

Culture, Value, and Place 2018, Vol 2:

Greater Sydney Case Study

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Executive Summary

1. Introduction

This case study reviews the opportunities and imperatives for culture and the arts in Greater Sydney at a time of great change and opportunity for the region.

The new metropolitan plan for Greater Sydney - *Greater Sydney Region Plan: A Metropolis of Three Cities* - aims to re-balance growth to enable the successful transition from a 4 million-person city to an 8 million-person region with 3 major centres (the Eastern Harbour City, Central River City and Western Parkland City). Produced by the Greater Sydney Commission, the realisation of this Plan is supported by a new level of governance coordination, alignment of land use, transport and infrastructure planning, and improved collaborations between all tiers of government, communities, business and civic organisations. It also includes greater recognition that arts and culture are fundamental to Greater Sydney's future ability to attract jobs, create desirable places to live, work and visit, broaden its appeal, and enrich both its metropolitan identity and sense of belonging.

This case study is a follow-up to a first report that the authors prepared in late 2017, entitled *Culture, Value, and Place*, commissioned by the NSW Department of Planning and Environment's Arts, Screen and Culture Division. This was an 'outside in' report that looked primarily at how other successful, medium-sized and globally focused metropolitan areas of the world are prioritising culture and arts and leveraging the benefits they provide to achieve their wider social and economic objectives.

This new paper, a detailed Sydney case study, reviews and compares culture and arts in Greater Sydney within a closer comparative perspective. It is based on a review of more than 20 reports on culture in Greater Sydney and New South Wales, a targeted set of international comparative benchmarks and analyses, and more than 50 interviews with public and private stakeholders in the region carried out between April and July 2018. It also benefits from dedicated interviews with leaders and experts in six other global metropolitan regions and case study analysis of 18 city-regions in total. It is designed to help inform the development of strategic priorities for the NSW Arts 2025 Strategic Framework.

2. Greater Sydney: The World's Next Great Cultural Metropolis?

Greater Sydney already has many special assets and advantages as a metropolitan region rich in culture. Our interviews with leaders and experts inside and outside the region, combined with our analysis of comparative benchmarks, policies and strategies, indicates that these advantages include:

- **The DNA of Sydney** with its unique and profound position for **first nations**, and its inherited **cultural diversity** over successive cycles of settlement, immigration and integration, gives it both a distinctive cultural identity, and accumulated global reach.

- **Brashness, self-confident endeavour, open-ness to talent and proactive fostering of diversity and difference** is very high, leading to freedom of expression, inclusion, egalitarianism and personal autonomy that all support creativity, innovation, and excellence.
- **The beauty and appeal** of the distinctive and diverse scenery, topography, and climate of the region have been, and are still, an inspiration for many forms of public art, outdoor celebrations, festivals, and open-air gatherings.
- Greater Sydney's established **museums, theatres and galleries** are of high international calibre and host leading collections and performances.
- The region has highly competitive and technically **innovative creative industries** (e.g. screen, architecture, design, fashion) that serve B2B and B2C markets internationally, and export expertise to the world.
- There is very high **visitor demand** for its calendar of cultural events and blockbusters, including Vivid, one of the most popular visual festivals in the world.
- It enjoys a **distinctive and diverse mix of suburban locations**, including in growth areas of the Central River City and the Western Parkland City that are hotspots for innovative and digitally advanced culture that have transnational appeal and potential as well as great community value.
- The metropolis also is home to many **top-class educational and civic institutions** that have great reach and relationships across the region and internationally. Sydney is currently attracting record numbers of international students, many in the arts and humanities.

By most measures Greater Sydney is now among an elite group of 15-20 leading metropolitan regions in the world, and by some measures it is one of a special group of 'contenders' vying to become versatile global cities, and join a settled top 8-10 cities of the world.¹

However, despite its many evident advantages, Greater Sydney is not yet fully established as a beacon of cultural experience, production, and interaction. The region is not yet fulfilling its cultural potential or optimising the value of its cultural assets. Now is the opportunity to embark on a new cycle of deeper cultural investment, innovation, and application.

This new cycle consists of two twin dynamics.

- i. Greater Sydney can build its global cultural identity and establish **distinctive points of global leadership** in important strands of arts and cultural consumption, production, performance and experience.
- ii. At the same time the region can also enhance **cultural opportunity and participation** across the whole of Sydney, empower and enable its many great metropolitan institutions and communities, and drive a process of substantive metropolitan integration.

These goals are mutually reinforcing and equally important. A cultural strategy for Greater Sydney is unlikely to succeed by promoting either only 'global leadership' or 'regional access' ahead of, or separately, to the other.

3. A Window of Great Opportunity

The timing is right to be ambitious for Greater Sydney and its cultural platform for multiple reasons:

- **This is the start of a new growth cycle for Greater Sydney** – with much more population to be accommodated, including young people at the start of their cultural journey, and the evolution of new settlements and housing choices. This raises attention towards how Sydney can achieve the lived experience to make this growth work.
- **The light rail systems and Sydney metro are coming.** Despite the current disruption of the infrastructure works, the enhanced connectivity that is soon to arrive will increase the opportunity to travel efficiently to cultural locations around the region. These will raise appetite for a higher amenity experience of street life, transport interchanges and densifying town centres.
- **“Urban Sydney” is emerging** in medium density neighbourhoods with high cultural authenticity and important cultural anchors (e.g. Bankstown CBD, Marrickville and Redfern). This Sydney – which is neither low amenity suburbia nor tourist spectacle – can be one petri dish for a different kind of approach to arts and culture.
- **Structural changes are underway in economy and society.** The acceleration of the experience economy and innovation economy, and changing consumption and production patterns, are transforming the way culture achieves success and resonance, and the way it contributes to social and economic outcomes. Content is king, regardless of its origin. The ability to curate, package and communicate unique stories, unique places and unique environments will shape what resonates locally and on a global stage. These trends offer the chance to develop new stories, systems and solutions, and avoid lock-in to old models of providing and selling culture.

These factors coincide with new developments in governance, planning and investment in Greater Sydney:

- **The *Greater Sydney Region Plan: A Metropolis of Three Cities* just completed**, fully aligned with the State Infrastructure and Transport Strategy, and commanding widespread civic and community support.
- **There is a renewed focus on cities in Federal Government**, leading to the possibility of new forms of collaboration and alignment and scope for greater innovation in how culture is resourced and deployed across the region.
- **The Western Sydney City Deal** provides a once-in-50 year opportunity to invest in high quality greenfield cultural development and build a sense of place and gravity around new infrastructure. It is also fostering improved local government collaboration and creating the chance for combined approaches of the scale to be catalytic and transformative.

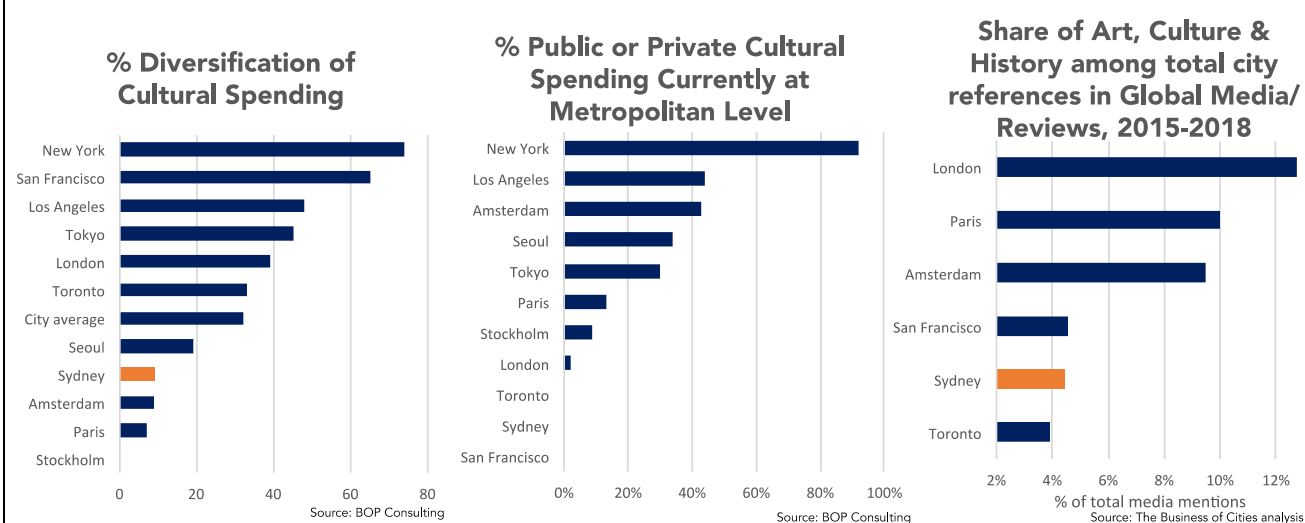
This all leads to critical roles for cultural development in Greater Sydney, so that culture can support quality of life, creativity, enterprise and economic innovation, health, identity and belonging.

Greater Sydney Culture in Global Perspective

Our analysis of Greater Sydney against other leading metropolitan cities identifies a number of areas that require urgent attention:

- There is a **spatial imbalance** of cultural assets between the CBD and the rest of the region, especially of larger institutions and of museums and galleries, and this is driving more asymmetries in the way culture is accessed and experienced.
- While **appetite and appreciation for the arts and culture is strong** and broadly in line with other leading regions, participation in Greater Sydney is more constrained by issues of access.
- Greater Sydney's overall **talent pool in cultural industries has been fairly stable** while it continues to grow in some other leading metropolises, and this may have implications for the eco-system of skills and small firms that can underpin the next generation of leading edge culture.
- There is a **high reliance on public money to fund projects** relative to most other leading regions, and lower diversification or experimentation with new revenue sources to support a higher overall level of cultural investment.
- The **global perception and global identity of Sydney is more narrowly associated** with its tourism icons and natural environment, while its distinctive people, histories, culture, diversity and creativity are less visible. Sydney has been pursuing a 'consumption model' and is yet to fully use its assets to drive its transition into a high value economy.
- The relative **size and maturity of Greater Sydney's designated cultural precincts** and neighbourhoods is less developed, and on average they are further away from key future economic growth locations. The latter include not only the Northern and Southern ends of the Eastern Economic Corridor (e.g. Macquarie Park, Sydney Airport), but also the strategic centres in the two other Corridors, including Parramatta, Olympic Peninsula, and Badgerys Creek Airport.

Figure 1: Assessments of Greater Sydney in international benchmarks of culture, and in international perception analysis



2018 figures

Adjectives used to describe and encapsulate Sydney in Global Media and Reviews 2015-2018



Source: Google, The Business of Cities Analysis

Nouns used to describe and encapsulate Sydney in Global Media and Reviews, 2015-2018

- The **projection of Sydney to the world will remain locked into a lower value** leisure formula, with a focus on 'fun', rather than a new equation of enrichment, innovation, and inspiration.
- The realisation of the **Greater Sydney Region Plan and the vision for Greater Sydney will become unstuck**. People will reject growth if growth is not inspiring and high amenity.
- Greater Sydney will remain a **second division player in the innovation economy**, which is where the next cycle of high value jobs is being created, and where the drivers of productivity growth are found.
- Greater Sydney will **not meet the expectations of future generations** for a high-amenity high-experience urban life.
- The **costs and the risks of social disengagement**, in terms of mental health, productivity, cohesion and civic capital, will be severe.
- The rate of other kinds of innovation (social, environmental and educational) **will be lower**.
- **Other cities will move ahead of Sydney** and the opportunity to become the leading city in the Southern Hemisphere will be missed.

All the world's leading cities have been strongly prioritising cultural investment and policy innovation over the past decade. They recognise the place-making, creativity and spill-over benefits of culture and the untold costs of metropolitan growth without bold cultural strategy. They see culture as a 'sine qua non', not a 'nice to have'.

All told, if culture does not become more central to Greater Sydney's future growth and identity, the metropolis will see its existing reputation become eroded and become permanently stuck in the 'second division' of cities.

5. What are the World's Best City Regions Doing and What Approaches Have Lessons for Sydney?

The world's successful fast-growing metropolises have been building and piloting new initiatives for some time. We have reviewed the global experience of more than 18 leading cities:

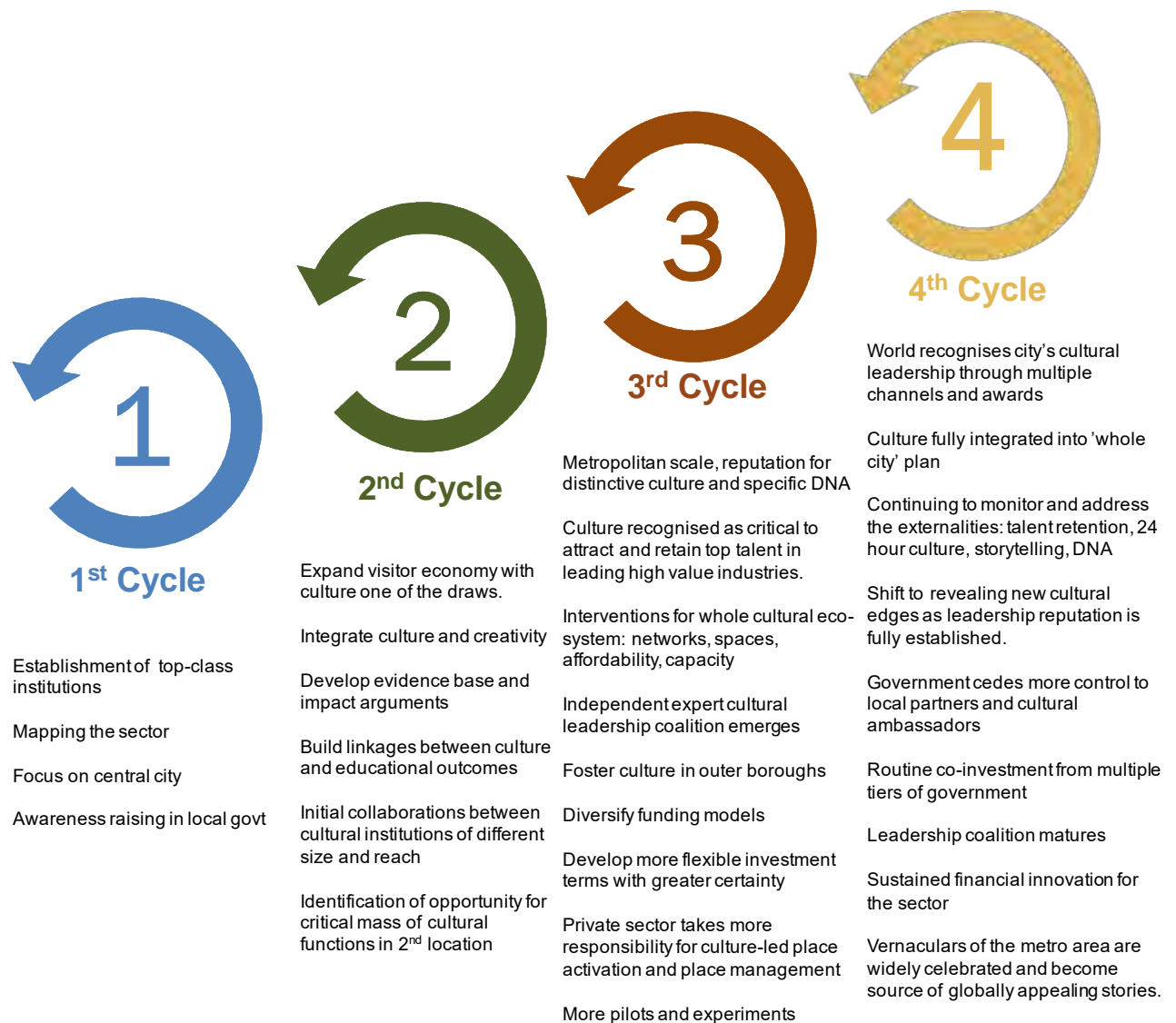
- Abu Dhabi
- Amsterdam
- Barcelona
- Berlin
- Hong Kong
- London
- Medellin

- Miami
- New York
- Oslo
- Paris
- San Francisco
- Seoul
- Singapore
- Stockholm
- Tel Aviv
- Toronto
- Tokyo

Recent Cycles of Cultural Development in cities.

This helps to identify a number of approaches that may be useful for Greater Sydney to consider. The analysis of the cultural policies, strategy and delivery of other leading metropolises of Sydney's calibre highlight the way that approaches tend to evolve through different cycles.

1. In the 1st cycle, the metropolitan area becomes proactive and intentional towards culture for the first time. It focuses on creating some leading institutions and begins to become interested in the networks of organisations and how they might work better together. It develops a visitor brand that connects culture to tourism. A primary culture quarter or district emerges often connected to a CBD or waterfront location. In this cycle, public leadership is essential to fund culture, to promote new projects, and to drive ambition and raise confidence. Cities completing this cycle include **Abu Dhabi, Oslo and Hong Kong**.
2. In the 2nd cycle, the metropolitan area recognises the connection between culture and creativity and begins to see culture not just as something to be consumed, but also as a driver of creativity and enterprise, a source of job creation, and a potential driver for place-making. In this cycle, educational institutions start to become engaged, deeper networking and clustering between cultural organisations is prioritised and initial efforts towards building a second hub location for culture are attempted. Culture is still primarily promoted to drive tourism but its wider linkages to cohesion, place-making, and growth management are recognised. Public leadership plays key roles in financing and strategising cultural development and it starts to foster wider leadership groups of cultural actors outside Government as well as beginning internal multi-agency coordination within Government. **Tel Aviv, Stockholm and Tokyo** are cities currently in this cycle.



3. In the 3rd cycle, metropolitan areas embrace the wider role of culture developed in the second cycle and embed the role of culture across a wider range of social, environmental, and economic policies. In this cycle, a metropolitan area tells its unique cultural story with great confidence and a differentiating voice. It makes a shift from hosting culture to being recognised for its distinctive cultural production. often emerges, and the diversification, both of the cultural offer and the locations, is established. The metropolitan areas in this cycle are usually growing their population base and redefining their spatial strategies leading to an enhanced role for culture both as an amenity and as an identity builder in new locations or areas of regeneration.

As the range and quality of locations and institutions grows it is recognised that new forms of networked and dispersed leadership are required to achieve coordination, trust, and confidence across a dynamic cluster of organisations, with multipliers and spill-overs into many aspects of public and civic life. Consequently, public leadership shifts more towards convening other leaders and the co-creation of strategies, and greater emphasis on fostering a climate for innovation,

experiments, and new ways to fund and finance culture. In this cycle, culture emerges not so much as a consumable asset for tourists but more as a carrier of metropolitan DNA, a driver of design and placemaking, and a source of identity, belonging, and cohesion. Examples of cities exemplifying this cycle include **Toronto, Berlin and Miami.**

4. In the 4th cycle, these metropolitan cities have fully articulated the role of culture in their development strategies, placemaking, and wider goals in liveability. Leadership is shared and flexible but united by high-trust and collaboration, and there is a common venture to innovate and experiment with culture across many parts of Government and civic life. Private and philanthropic investment is optimised and previously novel financial mechanisms to pay for culture have become normalised. Metropolitan areas in this cycle will usually have 3-4 established cultural hubs or quarters and there will be new locations with distinctive specialisation evolving all of the time. In this cycle, public leadership continues to play the roles of convenor, co-creator of strategy and joint venture funder, but it has learned how to optimise the role of civic leadership from across its institutional and social base in the promotion and development of culture. Government frequently then combines these co-leadership roles with new initiatives to tackle 'wicked issues' and 'unintended consequences' of wider metropolitan growth. These might include acute affordability challenges, inclusion of the most marginalised people in society, longer term financing of new catalytic projects, or winning the most competitive global contests. Government brings to these deeper challenges the skills of convening, soft power, innovation, and coalition building. It recognises that public finances and public policies alone are not enough. Those to have begun their journey into this 4th cycle include **London, New York and Paris.**

Our observation is that in this simplified development model Greater Sydney has successfully completed the 1st cycle and has nearly completed the 2nd cycle.

What that means is that Greater Sydney is ready to become a global player and is now embarking on a period where culture will become an important dimension of enterprise and place-making, liveability, and identity. The range, scale, and diversity of cultural organisations and locations will grow and evolve. In this cycle, leadership will need to shift from a plan and finance model more towards integrator, convenor, strategy, and innovation roles, whilst maintaining the core support for cultural provision and infrastructure. The goals of optimisation of government support for culture will lead to the use of new tools and mechanisms in the arenas of integrated multi-agency working, institutional networking, financing, precinct development, identity and reputation building. These new tools will not simply arise as they are needed but will need to be invented through conscious efforts.

Greater Sydney is currently pursuing approaches that are common to cities in their 2nd cycle, but 3rd cycle approaches are starting to emerge and need to be fostered. Repeating approaches from the 2nd cycle will not be enough for the region to establish itself as a global centre of culture and a metropolis with a strong cultural identity.

6. Features of Successful Metropolitan Cultural Strategy in Other Global City-Regions

As global city-regions move from one cycle to another they invest differently and adopt new tools and approaches to how culture is inspired, organised, and leveraged. When we examine the features of policies and strategies in the top global regions, 10 approaches are visible that reflect their shift into a 3rd cycle or 4th cycle. Some of these are already evident, or are developing anew in Sydney. Others are not yet fully visible.

1. Integrated Regional Approach for Culture

Other metropolitan areas are implementing fully fledged regional plans where culture is embedded and harmonised across local and higher-level plans, where incentives for local governments are well established and where there is systematic co-ordination with the sector. They recognise that without this integration, they cannot achieve visibility and scale, and that inefficient and sometimes perverse outcomes will occur. Greater London and the Paris Region are examples where this integrated approach is well underway.

As part of this integrated approach, artists and arts organisations are recognised as essential to the successful implementation of strategies in health, senior care, education, crime and waste management. Relocations of key assets are part of the equation, but alongside longer-term strategies about other non-cultural assets and the wider requirements of the cultural eco-system.

This requires a portfolio to engage with and co-ordinate local government authorities, and promote a different and more integrated way of combining assets. In cities with a metropolitan planning functions, it is the metropolitan level that becomes the natural locus for these responsibilities. This may mean an enhanced role for Greater Sydney Commission in its the next cycle, where arts and culture can become one of its core briefs and be even more central to its planning approach.

2. The Value, Evidence Base and Storytelling for Culture

The world's leading metropolitan regions are finding new and bold ways to gather evidence, quantify impact and tell powerful stories about the role of culture in the future of their region.

New York and London are examples where the cultural sector has become very experienced and skilful at communicating these positive spill-overs. New York invested in a 2-year project to demonstrate relationship between culture and wellbeing at the neighbourhood scale. London benefits from the constant data advances of a higher tier agency as well as the evidence from systematic longitudinal surveys. In these cases, and others, messages about art and culture are produced and updated consistently and with the involvement of experts outside the sector, and then communicated effectively at all levels of government.

Many strategies can be observed: sophisticated mapping and visualisation of the sector and its impact, comprehensive datasets to match Treasury requirements, and calculation of the opportunity costs of business-as-usual approaches. Some local governments in

Sydney are already adopting some of these tools, and mechanisms to articulate the benefits at a metropolitan scale may now be required.

3. Embedding Culture into Continuous Cycles of Placemaking and Precinct Development

Other leading metropolitan regions have observed the rise of the ‘experience economy’, which places a premium on a high emotional connection with public space, tourist sites, commercial areas, and places of rich cultural and historic significance. This requires fundamentals of good design but also heritage, context, digital immersion, vision and narrative, which can drive all kinds of short and long term value. Together these factors require much more active engagement with places and precincts.

As a result, metropolitan regions have been experimenting for some time with a range of planning and placemaking tools, and expanding the roles and responsibilities of communities, landowners and businesses in authentic place curation. Cultural activity and activation is often a key part of this process, as the examples of New York and Miami illustrate. In these and other metropolitan cities, cultural precincts do not become successful hubs of cultural production and experience because they are nominated or designated. Instead, effective frameworks of place management and enabling planning environments to have helped to underpin a more organic process.

Many places and neighbourhoods in Greater Sydney do not benefit from a shared commitment on the part of local governments, landowners, business and civic sectors to optimise the experience between buildings, make and manage place, and embed arts and culture in everyday life. Many local governments have strong placemaking initiatives but many also lack the tools or resources to achieve a continuously high quality and high activation of place. This indicates the need for improved tools which reflect the catalytic impacts of arts and culture in the experience of place in a complex metropolitan city.

4. Optimising Culture in New CBDs and Key Nodes

The *Greater Sydney Region Plan: A Metropolis of Three Cities* entails the development of a new major centre of gravity in Parramatta, and multiple other sub-centres in the Western Parkland City including the new Badgerys Creek Aerotropolis. Culture-led planning, programming, placemaking and infrastructure will be required in these locations as a priority.

