresented in the workforce helps address the barriers they face in accessing paid opportunities and career development.
- Where targeted interventions are funded, participants can demonstrate benefits such as securing paid work, progressing into greater responsibility or continuing a music career they were at risk of leaving.

Priority 4: Strengthen Local and Grassroots Music Ecosystems

National ambition

Every part of Scotland should be able to sustain a healthy music ecosystem that reflects local needs, strengths and circumstances, connecting music makers, audiences, venues, businesses, communities and local institutions.

People across Scotland should have fairer access to opportunities to make, work in and experience music. The spaces, services and support enabling this should reflect the different needs and opportunities of cities, towns, rural communities and islands.

Why this matters

Music develops through places. Healthy local ecosystems can depend on:

- Grassroots music venues and festivals
- Rehearsal, recording and performance spaces
- Promoters and local organisers
- Audiences
- Music education and participation
- Schools, colleges, universities and other education providers
- Community organisations, halls and shared spaces
- Music businesses
- Affordable, accessible transport
- Planning and licensing
- Local authority support
- Local networks and leadership

Alongside delivering events, courses and programmes, festivals, education providers and community organisations can provide spaces, equipment, employment, professional connections and opportunities to develop audiences and talent.

Local music includes activity across genres, traditions and communities, including Gaelic and Scots traditions and music made by New Scots and migrant communities. Informal and voluntary activity also needs to be taken into account when priorities are identified.

Distance, the availability, frequency and reliability of transport services, and travel and accommodation costs affect whether people can attend, perform or organise activity. These circumstances need to inform planning and investment from the outset.

Local music activity often connects towns and communities across local-authority boundaries. Evidence, planning and investment should reflect these relationships and how people access spaces, expertise and opportunities in other places.

National policy and investment should address shared barriers and strengthen conditions for local music activity. People and organisations who know and work within communities should shape local priorities and delivery.

Roadmap goals

Foundation

- Strengthen understanding of local music ecosystems and place-specific barriers, working with local music communities and building on existing evidence. Identify strengths, gaps and activity that may not be captured through established networks or data.
- Identify common conditions for healthy grassroots ecosystems, including access to spaces, audiences, transport and organisational capacity. Consider how organisations are run and how their work can continue when key staff or volunteers move on.
- Develop a framework for local partners to identify priorities, agree responsibilities and plan action, connecting national Roadmap priorities with existing local music, cultural and wider development plans.

This work should draw on local expertise. Plans and budgets should provide for the time and resources people and organisations need to participate.

Influence

- Strengthen music's recognition within local cultural, economic, regeneration and community policy, including through engagement between music communities, local institutions and elected members.
- Increase recognition of grassroots music activity and infrastructure in planning, licensing and business-rates decisions, and in how police and other public authorities work with music venues and event organisers. Promote fair and consistent treatment that reflects local circumstances.
- Encourage investment and policy to reflect different local and geographic circumstances, including transport and accommodation costs, access needs and environmental impacts. Work with transport providers and relevant public bodies to improve connections that enable people to attend, participate in and work in music.

Pilot and delivery

- Test a limited number of place-based approaches where local partners are willing, the need is well evidenced and appropriate resources are available. Share learning nationally.

Illustrative delivery opportunities

Examples could include:

- Local ecosystem profiling led by or with people and organisations active in the area
- Place-based partnerships co-designed with local music communities and relevant institutions
- Place-based investment proposals
- Grassroots infrastructure interventions
- Locally owned music action plans
- Touring networks and shared use of spaces, equipment or expertise
- Partnerships addressing audience and workforce travel, energy efficiency and adaptation to climate impacts

These examples are not predetermined commitments; their relevance and form will differ between places.

What success could look like by 2030

- Local partners use evidence and knowledge from music communities to identify existing strengths, barriers to activity and priorities for improvement.
- Evidence and proposals from local music communities inform local policy development and review, and the consideration of investment, planning and licensing decisions.
- Where local partners undertake joint work, they agree the priorities, responsibilities and resources needed to take it forward.
- More people can regularly attend live music, perform and take part in music-making in their local area.
- Live music reaches more communities, including through touring activity in smaller towns, rural areas and islands.
- Learning from local work shows other areas what was achieved, what resources were required and which approaches could be adapted.

Priority 5: Grow Resilient and Innovative Music Businesses

National ambition

Scotland should be a place where music businesses can start, develop and grow, with stronger commercial infrastructure enabling more of the intellectual property, expertise and economic value generated by Scottish music to be retained and reinvested here.

Music businesses should be able to develop sustainable services and commercial relationships from a Scottish base, support successful careers and access opportunities across the UK and internationally.

Why this matters

Music businesses range from individual creators and sole traders to established companies, social enterprises and other organisations trading in music. They include venue operators, promoters, festival organisers, studios, management companies, booking agencies, labels, publishers, music-technology businesses and specialist service providers.

Scotland has significant creative output and music activity, but its commercial infrastructure is underdeveloped in areas including:

- Artist management and booking agencies
- Record labels
- Music publishing
- Sync (placing music in film, television, games and advertising)
- Rights administration and intellectual property
- Distribution
- Business finance and professional services
- Investment
- Innovation and music technology

These gaps can mean income, expertise and commercial decisions move elsewhere, and can limit opportunities when music makers lack the representation, specialist knowledge or business capacity to develop their work.

Stronger management and agency businesses can help connect music makers with commercial opportunities, while developing and strengthening labels, publishers and other specialist businesses can build Scotland's capacity to invest in talent and generate long-term income.

For venues, promoters and festivals, business development includes managing operating costs and income, developing audiences and accessing appropriate finance and specialist advice.

Music businesses face persistent barriers to enterprise and innovation support that fits how they operate. Enterprise agencies should work with music-industry bodies and advisers with expertise in areas including publishing, management, licensing and music finance to provide clear routes to appropriate advice, finance and development opportunities.

Support must reflect different business models and irregular income, and be practical for small teams to access alongside running their business, allowing for the time needed to find suitable programmes, apply and attend training or advisory sessions.