Other cities have used their emergence into polycentric regions as the opportunity to define a bigger vision about metropolitan culture and demonstrate the potential for vibrant mixed-use lifestyles in new kinds of location.³ The examples of East London (from Stoke Newington to Stratford and Canary Wharf and now the Thames Estuary) in London, Oakland in San Francisco, Brooklyn in New York, and Incheon in Seoul all illustrate the importance of long term investment and strategy making for ‘2nd CBDs’ and other secondary locations, in addition to infrastructure catalysts. A number of features are common to building culture in:

- Identifying and amplifying existing cultural strengths in the area
- Strong focus on the production end of the creativity value chain
- 2 or more cycles of transport and digital infrastructure improvement

- A special role for the area's higher education institutions as centres for creative and cultural research and business support.

5. Building the Cultural 'Journey' at the Whole City and Neighbourhood Level

The shift from a city scale to metropolitan scale of development requires a more co-ordinated cultural offer. Other metropolitan regions, including especially Greater Toronto and metropolitan Tokyo, have made sustained effort to achieve:

- integrated cultural maps, passes and signage.
- cultivating the distinctiveness of the different institutions and providers and creating a thematic cohesion, to turn the cultural experience into a logical and legible narrative for residents and visitors alike.
- stitching together the spaces and places in between cultural buildings to make the passage navigable and pleasurable.

6. Initiatives to Boost Affordability in the Cultural Sector

Price inflation has prompted many cities not only to intensify efforts to improve overall housing supply, widen tenure mix and diversify locations, but also to experiment with new approaches and tools to retain artistic and cultural talent. San Francisco, London, Singapore, Paris and Berlin all provide examples of new initiatives operating at neighbourhood level. In addition to more general purpose housing policies, these examples focus on workspace and live/work spaces, and involve a mix of:

- caps on business rates
- active zoning and controls on the use of space
- rent controls
- leverage of philanthropic or institutional co-investment
- developer support and co-ordination.

These approaches complement the wider policies to improve citywide housing affordability for all key workers in the metropolitan economy.

7. Improved Co-Ordination Across Government Agencies

Improving the level of understanding of culture's value proposition across Government is a priority for Greater Sydney. A whole of government approach for culture is required to ensure that the value of culture is optimised, and it can support and reinforce wider objectives.

A siloed approach creates a pre-occupation on internal efficiency at the cost of destination, experience, identity, and confidence.

There is widespread appetite and for arts and culture to have a 'seat at the table' when other investment and infrastructure projects are formulated, and decisions made. This may translate into sustained partnerships across portfolios.

Other metropolitan cities and some higher tiers of government have created or tested new arrangements to elevate and integrate culture into decision making. These include:

- i. A 'Culture Cabinet' of senior cross-departmental staff
- ii. Placing culture within the Cabinet Office of a higher tier of government
- iii. Combining the briefs for culture and economy to achieve more synergies

Whichever option is chosen, the experience of other city regions suggests that in addition to a compelling creative proposition, an astute grasp of the machinery and decision-making processes of government is essential to position arts and culture more centrally in the design and delivery of key projects.

8. Unified Leadership and Governance for the Cultural Sector

Arts and culture in metropolitan areas benefit from sources of independent, proactive and senior leadership. These can help to effectively promote a diverse sector, leverage third party finance, and communicate the benefits of prioritising culture. They talk to the world about the culture of their city region. In many global cities a leadership board of this kind shares delivery responsibility with Government and is very outcomes-focused. The examples of London and Amsterdam offer two examples among many.

The leadership and co-operation provided to NSW Government by the Arts & Culture Advisory Committee is an important step forward. Separately, the Sydney Culture Network is emerging as a new kind of bottom-up collaboration and information sharing platform across the region. In the next stage it will be necessary to assess how these sources of leadership can be augmented further.

9. A Balanced and Compelling Metropolitan Brand and Identity

Many other top city regions have been grappling with the question of what their society and economy should look like in 2040 and 2050. Their leaders have recognised the need for an ambitious overarching narrative. They observe that developing and promoting the city's cultural identity involves looking beyond culture's capacity to drive tourism and bed-nights, and harnessing culture also to serve education, sense of belonging, creativity, innovation and other purposes. Building arts and culture in these ways is recognised to add to the tourism offer and appeal to the world, while in turn tourism is encouraged to boost cultural production and investment.

Examples such as Miami's *One Community One Goal*, Stockholm's *Capital of Scandinavia* brand, and Amsterdam's *Iamsterdam*, all illustrate the way leading metropolitan cities can pivot from a tourism and consumption-led identity to a citizen-owned identity built around culture, trade and innovation.

In positioning itself for cultural leadership, Greater Sydney can also help tell the story to the public, including to ease apprehension about spending on arts and culture within other envelopes of money.

10. Optimising Culture for the Innovation Economy

There is a big opportunity for more deliberate and strategic co-location of culture and creative practices with Greater Sydney's emerging centres of technology and innovation.

Many of the cultural locations that are established or more nascent are situated along two of Greater Sydney's three future economic corridors. However, this potential is undermined by at least three kinds of disconnection: long distances between these locations and areas of high value innovation, on-site segregation of arts & culture from other technology activity, and fragmentation between different art forms. These reduce the scope for positive multipliers and inhibit the emergence of vibrant 'live-work-play' environments that attract and retain certain kinds of talent. Addressing these issues can help serve Sydney's need to create the high-knowledge jobs of the future.

Other cities (e.g. New York, Toronto, Seoul) are observing that the fostering of districts of the scale and diversity to combine physical spaces for enterprise firms, several types of cultural infrastructure and high-quality street level programming, helps to drive successful new locations for jobs and investment.

7. Recommendations for Greater Sydney

Drawing on the insight of international experience summarised above, alongside our analysis of the global benchmarks and regional reports, and our interviews with leaders and experts in the region, we make 10 recommendations that will help fulfil the promise of Greater Sydney as the world's next great cultural metropolis.

- 1. Distil Sydney's unique DNA and tell a bolder story.** It is apparent that Sydney's identity and purpose in the 21st century has become ambiguous. Affection and pride in the city's scenic assets remains very high, but familiarity and fondness for Sydney's core values and vision need to be re-asserted in the context of growth of change. Sydney's cultural identities need to be distilled and its cultural production advantages clarified and asserted. Sydney needs to use culture to project its identity within the region and to the world, as a leader and innovator, rather than a focus on transaction-based projects designed to support primarily tourism. The best way to do this would be to build a deeper sense of identity and purpose for the region. Tourism, Trade, Enterprise, Knowledge Creation, Place-Making, Social Cohesion and Civic Participation can all be supported by distilling a clearer identity and it makes sense for this to be a broadly-based effort.

As part of this, Greater Sydney and its leaders need to have a clearer sense of exactly what it wants to achieve when by supporting culture and the arts. A central idea and mission that has real content is the way other metropolitan regions motivate their governments and inspire their businesses and communities.

This requires the patient work of discovering how Greater Sydney collectively sees itself and where it wants to become. Culture is the vehicle to tell and sell the unique story of Greater Sydney, redefining the West-East divides and building an integrative sense of self.

There is great enthusiasm among the city's cultural eco-system to co-create the bigger vision. A cross-section of cultural organisations and leaders should be encouraged to be active influencers within an identity alliance that is big and bold in ambition and extends well beyond the domain of art and culture.

2. **Optimise the cultural impact of catalytic developments.** Sydney is in a moment of re-engineering with major new developments in train that will change the shape, size, and flows across the region. A new airport, major infrastructure development, expansion of universities, identification of innovation precincts and corridors, hospital and health precinct development, relocation of major cultural institutions, all have the potential to generate significant cultural development and placemaking outcomes.

The development of the new Badgerys Creek airport in the Western Parkland City, and the associated City Deal, is an opportunity to give momentum to the Greater Sydney Plan. There is potential for an iconic facility and an indigenous cultural hub that fully projects the unique cultural inheritance of First Nations, to be created as part of the Airport project. Successful cultural development of precincts in and around Parramatta, Redfern-Eveleigh, Walsh Bay, The Bays, and Ultimo is also key because of their profile and potential to drive wider change. These will come to fruition at different points in the next two cycles and it is a priority to continuously engage with the delivery stakeholders on these projects to ensure that the projects meet high cultural and design standards. This may require new thinking about place animation and the best means to achieve the benefits of proximity and co-location.

3. **Support and amplify what already exists and works well.** There are already a great number of success stories in Greater Sydney: innovative arts centres supporting distinct local cultures, cutting edge creative firms, artist-led programs, high quality multi use facilities, world-class indigenous arts, and much more.

Many have grown organically and possess an authenticity that is a valuable point of difference for the region as a whole. Support for these can come from more tactical initiatives and as well continuous investment. Observing the needs of the most successful can help leverage greater corporate and philanthropic investment.

At the same time there is great appetite to be better informed about the full range of actions and achievements in the region. Platforms to share and celebrate best practice in Greater Sydney much more actively should be a priority. These can also signal what good looks like across the sector, raise confidence and familiarity with the projects that are succeeding, and provide more avenues to do complementary work. A visible and well-run platform can help avoid duplication and fragmentation, and have longer run effects of de-siloing organisations.

4. **Tackle the affordability crisis.** Greater Sydney's affordability for artists and cultural workers has multiple dimensions to it: housing costs, costs of living, affordable workspace, and wider enterprise costs (e.g. taxation and regulation). An affordability strategy will need to address all of these and consider how they interact.

Government should explore all options to intervene proactively to invest in and part-subsidise artist studios, in or close to areas where artists already work. A set of pilot projects or zones can help test the effect of different kinds of government support, as well as options for co-sponsorship. Partners within the private, philanthropic and local government sectors should be sought for these demonstration approaches.

Sydney's housing affordability relies in the long term on regional housing market capacity. This is itself also supported by placemaking that has a strong focus on culture, in order to make medium density lifestyles effective and desirable to a larger share of the metropolitan population.

- 5. Explore all opportunities to create shared facility and joint use hubs.** The integration of culture with the next cycle of new and expanded schools, hospitals, universities, service centres and other anchors should be pursued more urgently and strategically. These locations can become places where a cross-section of a community can participate and have flexible 24/7 functions that offer more of a what a vibrant global metropolis should provide.

- Actively monitor the Greater Sydney projects where timely influence can be leveraged to ensure a cultural component.
- Challenges and competitions to promote a joined-up arts and cultural offer.
- Sharing of best practice multi-use integration in NSW, Australia and globally

- 6. Foster a 'peak leadership' platform for the sector.** If Greater Sydney Culture can speak with a unified voice it will help the sector to attract investment and opportunity and enhance government support at all levels, across political cycles. Focus should now be trained on augmenting the peak leadership function with creative independence that can share leadership with Government and foster the soft governance and networking that is necessary in the sector.

NSW Government may need to play a convener role and not just a funder and policy role if it wants the sector to be more well-organised, articulate, and ambitious. Optimizing co-investment and leverage comes from having joint strategies and ambitions with partners, not just Government policies. Decision making, and communication can also be greatly aided by stakeholder support and endorsement.

- 7. Scale up the collaboration among Sydney's great cultural institutions and organisations.** Consider re-calibrating the funding and incentives structures to encourage Greater Sydney's cultural bodies to focus on their collective cultural mission, and not only their individual commercial mission. The creation of non-competitive and non-adversarial spaces should be a priority.

Options to consider include:

- a Strategic Fund earmarked for projects that have the scale to bring organisations to work together and build capacity.
- a shared back office for affiliated organisations.
- a 'one stop shop' to provide support smaller organisations to navigate the funding system and access expert advice.

- 8. Build a whole of Government approach.** Arts and culture and its achievement of liveability and vibrancy should become core to the success of government in Greater Sydney, but it requires ongoing effort to build the integration across government. Relevant approaches can include:

- Search actively for the champions for the arts across NSW Government

- Recruit and leverage active support from the Commonwealth Government
- Build regular intelligence of the strategic agendas of other Government agencies
- Carry out a stock take of which projects arts and culture are currently at the table, when the windows of opportunity are to influence them, and establish a Working Group to target projects accordingly
- Develop capable advocates across Government who have the know-how to align with priorities of other departments, engage with decision-makers at the right seniority, and pitch ideas persuasively
- Look to position Culture optimally within NSW Government and enable it to drive inter-departmental approaches.

9. **Develop a cultural talent attraction and retention policy.** Sydney's cultural influence will benefit from greater circulation of leading artistic talent into and out of the region. More bursaries, residencies and fellowships for international artists, performers, poets and others are some of the avenues to achieve this. Cultural 'summer schools' and 'winter schools' with private sector sponsorship can also bring young global talent to Sydney for the first time to participate and contribute to the region's arts and culture. These exchanges can help grow local skills and expertise, while also creating a larger cohort of mobile cultural 'ambassadors' for Sydney who communicate the region's cultural story around the world. Higher flows of cultural talent into Sydney can also help to retain more of Sydney's talent.

A talent policy with this focus may also feature initiatives to leverage Greater Sydney's cultural diaspora. The region has educated and fostered many great artists now operating internationally, and there is room to provide more opportunities for this demographic to return regularly, showcase their innovations, and celebrate Sydney and its global connections.

10. **Celebrate Sydney's special history and diversity.** Sydney is already a popular region for events and blockbusters, yet there is room to support the growth and development of more celebrations and festivals that recognise the region's uniquely layered history and rich mix of cultures. This may include events with larger scale and ambition as well as local and community productions. An events program could focus very deliberately and thematically on Sydney's cultural layers and depth, drawing on different kinds of expertise across the region. Continual celebration of Global Sydney and Ancient Sydney can acquire visibility and resonance beyond the region and so transmit a resurgent cultural identity.

1. Introduction

In early 2018, The Business of Cities Ltd prepared a background report entitled *Culture, Value, and Place* for the NSW Department of Planning and Environment's Arts, Screen and Culture Division. This report provided a thorough global review of latest evidence and analysis about the role culture plays in helping metropolitan regions that are growing and globalising to succeed.

In this first report we introduced a roster of 9 comparator city regions for the Greater Sydney region, to produce a benchmarking group of 10 aspirational metropolitan city-regions:

- Abu Dhabi
- Amsterdam
- Barcelona
- Hong Kong
- San Francisco
- Singapore
- Stockholm
- Sydney
- Tel Aviv
- Toronto

Culture, Value and Place was an 'outside in' report that looked primarily at how other successful, medium-sized and globally focused metropolitan areas of the world are benefiting from culture and arts and using these benefits to achieve their wider objectives.

Findings from *Culture Value and Place*

Among the key observations from this review included that:

1. Culture is playing a key role in helping cities and whole societies to evolve, change, accommodate growth, and retain core values as they transition into unknown futures. The role of culture in underpinning population growth and diversification, innovation, enterprise, creativity, education, livability, health, place-making, area-development, identity, belonging, participation and cohesion is widely recognised and embraced by the globalising city-regions.
2. Greater Sydney is midway through a 50-60-year transition into a larger population, with a more global, knowledge based, and experience fueled economy. It is becoming a leading global gateway serving many more partners, collaborations, visitors and customers. These shifts present the metropolitan area with unique opportunities, for which culture and cultural investment are critical.
3. Other city-regions are making key changes to their approaches to culture. These include large up-front investments in new and modernized cultural institutions, the development of large cultural clusters with the scale to anchor a larger

population or spatial strategy, the recognition that cultural investment is a means to achieve both densification and appealing public space, and the active management of the life cycle of change in different districts in the region through 'whole of place' initiatives.

4. Global city regions are developing a small number of new cultural precincts in places where there is enough available cultural content, a critical mass of visitors and interested locals, and good public transport. These precincts are relying on a sophisticated set of enabling policies, programs and management vehicles.
5. Most city regions are now aware that access to cultural assets for populations across the whole metropolitan area is a key imperative and are creating new partnerships to engage communities. They are also developing 'whole of government' approaches to ensure that they optimise the contribution of culture to diverse public agendas and they are fostering new forms of innovation with the private and civic sectors in financing, managing, and promoting culture.

This Report

This follow up case study reviews and compares culture and arts in Greater Sydney in a closer comparative perspective. The analysis draws on five different sources of insight accumulated between March and July 2018:

- More than 20 Global Benchmarks that measure and assess culture, vibrancy and diversity in cities and metropolitan areas
- Global case studies of policies, initiatives and strategies over the last 10-20 years in 18 leading global city regions, supported by consultation with leaders of cultural strategies and other experts in 6 cities (London, New York, Chicago, San Francisco, Paris and Tokyo)
- A review of reports on arts and culture produced by and for Greater Sydney and New South Wales over the last five years
- Attendance of workshops in Greater Sydney on the future of the Screen Industry and Cross-Sector Collaboration
- Interviews (face-to-face and phone calls) with more than 60 cultural leaders, experts and stakeholders in Greater Sydney.

During the preparation of this case study we benefited from the insight, evidence and feedback provided by the following stakeholders:

Greater Sydney Commission

Geoff Roberts
Heather Nesbitt
Halvard Dalheim
Stephanie Barker

NSW Government

Kirstie Allen and Kieron Hendicott, Infrastructure NSW
Sandra Chipchase, Destination NSW
Troy Daly and Vanessa Gordon, Urban Growth Development Agency
Giles Felgate, NSW Department of Justice

Annette Marley, NSW Health
Sam McClean, NSW Department of Industry
John Neish, NSW Department of Education
Jane Simmons, NSW Department of Education
Rachel Wheeler and Gina Groves, Transport for NSW
Gary White, Chief Planner, Department of Planning and Environment NSW

Other Government

Philip Edney, City of Canada Bay Council
Kiersten Fishburne, Liverpool City Council
Suellen Fitzgerald and Michael Daly, Western Sydney Parklands Trust
Hannah Lloyd Hensley and Ashleigh Cormack, Infrastructure Australia
Andrew Thomas, Lisa Colley and Benjamin Pechey, City of Sydney

Arts, Screen & Cultural Organisations

Jenny Bisset, Blacktown Arts Centre
Genevieve Clay Smith, Bus Stop Films
Darren Dale, Blackfella Films
Michael Dagostino, Campbelltown Arts Centre
Rosie Dennis, Urban Theatre Projects
Alexie Glass Kantor and Michelle Newton, Artspace
Victoria Harbut, ICE
Dr Rob Lang, RDA/Urban Theatre
David Longmuir, Gondwana Choirs
Anne Loxley, C3 West
Patrick McIntyre, Sydney Theatre Company
Lena Nahlous, Diversity Arts
Vandana Ram, Canterbury Bankstown Arts Centre Director
Dan Rosen, Australian Recording Industry Association
Shakthi Shakthidaran, CuriousWorks
Adrian Wiggins, Pollen

State Cultural Institutions

Caroline Butler Bowdon, Peter Morton and Peter White, Sydney Living Museums
Louise Herron, Sydney Opera House
Kim McKay, Australian Museum
Dr John Vallance, State Library of NSW
George Souris, Chair, State Library of NSW Council

SSOs

Lisa Havilah, Carriageworks
Liz Ann Macgregor, Museum of Contemporary Art

Cultural Events

Jo-Anne Birnie-Danzker, Sydney Biennale
Wesley Enoch, CEO, Sydney Festival
Leigh Small, Sydney Film Festival

University Experts in Culture

Barney Glover, Western Sydney University
Ross Harley, UNSW and Chair of Sydney Cultural Network
Liz Hughes, AFTRS
Andy Marks, Western Sydney University
Martina Mollering, Macquarie University

Margaret Petty, UTS

Business and Civic Leadership

Lisa Chung, Urbis

David Gonski, ACAC

Lyn Lewis Smith, CEO, Business Events Sydney

Simon Mordant, ACAC

Michael Rose, Chairman, Committee for Sydney

Eamon Waterford, Acting CEO, Committee for Sydney

In addition, we benefited from individual conversations with the Arts, Screen and Culture Division:

- Alex O'Mara
- Tarek Barakat
- Alex Bowen
- Grainne Brunsdon
- Antonietta Morgillo
- Cassandra Carolin

We also attempted to speak with the following individuals, but were unable to due to logistical or other reasons:

- Sandra Bender, Barangaroo Delivery Authority
- David Borger, Western Sydney Chamber
- Dr Michael Brand, Art Gallery of NSW
- Justine Earl-Smith, Property NSW
- Chris Gibson, University of Wollongong
- Kerri Glasscock, Sydney Fringe Festival
- John Kirkman, ICE
- Sophia Kouyoumdjian, Parramatta Artists Studio
- Dolla Merrilees, MAAS
- Jill Pattison, Industry NSW
- Rhoda Roberts, Sydney Opera House
- Kerry Robinson, Blacktown City Council
- Michael Rolfe, M&G NSW
- Lang Walker, Walker Corporation

2. Greater Sydney: The World's Next Great Cultural Metropolis?

Greater Sydney already has many special assets and advantages as a metropolitan region rich in culture. Our interviews with leaders and experts inside and outside the region, combined with our analysis of comparative benchmarks, policies and strategies, indicates that these advantages include:

- **The DNA of Sydney** with its unique and profound position for **first nations**, and its inherited **cultural diversity** over successive cycles of settlement, immigration and integration, gives it both a distinctive cultural identity, and accumulated global reach.
- **Brashness, self-confident endeavour, open-ness to talent and proactive fostering of diversity and difference** is very high, leading to freedom of expression, inclusion, egalitarianism and personal autonomy that all support creativity, innovation, and excellence.
- **The beauty and appeal** of the distinctive and diverse scenery, topography, and climate of the region have been, and are still, an inspiration for many forms of public art, outdoor celebrations, festivals, and open-air gatherings.
- Greater Sydney's established **museums, theatres and galleries** are of high international calibre and host leading collections and performances.
- The region has highly competitive and technically **innovative creative industries** (e.g. screen, architecture, design, fashion) that serve B2B and B2C markets internationally, and export expertise to the world.
- There is very high **visitor demand** for its calendar of cultural events and blockbusters, including Vivid, one of the most popular visual festivals in the world.
- It enjoys a **distinctive and diverse mix of suburban locations**, including in growth areas of the Central River City and the Western Parkland City that are hotspots for innovative and digitally advanced culture that have transnational appeal and potential as well as great community value.
- The metropolis also is home to many **top-class educational and civic institutions** that have great reach and relationships across the region and internationally. Sydney is currently attracting record numbers of international students, many in the arts and humanities.

By most measures, Greater Sydney is now among an elite group of 15-20 leading metropolitan regions in the world, and by some measures is one of a special group of 'contenders' vying to become versatile global cities, and join a settled top 8-10 cities of the world.⁴

However, despite its many evident advantages, currently Greater Sydney is not yet established as a beacon of cultural experience, production and interaction. The region is not yet fulfilling its cultural potential or optimising the value of its cultural assets. Now is the opportunity to embark on a new cycle of deeper cultural investment and application.

The Positive Developments in Train

There are a number of areas of clear recent progress in Greater Sydney:

- **Cultural Institutions are overcoming inherited fragmentation and siloes.** The co-location of Sydney Film Festival, the Biennale, Sydney Festival and Writers Festival is an example of sharing strengths, staff and knowledge, supported by Create NSW. There are many examples of increasingly successful and regular partnership between organisations of different size and specialisation.

The Sydney Cultural Network is an important new platform for collaboration, evidence gathering and coordination among more than 25 cultural organisations across all of Greater Sydney. This network is helping the organisations shift towards a default stance of co-operation, map their unseen interdependencies, and spot ways to be more complementary.

Improved partnerships of these kinds can also help Create NSW to assess how activities inter-relate and what the optimal interventions are to boost existing synergies.

- **Universities are becoming more strategic anchors in Greater Sydney,** thinking about not only their buildings but how to unlock and activate their precincts through cultural investment and make them more porous to surrounding communities. They are also involving the business community more actively in these processes. The joint venture between Animal Logic and UTS to create an academy of state-of-the-art studio space immersed in real industry practice is a model that can be expanded. So is the Launchpad incubator at the University of Western Sydney. These ventures can help equip the region's firms with the next generation of skills at the interface between culture and innovation.
- **Local councils are becoming more used to working together** and more strategic about the value of common approaches in a number of different areas, including arts and culture.

These are very positive indicators. But so far these examples are mostly:

- Small in scale
- Limited in resources
- Reliant on individual persistence rather than systemic incentives.

A Window of Great Opportunity

The timing is right to be ambitious for Greater Sydney and its cultural platform for multiple reasons:

- **This is the start of a new growth cycle for Greater Sydney** – with much more population to be accommodated, including young people at the start of their cultural journey, and the evolution of new settlements and housing choices. This raises attention towards how Sydney can achieve the lived experience to make this growth work.
- **The light rail systems and Sydney metro are coming.** Despite the current disruption of the infrastructure works, the enhanced connectivity that is soon to arrive will

increase the opportunity to travel efficiently to cultural locations around the region. These will raise appetite for a higher amenity experience of street life, transport interchanges and densifying town centres.⁵

- **“Urban Sydney” is emerging** in medium density neighbourhoods with high cultural authenticity and important cultural anchors (e.g. Bankstown CBD, Marrickville and Redfern). This Sydney – which is neither low amenity suburbia nor tourist spectacle – can be the petri dish for a different kind of approach to arts and culture.
- **Structural changes are underway in economy and society.** The acceleration of the experience economy and innovation economy, and changing consumption and production patterns, are transforming the way culture achieves success and resonance, and the way it contributes to social and economic outcomes. Content is king, regardless of its origin. The ability to curate, package and communicate unique stories, unique places and unique environments will shape what resonates locally and on a global stage. These trends offer the chance to develop new stories, systems and solutions, and avoid lock-in to old models of providing and selling culture. The adoption and addition of 21st century urbanity, technology and art into Sydney’s mix can add to its metropolitan appeal and intrigue.

These factors coincide with new developments in governance, planning and investment in Greater Sydney:

- **The *Greater Sydney Region Plan: A Metropolis of Three Cities* just completed**, fully aligned with the State Infrastructure and Transport Strategy, and commanding widespread civic and community support.
- **There is a renewed focus on cities in Federal Government**, leading to the possibility of new forms of collaboration and alignment and scope for greater innovation in how culture is resourced and deployed across the region.
- **The Western Sydney City Deal** provides a once-in-50-year opportunity to invest in high quality greenfield cultural development and build a sense of place and gravity around new infrastructure.⁶ It is also fostering bipartisanship and improved local government collaboration and creating the chance for combined approaches that have the scale to be catalytic and transformative.

This all leads to critical roles for cultural development in Greater Sydney, so that culture can support quality of life, creativity, enterprise and economic innovation, health, identity and belonging.

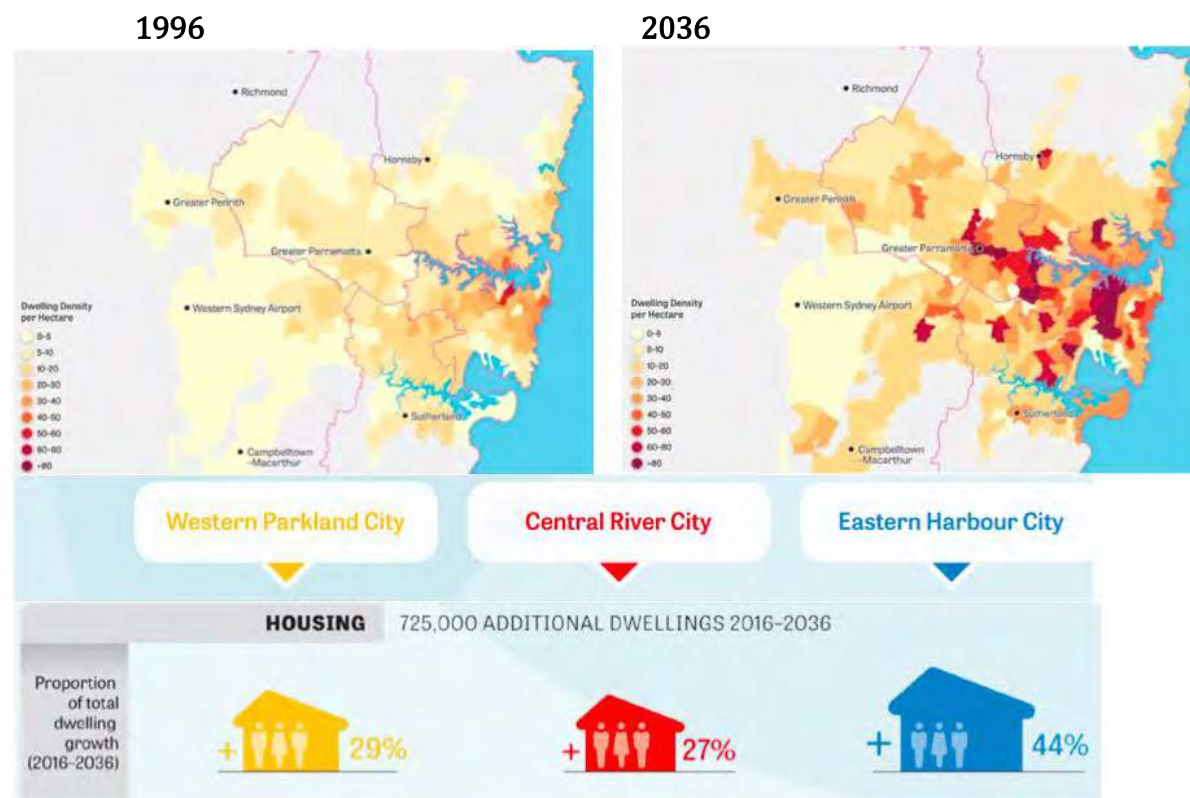
The Burning Platform

In the past culture and arts were often viewed as an ‘optional’ dimension of metropolitan success. But since at least the mid-1990s many metropolitan areas have recognised that culture is a central dimension of the competitiveness, liveability, sustainability, and cohesiveness of successful and growing cities.

Box 1: Sydney's distinct spatial evolution and imperative

Relative to other global cities, Sydney's spatial evolution has been very distinctive and created a set of path dependencies about the location of cultural and other infrastructure. Until the 1990s the low density expansion of the urban area and topographic challenges produced a mono-centric pattern of development where the Eastern Harbour City (and in particular the CBD) has historically housed most large cultural institutions.

But over the last 20 years and the next 20 years, the wider metropolis is where the majority of new population has been accommodated. Density is increasing across the urban area, not only in the central and eastern areas but also in centres along the Western, Bankstown and Illawarra rail corridors. Between 2016 and 2036 the Central River City and Western Parkland City are set to absorb 56% of new housing of Greater Sydney.



Source: The Metropolis of Three Cities: Greater Sydney Region Plan, 2018

These spatial trends, that are partly a product of constraints on topography and infrastructure, are why a metropolis of three cities has to come into being that reduces distances between jobs, homes and recreation. The Central River City and Western Parkland City already contribute important elements to the DNA of Sydney, but as the *A Metropolis of Three Cities Plan* explains, “more facilities to support arts and culture are required in the Central River and Western Parkland cities to balance the three cities.”⁷⁷ To achieve both ‘global leadership’ and ‘regional access’, a greater spread is now needed.

As the case studies we review below attest, culture is now playing fundamental roles in the success of metropolitan areas. All leading cities are experiencing high metropolitan growth and population diversification, alongside a rapid economic transition and digitisation. The complex, inter-disciplinary and mobile economies that cities now host mean that there is an increased premium on cities' ability to attract and retain particular kinds of talent, while at the same time the preferences of this talent have tended to switch towards more urban, high amenity and high experience lifestyles.⁸ Culture and the arts are therefore essential to the capacity of Greater Sydney and other metropolitan regions to manage these different axes of growth and change, and ensure that successful regions remain cohesive and competitive.

If Greater Sydney does NOT now pivot much more decisively and confidently to support its cultural development, there will be significant costs and missed opportunities:

- Sydney **will fail to differentiate itself** in terms of its unique cultural DNA and its specific advantages for cultural production, building upon its ancestors and anthropological history, its unique outdoors life style, its climatic and geographical characteristics, and its social and economic histories.
- The **sense of place, unique vernacular, feelings of identity and belonging**, and the story of Sydney will be lost or become indistinct. Sydney may lose its open-ness, magnetism and stickiness.
- The **projection of Sydney to the world will remain locked into a lower value** leisure formula, with a focus on 'fun', rather than a new equation of enrichment, innovation, and inspiration.
- The realisation of the **Greater Sydney Region Plan and the vision for Greater Sydney will become unstuck**. People will reject growth if growth is not inspiring and high amenity.
- Greater Sydney will remain a **second division player in the innovation economy**, which is where the next cycle of high value jobs is being created, and where the drivers of productivity growth are found.
- Greater Sydney will **not meet the expectations of future generations** for a high-amenity high-experience urban life.
- The **costs and the risks of social disengagement**, in terms of mental health, productivity, cohesion and civic capital, will be severe.
- The rate of other kinds of innovation (social, environmental and educational) **will be lower**.
- **Other cities will move ahead of Sydney** and the opportunity to become the leading city in the Southern Hemisphere will be missed.

As we observe in Section 3, nearly all the world's leading cities have been strongly prioritising cultural investment and policy innovation over the past decade. They

recognise the place-making, creativity and spill-over benefits of culture and the untold costs of metropolitan growth without bold cultural strategy. They see culture as a 'sine qua non', not a 'nice to have'.

All told, if culture does not become more central to Greater Sydney's future growth and identity, the metropolis will see its existing reputation become eroded and become permanently stuck in the 'second division' of cities. Arts and culture will not be leveraged to support identity-shaping in Sydney's diverse communities and engage the next generation of citizens.

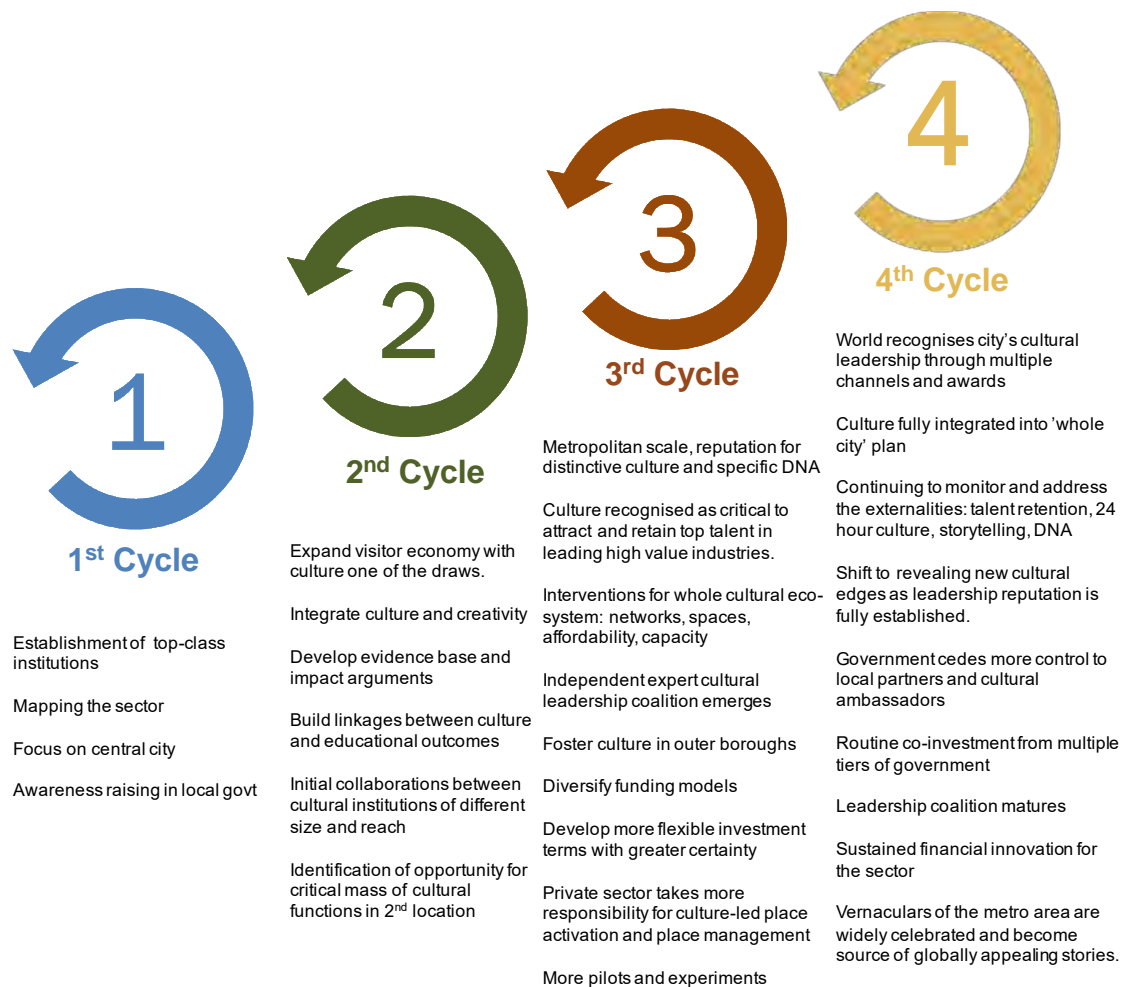
Shifting Into a New Cycle

The analysis of the cultural policies, strategy and delivery of other leading metropolises of Sydney's calibre, combined with insights from interviews with leaders who have delivered strategies elsewhere, highlight the way approaches tend to evolve through different cycles.

1. In the 1st cycle, the metropolitan area becomes proactive and intentional towards culture for the first time. It focuses on creating some leading institutions and begins to become interested in the networks of organisations and how they might work better together. It develops a visitor brand that connects culture to tourism. A primary culture quarter or district emerges often connected to a CBD or waterfront location. In this cycle, public leadership is essential to fund culture, to promote new projects, and to drive ambition and raise confidence. Cities completing this cycle include **Abu Dhabi, Oslo and Hong Kong**.
2. In the 2nd cycle, the metropolitan area recognises the connection between culture and creativity and begins to see culture not just as something to be consumed, but also as a driver of creativity and enterprise, a source of job creation, and a potential driver for place-making. In this cycle, educational institutions start to become engaged, deeper networking and clustering between cultural organisations is prioritised and initial efforts toward building a second hub location for culture are attempted. Culture is still primarily promoted to drive tourism but its wider linkages to cohesion, place-making, and growth management are recognised. Public leadership plays key roles in financing and strategising cultural development and it starts to foster wider leadership groups of cultural actors outside Government as well as beginning internal multi-agency coordination within Government. **Tel Aviv, Stockholm and Tokyo** are cities currently in this cycle.
3. In the 3rd cycle, metropolitan areas embrace the wider role of culture developed in the second cycle and embed the role of culture across a wider range of social, environmental, and economic policies. In this cycle, a metropolitan area tells its unique cultural story with great confidence and a differentiating voice. It makes a shift from hosting culture to being recognised for its distinctive cultural production. often emerges, and the diversification, both of the cultural offer and the locations, is established. The metropolitan areas in this cycle are usually growing their population base and redefining their spatial strategies leading to an enhanced role for culture both as an amenity and as an identity builder in new locations or areas of regeneration.

As the range and quality of locations and institutions grows, it is recognised that new forms of networked and dispersed leadership are required to achieve coordination, trust, and confidence across a dynamic cluster of organisations, with multipliers and spill-overs into many aspects of public and civic life. Consequently, public leadership shifts more towards convening other leaders and the co-creation of strategies, and greater emphasis on fostering a climate for innovation, experiments, and new ways to fund and finance culture. In this cycle, culture emerges not so much as a consumable asset for tourists but more as a carrier of metropolitan DNA, a driver of design and placemaking, and a source of identity, belonging, and cohesion. Examples of cities exemplifying this cycle include **Toronto, Berlin and Miami**.

4. In the 4th cycle, these metropolitan cities have fully articulated the role of culture in their development strategies, placemaking, and wider goals in liveability. Leadership is shared and flexible but united by high-trust and collaboration, and there is a common venture to innovate and experiment with culture across many parts of Government and civic life. Private and philanthropic investment is optimised and previously novel financial mechanisms to pay for culture have become normalised. Metropolitan areas in this cycle will usually have 3-4 established cultural hubs or quarters and there will be new locations with distinctive specialisation evolving all of the time. In this cycle, public leadership continue to play the role of convenor and co-creator of strategy and joint venture funder, but it has learned how to optimise the role of civic leadership from across its institutional and social base in the promotion and development of culture. Government frequently then combines these co-leadership roles with new initiatives to tackle 'wicked issues' and 'unintended consequences' of wider metropolitan growth. These might include acute affordability challenges, inclusion of the most marginalised people in society, longer term financing of new catalytic projects, or winning the most competitive global contests. Government brings to these deeper challenges the skills of convening, soft power, innovation, and coalition building. It recognises that public finances and public policies alone are not enough. Those to have begun their journey into this 4th cycle include **London, New York and Paris**.



Our observation is that in this simplified development model Greater Sydney has successfully completed the 1st cycle and has nearly completed the 2nd cycle.

What that means is that Greater Sydney is ready to become a global player and is now embarking on a period where culture will become an important dimension of enterprise and place-making, liveability, and identity. The range, scale, and diversity of cultural organisations and locations will grow and evolve. In this cycle, leadership will need to shift from a plan and finance model more towards integrator, convenor, strategy, and innovation roles, whilst maintaining the core support for cultural provision and infrastructure. The goals of optimisation of government support for culture will lead to the use of new tools and mechanisms in the arenas of integrated multi-agency working, institutional networking, financing, precinct development, identity and reputation building. These new tools will not simply arise as they are needed but will need to be invented through conscious efforts.

Greater Sydney is currently pursuing approaches that are common to cities in their 2nd cycle, but 3rd cycle approaches are starting to emerge and need to be fostered. Repeating approaches from the 2nd cycle will not be enough for the region to establish itself as a global centre of culture and a metropolis with a strong cultural identity.

Sydney needs to enter 3rd cycle and acquire the new tools and approaches that cycle requires, and not simply repeat the tools and approaches of cycles 1 and 2.

3. Greater Sydney Culture in Perspective

In this section, we draw on a variety of benchmarks and qualitative and quantitative data sources to supplement the insights we have gained through consultation with leaders within Greater Sydney, and to provide a more focused analysis of Greater Sydney's relative advantages and disadvantages in terms of arts and culture.

As we observed in Volume 1 of *Culture, Value and Place*, public benchmarks show that on the one hand, Greater Sydney maintains a strong lifestyle and cultural pull, and a competitive aggregate set of attractions. However, on the other hand, they also suggest that the overall rate of cultural attendance, the number of higher-end cultural attractions, and the volume of information exchange is fairly modest by global standards, although improving with the help of public policy. They provide preliminary indication that Greater Sydney may need additional government interventions to optimise access to culture and grow its cultural and creative industries.

This section draws on a combination of:

- New and additional published benchmarks
- Comparative datasets that are assembled and cross-checked across a small sample of metropolitan regions
- Analysis of Sydney institutions and perceptions on digital platforms.

It confirms a number of areas that require urgent attention:

- There is a spatial imbalance of cultural assets between the CBD and the rest of the region, especially of larger institutions and of museums and galleries, and this is driving more asymmetries in the way culture is accessed and experienced.
- While appetite and appreciation for the arts and culture is strong and broadly in line with other leading regions, participation in Greater Sydney is more constrained by issues of access.
- Greater Sydney's overall talent pool in cultural industries has been fairly stable while it has grown in some other leading metropolises, and this may have implications for the eco-system of skills and small firms that can underpin the next generation of leading edge culture.
- There is a high reliance on public money to fund projects relative to most other leading regions, and lower diversification or experimentation with new revenue sources to support a higher overall level of cultural investment.
- The global perception and global identity of Sydney is more narrowly associated with its tourism icons and natural environment, while its distinctive people, histories, culture, diversity and creativity are less visible. Sydney has been pursuing a 'consumption model' and is yet to fully use its assets to drive its transition into a high value economy.
- The relative size and maturity of Greater Sydney's designated cultural precincts and neighbourhoods is less developed, and on average they are further away from

key future economic growth locations. The latter include not only the Northern and Southern ends of the Eastern Economic Corridor (e.g. Macquarie Park, Sydney Airport), but also the strategic centres in the two other Corridors, including Parramatta, Olympic Peninsula, and Badgerys Creek Airport.

Alongside and separate to this analysis there are also well observed challenges around:

- **The night-time economy and Sydney's emergence as a 24-hour city** – particularly the availability of late-night public transport, the diversity of night-time activity options, and night-time promotion. Survey data indicates that public satisfaction with the city's night-time offer, and the ability to access and learn about it, is low.⁹
- **Loss of talent in some of its most competitive creative sectors.** Surveys of entrepreneurs and executives indicate that although Sydney benefits from great natural attractions for mobile talent, the region's infrastructure, transport and housing systems are contributing to the erosion of Sydney's appeal among the younger generation of mobile talent, many of whom work in the creative economy.¹⁰
- **The scope of smart cities propositions to support cultural infrastructure and build digital cultural networks.** By global standards, Sydney has been relatively slow to invest in smart, data-driven city infrastructure and planning and global analysis by McKinsey in 2018 suggests Sydney is behind leading Asia-Pacific cities for its technology base and citizen experience of smart applications.¹¹

What the Benchmarks Say

In Volume 1 of *Culture, Value, and Place*, we assessed Greater Sydney's performance in common public benchmarks against a 10 city-region observation group. These benchmarks span measures at the city, metropolitan and regional level, with more data increasingly gathered at the Greater Sydney scale including Western Sydney. Table 1 below summarises how Sydney ranked overall in this cultural benchmarking.

Table 1: Sydney's overall relative performance among group of 10 global peers across all cultural indices and metrics

Rank	City	Score (Max=1)
1	Amsterdam	0.75
2	Barcelona	0.71
3	San Francisco	0.61
4	Sydney	0.60
5	Toronto	0.54
6	Singapore	0.46
7	Stockholm	0.43
8	Hong Kong	0.39
9	Tel Aviv	0.17
10	Abu Dhabi	0.10

Source: TBoC Research using ELO algorithm: based on 25 measures across 8 separate indices (see Chapter 6). The Elo Rating System rates cities or regions by comparing their performance in every possible permutation against a list of other cities/regions. The system produces the most accurate comparative assessment of city/region performance, as it accounts for the fact that some cities/regions appear in more rankings than do others, and that each ranking measures a different number of cities.

Benchmarks measure different things about culture in cities, and with different criteria, so Sydney's position varies. A look at some of the specific benchmark results observes that Sydney routinely rates in the global top 20 in the big culture assessments, performing especially strongly in studies that focus on social and demographic aspects of culture (see Table 2). However, it is notable that **Sydney's position in these headline benchmarks is improving** – between 2012 and 2017 it improved from 13th to 10th in the Global City Power Index for cultural interaction, and from 30th to 14th in AT Kearney Global Cities Index for cultural experience.

Sydney's high position and positive dynamic is partly because many of the largest culture-based indices are weighted strongly towards the demographic and lifestyle dimensions of culture, where Sydney is performing well, and much less on the attendance and production dimensions, which can be harder to compare directly. This weighting can mean that other cities such as New York City, Los Angeles and Milan are commonly penalised because of quality of life challenges that spill over into the way culture is often assessed and judged. Meanwhile Sydney's performance benefits from the weighting towards cultural and visitor appeal in these measures.

Table 2: Greater Sydney's performance vs other peer cities in the cultural metrics of leading all-round city benchmarks

	Mori Memorial Foundation Global Power City Index (Cultural Interaction)	AT Kearney Global Cities Index (Cultural Experience)	Tan et al: Global Liveable Cities Index (Socio-cultural conditions)	EIU Liveability Ranking (Culture & Environment)	EIU/Citigroup Hotspots (Social and Cultural Character)
Sydney	10	14	11	20	2
Amsterdam	14	8	4	2	16
Barcelona	12	12	21	16	5
Hong Kong	22	19	15	61	41
San Francisco	28	11		19	22
Singapore	5	24	12	73	42
Stockholm	32		13	41	22
Toronto	29	23		9	11

*Tel Aviv and Abu Dhabi not included frequently enough in these indices.

These initial benchmarks show that on the one hand the city region maintains a strong lifestyle and cultural pull, and a competitive aggregate set of attractions. On the other hand, the overall rate of cultural attendance, higher-end cultural attractions, and information exchange is fairly modest by global standards, although improving with the help of public policy. It provides a preliminary indication that at the Greater Sydney scale, the city may need additional government interventions to optimise access to culture and grow its cultural/creative industries.

Analysis of new *Global Power City Index* data shows that **across traditional measures of cultural infrastructure provision and cultural interaction, Sydney ranks only 10th of the 15 peers that feature in the two volumes of *Culture, Value and Place*** (see Table 3). Areas of

strength for Sydney include number of stadiums, for which the city ranks 2nd of 44 cities, behind only London, and number of world-class cultural events, for which it ranks 14th - well ahead of many of its peers. Across all measures, Sydney sits just behind San Francisco and Los Angeles, and although some way behind Tokyo, is well ahead of other Asia-Pacific regions such as Singapore and Hong Kong.

However, the city performs less well in metrics measuring the number of museums (joint last among peers with Hong Kong), and in terms of perceptions among international experts about the opportunities Sydney provides for cultural and historical interaction (13th among peers). Sydney also has room to improve in terms of its enabling environment for creative activities, which the index defines as the ranking of contemporary artists based in the city plus results of expert and resident questionnaires that focus on perceptions of support for the creative industries.