Roadmap goals

Foundation

- Strengthen intelligence on Scotland's music-business ecosystem and commercial infrastructure. Build on existing evidence to identify successful businesses and areas of commercial strength, alongside gaps in specialist services, business capacity and routes to market. Use learning from what works to inform future development.
- Assess how effectively existing enterprise, innovation and business-development support serves music, identifying gaps in specialist expertise and barriers relating to eligibility, geography, business model and capacity to engage.
- Use the Roadmap's prioritisation criteria to identify the most significant commercial and value-retention gaps and develop credible proposals to address them. For each proposal taken forward, identify who will lead it, the resource required and the business outcomes it is intended to achieve.

Proposals should distinguish nearer-term opportunities to strengthen existing business capacity from longer-term work to develop missing commercial infrastructure.

Influence

- Strengthen recognition of music businesses within Scotland's enterprise and economic-development systems, and establish clearer routes between general business support and specialist music-industry advice.
- Work with enterprise agencies, funders, music-industry bodies and advisers with expertise in music rights and contracts to ensure business advice and investment decisions support informed choices about ownership and licensing, fair commercial terms, and the ability to earn and reinvest income from music.

- Connect music businesses more effectively with innovation, technology, finance and investment support, including opportunities to develop products, services and partnerships with sectors such as screen, games and tourism.

Pilot and delivery

- Enable a limited number of targeted business-development interventions where evidence demonstrates a significant gap and appropriate ownership and resources are in place.

Interventions should address barriers individual businesses cannot readily resolve alone, such as gaps in specialist expertise, finance or market access. Businesses remain responsible for their commercial decisions and associated risks.

Accessible advice and early-stage support should sit alongside targeted development for businesses with credible potential to grow, generate income, create paid work or address an identified commercial gap. Assessment should recognise that a small business can support substantial activity and employment beyond its own workforce.

Targeted support should follow the Roadmap's prioritisation criteria, considering the need's scale and urgency and the potential benefits of investment for music makers, businesses and the wider sector.

Illustrative delivery opportunities

Examples include:

- Financial planning support for music businesses, alongside work with funders and enterprise agencies to develop investment opportunities that reflect the sector's needs
- Business-development support for management companies and booking agencies
- Business-development support for record labels
- Support for music businesses to develop their publishing, rights-administration and licensing expertise and services
- Advice and professional connections to help music businesses license music for film, television, games and advertising
- Support for music businesses to develop and adopt new technologies, products and services
- Leadership and business development
- International business development and professional networks
- Specialist advice on contracts, payment practices and commercial terms
- Mentoring and paid placements within music businesses

These are illustrative opportunities rather than predetermined commitments.

What success could look like by 2030

- Music businesses have better access to relevant enterprise and innovation support, specialist advice and suitable funding and investment, through improvements to existing provision and the development of opportunities where gaps remain.
- Music businesses across live music, recorded music, publishing and specialist services have greater capacity to develop talent, reach audiences and markets, and generate income.
- Music businesses are better able to sustain paid work and reinvest in their development.
- More of the income from rights, representation and other music-business activity is earned and reinvested in Scotland.
- Priority commercial gaps are addressed through practical action, with evidence of the benefits for businesses and the music makers they work with.

Priority 6: Increase International Connectivity

National ambition

Scotland-based music makers and businesses should be able to build meaningful international careers and relationships without being structurally disadvantaged by gaps in support, coordination or access to opportunity.

A clearer, more coordinated approach to international music development should turn international activity into sustained careers, businesses, relationships and cultural reach.

Why this matters

International development can involve:

- Touring
- Export of recorded music, services and expertise
- Market development
- Showcasing
- Business-to-business relationships
- Rights, licensing and sync
- International partnerships
- Cultural exchange and creative collaboration
- Inward and outward visits by music makers, programmers and music-business professionals, including trade missions
- Market intelligence
- Marketing and audience development
- Turning international contacts and initial activity into further bookings, commercial agreements and continuing collaborations

These require different forms of support. Access to international audiences, income and professional relationships is fundamental to the development and sustainability of many music careers and businesses.

International opportunities are part of a longer process. Preparation, professional relationships, audience development and follow-up help turn initial interest into repeat bookings, sales, licensing income, further collaborations and lasting partnerships.

Support also needs to reach the professionals and businesses around music makers, including those developing tours, releases, rights and international relationships. Planning should consider costs, access requirements and environmental impacts.

Scotland operates within UK-wide funding, trade and international frameworks, making coordination and representation particularly important.

The Scottish Government's International Touring Fund pilot was announced in March 2026 for delivery through Creative Scotland. The British Council's cultural export and exchange support work with the Scottish Government was announced in December 2025. Learning from both should inform Scotland's longer-term international-development provision.

Roadmap goals

Foundation

- Build a stronger evidence base on international activity, barriers and existing provision, mapping Scottish, UK-wide and international support. Identify who can access support, where gaps remain and which markets offer credible opportunities across different genres and forms of music activity.
- Capture and use learning from touring, showcasing, export-development and cultural-exchange initiatives, including the International Touring Fund pilot and export-support feasibility work. Assess what enables initial opportunities to lead to sustained work and relationships.
- Develop and pursue a clearer proposal for Scotland's longer-term international-development needs, including sustained touring and export support. Identify the functions required, how existing expertise could contribute, who would take responsibility and what investment would be needed.

Influence

- Improve Scotland-based music makers', professionals' and businesses' access to relevant UK-wide and international opportunities. Work with Scottish and UK partners to address barriers to international work, including touring between the UK and EU, wider cross-border mobility and difficulties involving rights, licensing and digital platforms.
- Improve coordination between cultural bodies, enterprise agencies, trade and export advisers, and organisations delivering international music programmes, making it easier to find appropriate support and advice, prepare for international activity, access funding and develop resulting opportunities.
- Increase music's role within Scotland's international profile and relationships, connecting cultural, trade and tourism activity with opportunities for music makers and businesses to develop audiences, partnerships and paid work.

Pilot and delivery

- Progress the highest-priority future intervention to strengthen international development where the findings of existing pilots and feasibility work support it, and appropriate ownership and investment are in place.

Information and advice should be broadly accessible. More intensive support should follow the Roadmap's prioritisation criteria and reflect the credibility of the opportunity, the potential cultural or commercial benefit and the support needed to follow through.

Assessment should reflect how different genres and forms of music activity develop internationally. Evidence might include interest from an overseas promoter, publisher or cultural partner, or a developing audience in a particular market. Support should be accessible to music makers and businesses pursuing their first international opportunities and those building on an existing international track record. In both cases, assessment should consider evidence of audience or partner interest and a realistic plan to develop the opportunity.