Table 3: Sydney's performance in key measures of cultural infrastructure provision and interaction in comparison to peers

	Rank out of 44						
	No. of world-class cultural events	Environment of Creative Activities	No. of world heritage sites within 100km	Opportunities for cultural, historical and traditional interaction	No. of theatres + concert halls	No. of museums	No. of stadiums
London	1 st	2 nd	4 th	2 nd	6 th	3 rd	1 st
Paris	31 st	4 th	11 th	1 st	5 th	1 st	16 th
New York	15 th	1 st	26 th	6 th	1 st	4 th	13 th
Berlin	5 th	5 th	12 th	5 th	21 st	5 th	18 th
Tokyo	11 th	12 th	20 th	20 th	15 th	2 nd	5 th
Amsterdam	7 th	13 th	2 nd	9 th	8 th	10 th	37 th
Barcelona	10 th	16 th	12 th	4 th	17 th	22 nd	18 th
San Francisco	4 th	7 th	32 nd	16 th	9 th	18 th	37 th
Los Angeles	20 th	6 th	32 nd	25 th	2 nd	9 th	42 nd
Sydney	14 th	29 th	17 th	36 th	20 th	32 nd	2 nd
Seoul	25 th	40 th	4 th	40 th	34 th	14 th	9 th
Toronto	26 th	17 th	32 nd	23 rd	3 rd	24 th	28 th
Brussels	15 th	31 st	1 st	27 th	27 th	31 st	28 th
Stockholm	26 th	19 th	17 th	28 th	15 th	26 th	25 th
Singapore	32 nd	34 th	26 th	41 st	17 th	20 th	28 th
Hong Kong	32 nd	42 nd	26 th	44 th	31 st	32 nd	18 th

Source: Global Power City Index Yearbook 2017.

For this report, we have also developed some focused analysis of Greater Sydney's performance and position in areas of strategic relevance for arts and culture. In some cases, we have also broadened the range of comparator cities to observe other relevant approaches and assemble more accurate comparative data. Below we explore five core areas:

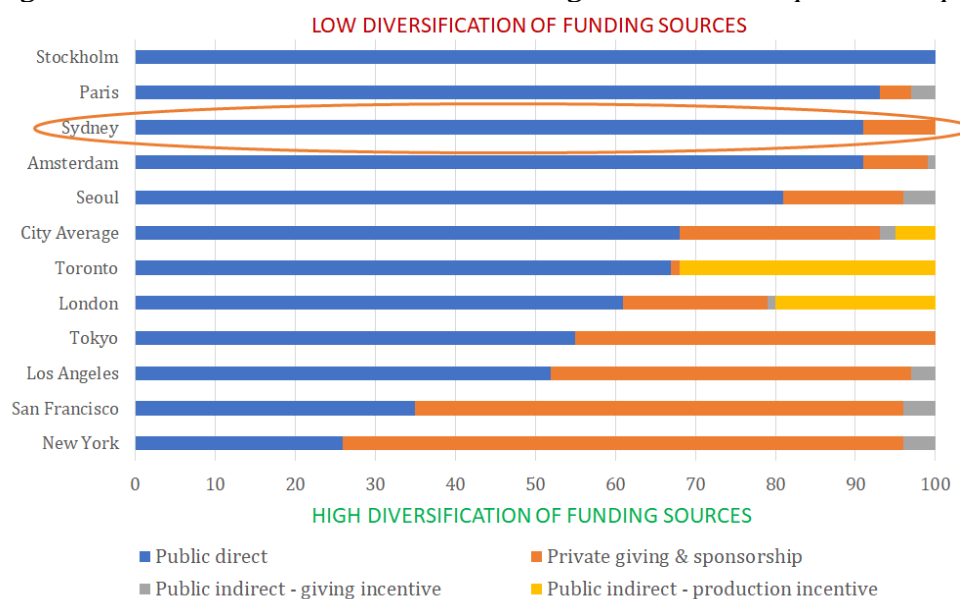
1. Diversification of Funding for Culture

In comparison to its peers, Sydney has a low rate of co-investment or activation of alternative funding sources for culture. Based on BOP Consulting figures, direct public funding accounts for 91% of all funding - higher than in all cities except for Paris (93%) and Stockholm (100%) (see Figure 2).

This contrasts both with cities such as Toronto and London, where indirect public funding plays a significant role, and with Tokyo and Los Angeles, where although funding is still split between only public direct and private, the balance is much more even. Another model is visible in cities such as San Francisco and New York, where private giving and philanthropic sponsorship account for a clear majority (>65%) of cultural funding.

There is no single optimum model that cities' metropolitan areas seek to pursue. It is common for many cities and metropolitan areas with an established pattern of cultural co-investment to benefit from consistent public and quasi-public spending on culture, while also finding additional sources of funding. Greater Sydney has untapped potential for more sponsorship and philanthropy and moving towards a higher investment scenario could involve creating the conditions to tap these sources, alongside forms of quasi-public financing such as lotteries and levies. The encouragement of more cultural investment overall will be supported by a diversified funding model.

Figure 2: Diversification of cultural funding sources in comparison to peers

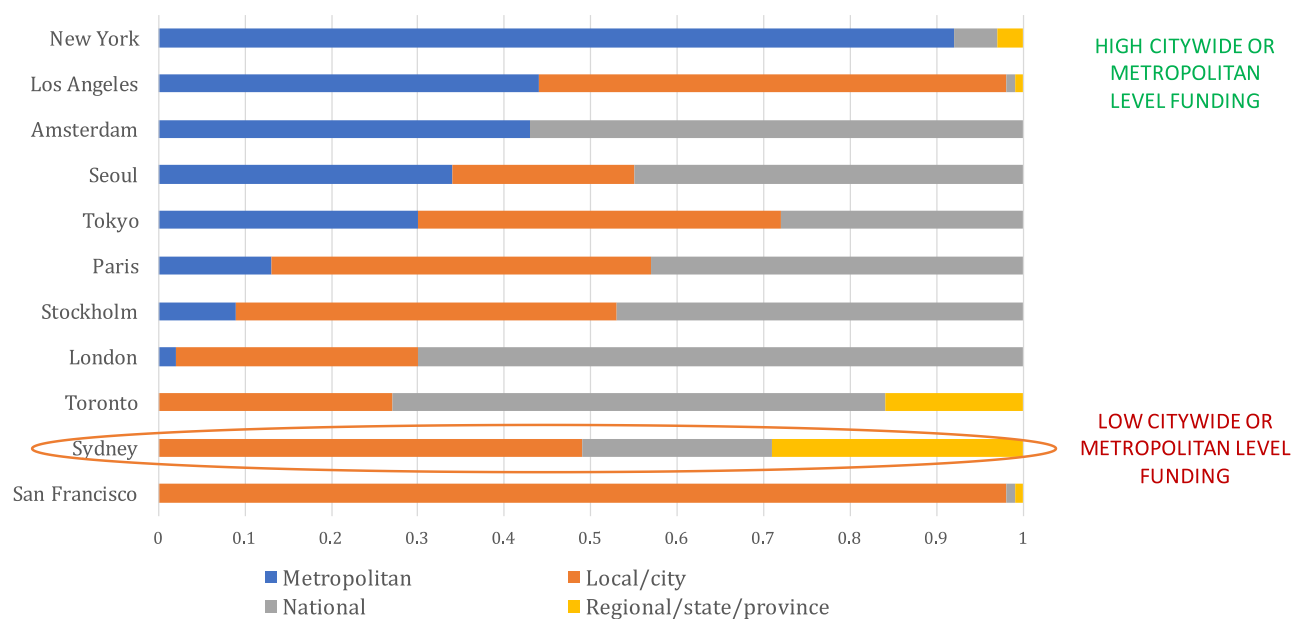


Source: BOP Consulting/World Cities Culture Forum (2017)

By global standards, Sydney's inherited institutional framework means that it experiences a low level of national/federal spending on culture and does not yet have an established system for metropolitan level funding. Outside of the United States, Sydney has the lowest share of spending by national/federal government (see Figure 3). By contrast it benefits from by far the highest contribution from regional or state government (i.e. NSW) across all peers - nearly double that of Toronto and more than ten times more than all other regions.

These figures show that NSW Government is playing an important leadership role in culture that befits the unique Australian institutional framework. For Greater Sydney, it provides an example of what citywide or metropolitan governments provide in other city-regions, but as a state government it also has priorities beyond Greater Sydney. With the Greater Sydney Commission and the new *Metropolis of Three Cities* Plan now up and running, there is a new energy in metropolitan planning and thinking, offering opportunities both to plan and develop culture, and to consider metropolitan level funding both on the public and private side.

Figure 3: Share of direct public culture funding by level of government



Source: BOP Consulting / World Cities Culture Forum.

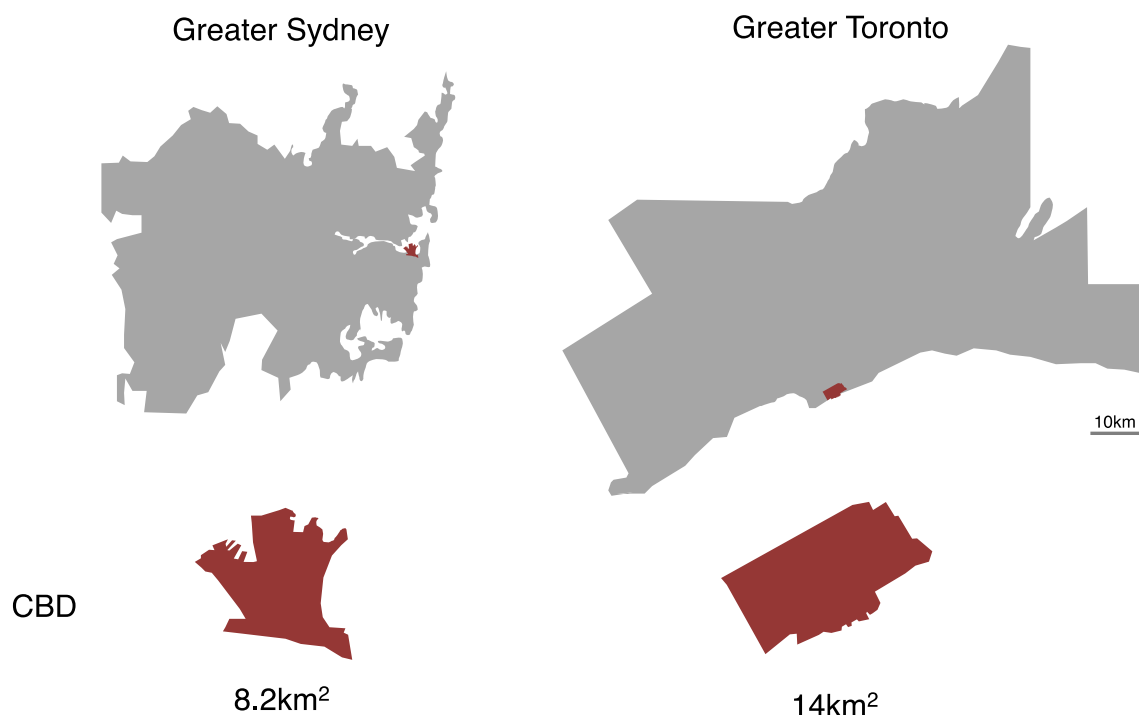
2. Distribution and Concentration of Cultural Institutions

Comparative analysis of institutional breadth and spread in metropolitan areas based on attendance or by specialism can be challenging due to the different approaches that cities adopt towards data collection and definitions. A full comparative analysis of multiple metropolitan regions was outside the scope of this study.

One way to develop a comparative approach is to assess the reach of cultural activities and organisations on global digital platforms. We reviewed the reach of organisations on Google, Facebook, TripAdvisor and Twitter, benchmarking them against global leaders in their fields. This approach has an added advantage of capturing some of the strength of

more grassroots and community-based institutions whose popularity is more commonly communicated on digital platforms than through formal attendance records.

We identified institutions with a minimum overall level of digital reach (based on reviews, likes, followers, etc.), and prioritised comparison with Greater Toronto, a city region with similar scale and governance to Greater Sydney.



While by no means comprehensive, this initial approach supports a number of findings that emerged from our interviews and comparative case study analysis:

Firstly, Sydney possesses a significant number of competent and capable cultural organisations located outside the CBD. Among the institutions we reviewed that met a minimum threshold of digital reach, 60% are outside Sydney CBD, compared to just 55% outside Toronto CBD (a similar size, at 14km² vs 8km² in Sydney) (see Table 4).¹²

Table 4: Percentage of cultural institutions in the CBD

	% of cultural institutions in CBD, by type*					
	Museums & Galleries	Performing & Visual Arts	Art, Music, Theatre & Dance Companies	Art, Fashion & Music Schools	Recording Studios	TOTAL
Sydney	43%	37%	52%	38%	13%	40%
Toronto	34%	50%	66%	73%	13%	45%

*Refers to all cultural institutions reaching a minimum threshold of digital reach, here defined as at least 500 Facebook likes, or an above average number of reviews/followers across more than one other channel (Twitter, Google, TripAdvisor)

Secondly, the breadth of cultural institutions in Greater Sydney is competitive, with a strong mix across museums, galleries, performing arts, cultural education and cultural festivals (see Table 5). The main area of relative disadvantage is in the domain of production, with a smaller number of artistic, music, theatre and dance companies. Overall, however, the reach of these organisations is strong.

Table 5: Number of institutions with high level of reach on digital platforms, and total engagement on digital platforms, by type of cultural institution

	No. of institutions with high level of reach on digital platforms, and total engagement by type of institution*						
	Museums & Galleries	Performing & Visual Arts	Art, Music, Theatre & Dance Companies	Art, Fashion & Music Schools	Recording Studios	Festivals	TOTAL
Sydney	46	19	21	13	15	10	124
	1.16m	2.10m	0.61m	0.47m	0.27m	1.76m	6.42m
Toronto	47	22	29	11	16	9	134
	1.72m	0.20m	0.67m	0.16m	0.90m	1.10m	3.93m

*High level of reach refers here to at least 500 Facebook likes, or, failing that, an above average number of reviews/followers across other channels (Twitter, Google, TripAdvisor). *Total engagement refers to the sum of Facebook likes, Facebook reviews, Twitter followers, Google reviews and TripAdvisor reviews for all institutions.

However, among some of the highest-reach core cultural institutions with international influence, Greater Toronto has more located outside its CBD. Half of its 10 most popular and influential museums and galleries are situated outside the CBD, compared to just 1 in Greater Sydney (see Table 6). Sydney has strong representation on the production and education side outside the CBD – particularly in terms of the number of catalytic cultural educational institutions with a global reach (see Table 7).

Table 6: Proportion of top-10 most popular institutions within each type that are located outside the CBD

	Proportion of top-10 most popular institutions within each type located outside CBD			
	Museums & Galleries	Performing & Visual Arts	Art, Music, Theatre & Dance Companies	Art, Fashion & Music Schools
Sydney	10%	40%	20%	50%
Toronto	50%	20%	10%	30%

*Percentages refer to the proportion of the 10 most popular museums & galleries outside the CBD, the proportion of the 10 most popular art, fashion and music schools outside the CBD, etc. Most popular institutions based on total engagement across all channels.

Table 7: Number of catalytic cultural institutions with global reach that are located outside the CBD, by type

	No. of catalytic cultural institutions with global reach located outside CBD, by type			
	Museums & Galleries	Performing & Visual Arts	Art, Music, Theatre & Dance Companies	Art, Fashion & Music Schools
Sydney	1	1	2	4
Toronto	3	0	1	0

*Most popular institutions based on total engagement across all

channels. Number of catalytic cultural institutions refers to the number of institutions reaching a certain engagement percentile when compared to the global leader in terms of engagement within each category. See appendix for full details.

One result is that **Greater Sydney has fewer well established cultural hubs (with multiple institutions within 500m-1km from each other) outside its urban core.** By contrast, region such as Amsterdam, Miami and San Francisco have seen the emergence of 2nd and 3rd cultural hubs with several sources of cultural activity, and some institutions with a catalytic scale or reach (see Table 8). In Sydney, institutions are dispersed and are not close to others, partly because of Greater Sydney's distinctive spatial layout relative to other top global cities, and partly because deliberate hub approaches have not yet been delivered.

Table 8: Characteristics of 2nd and 3rd cultural hubs in Sydney selected peer cities

Region	Secondary hub location	Distance from CBD	No. of cultural institutions in close proximity*	No. of catalytic cultural institutions with global reach	Cluster intensity**	
					Core Institutions (Museums, Theatres & Galleries)	All institutions
Amsterdam	Utrecht	35km	11	2	24.2%	24.2%
Miami	Fort Lauderdale	40km	7	2	11.9%	12.5%
Amsterdam	Haarlem	17km	9	2	11.6%	13.4%
San Francisco	Oakland	13km	8	2	10.3%	11.2%
New York	Newark	14km	6	1	7.6%	9.2%
San Francisco	Berkeley	17km	13	0	6.8%	9.0%
New York	Queens	14km	3	1	5.6%	5.6%
Barcelona	Badalona	9km	4	0	2.2%	3.0%
Barcelona	Sabadell	19km	8	1	1.6%	11.6%
Sydney	Parramatta ¹	20km	6	0	1.5%	8.6%
Toronto	North York	13km	4	0	1.1%	1.4%
Toronto	Oshawa	50km	3	0	1.1%	1.1%
Sydney	Penrith	49km	3	0	0.8%	0.9%

*"In close proximity" refers to the number of institutions located no more than 750m away from each other, unless otherwise separated by inaccessible land (e.g. a river), in which case the maximum allowable distance between institutions was increased slightly.

**Catalytic institutions refers to institutions reaching a certain engagement percentile when compared to the global leader in terms of total engagement in each category. See appendix for full details.

***Cluster intensity calculated by benchmarking the total engagement of each institution within the cluster against the global leader (to obtain a percentile figure) and then summing the percentiles of all institutions within the cluster. See appendix for full details.

[†] Not including forthcoming cultural institutions.

In general, these observations on concentration confirm Deloitte's analysis from 2014 which shows that Western Sydney in particular has a significant shortage of cultural venues and events compared to Eastern Sydney.

3. Cultural Employment

Greater Sydney is the capital of NSW's and Australia's creative economy. The size of its cultural industries is among the middle bracket of successful city regions of its calibre. 2018 data suggests that the percentage of Sydney metropolitan population in cultural jobs (4.9%) is the 9th highest of 20 global cities. On the one hand this is ahead of Miami, Toronto and Singapore, but it is some way behind regions Greater Sydney would regard as peers including San Francisco (5.7%, 2nd), Hong Kong (5.7%, 3rd) and Barcelona (5.5%, 5th). Meanwhile data on Greater London and metropolitan Paris routinely show percentages in excess of 7%.¹³

Sydney's share of cultural workers has remained very stable between 2006 and 2016.¹⁴ Meanwhile many other leading city regions have tended to grow their cultural employment share, including successful technology and financial centres (San Francisco, Seoul, Singapore, Montreal and Barcelona have all made substantial jumps in the past 3-5 years, from different starting points). A small number have seen their share fall (including Greater Toronto).

Overall, the data suggests that over the last decade some cities have successfully exerted more of a gravitational pull to cultural workers, and that the gaps between those that are strongly specialised and those that are not growing. Sydney still has the chance to join the leading group that has a large and influential base of cultural talent.¹⁵

4. Cultural Attendance, Cultural Participation and Attitudes Towards Culture

Our review of longitudinal survey data paints an interesting picture for Greater Sydney. Although comprehensive comparative analysis against other global metropolitan regions is not possible because survey questions and purposes vary, there are some important trends to observe.

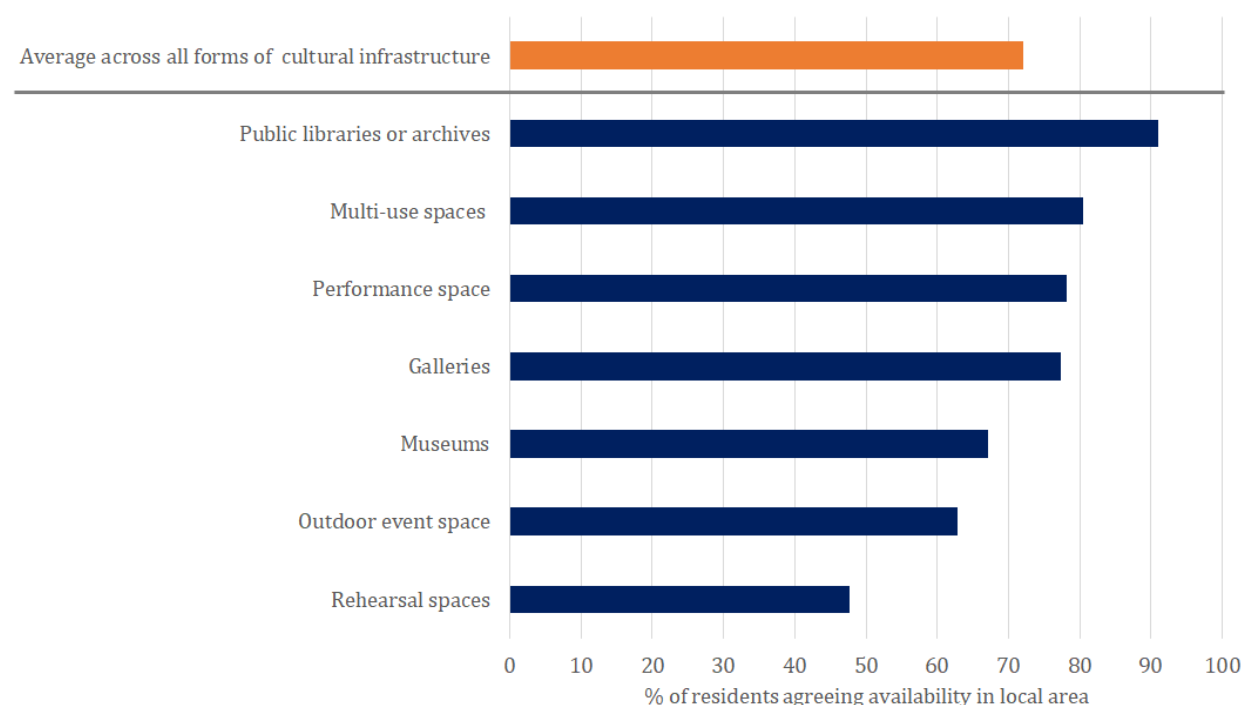
- (I) The rate of arts and culture attendance and participation in Greater Sydney is healthy compared to leading metropolitan regions.
- (II) Perceived availability of many types of cultural facility and experience is good, with the main gaps typically perceived to be access to museums, outdoor event space and rehearsal space.
- (III) Access and distance barriers are causing more people in Greater Sydney to become detached from culture and the arts, especially in Central River City and Western Parkland City. This is causing some disparities in attendance, especially of museums, live music, theatre and dance events, and knock-on effects on perceptions of the accessibility of arts as a whole.
- (IV) Limited awareness and information about what is already available and successful locally is also an important barrier in many parts of Greater Sydney.

Firstly, Greater Sydney's overall arts attendance, including to live music, theatre performances and dance events, is strong both by both national and international standards. In 2016, 78% of people attended the arts at least once in the previous year.¹⁶ This is not only significantly higher than the Australian average of 72%, but also high compared to data available for global peers, on a par with Singapore (78%), and ahead of most UK cities.¹⁷ Attendance at live music events (59%) and theatre performances (49%) in Sydney continues to be significantly higher than the Australian national average.¹⁸

Participation in the arts is also high, though more in line with national standards. In 2016, 45% of Sydney residents creatively participated in the arts - significantly higher than in Singapore (28%) and slightly higher than in London (43%), but lower than in Hong Kong (55%).¹⁹ Greater Sydney particularly stands out for its strong levels of participation in creative writing, and **high uptake of online art and high rates of digital participation in culture**. In 2016, 84% of residents had engaged with the arts online at least once in the previous year, and 2018 data recently showed that 60% of residents have regularly used the internet to access a cultural collection of some kind.²⁰ Although direct comparable data is not available, online engagement with the arts appears to be competitive in Greater Sydney versus many of the other top regions reviewed.

Perceived availability for many types of cultural infrastructure is strong. In 2018, across all types of cultural infrastructure, 72% of residents agree that arts and culture is easily available. In particular, Sydney benefits from a good availability of libraries, with 90% of residents agreeing that public libraries are available in their local area. The perceived availability of performance spaces (80%) and galleries (77%) is also high. However, at the other end of the spectrum, only 48% of residents agreed that rehearsal spaces are readily available (see Figure 4).²¹

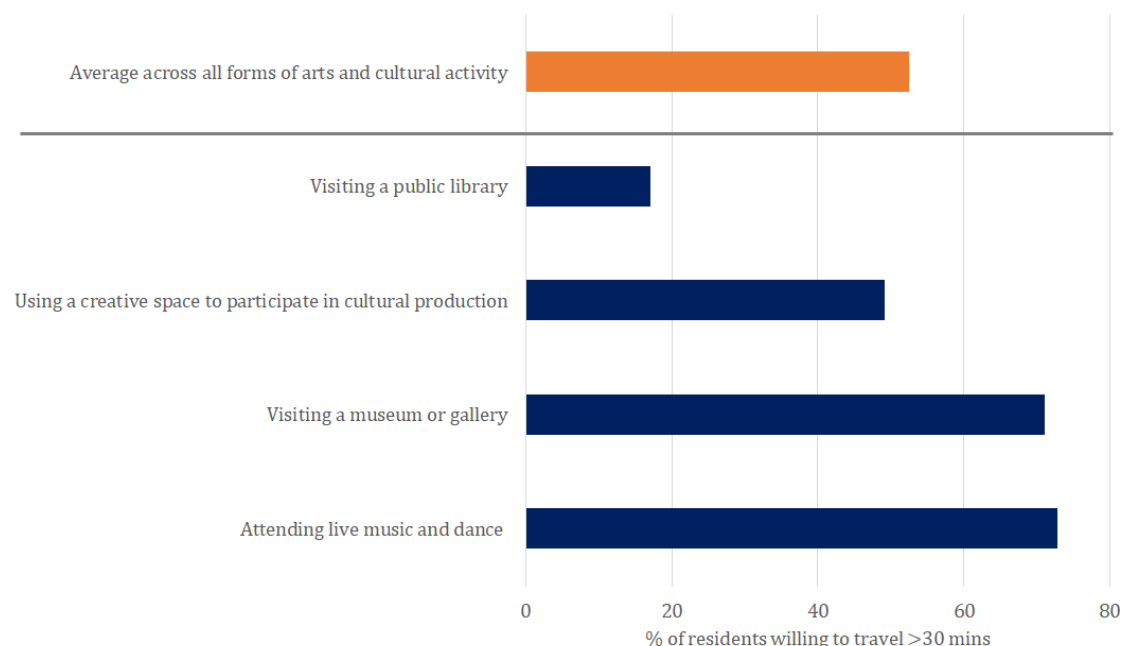
Figure 4: Perceived availability of culture in local area, by type of cultural infrastructure



Source: 2018 CIPMO Community Survey

Greater Sydney also benefits from a fairly **high tolerance of long-distance travel to access culture**. In 2018, across all types of cultural infrastructure, over 50% of residents are prepared to travel for more than 30 minutes to participate in the arts and culture, although this figure ranges from 17% for public libraries to 72% for live music and dance (see Figure 5).²²

Figure 5: % of residents willing to travel >30 minutes to access culture, by type of cultural infrastructure



Source: 2018 CIPMO Survey.

However, survey data also reveal some important concerns for Sydney.

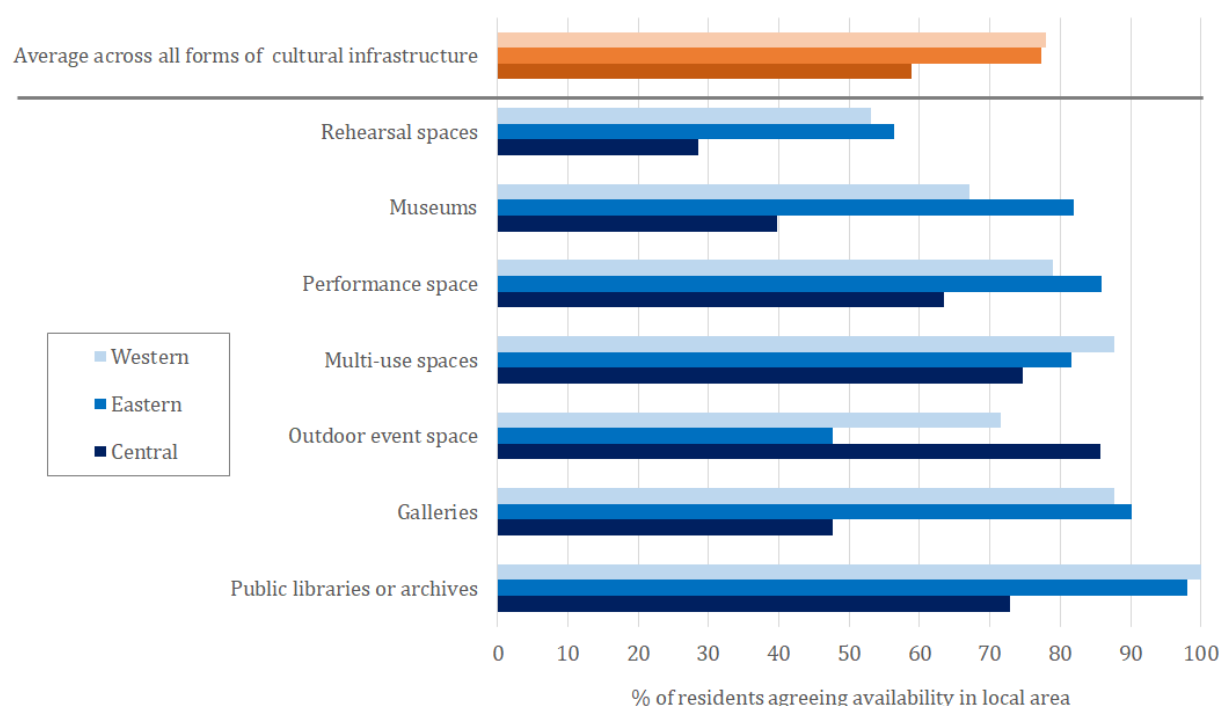
Access issues are causing more people in Greater Sydney to become detached from culture and the arts. Around 20% of all Greater Sydney residents continue to be put off participation and attendance by culture being too far away.²³ Although Western Parkland City residents are willing to travel further, it is currently too difficult and time-consuming for them to do so regularly.

The perceived reasons for not participating in five key arts and culture activities indicate that the percentage of residents citing distance is on average similar across the three cities. However, distance is a much more frequently cited reason for not visiting museums and galleries (33% on average) than for other activities – particularly compared to attending live music, theatre or dance (14%) and using creative spaces to participate in cultural production (10%). For both visiting museums and galleries, and attending live music, theatre and dance, residents in the Central River City and Western Parkland City are much more likely to cite distance as a reason for not participating than residents in the Eastern Harbour City.²⁴

Moreover, 2018 data reveals **wide geographical disparities in terms of current satisfaction with cultural infrastructure availability**. Across all types of infrastructure, residents in the Central River City in particular are dissatisfied with availability (see Figure 6). Satisfaction with infrastructure availability also varies by type of infrastructure.

Perceived gaps in local availability between the Central River City and the Western Parkland and Eastern Harbour City are more pronounced for galleries and rehearsal spaces than for multi-use spaces and outdoor spaces, for example.

Figure 6: Perceived availability of culture in local area, by type of infrastructure and region



Source: CIPMO 2018 Survey.

Regional attendance and participation data highlight some stark disparities. While in 2018 over 78% of Eastern Harbour City residents visited a museum more than three times in the past year, this figure falls to 63% in the Western Parkland City and just 34% in the Central River City. The proportion of people regularly attending live music, theatre and dance events is also more than 50% higher in the Eastern Harbour City and Western Parkland City than in the Central River City.²⁵

A similar story emerges for certain types of cultural participation. Certain locations, including the Inner South West and Outer South West, have much lower participation rates in arts than do others, such as the City and Inner South and Inner West. Some parts of Eastern Sydney, such as the Eastern Suburbs, also have very low rates of participation too.

Sydney is also seeing a **rising proportion of people who think that the arts are “not for people like me”**. In Sydney in 2016, 23% of residents agreed with this statement. Allowing for varying context and interpretation, this is substantially higher than recent surveys of residents in London and Manchester, for example (14%).²⁶ Reflecting a national trend, the notion that “arts are not for people like me” has also increased at the state level - from 14% in 2013 to 22% in 2016.²⁷

Overall, survey results indicate that **Sydney has a growing appetite for more cultural facilities and increased access to cultural infrastructure**. Improvements in Parramatta will be important for addressing the issue of low availability in the Central River City, but also for reducing current gaps in the Western Parkland City. However, rather than simply developing new infrastructure, data suggests that some of these gaps could be best plugged simply by amplifying what is already there and promoting it more widely. On average, just over half of all Greater Sydney residents believe that better knowledge about available cultural infrastructure (52%) and better accessibility (51%) would increase participation in and enjoyment of the arts and culture to a large extent.²⁸

5. Global Perceptions About Sydney and Culture

There are a number of benchmarks and surveys that explore perceptions about cities, but few provide detailed assessment on cultural perceptions and identity. One alternative is to examine online platforms. For this analysis we reviewed all descriptions and observations made about Sydney and some of its international peers in the 3 years from mid-2015 to mid-2018, across online media (newspaper articles, blogs, reviews). We reviewed perceptions in 11 nations for which online repositories are large and reliable, and included non-English language sources where appropriate. For full methodology, see footnote.

We identified hundreds of common nouns and adjectives used to describe Sydney directly in common phrases and used to associate with Sydney. We visualised the relative frequency of words used using a word cloud. Below are the Word Clouds used about Sydney, and 5 other leading cities.

Adjectives used to describe Sydney 2015-2018



Nouns to describe Sydney, 2015-2018



Paris

Adjectives used to describe Paris

Nouns used to describe or refer to Paris.



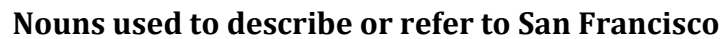
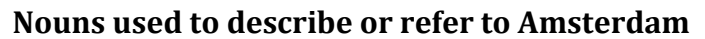
London

Adjectives used to describe London

Nouns used to describe or refer to London



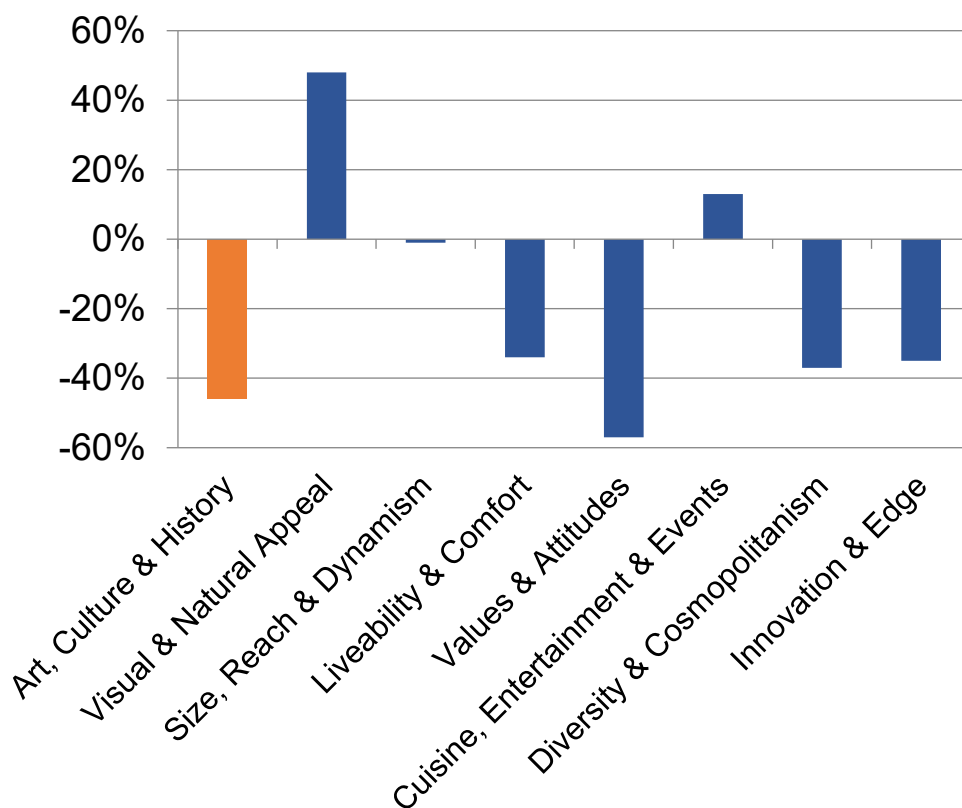
Adjectives used to describe Toronto



- Sydney is loved and admired in similar ways to other great cities. It is increasingly seen to have a global feel in terms of its size, population, ambition and vibrancy. This shows its potential.
- Sydney's qualities are widely perceived to be its beauty, its striking natural scenery, and its cosmopolitan vibe. Its iconic landmarks are disproportionately more visible than those in other cities. Visual and natural appeal is referenced 40% of the time in international media and review mentions of Sydney, compared to 27% across the five other cities.

- Art, culture and history are less referred to in Sydney. Only 4% of nouns and adjectives used referred to these attributes about Sydney, compared to an average of 8% in the other 5 cities studied, as high as 13% in London.
- Sydney has a fairly strong profile for its cuisine, entertainment and events, above the global average and nearly three times as commonly mentioned as art and culture.
- Other cities are well known internationally for their distinctive neighbourhoods, communities with a 'village feel', and many areas with a deep sense of place. Although such locations exist in Sydney, they are not well known or communicated globally.
- Other cities have stronger associations with design, placemaking, and creativity, and are more able to leverage arts and culture into wider spill-overs (see Figure 7).

Figure 7: Presence of terms to describe or associate Sydney, by theme, compared to other global city regions



Example terms

<i>Art, Culture & History</i>	Artists, Culture, Tradition, Galleries, Street-art
<i>Visual & Natural Appeal</i>	Landscapes, Beauty, Nature, Landmarks, Parks
<i>Size, Scale & Dynamism</i>	Busy, Exciting, Large, Global
<i>Liveability & Comfort</i>	Liveable, Safe, Walkable, Public Transport, Cycling-friendly
<i>Values & Attitudes</i>	Friendly, Fast-paced, Character, Laid-Back, Authentic
<i>Cuisine, Entertainment & Events</i>	Nightlife, Food-scene, Festivals, Shopping, Sport
<i>Diversity, Cosmopolitanism</i>	Multi-cultural, Diverse, Openness, Eclectic
<i>Innovation & Edge</i>	Ideas, Entrepreneurship, Innovation, Creativity, Modern

4. The Approaches That Work

The world's successful fast-growing metropolises have been building and piloting new initiatives for some time. Their global experience helps to identify a number of approaches that may be useful for Greater Sydney to consider.

Drawing on the case studies developed in the *Culture Value and Place* report, and additional research and interviews, we have reviewed the global experience of more than 15 leading cities (Abu Dhabi, Amsterdam, Barcelona, Berlin, Hong Kong, London, Medellin, Miami, New York, Oslo, Paris, San Francisco, Seoul, Singapore, Stockholm, Tel Aviv, Tokyo and Toronto).

This section observes 10 important common approaches for cities now in their 3rd or 4th cycle of cultural strategizing and co-ordination.

1. Integrated Regional Approach for Culture

Other metropolitan areas are implementing fully fledged regional plans where culture is embedded and harmonised across local and higher-level plans, where incentives for local governments are well established, and where there is systematic co-ordination with the sector. They recognise that without this integration, they cannot achieve visibility and scale, and that inefficient and sometimes perverse outcomes will occur.

As part of this integrated approach, artists and arts organisations are recognised as essential to the successful implementation of strategies in health, senior care, education, crime and waste management. Relocations of key assets are part of the equation, but alongside longer-term strategies about other non-cultural assets and the wider requirements of the cultural eco-system.

Among the ways other regions have taken steps to do this include:

- Embedding culture as a Guiding Principle in the Strategic Plan for the Metropolitan Region.

Culture used to be just one policy in previous London Plan, but in the most recent London Plan there is a whole chapter dedicated to Culture. Culture is described as a guiding principle for achieving cross-cutting, sustainable and equitable outcomes across the metropolitan region, with a very strong presence in the London Economy chapter of the Plan.²⁹ A full chapter on culture in planning legislation is sending a strong signal to planners across the metropolis that this is something to prioritise in the next stages of development. The Plan is being delivered by the Culture and Creative Industries team, a department within the Metropolitan Authority.³⁰

- Creating a Department for Economic Development and Culture.

This has been successfully developed in Toronto and has resulted in a new set of policies that identify the mutually reinforcing linkages.

- Ensuring or Legislating that every Local Government has a Creative Industries Officer.

This has been developed over the last 15 years in many parts of the UK including Greater London and Greater Manchester, with many Officers working at the interface of economic development and the arts sector.

- Providing a toolkit for all governments in the region to embed cultural strategy.

The Chicago Metropolitan Agency of Planning (CMAP) is an example where a metropolitan body provides a high quality technical assistance program that encourages communities to voluntarily approach the metropolitan level for advice on cultural planning and zoning. This helps to ensure that policies remain grounded in what is important and distinctive to each community. CMAP has become the go to organisation to help councils build and implement policies, with active local communities and a focus on low-cost interventions. This also fosters cross-regional learning from different governments.

These kinds of approaches require a portfolio to engage with and co-ordinate local government authorities, and promote a different and more integrated way of combining assets. In cities with a metropolitan planning function, it is the metropolitan level that becomes the natural locus for these responsibilities. This may mean an enhanced role for Greater Sydney Commission in its the next cycle, where arts and culture can become one of its core briefs and be even more central to its planning approach.

2. The Value, Evidence Base and Storytelling for Culture

The value of arts and culture and the spill-over benefits into other areas of social and economic life are not currently fully appreciated by all sections of Government and all members of the public in Greater Sydney.

The world's leading metropolitan regions are finding new and bold ways to gather evidence, quantify impact and tell powerful stories about the role of culture in the future of their region. In these cases, and others, messages about art and culture are produced and updated consistently and with the involvement of experts outside the sector, and then communicated effectively at all levels of government.

Other metropolitan regions have benefited from investing in a deeper base of evidence and data to persuade decision-makers and quantify more intangible impacts (See below). Some have benefited from a highly credible independent agency in aggregating and testing evidence, explaining new trends and building compelling propositions. New York invested in a 2-year project to demonstrate relationship between culture and wellbeing at the neighbourhood scale. London benefits from the constant data advances of a higher tier agency as well as the evidence from systematic longitudinal surveys.

Many strategies can be observed:

- Sophisticated mapping and visualisation of the sector and its impact
- Comprehensive datasets to match treasury requirements

- Calculation of the opportunity costs of business-as-usual approaches.

Those city regions that have been successful in making the case about the way cultural impacts on the economy and well-being have been patient and persistent through multiple political cycles, finding new ways to make the argument fresh and align tactically with new agendas.

New York's Use of Impact Analysis to Advocate for Bold Cultural Strategy

One example of the importance of evidence, data and public engagement is in New York. CreateNYC is the first-of-its-kind comprehensive cultural plan for the metropolitan city and a roadmap for optimising and diversifying culture throughout the metropolis for the next decade.³¹

The impact and effect of CreateNYC was underpinned by a ground-breaking 2-year project that explored the relationship between culture and wellbeing at the neighbourhood scale.³² The study, undertaken at the University of Pennsylvania, made a powerful case for spreading access to culture beyond Manhattan and evenly across the metropolitan city's five boroughs.

Through careful analysis of the cultural facilities and by undertaking grassroots neighbourhood studies in more than 20 locations, the project made a powerful case to government that:

- Cultural assets are not distributed evenly across the city
- Cultural assets clearly correlate with improved wellbeing
- Wellbeing benefits are stronger in lower income communities.³³

These findings helped to provide CreateNYC with an important evidence base calling for strengthened arts investment in lower income parts of New York.

Nesta and the Role of Cutting Edge Evidence of Culture in Shaping Opinion

Since it was established in 1998, the UK foundation Nesta has been building a compelling evidence base to demonstrate and gather widespread support for the important role of culture, innovation and technology in tackling the current and future challenges facing the UK and its cities.

After two decades of experimenting with different types and scales of support, Nesta has learnt that it makes the biggest impact when it backs emerging fields using a combination of research and evidence, advocacy, investment and a program of grants. Culture and the creative economy is one area where Nesta has a strong capacity to achieve depth and lasting change. In recent years, Nesta has been developing its evidence base using the following methods:

- Machine learning to identify and measure creative jobs
- Social network analysis to understand the networks of creative individuals
- Dynamic mapping to classify creative industries
- Interactive data visualisations to support local policy.³⁴

This robust and ever-improving evidence base has enabled Nesta to influence policy and make strong progress towards developing a resilient and innovative arts and cultural sector in the UK. Nesta's work is supported by a range of arts and cultural organisations, funding bodies, higher education institutions and different tiers of government. The foundation now has a strong presence in many countries around the world because of its willingness to share ideas, research and best-practice with other governments attempting to use culture, innovation and technology to tackle similar social challenges facing the UK.³⁵

3. Diversified Funding Models

Many metropolitan regions identify the importance of innovating to raise the overall level of cultural investment. They observe that a lack of stability, flexibility or predictability in the way public funding is administered can sometimes reduce the level of cultural innovation and ambition, and can slow down the necessary pivot to new cultural trends. They look for opportunities to add to the range of funding sources.

Other metropolitan regions have diversified and added to the ways arts and culture is funded in a number of ways:

- A public lottery system with substantial share of revenues devoted to arts
- Leverage of hotel, tourism or advertising taxes for arts purposes
- Developer levies and fees to secure local public art and cultural provision
- Bonds to finance large scale infrastructure modernisation
- Activation and incentivisation of the philanthropic community
- Matching grants to attract private sponsors
- Crowdfunding approaches.

Examples highlighted below include Miami, Toronto and Singapore.

Miami: County-Wide General Bonds to Finance Cultural Development and Developer Obligations to Incorporate Public Art

1. Bonds to Finance Cultural Development

In 2004, voters in the Miami region agreed to a US\$2.9 billion General Obligation Bond (GOB) dedicating more than US\$450 million to construct and improve cultural facilities.³⁶ While the money raised by the bond was primarily used to refinance larger and more established institutions such as the Miami Museum of the Arts, it also helped catalyse the resurgence of smaller galleries and independent artists, clustering in now mature culture and design districts such as Wynwood.³⁷

The Operation and Impact of the Bond

Funding from the Bond included direct allocations, allocations to local governments, and allocations to cultural organisations operating across Miami. The Bond allowed major expansions, renovations and building acquisitions, ranging in value from US\$500,000 for renovations to the Seminole Theater to US\$165 million for a new, world-class Miami

Science Museum.³⁸ Improvements to arts centres, branch libraries and other educational buildings have all been financed, as has the preservation of historic cultural assets.³⁹

The boost to Miami's performing arts scene has been especially visible:

- financing performing arts centres outside the CBD that host high quality productions, educational programming and community gatherings⁴⁰
- strong and sustained growth in attendance and participation. Overall, at a county level, cultural attendance increased by 19% between 2012 and 2017.⁴¹ The impact of the arts and culture as a whole on the Miami regional economy is now around US\$1.1 billion.⁴²

The cultural section of the US\$2.9 billion program was unique in that it created a concurrent obligation for private investors to finance the beneficiaries of the money. For example, when operators of Hampton House received US\$4.7 million to spearhead its transformation into a social and cultural centre, they needed money to keep the doors open.⁴³ After the introduction of the bond, other region-wide transformations, including the spin-off effects of the launch of Art Basel Miami Beach, led to an increased demand from private investors to invest in the County's cultural infrastructure.