Illustrative delivery opportunities

Examples include:

- Longer-term touring support that enables initial tours and return visits to develop audiences in identified markets
- Market intelligence and advice on international working requirements
- Export preparation and business development
- Marketing and audience development in identified markets
- International partnerships, cultural exchange and creative collaboration
- Trade visits connecting Scotland-based businesses with overseas promoters, agents, labels and publishers, and bringing international partners to Scotland, with support to turn resulting contacts into bookings, deals or collaborations
- Support to prepare for showcases, connect with relevant international partners and develop the opportunities arising from participation
- A dedicated or networked international-development function, building on existing expertise

These are illustrative opportunities rather than predetermined commitments. Provision should draw on feasibility findings and sector expertise, build on established international relationships and address music makers' and businesses' support needs.

What success could look like by 2030

- Music makers, professionals and businesses can find and access international support suited to their needs and stage of development.
- Scotland-based music makers, professionals and businesses have increased access to and success in securing relevant funding, advice and development opportunities through UK-wide and international programmes.
- More music makers and businesses build repeat international work, audiences and income while remaining based in Scotland.
- Cultural partnerships lead to continuing exchange, collaboration and new creative work.
- Touring and export support helps music makers and businesses build on individual tours and projects through return visits, audience development and continuing work with international partners.
- Partnerships between organisations build on established expertise and international networks to help music makers and businesses prepare for international activity, meet relevant partners and turn initial contacts into continuing work and collaboration.

Priority 7: Grow Audiences, Participation and Demand for Scottish Music

National ambition

People across Scotland should have greater opportunity to discover, access, participate in and build lasting relationships with Scottish music, strengthening both its cultural reach and the long-term demand needed to sustain the music industry.

People in Scotland and beyond should have accessible opportunities to discover, enjoy and take part in music throughout their lives. Participation should be valued for its cultural and social benefits as well as its contribution to audiences and demand.

Why this matters

How people engage with music is shaped by:

- Public-service media
- Commercial and community broadcasting
- Specialist music journalism
- Streaming, social media and digital platforms
- Record shops and online music retailers
- Music makers' own communications and promotion
- Live venues, festivals and community events
- Affordability
- Transport and geography
- Accessibility
- Representation
- Education and participation
- Changing audience behaviour
- Peers and word of mouth

These routes interact. Someone may encounter music through a local performance, a radio programme, a recommendation or a digital service, then choose to listen again, attend an event, buy music or take part themselves.

Broadcasters, journalists, programmers and other people selecting and presenting music help audiences discover work they might otherwise miss. Grassroots venues, festivals and community activity introduce new and independent music and create opportunities to turn discovery into repeat attendance, listening and support for music makers.

Music education and participation help develop audiences and demand over time. Connecting education providers, community music organisations, venues and music makers can link learning and participation with attending performances, discovering different genres and lifelong engagement with Scottish music. Investment should also recognise participation as a cultural outcome in its own right, sustaining opportunities to make music across ages and communities.

Awareness alone does not ensure access. Cost, transport, event timings, accessibility and whether people feel represented or welcome affect their ability to engage. Reaching audiences also depends on music makers' ability to perform, record, release and promote their work.

Roadmap goals

Foundation

- Build stronger evidence on audiences, participation and music discovery, drawing on existing research to understand how people encounter Scottish music, what encourages continued engagement and who is less well served by existing opportunities. This should distinguish how many people a platform or programme reaches from whether it helps them discover Scottish music and continue engaging with it.
- Identify the barriers that most restrict access, participation and discovery for audiences and music makers, including affordability, transport, accessibility, representation and gaps between local exposure and wider recognition.
- Develop evidence-backed proposals to address priority needs, identifying the action required, potential delivery partners, resource needs and intended benefits for audiences, participants and music makers.

Influence

- Work with public-service broadcasters and other music media to increase opportunities for people to discover new and independent Scottish music through programming, editorial coverage and partnerships with the music sector.
- Work with funders, cultural bodies and music organisations to make audience development and discovery a clearer part of programme design and investment decisions, including the resources and knowledge music makers need to reach audiences.
- Work with venues, promoters, education and community organisations, and relevant public bodies to address financial, geographic and accessibility barriers to attending and taking part in music, alongside barriers linked to whether people feel represented or welcome.

Pilot and delivery

- Enable a limited number of interventions in music discovery, participation or audience development where there is clear evidence of a significant barrier, credible leadership, agreed responsibilities and appropriate resources in place.

- Each initiative should set a clear objective and measures of success. A participation project could measure who can take part and whether they continue attending; an audience-development initiative could measure new listeners, repeat attendance or income for music makers. Targets should reflect the activity's scale, genre and communities.

Illustrative delivery opportunities

Examples include:

- Music-discovery partnerships between broadcasters, journalists, venues, festivals and music makers
- Approaches to widening young people's access to Scottish music and supporting their continued engagement as audiences and participants
- Accessibility improvements and clearer information about access arrangements
- Digital engagement and audience-development support for music makers and organisations
- Local audience development linked to community and leisure music-making
- Collaborative promotion across venues, festivals, music retailers, media and music businesses
- Shared audience research to inform programming, participation opportunities and promotion

These are illustrative opportunities rather than predetermined commitments. Activity should build on sector expertise and existing routes to music discovery and engagement.

What success could look like by 2030

- Music makers, organisations and funders use evidence to guide decisions about reaching audiences and widening participation.
- More people discover new and independent Scottish music through live activity, broadcasting, journalism, music retail and digital services.
- People facing financial, geographic or accessibility barriers have better opportunities to attend and take part in music.
- More children, young people and adults can participate regularly in music-making that reflects their interests and communities.
- Music makers build lasting audience relationships, reflected in continued listening, repeat attendance, purchases or other forms of support.
- Participation strengthens people's enjoyment, confidence and connection with music and with one another.

Priority 8: Position Music as a National Asset

National ambition

Music should be recognised and invested in across Scotland as a national cultural, social and economic asset – central to the country's identity, communities, economy and international profile.

Its value should be reflected in decisions across government and public institutions, through policies and investment that strengthen cultural activity, sustainable careers, business development and the infrastructure on which they depend.