In 2017, voters approved a new US\$400 million bond allocating fixed amounts of money to several project areas, including US\$78 million to cultural facilities and parks.⁴⁴

2. Development Levies to Sponsor Public Art

More than 40 years ago, Greater Miami was one of the first counties nationwide to implement a public arts program, known as **Miami-Dade Art in Public Places**. New public-owned county buildings had to allocate 1.5% of their construction costs to the purchase or commission of public artworks. Since its implementation, the Miami-Dade Art in Public Places Trust has acquired or commissioned more than 700 works of art.⁴⁵

Considered one of the most successful in North America, the program has installed hundreds of sculptures, murals, paintings and photographs at diverse sites ranging from Miami International Airport and PortMiami to fire stations, parks, community health centres and public housing developments.⁴⁶ The program's commitment to accessibility and visibility sets it apart from others of its kind: installing art in such diverse locations means it captures audiences that are not generally inclined to set foot inside museums and galleries.⁴⁷

In 2016, the City of Miami proposed to take over management of the program within city boundaries and to extend the requirement to private development projects above a certain threshold (US\$1-3 million).⁴⁸ Private developers will be required to spend 1.25% of a project's hard construction costs on commissioning or acquiring artworks to be installed on site or pay 1% of costs into a new city arts trust fund.⁴⁹ The logic behind the proposal was that the move would save on administrative fees, reduce the burden of financial penalties, and grant the city more creative control over iconic artworks.⁵⁰

London: National Lottery

Since 1994, the National Lottery has transformed arts and culture funding for Greater London. Previously, higher tier government funding emphasised regularly funded organisations, and there was only a small budget for individual projects and schemes. Individual artists were not eligible to apply for funding, and amateur arts were rarely supported. Little money was available to build or refurbish theatres and performance spaces, meaning much capital infrastructure was in a state of disrepair.⁵¹

The introduction of National Lottery funding for the arts enormously opened up applications for Arts Council funding to anyone with an artistic project. As a result of the Lottery, individual artists can now obtain funds to research, develop and tour their work.⁵²

Between 1995 and 2014, London received approximately \$2 billion in National Lottery funding for the arts 25% of which went directly to five of the city's largest cultural institutions.⁵³ The National Lottery also established an independent body Commission to distribute 20% of funds for expenditure on projects marking the beginning of the new millennium, resulting in nearly \$1 billion of funding for the New Millennium Experience Company and the Greenwich Millennium Dome.⁵⁴

More recently, National Lottery funding has also helped to transform Outer London's new Cultural Boroughs. The Lottery helped transform Waltham Forest, through supporting galleries, parks and heritage-led regeneration of street markets. In Brent, funding of \$3 million has helped to open up parks and cemeteries to the public and support community groups telling stories about Jewish history and the First World War.⁵⁵

San Francisco: Leveraging Hotel Revenue and Development for Arts and Culture

Established through a combination of City and State legislation, the San Francisco **Grants for the Arts** has evolved into a national model of arts funding, drawing on the annual revenue derived from the hotel tax portion of the City's General Fund.

The hotel tax was designed to both attract talent, drive visitor revenue, and re-invest in the sector. The civic funding entices artists to move to the city and in turn, they put on the performances that tourists want to see.

Awards funding goes to visual arts, parades, civic activities, dance, literary arts, media, music and multi-arts programs. Once selected for an initial US\$5,000 grant, an arts organisation is typically funded indefinitely, with the amount rising over time. In the most recent funding year, for example, literary festival Litquake received US\$10,050, while San Francisco Opera was given US\$643,500.⁵⁶ The aim is to create a stable, dependable resource for a full spectrum of arts organisations in San Francisco.⁵⁷

The advisory committee is not a jury: Kary Schulman (Director) and her team select arts organisations based on proven track records, ticket sales, unique offer and following.

The Grants program is a major reason why San Francisco has maintained an international reputation as a creative, eclectic city. Since inception, GFTA has distributed over US\$320 million to hundreds of non-profit cultural organisations across San Francisco. In FY 18 nearly US\$11 million was shared by 213 cultural groups and arts activities.

Public Art Finance Requirements

San Francisco has an Art Enrichment Ordinance (the 2%-for-art program) to provide a guaranteed funding mechanism for the acquisition of artwork for new public facilities and civic spaces. The Ordinance ensures that 2% of the gross construction cost of civic buildings, transportation improvement projects, new parks, and other above-ground structures such as bridges, is allocated for public art.

San Francisco also has a “1%-for-art program” that requires that large projects in the Downtown and nearby neighbourhoods provide public art that equals at least 1% of the total construction cost. This program was established by the 1985 Downtown Plan and is overseen by the San Francisco Planning Department. Since 2012, some projects may choose to dedicate a portion of their 1% art requirement to the City’s Public Art Trust, which can be used for a variety of purposes including restoration of artworks in the Civic Art Collection, non-profit capital projects and temporary public art programming.⁵⁸

Toronto: A Billboard Tax to Fund Arts and Culture

In 2013 the large central council of Toronto committed to a 4-year plan to increase Toronto’s yearly arts investment by C\$17.5 million, using a C\$22.5 million dedicated arts and culture reserve created from billboard tax revenues.⁵⁹

The tax, first applied in 2010, applies to owners of all billboards in with a sign greater than one square metre, and enters the local government’s general revenues. But through the 2013 budget process, the City Council set aside an accumulated sum of tax revenue of C\$22.5 million, into a reserve fund to support the four-year phase-in of arts and culture funding increases.⁶⁰ In order to meet Toronto’s C\$25 per capita arts funding commitment, the City Council has since focused on increasing the arts budget by a further C\$2 million.

⁶¹

As a result, Toronto Arts Council – an arms-length organisation set up to distribute arts and culture funding – has seen an increase of C\$8 million to its grant budget. In four years, this has helped to support over 1,000 arts organisations and artists, across performances, exhibitions and events attended by nearly 10 million people and earning C\$60 million in ticket sales.⁶² Programmatically, much of the funding has been used to expand services beyond the CBD and target at-risk youth.

Singapore: Cultural Matching Fund

Established by the Singapore's Ministry of Culture, Community and Youth in 2013, the Cultural Matching Fund is a dollar-for-dollar scheme matching grants of private capital to registered non-profits in the arts and heritage sector.

Matching these grants is designed to incentivise private investment in the cultural sector and supports the Ministry's aim to create a more sustainable arts and heritage scene in which more of Singapore's citizens and businesses have a greater stake to create more of a sense of shared ownership.

The National Arts Council administers the Cultural Matching Fund to different cultural sector individuals and organisations. The top three uses of the fund are: supporting core programs, community and educational programs, and supporting staff salaries in cultural organisations.⁶³

For smaller grants below S\$300,000, grant matching is given full flexibility as long as it aligns with the wider Singapore brand strategy. Larger grants up to S\$10m have to have long-term impacts, including capacity building among organisations and staff, acquiring artwork and artefacts for the benefit of the general public, and upgrading cultural infrastructure.

Donors enjoy a 250% tax deduction on their cash donation. Some are nominated as patrons of arts / heritage, which are conferred by the National Arts Council and the National Heritage Board respectively.⁶⁴

Paris: Active Public Financial Institutions and a 1% Levy

The "1%" concept has long been an important part of the funding and priority given to the Paris arts and culture scene. Owners of public buildings have been required to devote one percent of the cost of their construction, rehabilitation or extension to public art for more than 60 years.⁶⁵ Today, the concept has been taken a step further by the City of Paris and the Crédit Municipal de Paris – the city's oldest financial institution – through a new joint-effort policy known as the "1% art market".

The Crédit Municipal de Paris (CMP) is a public lender⁶⁶ that for the last 10 years has partnered with community networks, social services and banks to offer a personal microcredit scheme throughout the whole 'Greater Paris' region (the Île-de-France).⁶⁷ Since 2011, it has provided financial support for Paris' major cultural institutions, and thanks to partnerships established with the Department of Cultural Affairs and Paris Museums, also helps to sponsor temporary exhibitions and cultural museum projects, such as Heritage Days, music festivals and the famous "Nuit Blanche". It also helps museums open up to visits and exhibitions for schools or disadvantaged neighbourhoods.⁶⁸

The new 1% art market sees the CMP, which organises more than 80 auctions per year, devote 1% of the proceeds to Parisian artists. The money will be spread over a maximum of three projects and will be used to support artists in the field of emerging visual arts, helping them not only to create the art, but also to distribute it internationally. The CMP

has also recently announced that it will offer several hundred cubic metres of secure and non-floodable floor space to help accommodate and protect heritage works that are currently located in vulnerable areas.⁶⁹

Crowdfunding in Paris, Amsterdam and Medellin

As part of Paris Region's ambition to become the leading cultural metropolis in Europe, policymakers are devising new approaches outside the traditional funding system to supporting emerging talent and young creators across music, live performance, visual arts, cinema and audiovisual arts.

The **L'Ile-des-Chances** crowdfunding scheme is designed to allow artists excluded from subsidies or banking support to raise funds for a project (often small amounts) from a large number of investors. The Region establishes a partnership with a company or foundation active in crowdfunding and specialised financing (e.g. for musicians).⁷⁰

3. Embedding Culture into Continuous Cycles of Placemaking and Precinct Development

Many places and neighbourhoods in Greater Sydney are 'orphans' of public policy, with no custodian to optimise the experience between buildings, place making and place management, and embed arts and culture in everyday life. Local governments are frequently incentivised to achieve one-off land sales revenues rather than achieve a continuously high quality and high activation of place.

A new revolution in placemaking is needed, which requires careful consideration of different planning and placemaking tools, and the roles of communities, landowners and businesses in authentic place curation.

In most other metropolitan cities, cultural precincts do not become successful hubs of cultural production and experience because they are nominated or designated. Most emerge organically. Providing the place management frameworks and enabling planning environments are important to this organic process. Implementing a 'whole place' agenda that includes culture at the centre and gives culture a seat at the table from the start.

In this section we review examples from Singapore, Medellin, San Francisco, Miami, Barcelona, Toronto and Paris, and highlight:

- Citywide multi-agency placemaking-led strategies and re-activation of disused sites
- Individual districts where new efforts are being trialled
- Improved place management tools.

Singapore: Creative Placemaking

In Singapore⁷¹, the Urban Development Authority has started to integrate arts and culture into the heart of placemaking and urban development to create a collective sense of place and identity across the city and build attachment to neighbourhoods as population grows.

Cultural locations across the city have become much more inclusive and accessible. For example, Kampong Glam (Malay) and the Indian Heritage Centre signify Singapore's global approach to celebrating culture.⁷² Arts-centred events, such as I Light Marina Bay Festival and Singapore Night Festival, are tools in the place management strategy that involves tactical urbanism, pedestrianizing streets, urban greening, and introducing more street furniture.

Singapore's shift towards a culture-led placemaking approach is indicated by four recent developments:

- **A major new cultural precinct.** The Civic District and Bras Basah-Bugis involves SGD 740 million of the 2015 Budget allocated for transforming the Civic District into an integrated arts, culture and lifestyle precinct.
- **A new 8km walk to much better connect the landmarks in the CBD and create an enduring cultural experience.** Jubilee Walk will provide an integrated experience for the National Museum, Esplanade and National Gallery Singapore.
- **Planning adjustments** to activate public spaces through art, festivals and concerts.
- **Car-Free Sundays in key districts**, launched in 2016, enabling the public to walk, jog or cycle, and enjoy a program of cultural activities and walking tours.

Singapore's shift to activate and enliven the streets through culture has benefited from a shared approach between:

- Urban Redevelopment Authority (URA)
- Land Transport Authority (LTA)
- National Parks Board (NParks)
- National Arts Council (NAC)
- Health Promotion Board (HPB)
- Sport Singapore (SportSG),
- Singapore Land Authority (SLA)⁷³

An aerial view of the Civic District (foreground), Singapore River and Central Business District of Singapore



Source:

[https://commons.wikimedia.org/wiki/File:Aerial_view_of_the_Civic_District,_Singapore_River_and_Central Business District, Singapore - 20080518.jpg](https://commons.wikimedia.org/wiki/File:Aerial_view_of_the_Civic_District,_Singapore_River_and_Central_Business_District,_Singapore_-_20080518.jpg)

Medellin: Integrating Culture in Urban Projects in the Outer Region

Medellin has long pioneered a model of 'social urbanism' that uses culture as the central ingredient to strengthen the quality of life for marginalised communities in the hillside *comunas*.

The city has pioneered many '**Integral Urban Projects**', which are cross-cutting solutions to multiple problems since 2004. The types of projects range from transport or street lighting to cultural centres. The city has focused on:

- Activating public parks with free science and technology museums ⁷⁴
- Creating a network of Library Parks, large public libraries surrounded by public park space, developed with a strong emphasis on community participation on all aspects of the design, management and function of the libraries ⁷⁵
 - Providing Cultural Centres not only for events but with cubicles for rehearsals, multi-purpose rooms, exhibition galleries and public courtyards.⁷⁶

Medellin has shifted the balance of its public cultural investment towards the Outer Region over time. In 2014, the Medellin government allocated 85% of its capital budget for infrastructure and services to the poorest parts of the city. Investments are principally

into cultural community projects, innovative transport solutions, modern architecture and public space.

San Francisco: Central Market/Tenderloin Strategy

San Francisco is building cultural arts at the centerpiece of its Mid-Market, Tenderloin and Sixth Street neighbourhood redevelopment.⁷⁷ The approach is cementing a combination of approaches:

- Engaging public-private partnerships with neighbourhood arts organisations and commission artists to paint crosswalks, murals, or street furniture ⁷⁸
- Developing a strategy with expert business and community insight ⁷⁹
- A leadership and implementation mechanism involving the sector to ensure aligned participation of many public agencies already working in the district, identifying overlap and imperatives for coordination
- Expert support for artists and cultural organizations to maintain or improve their presence in the neighbourhood despite development.⁸⁰

Barcelona: A Large Scale Cultural District in a Secondary Centre

Barcelona is developing one of its largest suburban centres as a Cultural District. L'Hospitalet is a district 7 kilometres from the urban core. It is outside the City Council boundary and in the context of a much more dense metropolitan area the district is widely perceived to be outside common cultural circuits and flows in Barcelona. The project is being delivered by the local and metropolitan government in the town centre and is designed to create a critical mass of activities at medium to high density in the urban core of the area.

The land use in the area is dominantly classified as industrial with large scale warehouses, but the Metropolitan Plan enables the local council to introduce creative and cultural uses into the buildings. There are also plans to develop housing and smaller commercial and entertainment uses to correspond to the creative identity of the area.

Since 2015, two contemporary art galleries have been established in the area (Nogueras Blanchard Gallery and the Gallery + R) and 14 artists have settled in the area. The Council is also negotiating establishing two private music and design initiatives in two factories in the district.⁸¹ L'Hospitalet is now home to 200 cultural companies, generating over 1,500 jobs and a turnover of over \$450 million.

Miami: Zoning to Sustain Cultural Vibrancy of a District in Transition

Miami is an example of a city where a Business Improvement District has effectively partnered with the city's Planning and Zoning Department to ensure that one of its most mature cultural precincts can continue to maintain its cultural identity as it evolves into a higher value, denser and more multi-functional environment.

In 2015, Wynwood BID successfully collaborated to create a new zoning overlay in Wynwood to shift the district from light industrial and warehouse uses to a mixture of housing, businesses and galleries. This operates similar to zoning codes in other cities in terms of regulation of building height, streetscape, parking and the establishment of a public benefits trust fund but it is administered by a private entity, Wynwood BID. The codes encourage the creation of a walkable neighbourhood and the development of art in Wynwood. Art galleries and live-work spaces are permitted without case-by-case review, allowing for faster approval and construction. They include a 2-3 storey height bonus to encourage greater density and fund affordable housing and public open space. An additional fee is levied on the bonus area and placed in a Public Benefits Trust Fund administered by the BID.⁸²

The effect of the new arrangement is to preserve the unique street art and industrial characteristics of the current Wynwood Arts District while promoting an environment where people work, live, and play.⁸³ The new zoning promotes affordable small studio apartments (less than 650 square feet) instead of large live-work spaces, with option to pay for a release from parking requirements at US\$12,000 each. This money then goes into the Wynwood Public Benefit Trust Fund and is used to pay for centralised parking.

Toronto: Business Improvement Areas

In Toronto, Business Improvement Areas (BIAs) play a pivotal role in the culture-led reactivation of urban neighbourhoods and the establishment of a strong cultural brand for the whole of Greater Toronto. There are now over 82 across the metropolitan region, representing over 35,000 businesses in the Greater Toronto Area.⁸⁴

BIAs commonly involve clustering arts and cultural amenities alongside hospitality, sports and business to create vibrant districts for living, working and creating.⁸⁵ Promoting local style, identity and built heritage are core features of the approach that BIAs take to create thriving places. This highly localised approach creates a strong sense of civic pride among residents and business owners within the BIA, but has also been shown to attract a rising number of visitors and tourists, who are seeking out more authentic urban experiences as part of the growing experience economy.

The Toronto BIA model consist of associations of commercial property owners and tenants who are overseen by a volunteer Board of Management. Members are elected by constituent businesses in the BIA boundary and are appointed by a local government council.

The Board coordinates partnerships between local businesses and local governments, who have come to recognise the pivotal role of these improvement areas in local communities across the metropolitan region and are one of the movement's main champions.

The BIAs in Greater Toronto form a network (TABIA) that provides a platform to share information and experiences to achieve a common standard of best practice. It influences

City and Provincial government decision-making on legislation pertaining to small businesses by advocating on the behalf of BIAs.⁸⁶

The legislation of the higher tier government (Ontario Province) empowers BIAs to raise their own money to make local improvements to attract more customers to their businesses.⁸⁷ External BIA funding comes from mandatory added assessment to property tax bills, donations, contributions from tax-exempt properties, local government assistance programs and subsidies from higher tiers of government.

Across Toronto, there are many examples of BIAs transforming struggling commercial areas into vibrant, culture-rich and attractive urban environments. There is a strong evidence base now, through Return on Investment reports, on the impact of their work on property values, social cohesion, employment and tourism rates across Toronto's metropolitan region.⁸⁸

Paris Region: Activating Spaces in Transition as New Uses

The government of the Paris Region (Ile de France) has paved the way for pop-up arts and culture-led activation of disused spaces across the region.

The combination of increasing population density, deficits of quality public space, the rising cost of creative workspace and the high number of vacant properties across Ile de France have created the perfect conditions for experimental 'transitional planning initiatives' to thrive. Over 62 sites have been activated since 2012.

These initiatives have proven very popular among developers and landowners, who would otherwise be paying expenses on disused land or property awaiting demolition or revitalisation. In 2015, the national-state owned rail company SNCF and one of the largest landowners in Paris, launched Temporary Artistic Sites, an experimental initiative giving new, public life to their disused properties or pieces of rail infrastructure.⁸⁹ The launch of Temporary Artistic Sites and the rise of other local arts venues across the city is part of a broader movement in Paris which is increasingly recognising the value of culture in tackling environmental and social issues.⁹⁰ Spaces within the active portfolio include:

Name	Building	Location	Type
Street Art 13	-	Inner suburb	Street art walk
Les Grands Voisins	Former hospital site	Inner suburb	Public park + educational, cultural and sports activities
Le Shakirail	Former train yard	Inner Suburb	Workshops, studio space, theatre and music venue
La Station – Gare des Mines	Disused coal station	Inner Suburb	Concerts, exhibition and bar
Wonder/Liebert	Disused factory	7km from CBD	Exhibition space, concert hall and restaurant
Le Halle Papin	Disused factory	8km from CBD	Workshops and cultural events

These programs benefit from high-level support from Ile de France's regional government, which is subsidising innovative projects in over 100 neighbourhoods across the region by distributing through a \$370 million fund through the Regional Aid Platform.

The government accepts proposals from local governments, coalitions of neighbouring local governments, non-profit organisations, or cooperatives. They can represent many different artistic and cultural forms but must involve (digital or physical) civic engagement. Chosen projects are required to spend their funding on equipment, construction materials, digital tools and training young recruits.⁹¹

Despite the temporary nature of these creative projects, they are leaving a strong arts and cultural legacy across the region by inspiring developers to think more innovatively about how the value of culture can be incorporated into their forthcoming projects. In the former hospital site of *Les Grands Voisins*, the developers have changed the project to add 5,000m² to arts and cultural activities and businesses, while also increasing green space by 4,000m².⁹²

The movement has also been emulated in cities across France, including Nantes, Reims, Bordeaux, Marseille and Lille, with similarly high levels of success.⁹³

4. Optimising Culture in New CBDs and Key Nodes

The *Greater Sydney Region Plan: A Metropolis of Three Cities* entails the development of a new major centre of gravity in Parramatta, and multiple other sub-centres in the Western Parkland City including the new Badgerys Creek Aerotropolis. Culture-led planning, programming, placemaking and infrastructure will be required in these locations as a priority.

Other cities have used their emergence into polycentric regions as the opportunity to define a bigger vision about metropolitan culture and demonstrate the potential for vibrant mixed-use lifestyles in new kinds of location.⁹⁴ The examples of East London (from Stoke Newington to Stratford and Canary Wharf and now the Thames Estuary) in London, Oakland in San Francisco, Brooklyn in New York, and Incheon in Seoul all illustrate the importance of long term investment and strategy making for '2nd CBDs' and other secondary locations, in addition to infrastructure catalysts. A number of features are common to building culture in:

- Identifying and amplifying existing cultural strengths in the area
- Strong focus on the production end of the creativity value chain
- 2 or more cycles of transport and digital infrastructure improvement
- A special role for the area's higher education institutions as centres for creative and cultural research and business support.

Incheon: A New Regional Airport Supported by Cultural Investment

Incheon is an example of a new metropolitan airport that was designed to become a cultural gateway to the wider region and an expression of Seoul and Korean identity.

Established 50km west of Seoul CBD, at the edge of the Seoul Capital Region, Incheon International Airport (IIA) is now ranked among the best airports in the world and is recognised for its approach to the integration of culture, commerce, entertainment and transport infrastructure. In 1991, the Korean Government established a publically owned but independent Incheon International Airport Corporation (IIAC), which developed a

bold, long-term vision for the airport and the surrounding areas as a cultural destination and began work on the early planning and design stages with this in mind.

IIA opened in 2001 and it has won the Airports Council International's World Best Airport award for 12 consecutive years.⁹⁵ Today, the airport is globally connected to 194 cities and welcomes 40 million passengers with a strong first impression of authentic Korean culture, cuisine and commerce.⁹⁶

Some of the most important cultural assets in IAC's terminals include the **Cultural Museum of Korea** and the **Korean Traditional Culture Experience Centre**, where visitors can participate in traditional craft workshops, enjoy Gugak performances and purchase products handmade by Korean artists.

In 2017, an integrated resort opened in Incheon 1.1km away from the Airport.⁹⁷ The US\$1 billion (A\$1.3 trillion) project was funded by a partnership between Paradise, a Korean tourism group and Sega Sammy Holdings, a Japanese holding company. 'Paradise City' provides over 1.5 million annual guests and visitors with the opportunity to experience the fusion of authentic Korean culture and cuisine with a globally-sourced collection of iconic artworks and sculptures from artists including Yayoi Kusama, Damien Hirst and Alessandro Mendini.

The development of the IIA also spurred investment in arts, heritage and entertainment in the nearby city of Incheon, which has experienced a long period of growth in the last three decades. In 1994, the Incheon government opened the Incheon Culture and Arts Centre, an anchor of the city's cultural scene and home to major cultural institutions, including City Orchestra, City Choir, City Dance Company and City Theatrical Company.

Art and culture produced by local artists was exhibited in the city's arts and cultural facilities, and visited by a mix of city residents, Korean citizens and global visitors. Local artistic production grew as did the formation of artist residencies. In 2009, Incheon Art Platform (IAP) opened in the Jung-gu district of the city, a historic and architecturally significant area where valuable buildings have been maintained for the purpose of becoming important cultural assets. On the Artist-In-Residence programme, IAP hosts visual artists, performing artists and writers for three-month arts and provides individuals with the skills to pursue successful creative careers in Incheon. It also runs a Peace Art Residency, through which it provides artists with the means to carry out research, engage with local communities and create peace-building art or literary work relating to Incheon islands located near to the border with North Korea.⁹⁸

Brooklyn: a Cultural District in a secondary node of the regional economy

Through a combination of private funding and public steering, emerging arts and cultural organisations and institutions have been well integrated with large scale landmarks to create the Brooklyn Cultural District (BCD), a successful arts and cultural centre in Fort Greene in Downtown Brooklyn.

The concept of the Cultural District was conceived in 1987 by Harvey Lichtenstein, the former president and executive producer of the Brooklyn Academy of Music and an important civic leader in Brooklyn. Cultural institutions clustered around the Brooklyn

Academy of Music, including the Brooklyn Music School Majestic Theatre and the Alliance of Resident Theatres.⁹⁹

In 2004 the area was rezoned to achieve a greater mix of uses. Over the last decade, the District has become the cultural epicentre of Brooklyn benefiting from investment of over US \$650 million and joint efforts between New York City Economic Development Corporation, the Department of Cultural Affairs, the Department of Housing Preservation and Development, the Department of City Planning, and the Downtown Brooklyn Partnership (DBP). The District initiative has survived many political cycles and continues to be a major Mayoral priority.