Why this matters

Music contributes to Scotland through:

- Culture, identity and musical traditions
- Employment, businesses and the wider creative economy
- Tourism
- Places and communities
- Education and skills
- Participation, social connection and wellbeing
- International profile and relationships

These contributions depend on an interconnected sector: music makers and the wider music workforce, music businesses, venues and festivals, education providers, and cultural and community organisations all play a part.

Music education supports access to music-making and the development of future audiences and the workforce. Grassroots and community infrastructure offers places to create, develop and perform music, build skills and experience, and participate in local music-making.

Scotland's musical identity is diverse and ever-evolving, shaped by people and communities working across genres, generations and places. It encompasses established traditions (including Gaelic and Scots) and contemporary practice, drawing on the varied backgrounds, experiences and influences of the people who call Scotland home.

Investment should recognise music's artistic and cultural importance alongside its social and economic benefits. Music is also connected to other artforms through shared skills, spaces, audiences and creative collaborations. These relationships should inform decisions about how music is supported within Scotland's wider cultural sector.

Decisions affecting music extend across culture, education, enterprise, tourism, planning and international policy. Treating music as a national asset means recognising its contribution in the objectives, investment and practical delivery of these policy areas.

Roadmap goals

Foundation

- Build a coherent national evidence case for music's cultural, social and economic value, drawing together findings from work across the other seven national priorities outlined in this Roadmap, alongside existing research. Identify the evidence needed to inform specific policy and investment decisions, including gaps that materially limit the case for action.
- Establish a baseline of how music is currently reflected across relevant Scottish policy, including where it is incorporated into policy objectives, investment and delivery, and where significant gaps remain.
- Develop and maintain a clear national case for policy change and investment in music, setting out the changes sought, the supporting evidence, the institutions responsible for decisions and the intended benefits.

Influence

- Work with relevant Scottish Government portfolios and public bodies to reflect music's cultural, social and economic contribution in policy objectives, investment and implementation.
- Strengthen understanding among ministers, parliamentarians, public officials and agency leaders of how Scotland's music sector works, including the relationships between cultural activity, education, community infrastructure, businesses and employment.
- Use the national evidence case to secure practical consideration of music in economic, industrial, education, tourism, international and place-based policy, including explicit provision for music within future tourism strategy and delivery.
- Build the case for stronger long-term investment in music, showing how the scale, continuity and design of support affect cultural activity, access, sustainable careers and business development.

Pilot and delivery

Delivery will focus on targeted policy and advocacy activity, drawing on evidence and proposals across the other seven national priorities in this Roadmap.

Activity should address a defined policy or investment decision, identify who is responsible and specify the change sought. Contributing organisations should have the relevant remit and capacity.

Illustrative delivery opportunities

Examples include:

- Evidence briefings and sustained engagement with government, parliamentarians and public agencies around specific policy and investment decisions
- Engagement with political parties to inform their manifesto commitments on music
- Investment proposals that identify the need, intended benefits, resource requirements and responsibility for delivery
- Dialogue across government portfolios and agencies where decisions affecting music require coordinated action
- Joint advocacy with cultural and music-sector partners on national and UK-wide issues, including international touring, intellectual property and the implications of artificial intelligence (AI) for music makers' rights and opportunities

The choice of activity should follow the evidence, the significance of the decision and the opportunity to influence it.

What success could look like by 2030

- Relevant government and agency policies include explicit objectives and actions for music, with identified responsibility for implementation and resources where required.
- Ministers, public officials, agencies and funders use a stronger shared evidence base when developing and reviewing policy and considering investment in music, with cultural value recognised alongside economic and social contributions. This includes the contributions of music education and community activity.
- Evidence and proposals developed through the Roadmap have contributed to identifiable changes in policy, funding arrangements or agency priorities, including how music is supported through enterprise, education, tourism and place-based activity.
- Scotland has a clear, evidenced set of priorities for music beyond 2030, informed by progress achieved, remaining barriers and the experience of people working and participating in music.

The final evaluation of the 2026–30 Roadmap, published in March 2031, should document progress against these outcomes, assess the Roadmap's contribution and provide a basis for future policy, investment and advocacy.

7. Putting the Roadmap into practice

The Roadmap will be implemented from publication in October 2026 to December 2030 through a shared implementation programme alongside activity initiated independently across the sector. The shared programme is work agreed between participating organisations and set out in annual implementation plans, with intended results, responsibilities and resources.

People, businesses and organisations are encouraged to use the priorities to guide their own work, develop partnerships and take action within their responsibilities and resources. They can do so without approval from the SMIA or Roadmap Advisory Group, and without inclusion in an annual plan.

Implementation phases

The periods below indicate the main emphasis of the shared implementation programme. Activity can begin earlier where the delivery conditions set out below are met. Evidence gathering, learning and work with government, public bodies and funders on policy, funding and support will continue throughout.

Late 2026

Establish governance, agree initial responsibilities, prepare the first implementation plan and progress immediate opportunities.

2027–March 2028

Strengthen evidence where needed, develop partnerships, pursue proposed policy and funding changes, prepare investment proposals and secure resources, alongside early delivery.

From 2028

Progress selected larger interventions where evidence, agreed ownership and resources are in place.

2029–2030

Continue delivery, develop and extend effective activity where justified, adapt to results and continue pursuing the policy and funding changes identified through the priorities.

Agreeing roles and responsibilities

Progress across the eight national priorities will depend on people, businesses, organisations and public institutions contributing different forms of expertise, authority and resource. The organisations best placed to lead will differ by issue; not every organisation needs a role in every priority. Four roles describe how contributions connect:

Lead

Takes primary responsibility for agreed work, with the relevant remit, authority, capability and resources to do so.

Convene

Brings together the people and organisations needed to make a defined decision or achieve a shared result.

Influence

Makes the case for change to those responsible for the relevant decisions, using evidence, sector experience and proposals for action.

Support

Contributes evidence, expertise, funding, delivery capacity or access to relevant people, networks, facilities and opportunities.

An organisation may undertake several roles, and roles may change as work develops. Convening partners helps coordinate discussion and agreed activity; each partner retains responsibility for its own decisions. No organisation should be named as a lead or delivery partner without its agreement. Consultation, advice or evidence does not constitute a commitment to deliver.

Each activity in the shared programme should have an agreed lead organisation or accountable partnership. The annual plan should record who can make which decisions and the contributions agreed with others. Responsibilities should not be assigned by default to the SMIA or another organisation, or on the assumption that new duties can be absorbed within existing workloads and budgets.

HOW ACTION HAPPENS

Two routes to progress across the eight national priorities
People and organisations can contribute through either or both routes.

SHARED IMPLEMENTATION PROGRAMME

—
Participating organisations
agree work through annual
implementation plans.

Each activity has agreed leads,
partner contributions, intended
results and resources.

The SMIA coordinates.
The Roadmap Advisory Group
advises and scrutinises.

Delivery remains with agreed leads
and partners.

Significant new delivery requires
evidence, agreed leadership and
sufficient resources.

INDEPENDENTLY INITIATED ACTIVITY

—
People, businesses and organisations
use the priorities to guide their own
work and develop partnerships.

Those undertaking and resourcing
activity retain responsibility for their
decisions and delivery.

No SMIA or Advisory Group
approval, or inclusion in an annual
implementation plan, is required.

Shared programme reporting
requirements do not automatically
apply to independent activity.

PROGRESS ACROSS THE
EIGHT NATIONAL PRIORITIES

Choosing work for the shared programme

All eight priorities remain active throughout 2026–30. Annual planning will use seven prioritisation criteria to guide where attention and resources are focused:

Scale and impact

The significance of the need and the likely cultural, social or economic benefits of addressing it.

Urgency and risk

The consequences of delay or inaction, including the risk of losing important activity, capacity or infrastructure.

Equity and place

Which people and places face disproportionate barriers, and how action could improve access and opportunity.

Strategic leverage

Whether progress could support other Roadmap priorities or help secure further investment.

Strength of evidence

How clearly the need is understood and how well the evidence supports the proposed response.

Additionality

The additional benefit the work would provide compared with what already exists. For example, meeting an unmet need, improving existing provision or extending its benefits to more people or places.

Deliverability

Whether leadership and responsibilities are clear and appropriate, with sufficient capacity and a realistic route to securing the resources required.

These criteria guide judgement rather than produce an automatic score. Decisions should explain how the criteria have been balanced, including any significant trade-offs.

Smaller, informal or less documented activity should receive fair consideration even where detailed data is limited. Local knowledge, lived experience and qualitative evidence should inform assessment alongside quantitative data, recognising that activity can be important to particular communities even where its overall scale is smaller.

Conditions for significant new delivery

Significant new interventions in the shared programme will proceed only when evidence, ownership and resources are in place:

- **Evidence:** The need is sufficiently clear, the proposed response is supported by relevant evidence and an intended benefit is identified.
- **Ownership:** An organisation or partnership has agreed to lead and has the remit, authority and capability to do so. Responsibilities must be agreed with those expected to carry them out.
- **Resource:** Sufficient funding, people, expertise and practical capacity are available, including paid time, coordination, access requirements and organisational capacity.

Where a condition is missing, establishing it becomes part of the immediate work. This may involve gathering evidence, convening partners, working with policymakers and funders to secure specific changes, or improving existing activity.

These conditions can also guide independently initiated activity; decisions remain with those undertaking and resourcing it.

Action can begin under any priority once the conditions are met. Work on a clearly evidenced need can proceed while wider research continues.

Annual planning and resources

The SMIA will coordinate annual planning with the independent Roadmap Advisory Group described below and relevant partners. Plans will identify a manageable shared programme using the criteria above, informed by progress and outstanding needs across all eight priorities.

For each activity in the shared programme, the annual implementation plan should identify:

- The need, supporting evidence and contribution to the national priorities
- Intended results and who should benefit
- The agreed lead and partner contributions
- Resources required, available and still to be secured
- Timetable, milestones and review points
- Starting position, measures and evidence gaps
- Risks and dependencies, including decisions, funding or partner contributions needed to proceed

Detail should reflect the activity's scale and complexity. Plans should distinguish work ready to begin from proposals needing further evidence, agreement or resources, and identify how those gaps will be addressed. This may involve clarifying remits, developing partnerships, agreeing leadership or securing resources. Significant new delivery must meet the evidence, ownership and resource conditions above.

Budgets and delivery arrangements should apply Section 5's principles, including fair pay, access costs and environmental impacts. Resources should cover delivery and the work needed to make it possible: staff and freelance time, coordination, expertise, access and participation support, travel and reporting. Contributions and expected results should be agreed against available funding and capacity; leads and partners remain responsible for managing their contributions.

Building on existing work and local strengths

Before developing a new programme or structure, partners should assess whether connecting, improving or extending existing provision could meet the need. New activity should demonstrate its additional benefit. Research commissioned through the shared programme should address a clear gap and explain how findings will be used, for example, to identify support needs, choose responses or make an investment case. Existing evidence should focus research on unresolved questions. Where a need is sufficiently evidenced, the next task is to agree action, leadership and resources.

National partners can address shared structural barriers, develop evidence and specialist capacity, and work on policy and funding changes. Regional and local partners can shape responses with communities, connect music with local services and plans, and build on local strengths. Locally owned music and cultural plans should agree priorities and responsibilities with communities and develop lasting capacity.

National work should draw on local knowledge. Local partnerships should be able to access national expertise and resources and work across administrative boundaries where music activity connects places. Scottish, UK-wide and international policy, funding or programme issues should involve the bodies responsible. Trade bodies, sector organisations and partnerships can contribute expertise, representation and relationships to address barriers and improve access to opportunities for people and businesses based in Scotland.

The SMIA and Roadmap Advisory Group

The SMIA will steward the framework, convene partners, coordinate shared planning and progress reporting, and maintain and share sector evidence. It will make the case to government, public bodies and funders for the policy and investment changes identified through the priorities, and make progress and unresolved issues visible. It may lead defined activity where agreed and within its remit, capability and resources. Its coordinating role does not make it responsible for delivering every priority or give it authority over independent organisations.

An independent, paid Roadmap Advisory Group will be recruited in late 2026 and convened by the SMIA. It will meet every two months throughout implementation, bringing sector experience and perspectives from across Scotland. Participation will include payment for preparation time and provision for access and participation costs. The Group will:

- Review evidence and advise on selecting shared programme activity using the criteria above
- Examine intended results, agreed responsibilities and realistic resource requirements
- Review progress, risks and unresolved barriers, and recommend changes or further action
- Consider who benefits, whose perspectives are missing and how Section 5's principles are applied
- Contribute to annual progress reporting and the final evaluation

The Group's role is to advise and scrutinise. Funding, delivery and organisational decisions remain with the bodies responsible. The Group's membership, remit and working arrangements will be made public. Its terms of reference will explain how it works with the SMIA staff team and Board, and how its recommendations are recorded and considered by the SMIA and relevant partners. Published working arrangements will explain how sector participants can submit evidence, questions and concerns for the Advisory Group's consideration.