Since 2012, the District has been using sensitive streetscape enhancements and thoughtful urban design tactics to knit together the cultural hardware (landmark institutions) with software (emerging workspaces, arts organisations and informal public spaces). The Downtown Brooklyn Partnership's streetscape investment of US \$3 million in 2013 funded enhancements such as distinctive lighting, creative landscaping and additional street furniture across the district. Economic impact studies have assessed that 1/3 of cultural institutions' overall economic impact have a direct correlation to the enhancement of the local urban fabric.¹⁰⁰

Today, the District is home to over 60 arts groups and institutions who welcome over 4.5 million visitors and generate over US \$350 million in economic activity each year.¹⁰¹ By facilitating a mix of arts organisations, including combined arts and science institutions, the District has been able to forge relationships with the Brooklyn Tech Triangle, a nearby cluster of the whole region's innovation economy. Through the recommendations made in plans such as *Culture Forward*, a joint publication by the Downtown Brooklyn Arts Alliance and district management partnership, the District continues to develop its cultural footprint while also providing more affordable housing and studio space.¹⁰²

5. Building the Cultural 'Journey' and Narrative at the Whole City and Neighbourhood Level

There is concern that the cultural experience in most parts of Greater Sydney is not as joined up or legible as it could be. It can be difficult to connect one institution with another, and there is limited visual or informational signposting to guide people between locations. Similarly, there are few clear accounts of the cultural journey to be taken in different parts of the city, and the unified experience on offer. In addition, examples of great activation of the commuter or visitor journey experience through arts and culture (e.g. Wynyard Station walkways) are comparatively few and far between.

These deficits partly reflect a high degree of institutional fragmentation and low scope for innovation in the way infrastructure and development is enhanced. Yet it will be important for future facilities and institutions that are established or supported in Greater Sydney to fit within an authentic wider narrative.

The shift from a city scale to metropolitan scale of development requires a more co-ordinated cultural offer. This includes:

- Integrated cultural maps, passes and signage
- Cultivating the distinctiveness of the different institutions and providers and creating a thematic cohesion, in order to turn the cultural experience into a logical and legible narrative for residents and visitors alike
- Stitching together the spaces and places in between cultural buildings to make the passage navigable and pleasurable.

Many metropolitan regions are seeing new kinds of joint venture to create a more integrated experience, at local, district or city level. Partnerships all around the world are helping to roll out cultural initiatives on walkways, thoroughfares and transport interchanges. San Francisco's Muni Art project, for example, is transforming over 100 ordinary buses into art galleries. These projects create jobs, opportunities and transferable experience for their region's artists.

Tokyo: Cultural Resources District

In Tokyo, a coalition called the Cultural Resources Alliance united around the proposition that the redevelopment associated with 2020 Tokyo Olympics had to focus much more on the experience *between* buildings rather than just on the buildings themselves.¹⁰³

The aim has been to connect nearby areas with high cultural capital in a walkable and accessibly **cultural capital zone**, which can increase the attractiveness of local communities and Tokyo as a whole. The project addresses the concern that visitors are incentivised and invited only to consume culture in a narrow range of tourist hotspots.

This 2-3km area stretches from the northeast Tokyo neighbourhoods of Yanesen and Negishi to Ueno, Hongo and Yushima. It links areas home to feudal era culture through to cutting edge popular and artistic culture, and spiritual culture rooted in the traditions of Edo.

The District is creating new places, opportunities, and digital venues for the interaction of manufacturing, art and knowledge, crossing boundaries between public, private, academic and industry institutions. An incubator in the form of a public urban lab has been set up to facilitate interactions between art, industry, and community.¹⁰⁴

Several administrative and design changes have been made to make this District possible:

- Reduce tax on investment and support programs designed to preserve and use cultural resources ¹⁰⁵
- Creating a "special zone" in the District, to relax the application of the Building Standards Law and Fire Prevention Law so that historic buildings can be rendered useable and available for different kinds of cultural use where appropriate
- Design pedestrian friendly streets by burying unattractive infrastructure and increase the functions of side streets and laneways.

Toronto: A Cultural Corridor and Cultural Hotspots

Greater Toronto is an example of a city region that has seen cultural institutions partners effectively to create a shared journey and brand.

The 2-kilometre Bloor Street Cultural Corridor was formed in 2014 first as a partnership of organisations and was later designated as an official cultural corridor by government. The Corridor approach has helped to develop rich cultural amenities and events to the public all-year round on the stretch of Bloor Street West. The Corridor showcases the breadth of Toronto's cultural offer and brings a mix of institutions that were sometimes operating in siloes into regular dialogue - including museums, art exhibitions, music concerts, film screenings and architectural landmarks.

What makes the Cultural Corridor so successful is its community of arts and cultural organisations. Organisations that are interested in supporting the Cultural Corridor but do not fit all of the criteria are invited to join the partnership as cultural associates. All participants have skin in the game – they make a cost-sharing financial contribution.

Since the Corridor partnership was established, its impact on the city has been significant. Over 3 million members of the public visit the Corridor's arts and cultural facilities, events and performances each year. Arts and cultural organisations on the Corridor generate C\$ 630 million in economic impact each year, and now employ 5,500 culture workers.¹⁰⁶

Meanwhile Toronto has also established a **Cultural Hotspot** initiative to deliberately spotlight and celebrate strengths in arts and culture in Toronto's suburban neighbourhoods. A different area is named a 'Hotspot' each year since 2014, with suburbs such as Scarborough and North York (12-25km outside the CBD) featured. The award helps to program special events, festivals and art gatherings over the summer months, as well to grow creative interest through workshops, courses and youth mentorship. A Cultural Loops Guide has become one of the results of the Hotspot initiative, showing tourists how to experience culture as a journey through part of a Toronto sub-region.¹⁰⁷

London: The 'Borough of Culture'

In Greater London, leaders in the cultural sector observed that while attendance numbers of cultural activities are huge, and the profile is wide, significant numbers of London community continue not engage at all with London's cultural institutions, even when transport access has been dramatically improved.

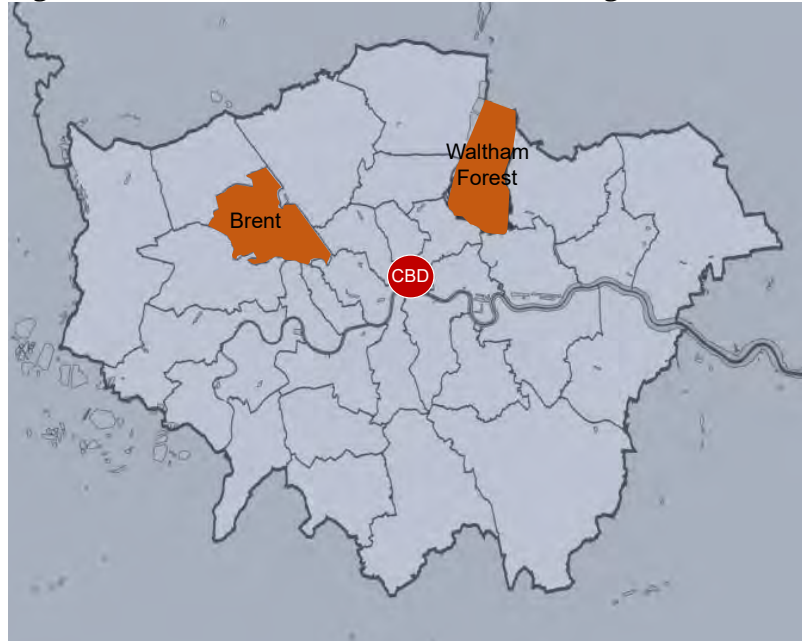
An idea emerged to take more culture to Outer London and allow local communities to develop their own programs that would build identity and engagement. **The London Borough of Culture** award is a major new initiative launched by the Metropolitan Government.

Inspired by the success of the European 'Capital of Culture' program and UK City version, the award offers more than \$2 million of funding to a winning local government each year

to stage a 1-year program of ambitious cultural events and initiatives. The aim is to celebrate the unique character of local people and places.

In total, 22 local governments submitted bids to be named London Borough of Culture. In addition to the winning local areas, six local governments share a pot of \$1.5m made available for Greater London's Cultural Impact Awards - landmark projects highlighted by local governments in their initial bids, such as festivals for old people, or music and film showcases. This helps to spread the benefits more widely.¹⁰⁸

Figure 8: The location of the first two Boroughs of Culture in Greater London



Success factors:

- When devised from the top down, the project did not initially land. It was leadership from local government leaders who bought into the idea and became champions of it that turned it into a tangible initiative.
- It incentivises the local governments develop not just a 1-year program but a fully-fledged plan to make culture an integral part of the local government's future.
- The program is not run by the Greater London government – rather the local governments are empowered to step up, giving them experience and capacity to continue building cultural programs. The Greater London level is the broker and provides 'air cover' when required.
- The Borough of Culture award does not primarily rely on the large CBD-based London cultural institutions becoming involved and playing a leadership role. Rather they are partners in a system which is more horizontal.

6. Initiatives to Boost Affordability in the Cultural Sector

Residents and workers in many metropolitan cities around the world are experiencing price inflation in terms of the costs of housing, costs of living, access to affordable

workspace, and wider enterprise costs (e.g. taxation and regulation). Affordability represents a drag on the cultural economy as well as other economies.

Rising unaffordability has prompted many leading cities to intensify efforts to improve overall housing supply, widen tenure mix and diversify locations. Several have also been experimenting with very proactive interventions to support artists to live and work in urban locations that enable them to cluster and participate in the wider creative economy.

The new initiatives being tested include:

- Caps on business rates
- Active zoning and controls on the use of space
- Rent controls
- Leverage of philanthropic or institutional co-investment
- Developer support and co-ordination.

At the same time as intervening for affordability, more metropolitan cities are investing in small-scale seed programs to foster grassroots culture (pop-ups, mini festivals) that do not benefit from public funding.

San Francisco, London, Singapore, Paris and Berlin all provide examples of new initiatives operating at neighbourhood level. Most focus on workspace and live/work spaces. These efforts reflect increasing concern in the cultural eco-system.

These approaches complement the wider policies to improve citywide housing affordability for all key workers in the metropolitan economy, as well as to manage other costs of living and enterprise. Most cities look to ensure that the policy mix in these different areas is complementary.

San Francisco: Community Arts Stabilization Trust

In San Francisco, the 60% increase in rents between 2011 and 2015¹⁰⁹ created unprecedented challenges for artists to retain their current workspace or home locations.¹¹⁰ The major new innovation, now being trialled in other city regions across North America, is the **Community Arts Stabilisation Trust (CAST)**.

CAST is public-private partnership between the Northern California Community Loan Fund (NCCLF) and a local philanthropic grant body, the Kenneth Rainin Foundation.¹¹¹ In 2013, the partners used a seed fund of US\$5 million from the Kenneth Rainin Foundation to establish the Trust as a public charity acting as a non-profit real estate and holding company, whose purpose is to protect artist workspaces.¹¹²

CAST draws on a mix of tax-deductible philanthropic donations, tax credits and funding from government agencies.¹¹³ Initially CAST issues deed restrictions for each building, which secures the place for non-profit arts and cultural uses in its properties in creative San Francisco neighbourhoods and any future CAST properties.¹¹⁴

Its 'lease to own' business model involves leasing properties to a diverse range of artists at below-market rates for seven to ten years, to give them time to gain commercial

standing. When repayment is due, tenants are given the opportunity to purchase the property at the price originally paid by CAST with no interest. For those seeking shorter or medium-term support, CAST provides grants and technical expertise to artists and arts organisations seeking to enter the city's property market.¹¹⁵

However, CAST now leases creative workspace to artists and members of arts organisations to reach over 95,000 people across San Francisco. It is currently looking to expand into the region's '2nd CBD' of Oakland, akin to Parramatta.¹¹⁶

One example of CAST's impact is in CounterPulse, an incubator for interdisciplinary dance in the SoMA district near to Twitter's new headquarters. Faced with losing their lease due to rising prices, in 2014 CounterPulse was selected as a CAST pilot project.¹¹⁷ CAST purchased a new 8,000-square foot building for the organisation in the Central Market neighbourhood for US\$6 million using a mix of tax credits, philanthropic dollars and public funding.¹¹⁸ CounterPulse used its tech company neighbours, Twitter and Zendesk, to secure over US\$300,000 of its US\$1 million down-payment and raised the rest of the funds through a partnership between City and Regional Agencies, and by organising local pop-up events and performances. The introduction of New Market Tax Credits in 2015 by the higher tier of government provided CounterPulse with US\$800,000 to renovate the building to suit their needs.¹¹⁹ The relocation has also allowed it to expand its yoga, dance, artistic outreach and theatre management programs with young people from low-income families.¹²⁰ Through its many streams of work, innovation and risk taking, CounterPulse has managed to raise US\$4 million of the US\$6 million needed to purchase the property from CAST when finance is due in 2022.¹²¹

The success factors of CAST include:

- The expertise of members of CAST's board, especially around funding, philanthropy, social investment, enterprise, community outreach and technical assistance.¹²² This has helped to deliver successful projects despite the time and capital-intensive nature of their work.¹²³
- CAST's reputation as an honest broker, a non-profit forging strong and transparent connections between artists, arts organisations, developers and landlords.

CAST sits aside from other important efforts to sustain housing affordability for San Francisco artists. The DALP lottery scheme (Downpayment Assistance Loan Program) provides a deferred home payment loan of up to US\$375,000, to qualified low and middle income first time homebuyers. Separately a 'silent' loan is offered that requires no monthly payments for 30 years. The loan and appreciation become payable at the end of the term, or repaid upon sale or transfer. Cultural workers are not given advantages but are known to benefit significantly from these programs.

London: Community Enterprise Zones

The rapid decline in affordable arts workspaces has also prompted innovation in Greater London.¹²⁴ Community Enterprise Zones (CEZ) are a Greater London Authority initiative to retain artists in key inner suburb locations as well as emerging culture-rich outer suburbs.

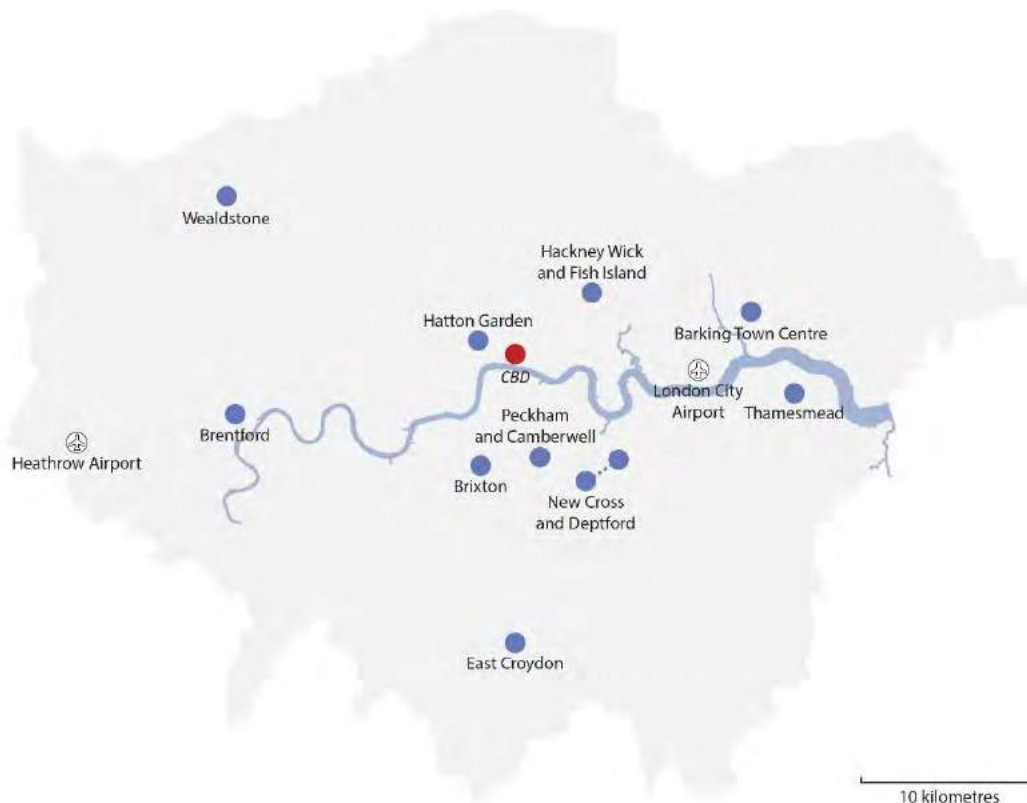
CEZs vary in size and are not prescriptive: some consist of 3 or 4 streets in a neighbourhood, others may be collections of physical spaces in a larger precinct, bound by a common purpose. The main requirement is that each CEZ must have a physical centre providing members with a point of contact with a clear identity and strong visual representation.¹²⁵ The aim is for the CEZ to foster impactful partnerships between artists, residents, property owners and the local business community.

CEZs use planning obligations to secure affordable spaces for production at below-market rate rents, develop live-work spaces and create a supportive environment for young artists seeking to launch successful creative careers in the city.

The process has involved the following steps:

- 25 local governments formed consortia with local artists and creative businesses to identify viable areas for CEZ designation. Successful CEZs have to be places that provide workspaces and live-workspaces at well below-market rents, while supported by Local Government Plans that have culture strategy embedded across policy areas (transport, technology, infrastructure, planning, broadband). There also has to be a consideration of how the spaces can build artists' entrepreneurial skillset and engage creatively with nearby marginalised communities.¹²⁶
- Metropolitan Government awarded 10 locations an approximately \$90,000 development grant across the whole metropolitan region, at varying stages of evolution into creative hubs (see Figure 8).
- Action plans are formed to identify match funding, leverage and other sources of funding for CEZs, and identify delivery responsibility. Three CEZs are selected for further funding through two streams: a revenue grant (between \$350,000 – \$750,000) and a capital grant (between \$350,000 – \$700,000).¹²⁷

Figure 9. Map of the location of London's successful first-stage CEZ bids.



Source: The Business of Cities.

In North London, Haringey Local Government have studied the likely impact and return of the CEZ initiative. The findings show that CEZs are capable of creating over 300 new jobs each year and generating growth of \$45 million in each of the three chosen local governments.¹²⁸

Success factors so far include:

- Strong leadership by Mayor Sadiq Khan to leverage the role of artists and arts organisations in urban regeneration, and to identify future centres of arts and cultural production and innovation.
- Selection of locations that are benefiting from new transport and are strategic economic corridors (e.g. Thamesmead in Bexley), thereby integrating culture into future areas of growth.
- Policies for CEZs are set out in the London Plan, the metropolitan area's statutory strategic development plan, providing guidance to London Local Governments on how to incorporate the creation of CEZs into their Local Development Frameworks (Local Plans) and how to regulate them.¹²⁹

Amsterdam Incubator Policy

Rising studio space and accommodation prices have seen Amsterdam emerge as one of the first cities in the world with a long-term studio and creative incubator policy.

Creative incubators are multi-tenant buildings that provide new artists in Amsterdam with a space to establish themselves. They are usually available to artists at affordable rates (maximum \$470 per month) for between 3 and 20 years.

To support the development of incubators, Amsterdam allocated \$70 million in municipal grants for construction work, consultancy, research and administrative work. A public Bureau Broedplaatsen (BBp) became the service point for individuals or groups wishing to start a creative incubator, a process that requires expertise, good networks, management, licences and financing. BBp provides customised services according to the needs of different situations and based on the BBp roadmap.

To date, 60 creative incubators have been formed and thousands of artists have been able to develop ideas, collaborate on projects and hone their artistic skills before becoming independent artists and entrepreneurs, or joining more mature arts organisations across the region.

Over time the Amsterdam policy has evolved in a number of ways. Firstly, there has been a push to deploy more city and nationally-owned real estate for creative incubators. Secondly, the monitoring and auditing of stock has improved, and efforts made to densify around incubators and encourage increased turnover of studio stock to provide more space.¹³⁰

Singapore: Framework for Arts Space

In Singapore, a Framework for Arts Spaces has been set up to improve opportunities for affordable co-working in the city, to reflect the changing appetite for clustering and transdisciplinary interaction.

The National Arts Council operates 43 properties under the scheme, comprising 5 multi-tenanted arts centres, 36 single-tenanted buildings and 2 co-located spaces in community buildings. These spaces have benefitted 135 artists and arts groups over the last 10 years in their artistic development, including the current 68 arts groups and 28 artists.

The new Framework looks to redevelop publically-owned property to ensure that it contains suitable artist workspaces fit for new production models. It also allows more artists to utilize the new cultural infrastructure coming online, such as the Goodman Arts Centre, which will lease 49 new workspaces. 250 artists and arts groups will benefit as tenants of NAC properties under the framework.

The success factors so far are linked to:

- More customised support provided for artists at different stages of their development
- Successful engagement with communities by co-locating artists and arts groups in community spaces such as schools or commercial buildings, brokered by a

designated place manager to facilitate collaboration with arts tenants and the surrounding community.¹³¹

Rent controls in Paris and Berlin

Some cities are experimenting with rent controls in certain areas where cultural workers are a large share of the renting population.

In Berlin, the *Mietpreisbremse* rent control law passed by higher tiers of government came into effect in 2015 in response to the rise in rental prices, in a context where 84% of residents are renters.¹³² The law prevents landlords in Berlin from increasing rents by more than 10% of the local average, even for new tenants.¹³³ This is supporting many of the 220,000 creative sector employees in Berlin.

Meanwhile in Paris, the *Loi ALUR* rent control on all new or renewed leases was signed in 2015. Rents in Paris must be no higher than 20% above or 30% below the median rental price for the area which will be observed/determined by a local rent observatory.¹³⁴ The market most affected has been studios and one-bedroom apartments, popular with artists.

Elsewhere, other promising examples include the city of Porto, which has launched InResidencePorto scholarships to support national and international artists to come to the city and help re-imagine 8 strategic spaces in the centre of the city and in two suburbs. Artists are able to apply for a grant of up to \$8,000 to create an artistic project of residence for two months.¹³⁵

7. Improving Co-ordination Across Government Agencies

Improving the level of understanding of culture's value proposition across Government is a priority for Greater Sydney. A whole of government approach for culture is required to ensure that the value of culture is optimised, and it can support and reinforce wider objectives.

A siloed approach creates a pre-occupation on internal efficiency at the cost of destination, experience, identity, and confidence.

There is widespread appetite and for arts and culture to have a 'seat at the table' when other investment and infrastructure projects are formulated, and decisions made. This may translate into sustained partnerships across portfolios.

Other metropolitan cities and some higher tiers of government have created or tested new arrangements to elevate and integrate culture into decision making. These include:

- i. A 'Culture Cabinet' of senior cross-departmental staff
- ii. Placing culture within the Cabinet Office of a higher tier of government
- iii. Combining the briefs for culture and economy to achieve more synergies

Whichever option is chosen, the experience of other city regions suggests that in addition to a compelling creative proposition, an astute grasp of the machinery and decision-making processes of government is essential to position arts and culture more centrally in the design and delivery of key projects.

New York: A Cabinet of Metropolitan Leaders to Implement Culture

As part of its comprehensive Metropolitan Plan, the New York Department of Cultural Affairs has launched a **Culture Cabinet** to coordinate and drive forward the city's cultural efforts. The Cabinet consists of representatives from a range of metropolitan agencies, led by a chief of staff. Much of the setting-up process has involved enhancing the awareness of culture among government departments that were initially 'resource-anxious' and identifying specific mutual benefits.

The Cabinet is now leveraging joint metropolitan resources for arts and culture initiatives and will promote collaborations aimed at increasing access to culture for all people, especially in Outer New York, which is a central goal of the Create NYC plan.¹³⁶ The City has also announced approximately \$225,000 for a new fund to support collaborations between City agencies and cultural organizations.¹³⁷

Artists in Residence in Public Agencies

New York is also a leader in using **Public Artists in Residence (PAIR)** as a way to integrate arts throughout the public sector. Launched in 2015, it embeds artists in government to propose and implement creative solutions to pressing civic challenges. It is based on the premise that artists are creative problem solvers who reimagine challenges and can move beyond politics to create long term, lasting impacts.

Each PAIR residency is a minimum of one year. The residency begins with a research phase, during which the artist spends time at the agency meeting staff and learning about its operations and initiatives while also introducing their art practice and process to agency staff. The research phase concludes with a proposal from the artist outlining one or more public-facing participatory projects that will be implemented in partnership with the agency. Artists receive a fee, project budget desk space with the host agency, and additional in-kind resources provided by both DCLA and the host agency.

The PAIR program is made possible by metropolitan city funds and additional support provided by four philanthropies.¹³⁸

8. Enhanced Leadership and Governance for the Cultural Sector

The leadership and co-operation provided to NSW Government by the Arts & Culture Advisory Committee is an important step forward. Separately, the Sydney Culture Network is emerging as a new kind of bottom-up collaboration and information sharing platform across the region. In the next stage it will be necessary to assess how these sources of leadership can be augmented further.

Arts and culture in metropolitan areas around the world benefit from sources of independent, proactive and senior leadership. These can help to effectively promote a diverse sector, leverage third party finance, and communicate the benefits of prioritising culture. They talk to the world about the culture of their city region. In many global cities a leadership board of this kind shares delivery responsibility with Government and is very outcomes-focused.

The examples of Tokyo, London, Singapore and Amsterdam offer four important illustrations of different models that have been applied in recent years in response to limitations with previous approaches.