Review, reporting and learning

For each activity in the shared programme, the lead organisation or accountable partnership should provide updates against the intended results, milestones and resources agreed in the implementation plan. Reporting responsibilities should be agreed at the outset and be proportionate to the scale of the work.

Where progress falls behind or circumstances change, the lead and relevant partners should agree what needs to happen next. The SMIA will record any changes to the shared programme and identify decisions or resources still needed. The Advisory Group will review these issues and recommend action while responsibility for delivery remains with the agreed lead.

Pilots should have an agreed purpose, intended benefits and review point before they begin. Decisions to continue, adapt, extend or stop activity should follow findings and available resources. Plans should be updated as evidence, resources or circumstances change, recording delays, dependencies and the action or decisions needed.

7. Putting the Roadmap into practice (CONT.)

The SMIA will coordinate and publish an annual progress report with partner contributions, explaining:

- What work has taken place and what results have been achieved
- Who has benefited and where progress remains uneven
- How delivery compares with the agreed plans, resources and timescales
- What has been delayed or remains unresolved, and why
- What action or decisions are required next, who has agreed to take them forward and where responsibility remains unresolved

Reporting will distinguish shared programme results from independent activity and wider sector changes. Organisations are encouraged to share findings – including results, costs, capacity and approaches others could adapt – with the SMIA, partners and wider sector. Shared programme reporting requirements do not automatically extend to independent activity. Learning will inform subsequent plans, the final evaluation and other organisations’ work.

Sector participation and changes to the framework

The SMIA Summit will include an annual discussion of progress, what needs to improve, emerging issues and the following year’s priorities. Findings should inform subsequent plans, evaluation and the next Roadmap’s evidence base. The SMIA will explain in its planning and reporting how these discussions have informed its work and the shared programme. It will also make clear how people can contribute evidence, concerns and suggestions between Summits, addressing access and participation needs.

The eight national priorities provide the framework through 2030, while annual plans adapt to changing circumstances. If changes to the vision, ambitions or priorities are justified, the SMIA will review them with the Advisory Group and relevant partners. Agreed changes will be explained publicly, with reasons, supporting evidence and implications for implementation.

8. Measuring progress and evaluation

Assessment will examine progress towards the vision and five change ambitions through the success statements under the eight national priorities. It will consider changes for music makers, the wider workforce, businesses, organisations, audiences and communities, and the contribution of policy, investment and infrastructure.

Success includes protecting valued activity, improving working conditions, widening access and strengthening the capacity to sustain music, alongside growth and new opportunities. Music's artistic and cultural value should be considered in its own right, alongside its social and economic contributions.

What progress looks like

Measures should reflect the activity's purpose. Workforce assessment should consider paid work and career progression alongside training attendance. Digital reach should be considered alongside discovery and continued engagement, with audience measures adapting as platforms and listening habits change. Investment assessment should capture changes in the amount, reach and allocation of funding; business assessment should consider income, expertise and commercial value retained and reinvested in Scotland.

Evidence gathering, clearer responsibilities and stronger partnerships should be assessed through the decisions they inform, barriers they help resolve and action they enable. Assessment should also recognise meaningful progress before a final decision: evidence used in a review, feedback refining an investment proposal or agreement on next steps. Reporting should distinguish these developments from decisions made, resources secured and improvements experienced by people, businesses and communities.

Baselines, indicators and targets

The SMIA will work with the Roadmap Advisory Group and relevant partners to agree indicators and any targets, drawing on priority outcomes and annual plans. The first annual implementation plan should set out the initial approach to measurement for the shared programme: the measures and existing evidence sources to use, the priority gaps to address, and the responsibilities and resources needed to gather and assess information. Where arrangements remain unresolved, it should identify the steps needed to agree them.

Each activity in the shared programme should identify its starting position, intended benefits, measures, evidence sources and review points, with evidence-gathering responsibilities and resources agreed alongside delivery. Baselines should build on existing research, addressing gaps during early implementation and making coverage, dates and uncertainty clear. An incomplete national baseline should not delay action on a sufficiently evidenced need.

Numerical targets should be used only where the starting position, responsibility, resources and ability to affect the outcome are sufficiently clear. They should reflect the activity's scale, timescale and intended beneficiaries.

Who benefits and whether change lasts

Assessment should examine who benefits and who remains poorly served across places, communities, roles, career stages and business models. Numbers should be considered alongside the experience of participants, those delivering activity and people facing barriers. Smaller and informal activity should receive fair consideration where formal data is limited.

Workforce assessment should reflect different professional ambitions and employed, freelance and portfolio careers, including whether people can secure sufficient paid work and remain in music. Local assessment should examine whether activity can meet its ongoing costs and the lasting skills, relationships and capacity developed within communities, considering benefits for visiting practitioners and local people and organisations.

Assessment should examine the application of Section 5's principles, including access, Fair Work and relevant environmental impacts. Measures should be proportionate to the activity and evaluation resources.

Understanding contributions to change

Evaluation will distinguish results associated with the shared programme, independently initiated activity and wider sector changes. It will examine partners' contributions alongside changes in the external environment in which Scotland's music industry operates, including funding and policy. Section 7 explains review, reporting and how learning will inform subsequent plans.

Reporting should explain contributions to each relevant national priority. When figures are combined to assess overall progress, the same result should be counted only once: a funding award supporting two priorities should appear once in the total investment secured.

Final evaluation

Implementation ends in December 2030. The SMIA will coordinate the final evaluation, which will be completed between January and March 2031 and published in March 2031. It will assess progress across the eight priorities and five ambitions, examine how different partners and approaches contributed, identify unresolved structural barriers, and consider who benefited, which improvements are likely to last and what further action is needed. Findings will inform future policy, investment and the next Scottish Music Industry Roadmap.

9. Evidence and methodology

The SMIA developed this Roadmap to help Scotland's music industry address persistent problems and establish shared priorities for practical action. It was developed within available staff time and resources, alongside the SMIA's wider services, projects and events.

What informed the Roadmap

The Roadmap draws on:

- The SMIA's work with members, including surveys, membership information and issues raised through ongoing engagement
- Structured discussions at the SMIA Summit in 2024 and 2025
- Existing research, official statistics, policy and funding information, and sector and local studies from Scotland and elsewhere in the UK
- Stakeholder feedback on the draft framework and national priorities

The eight priorities were already in draft form when stakeholder validation began. Contributors were invited to comment on areas relevant to their experience and responsibilities: what needed to change, what existing work to build on and what implementation would require.

How feedback shaped the text

Some feedback led to changes to the priorities, some informed implementation arrangements and some proposals were retained for further consideration. It strengthened the focus on sufficient paid work and career retention, local circumstances, continuing international relationships, and the cultural and social value of participation. Particular programmes or structures still require consideration of need, existing provision, responsibility and resources.

Participation in this process does not imply endorsement of every part of the Roadmap or agreement to deliver activity.

What the evidence can and cannot tell us

The evidence does not provide a complete picture of Scotland's music industry. Stakeholder validation brought together selected relevant perspectives and was not representative of the whole sector. Member surveys and records provide insight into the people and organisations they cover.

Research varies in age, geographic coverage and what it measures. Some publications use the same underlying information, and figures cannot always be compared or combined. Gaps and differences of view remain, including perspectives less visible through the SMIA's existing networks. These limitations should guide interpretation and further engagement or research.

Building on the work

The Roadmap provides a basis for action that can be strengthened through experience. The SMIA will use sector feedback, research and learning from implementation to inform annual planning and evaluation. Further evidence gathering should address questions that matter to decisions and reflect the time and resources available to carry it out and keep the evidence up to date.

A separate Evidence Base and Methodology publication accompanies the Roadmap. It provides the sources and references, a fuller account of engagement and validation, and the detailed limitations and considerations needed to interpret and use the evidence. Appendix A retains the source notes supporting Section 3.

10. Glossary

Additionality

The additional benefit the work would provide compared with what already exists. For example, meeting an unmet need, improving existing provision or extending its benefits to more people or places.

Annual implementation plan

The document setting out the shared programme for a year, including agreed activity, responsibilities, resources, milestones and measures of progress.

Baseline

The starting position against which later changes can be assessed.

EDIA

Equity, diversity, inclusion and accessibility.

Fair Work

Fair pay, timely payment, security, opportunity, respect and safer working cultures, with clear ways for workers to raise concerns, suggest improvements to working conditions and access trade union or other worker representation.

Foundation

Developing evidence, agreeing responsibilities, building partnerships and preparing proposals that establish the basis for action.

Freelance

A working arrangement used across many music occupations, involving projects, assignments or work for different clients.

Grassroots

Used here to describe music activity developed and sustained by music makers, organisers and communities within local areas or music scenes, together with the networks, businesses, organisations and spaces that support it. It can involve professional, voluntary and informal activity.

Illustrative delivery opportunities

Examples of activity that organisations and partnerships could pursue in response to the priorities, either through the shared implementation programme or within their own work.

Independently initiated activity

Work developed by people, businesses or organisations in response to the priorities, through their own decisions and partnerships. It does not require approval through the shared planning process.

Indicator

A measure used to assess progress towards an intended result.

Influence

Working with those responsible for policy, funding and institutional decisions to secure changes that support the priorities.

Infrastructure

The physical, commercial, professional and institutional assets, systems and relationships on which the music industry depends.

Institutions

Public bodies, funders, local authorities, agencies, broadcasters, education and skills bodies, and other established organisations whose decisions shape conditions for music.

Investment proposal

A proposal for investment, setting out what it would fund, who would benefit, the outcomes expected and the resources and partners required.

Music ecosystem

The people, organisations, businesses, institutions, places, systems and relationships that shape how music is made, developed, experienced and sustained.

Music industry / music sector

Used broadly to include the people, businesses, organisations and institutions involved in creating, developing, performing, teaching, producing, distributing, promoting and experiencing music, and the infrastructure that supports this activity, across commercial, publicly funded, charitable, educational, community, voluntary and informal settings.

Music makers

People who create or perform music.

National ambition

The direction and scale of change Scotland needs within a national priority.

New Scots

People living in Scotland who have been forcibly displaced or are seeking protection from persecution, as described in the Scottish Government's New Scots Refugee Integration Strategy. This includes refugees, people seeking asylum and others in need of international protection.

Outcome

A change or benefit an activity contributes to, such as improved access or more secure paid work.

Ownership, in delivery

An organisation or partnership agreeing to take responsibility for leading work, with the relevant remit, authority and capability. This is distinct from ownership of buildings, businesses or music rights.

Pilot and delivery

Testing or implementing selected responses where evidence, ownership and resources are in place. This includes targeted policy and advocacy activity where appropriate.

Portfolio career

A career combining several roles or sources of income, which may include work within and outside music.

Roadmap

The strategic framework for Scotland's music industry for 2026–30 set out in this document. It guides the shared programme and independently initiated activity.

Roadmap goals

What can realistically be established, influenced or progressed during 2026–30, taking account of authority, capacity and resources.

Scotland-based

Describes people, businesses or organisations based in Scotland. Where a programme requires a more specific definition, its eligibility criteria should make this clear.

Scottish music

Music made by people from or based in Scotland, across genres, languages and traditions.

Sector intelligence

Evidence and insight gathered and maintained to inform decisions, investment and evaluation.

Shared implementation programme

Work agreed between participating organisations and coordinated through annual implementation plans, with identified results, responsibilities and resources.

SMIA

Scottish Music Industry Association.

Sync

Placing music in film, television, games and advertising.

Value retention

Keeping more of the income, expertise and commercial value generated by music in Scotland, where it can support careers, businesses and further activity.

Appendix A: Source notes

These notes support the numbered citations in Section 3. They retain the source definitions and limitations needed to interpret the figures and findings.

[1] UK Music, *This Is Music 2025*, pp. 8–9. Both figures refer to the UK industry in 2024. Gross value added and export revenue are distinct measures and must not be added together or used to infer a Scottish share.

[2] UK Music, *Music Tourism Data Map, Scotland, 2025*, and *Music Tourism Methodology 2026*. Modelled direct and indirect spending and supported full-time-equivalent jobs associated with music tourism. These are not the total value or employment of Scotland’s music industry.

[3] Improvement Service, *Instrumental Music Services: Results from the IMS Survey 2025*, pp. 3–4, 7 and 12. Covers local authority instrumental tuition in 2024/25; excludes Youth Music Initiative-funded tuition and classroom music. All 32 authorities responded, but not all questions have complete responses; no denominator is supplied for the five-authority finding here.

[4] SMIA, *Summit 2025 roundtable records*. Findings describe recorded contributions across four session topics, not four independent discussion groups or agreement by all participants. No combined participant count is claimed. The accompanying Evidence Base and Methodology publication provides the detailed source references and coding limitations.

[5] Music Venue Trust, *Annual Report 2025*, pp. 28–29. The Scottish overview covers 68 trading Music Venues Alliance venues; its underlying survey-response count is not disclosed. The remaining venues cannot all be described as loss-making because this includes those breaking even.

[6] Help Musicians and the Musicians’ Union, *Musicians’ Census 2023*, p. 13. UK-wide voluntary survey of 5,867 musicians, conducted January–March 2023. Describes respondents, not a representative estimate for Scotland or all music occupations.

[7] Robert Allan, “A Question of Value?” *Mapping and Measuring the Scottish Music Industries* (PhD thesis, University of Glasgow, 2024), p. 208. Reports views from a purposively recruited survey; not a census of music businesses.

[8] Scottish Government, *Cultural Engagement in Scotland 2023: Findings from the Scottish Household Survey*, p. 23. Describes reported live-music attendance across household-income groups; it does not establish the cause of the difference or measure attendance at Scottish artists’ performances specifically.

[9] SMIA, *Annual Member Survey 2026 – a snapshot*, pp. 1 and 10, and *SMIA Annual Member Survey Findings 2026*. Voluntary survey; all 97 respondents answered the multiple-selection question about barriers to developing new business skills. Counts are 64 for lack of time and 54 for financial constraints; percentages are rounded to whole numbers. The findings describe respondents and are not representative estimates for the full membership or Scottish music industry.

Acknowledgements

The SMIA thanks everyone who contributed their time, experience, evidence and ideas to the development of this Roadmap. Their willingness to share what is working, where pressures persist and what needs to change has helped shape its priorities and approach.

We are grateful to SMIA members who responded to surveys and shared their experiences through ongoing conversations, and to everyone who contributed to discussions at the SMIA Summits in 2024 and 2025. These contributions helped identify the challenges affecting day-to-day work in music and the changes people want to see for the sector's future.

Particular thanks go to those who reviewed the draft framework and priority extracts during stakeholder validation, and those who contributed through other sector discussions. Reading drafts, challenging assumptions, identifying omissions and sharing practical knowledge helped us clarify the priorities and the conditions needed to take them forward.

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Association of Independent Music
British Council
City of Edinburgh Council
Creative Scotland
Culture Counts
Culture for Climate Scotland
Drake Music Scotland
Featured Artists Coalition
Glasgow Life
The Ivors Academy
LIVE (Live music Industry Venues and Entertainment)
Music Education Partnership Group
Music Managers Forum
Music Venue Trust
Musicians' Union
PRS Foundation
Showcase Scotland at Celtic Connections
Showcase Scotland Expo
Skills Development Scotland
South of Scotland Enterprise
Stirling Council
The Touring Network
Traditional Music Forum
UHI Perth
UK Music
University of the West of Scotland
Wide Events
Youth Music Initiative (Creative Scotland)

The Music Organisation Development Network (MODN) also helped shape the Roadmap, bringing together publicly funded and commercial music organisations to consider how well the emerging priorities reflected their day-to-day experience and development needs in Scotland. We thank MODN members for sharing their knowledge and perspectives, with particular thanks to 677 Media Management, Last Night From Glasgow and Noise Unit PR for their extensive feedback.

We also thank the researchers, authors and organisations whose research, data and publications informed the work. Their findings helped place the experiences shared with us in a wider context and informed our understanding of the challenges and opportunities facing music in Scotland. The accompanying Evidence Base and Methodology document provides fuller recognition of these sources and the contributions made during development.

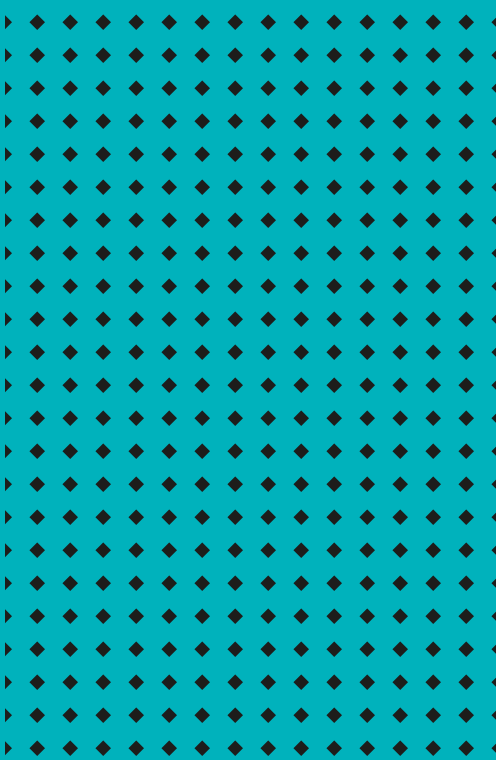
We recognise that contributing meant making time alongside demanding workloads and other responsibilities. We are grateful for the care, candour and constructive challenge people brought to this process, and for their commitment to improving the conditions in which Scotland's music sector works.

A special thanks also goes to the SMIA staff team and Company Board for the time, effort and commitment they have brought to developing this Roadmap, alongside their ongoing contribution to the organisation's day-to-day work. Their dedication supports the SMIA's continuing efforts to strengthen, empower and unite Scotland's music industry.

The SMIA staff team includes Robert Kilpatrick (CEO and Creative Director), Aja Garrod-Prance (General Manager), Daria Jaszcz (Marketing and Communications Executive) and Vahishtai Ghosh (Equalities and Industry Development Officer).

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Roadmap Design by Martin Baillie.



To find out more, and to both read and download
the Scottish Music Industry Roadmap 2026–30,
visit smia.org.uk/roadmap