Arts Council Tokyo

Greater Tokyo has reformed the governance for arts and culture in recent years. Until recently, Tokyo had few locally-trained arts leaders and little tradition of empowering individual artistic directors to manage and program culture. The model of 'stakeholder committees' had been much more common, known for bureaucracy rather than cutting edge arts approaches.

In 2012, Arts Council Tokyo was set up by the Tokyo Metropolitan Government to provide a more independent and arms-length leadership of the sector that had the capability to drive cultural innovation, promote cultural identity of Tokyo globally, and raise the heritage and historic narrative of Tokyo.

The Council is entrusted to make budgetary decisions about grants, pilot schemes and strategic longer-term agendas. Many of the grants now extend to three years, rather than the previous single year approach. Initial grants are up to \$25,000 per year rising to \$50,000 for international scale projects, with around 80-100 projects approved each year.

The Arts Council funding has also created avenues for much more strategic capacity building in key cultural fields that had been under-invested (e.g. animation), and to activate culture on waterfronts, particularly along Sumida River. Arts Council Tokyo has focused on training more arts managers, providing the skills and offer to appeal to younger citizens who are moving to cities.¹³⁹ One result is the emergence of highly popular neighbourhood events and outdoor museums (e.g. Roppongi Art Night, Grand Tea Ceremony) promoting art in everyday lives and showcasing a different model for mixed use urban development.

Overall, Arts Council Tokyo is seen by leaders in the region as a good stepping stone from a model that was highly politicised and reactive, to one that is more engaged with the cultural eco-system and has more appetite for risk and experimentation.

Singapore Heritage Board

Formed in 1993, the Singapore Heritage Board is an example of a statutory board sitting within the Ministry of Culture that is able to build integrated strategies for the cultural institutions.

The Board manages six museums and several community heritage organisations. It has the clout to launch and implement heritage blueprints for the whole of Singapore.¹⁴⁰ Among its advantages are:

- A sizeable operating budget of S\$96 million ¹⁴¹
- Reputation to establish liaison with other museums, universities and other institutions to secure maximum collaboration
- Has convened a 50-member Museum Roundtable since 1996, with the objective of building a museum-going culture in Singapore while positioning museums as cultural destinations ¹⁴²
- It has grant making capability ¹⁴³
- It is able to the physical networks and experience of community museums, galleries and heritage trails ¹⁴⁴
- It is able to undertake and sponsor high quality research.

Amsterdam's Co-Ordination of Local Governments to Diversify Culture

Since 2009, it has been a priority of organisations that have a metropolitan-wide brief (e.g. Amsterdam Marketing) to encourage visitors to expand their mental map of what Amsterdam has to offer and to take in the sights and cultural activities of the whole region. Through the '**Visit Amsterdam – See Holland**' campaign (see Figure 9). Amsterdam Marketing worked with a number of different partners, who were involved both financially and operationally:

- 36 local governments in the Amsterdam Metropolitan Area (AMA)
- Local tourist boards and marketing organisations
- The higher tier of government Board of Tourism and Conventions to promote the region in foreign markets
- Public transport companies.¹⁴⁵

The outcomes of collaboration included:

- An **Amsterdam Card** to make connectivity between attractions easier and more affordable, allowing visitors to combine local transport with regional buses and gain admission to surrounding museums for €13.50.
- After the campaign began, the number of visitors venturing out into the greater region increased by 20% from 2011-2015, and tourist spending outside Amsterdam increased by €300 million, with Heritage Areas and Small-Town Harbours especially successful.¹⁴⁶

Figure 9: Adopted spatial narrative of Greater Amsterdam for visitor purposes.



The 2nd stage of collaboration has involved the establishment of a Metropolitan Cultural Platform (**Cultuur Impuls**).¹⁴⁷ The aim was to bring local governments together to increase spread and accessibility of cultural infrastructure throughout region, and re-purpose existing infrastructure for cultural use. The platform began as knowledge sharing and research among the local governments, and within 2 years grew into formalised collaboration involving the larger local governments and two provinces. The enhanced platform has seen more deliberate co-ordination and profiling of the cultural offer at all levels, raising profile of art and culture with local government departments, and co-investing in heritage and outdoor culture that has metropolitan scale and impact.

9. Greater Sydney Brand and Identity

Many other top city regions have been grappling with the question of what their society and economy should look like in 2040 and 2050. Their leaders have recognised the need for an ambitious overarching narrative. They observe that promoting the city primarily to drive bed-nights is not a long-term strategy for a high value economy. They view the cultural offer as a driver of appeal to the world.

Examples such as Miami's *One Community One Goal*, Stockholm's *Capital of Scandinavia* brand, and Amsterdam's *I amsterdam*, all illustrate the way leading metropolitan cities can pivot from a tourism and consumption-led identity to a citizen-owned identity built around culture, trade and innovation. Other examples, like New York, demonstrate the importance of sustained citizen outreach to ensure the creative brand is authentic and relevant.

Amsterdam: I amsterdam

Now 15 years old, **I amsterdam** is an identity building project that has had a major impact in the way the Amsterdam region is perceived and perceives itself.

In 2004, Amsterdam Partners, a private public partnership between government, industry, local communities and marketing organisations was established to launch 'I

Amsterdam.’ The campaign was designed to shift the city’s identity away from a low value consumption economy and negative associations with drugs, sex trade and cheap entertainment. The aim was to create a more established, unified and consistent brand which would focus on promoting the whole Amsterdam metropolitan area as a ‘great place to live and work.’ I amsterdam helps re-state Amsterdam’s DNA as a capital of tolerance, creativity and commerce, while targeting talent thinking about moving to the city as well as residents and visitors.¹⁴⁸ Rather than a logo or a slogan, the process focused on boldly declaring Amsterdam’s 21st century direction while staying in touch with the city’s core values.

Promoting Amsterdam as a city and a region of culture is one of the main priorities of I amsterdam.¹⁴⁹ I amsterdam is also community owned - it promotes the city as a welcoming and accessible place for everybody who lives, works, studies or owns businesses there.¹⁵⁰

The I amsterdam brand identity is supported by a number of different funding streams, including capital investment from the City Council and private organisations. The impacts of the I amsterdam campaign have been widespread, reaching sectors including transport, business, culture and tourism. The return on investment has seen Amsterdam become the number one city for cyclists, the fourth European city for business, and a leading capital of culture that spills over across the Amsterdam region.

New York: Maximum Outreach in Cultural Planning

CreateNYC has built public ownership in the future of culture in New York City through a much deeper level of public engagement than attempted previously. The Department of Cultural Affairs worked with Hester Street Collaborative, a non-profit urban planning and design firm specialising in community engagement, to increase public participation.¹⁵¹ Hester Street developed a unique engagement toolkit including a range of outreach activities – workshops, telephone interviews, and one-on-one conversations with the cultural commissioner – to maximise input.

The toolkit enabled nearly 200,000 New Yorkers to participate in the process, including 30,000 residents who showed up to more than 400 live events, and over 150,000 who participated online.¹⁵² In the end, 99% of all New York zipcodes were covered. Social media reach surpassed 137,000.¹⁵³

Public engagement helped to refine the priorities of the plan. In particular public participation highlighted affordability as a key issue and helped make the case that 75% of the city’s artists support themselves with outside income, and that nearly 50% are unable to afford supplies. As a result, the strategy includes plans to innovate in new ways to support individual artists across the five borough arts councils.

10. Optimising Culture for the Innovation Economy

In addition to their many positive impacts on social outcomes in cities, metropolitan areas are recognising that arts and culture drive innovation in at least three important ways.

Firstly, cultural and creative industries are themselves a key form of innovation enterprise that require an eco-system that is well sequenced. They participate in the wave of advanced, technology powered economic change and disruption, which in turn drives job creation and productivity increases for the cities that successfully accommodate these new economies.¹⁵⁴

Secondly, cultural participation is a stimulus for wider innovation. More evidence is being gathered that cultural diversity and mixed participation helps to enable collaboration across disciplines, industries, technologies and services

Thirdly, a high quality of placemaking, public art and cultural anchors and activation create conducive locations for innovation enterprises to establish themselves. As we observed in Volume 1 of *Culture, Value and Place*, this is resulting in more locations in metropolitan areas seeking a cultural presence as part of the sequencing of infrastructure in order to realise their potential.

These multi-dimensional links and feedback loops between culture and innovation mean that metropolitan regions have been opting for a more deliberate and strategic co-location of culture and creative practices with centres of technology and innovation. Cities such as New York, Toronto and Seoul are observing that the fostering of districts of the scale and diversity to combine physical spaces for enterprise firms, several types of cultural infrastructure and high-quality street level programming, helps to drive successful new locations for jobs and investment.

Many of the cultural locations that are established or more nascent are situated along two of Greater Sydney's three future economic corridors. However, this potential is undermined by at least three kinds of disconnection: long distances between these locations and areas of high value innovation, on-site segregation of arts & culture from other technology activity, and fragmentation between different art forms. These reduce the scope for positive multipliers and inhibit the emergence of vibrant 'live-work-play' environments that attract and retain certain kinds of talent. Addressing these issues can help serve Sydney's need to create the high-knowledge jobs of the future.

Strategically Planned Co-Location in Singapore's Jurong District

In Singapore, a new master plan for the city's 2nd CBD will see culture, innovation and housing co-locate in the same contiguous area in the West of the city, around 13 km from the city centre. The three constituent parts of the district (The Jurong Innovation District, the Jurong Lake District and the Tengah New Town housing development) will span around 2km and will be connected via high-speed bus and rail links. As is now common in Singapore, the comprehensive approach to design, masterplanning and management of the district is creating complementarity both in function and programming, allowing residents to transition between professional, educational and recreational facilities.

The ambition is to develop the 360-hectare area so that it combines advanced manufacturing innovation with medium and high density housing for 40,000+ homes, and the future Kuala Lumpur-Singapore high-speed rail terminus.¹⁵⁵ Supportive zoning allows for co-location, maximising vertical urban green space, with major transport below-ground, and ground-level heritage and cultural buildings being upgraded and in

some cases repurposed.¹⁵⁶ In order to host the value chain of activities from learning and research to innovation and production, and serve as a “living lab”, there is a strong focus on cultural vibrancy and the development of a medium-sized concert hall is an important part of the project.¹⁵⁷

Berlin: Retention and Upgrade of Cultural Fabric in Innovation Locations

Berlin’s inner-city districts of Mitte and Friedrichshain-Kreuzberg have emerged as culture rich and innovation rich neighbourhoods as a result of 20 years of enabling policies and investment by government. In 1993, the city government designated the neighbourhood a renovation area. A 15-year restoration effort saw 88% of buildings were restored, and squares, public gardens, streets and pavements cleaned up and refurbished with public artworks and memorials. Museums were invited to set up in upgraded buildings.

Today, buildings accommodate a range of uses, including housing, retail, leisure and culture. Mitte is home major institutions such as the German Historical Museum and the Märkisches Museum, and five major museums on Museum Island, while Friedrichshain-Kreuzberg, which is home to a large first-generation Turkish diaspora, has become globally renowned for its fusing of the traditional and the modern.

Central government designated the Spree river banks as the location for a new major centre for the music and media industries, and Mitte’s Chausseestraße famously gained the epithet “Silicon Allee” for its concentration of high-tech innovation firms.¹⁵⁸ In 2011, the Berlin Mayor and Chairman of Google inaugurated Factory Berlin, the world’s first business club for start-ups.¹⁵⁹ Google recently announced its plans to transform part of a former electric substation into a Google Campus,¹⁶⁰ and Twitter recently chose Mitte as its new German headquarters, instead of Frankfurt (the country’s industrial and financial hub) and Munich (home to Apple and Microsoft).¹⁶¹

Subsequently all three levels of government and other organisations have worked to protect the area’s cultural fabric amid development pressures and ensure that innovation and culture can continue to co-exist. **The city government focuses on** refurbishing publicly owned properties for artists and other creative classes, such as the Kreativhaus in Kreuzbegr, a former school that today offers studio space for fine artists and rehearsal studios for musicians.¹⁶² **Local government** has supported cooperative housing funds aimed at increasing affordable community housing,¹⁶³ and funds partnerships protecting diaspora cultures.¹⁶⁴ And **the Berlin Lottery Foundation** has helped to create and secure affordable work and performance spaces for artists such as the Sophiensæle.¹⁶⁵ These have helped to sustain the innovation precinct through its second and now third cycle of growth and success, while also driving international appeal to Berlin.

These examples across the 10 common approaches all illustrate cities, regions and metropolitan areas innovating to elevate the role of arts and culture as they grow and evolve. Each city-region has to adopt its own approaches suitable to its situation and institutional framework. Each is in its own point in its cycle and is developing tools and solutions accordingly. Not all city-regions adopt the same tools, instead, they increase the

range of tools they have in order to address agendas that are increasingly multi-dimensional and integrated.

These short case studies are designed to offer sources of inspiration and learning. The questions for Greater Sydney are how can the region adapt and adopt more of the tools that the rest of the world are acquiring so that it has a larger and more capable tool box? In Section 5 we propose 10 recommendations.

5. Recommendations

Drawing on the insight of international experience summarised above, alongside our analysis of the global benchmarks and regional reports, and our interviews with leaders and experts in the region, we make 10 recommendations that will help fulfil the promise of Greater Sydney as the world's next great cultural metropolis.

1. **Distil Sydney's unique DNA and tell a bolder story.** It is apparent that Sydney's identity and purpose in the 21st century has become ambiguous. Affection and pride in the city's scenic assets remains very high, but familiarity and fondness for Sydney's core values and vision need to be re-asserted in the context of growth of change. Sydney's cultural identities need to be distilled and its cultural production advantages clarified and asserted. Sydney needs to use culture to project its identity within the region and to the world, as a leader and innovator, rather than a focus on transaction-based projects designed to support primarily tourism. The best way to do this would be to build a deeper sense of identity and purpose for the region. Tourism, Trade, Enterprise, Knowledge Creation, Place-Making, Social Cohesion and Civic Participation can all be supported by distilling a clearer identity and it makes sense for this to be a broadly-based effort.

As part of this, Greater Sydney and its leaders need to have a clearer sense of exactly what it wants to achieve when by supporting culture and the arts. A central idea and mission that has real content is the way other metropolitan regions motivate their governments and inspire their businesses and communities.

This requires the patient work of discovering how Greater Sydney collectively sees itself and where it wants to become. Culture is the vehicle to tell and sell the unique story of Greater Sydney, redefining the West-East divides and building an integrative sense of self.

There is great enthusiasm among the city's cultural eco-system to co-create the bigger vision. A cross-section of cultural organisations and leaders should be encouraged to be active influencers within an identity alliance that is big and bold in ambition and extends well beyond the domain of art and culture.

2. **Optimise the cultural impact of catalytic developments.** Sydney is in a moment of re-engineering with major new developments in train that will change the shape, size, and flows across the region. A new airport, major infrastructure development, expansion of universities, identification of innovation precincts and corridors, hospital and health precinct development, relocation of major cultural institutions, all have the potential to generate significant cultural development and placemaking outcomes.

The development of the new Badgerys Creek airport in the Western Parkland City, and the associated City Deal, is an opportunity to give momentum to the Greater Sydney Plan. There is potential for an iconic facility and an indigenous cultural hub that fully projects the unique cultural inheritance of First Nations, to be created as part of the Airport project. Successful cultural development of precincts in and around Parramatta, Redfern-Eveleigh, Walsh Bay, The Bays, and Ultimo is also key because of

their profile and potential to drive wider change. These will come to fruition at different points in the next two cycles and it is a priority to continuously engage with the delivery stakeholders on these projects to ensure that the projects meet high cultural and design standards. This may require new thinking about place animation and the best means to achieve the benefits of proximity and co-location.

3. **Support and amplify what already exists and works well.** There are already a great number of success stories in Greater Sydney: innovative arts centres supporting distinct local cultures, cutting edge creative firms, artist-led programs, high quality multi use facilities, world-class indigenous arts, and much more.

Many have grown organically and possess an authenticity that is a valuable point of difference for the region as a whole. Support for these can come from more tactical initiatives and as well continuous investment. Observing the needs of the most successful can help leverage greater corporate and philanthropic investment.

At the same time there is great appetite to be better informed about the full range of actions and achievements in the region. Platforms to share and celebrate best practice in Greater Sydney much more actively should be a priority. These can also signal what good looks like across the sector, raise confidence and familiarity with the projects that are succeeding, and provide more avenues to do complementary work. A visible and well-run platform can help avoid duplication and fragmentation, and have longer run effects of de-siloing organisations.

4. **Tackle the affordability crisis.** Greater Sydney's affordability for artists and cultural workers has multiple dimensions to it: housing costs, costs of living, affordable workspace, and wider enterprise costs (e.g. taxation and regulation). An affordability strategy will need to address all of these and consider how they interact.

Government should explore all options to intervene proactively to invest in and part-subsidise artist studios, in or close to areas where artists already work. A set of pilot projects or zones can help test the effect of different kinds of government support, as well as options for co-sponsorship. Partners within the private, philanthropic and local government sectors should be sought for these demonstration approaches.

Sydney's housing affordability relies in the long term on regional housing market capacity. This is itself also supported by placemaking that has a strong focus on culture, in order to make medium density lifestyles effective and desirable to a larger share of the metropolitan population.

5. **Explore all opportunities to create shared facility and joint use hubs.** The integration of culture with the next cycle of new and expanded schools, hospitals, universities, service centres and other anchors should be pursued more urgently and strategically. These locations can become places where a cross-section of a community can participate and have flexible 24/7 functions that offer more of a what a vibrant global metropolis should provide.

- Actively monitor the Greater Sydney projects where timely influence can be leveraged to ensure a cultural component.

- Challenges and competitions to promote a joined-up arts and cultural offer.
 - Sharing of best practice multi-use integration in NSW, Australia and globally
6. **Foster a ‘peak leadership’ platform for the sector.** If Greater Sydney Culture can speak with a unified voice it will help the sector to attract investment and opportunity and enhance government support at all levels, across political cycles. Focus should now be trained on augmenting the peak leadership function with creative independence that can share leadership with Government and foster the soft governance and networking that is necessary in the sector.

NSW Government may need to play a convener role and not just a funder and policy role if it wants the sector to be more well-organised, articulate, and ambitious. Optimizing co-investment and leverage comes from having joint strategies and ambitions with partners, not just Government policies. Decision making, and communication can also be greatly aided by stakeholder support and endorsement.

7. **Scale up the collaboration among Sydney’s great cultural institutions and organisations.** Consider re-calibrating the funding and incentives structures to encourage Greater Sydney’s cultural bodies to focus on their collective cultural mission, and not only their individual commercial mission. The creation of non-competitive and non-adversarial spaces should be a priority.

Options to consider include:

- A Strategic Fund earmarked for projects that have the scale to bring organisations to work together and build capacity
 - A shared back office for affiliated organisations
 - A ‘one stop shop’ to provide support smaller organisations to navigate the funding system and access expert advice.
8. **Build a whole of Government approach.** Arts and culture and its achievement of liveability and vibrancy should become core to the success of government in Greater Sydney, but it requires ongoing effort to build the integration across government. Relevant approaches can include:
- Search actively for the champions for the arts across NSW Government
 - Recruit and leverage active support from the Commonwealth Government
 - Build regular intelligence of the strategic agendas of other Government agencies
 - Carry out a stock take of which projects arts and culture are currently at the table, when the windows of opportunity are to influence them, and establish a Working Group to target projects accordingly
 - Develop capable advocates across Government who have the know-how to align with priorities of other departments, engage with decision-makers at the right seniority, and pitch ideas persuasively
 - Look to position Culture optimally within NSW Government and enable it to drive inter-departmental approaches.
9. **Develop a cultural talent attraction and retention policy.** Sydney’s cultural influence will benefit from greater circulation of leading artistic talent into and out of the

region. More bursaries, residencies and fellowships for international artists, performers, poets and others are some of the avenues to achieve this. Cultural 'summer schools' and 'winter schools' with private sector sponsorship can also bring young global talent to Sydney for the first time to participate and contribute to the region's arts and culture. These exchanges can help grow local skills and expertise, while also creating a larger cohort of mobile cultural 'ambassadors' for Sydney who communicate the region's cultural story around the world. Higher flows of cultural talent into Sydney can also help to retain more of Sydney's talent.

A talent policy with this focus may also feature initiatives to leverage Greater Sydney's cultural diaspora. The region has educated and fostered many great artists now operating internationally, and there is room to provide more opportunities for this demographic to return regularly, showcase their innovations, and celebrate Sydney and its global connections.

10. **Celebrate Sydney's special history and diversity.** Sydney is already a popular region for events and blockbusters, yet there is room to support the growth and development of more celebrations and festivals that recognise the region's uniquely layered history and rich mix of cultures. This may include events with larger scale and ambition as well as local and community productions. An events program could focus very deliberately and thematically on Sydney's cultural layers and depth, drawing on different kinds of expertise across the region. Continual celebration of Global Sydney and Ancient Sydney can acquire visibility and resonance beyond the region and so transmit a resurgent cultural identity.

Appendices

Methodology for analysis of reach on digital platforms

To calculate cluster intensity and the number of catalytic institutions in each category, we summed engagement for each institution across all channels (Twitter, Facebook, Google and TripAdvisor) and then compared it to the global leader in each category, in order to obtain a percentile score that was reflective of its comparative reach among its 'type' of institution.

For example, if a museum or gallery received a percentile score of 2%, then this means that its engagement is around 2% as large as that of the Museum of Modern Art in New York, the global leader for digital engagement in this category.

To provide an indication of the number of catalytic institutions with a global reach, we found the number of institutions in each category/cluster that had percentile scores (relative to global leaders) of:

- More than 2.5% (for museums, galleries, and performing/visual arts venues)
- More than 10% (for all other institutions)

Global leaders identified for each category:

Museums and Galleries: Museum of Modern Art, New York

Performing and Visual Arts: Sydney Opera House, New South Wales

Art, Music, Theatre & Dance Companies: Berliner Philharmoniker, Berlin

Art, Fashion and Music Schools: Parsons School of Design, New York

Recording Studios: Abbey Road Studios, London

Festivals: Lollapalooza, Chicago

Methodology for Perception measures

Perception data for Sydney and a sample of five other cities is based on Google Search platform. The Search examined the adjectives and nouns used to describe each city from across 11 countries' online media repositories over a three-year period (June 2015 to June 2018).

- The five sentences searched for each city (x) were:
 - (x) is a * city
 - (x) is a city of *
 - (x) is famous for *
 - (x) is renowned for *
 - (x) is described as *
 - (Where * is any word used to describe the city)
- We undertook a total of 50 searches for each city – one for each of the five sentences, in 10 countries' repositories (each of the 11 countries' online media repositories **except** the city's home country, e.g. excluding Australia for Sydney). We recorded all the adjectives and nouns that were returned over a 3-year period (June-2015 to June 2018).
- The 11 countries selected (UK, Ireland, USA, Canada, New Zealand, South Africa, India, Israel, Spain, Germany and France) were chosen due to their large and reliable online media repositories. For some countries (France, Spain and Germany), searches were conducted in the native language and results were translated using Google's in-built translation function.
- For most nouns and adjectives, we included single words, except where terms or phrases depended on two words.
- For the comparative analysis, we classified all the nouns and adjectives into eight categories based on their thematic area. All adjectives that have had general meaning and could have featured in more than one category (e.g. great, amazing, excellent) or which did not belong in any category were discounted. The 8 categories were:
 - Art, Culture and History (example terms: artists, culture, tradition, galleries, street art)
 - Visual and Natural Appeal (e.g. landscapes, beauty, nature, landmarks, parks)

- Size, Scale and Dynamism (e.g. busy, exciting, large, global)
- Liveability and Comfort (e.g. liveable, safe, walkable, public-transport, cycling-friendly)
- Values and Attitudes (e.g. friendly, fast-paced, character, laid-back, authentic)
- Cuisine, Entertainment and Events (e.g. nightlife, food-scene, festivals, shopping, sport)
- Diversity and Cosmopolitanism (e.g. multi-cultural, diverse, openness, eclectic)
- Innovation and Edge (e.g. ideas, entrepreneurship, innovation, creativity, modern)
- The total number of nouns and adjectives used to describe Sydney in each category were compared to the average scores among the 5 sample cities selected, to obtain the relative percentage scores.

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- ²³ All figures derived from the 2018 CIPMO Community Survey - 72% figure based on taking a weighted average (by population) of the percentages of Central, Eastern Harbour and Western Parkland City residents responding "yes" to the question "do you have the following types of cultural infrastructure available in your local area: public libraries or archives, galleries, outdoor event space, multi-use spaces with flexibility to be used for a variety of cultural purposes, performance spaces, museums and spaces to rehearse or develop artistic practice?" and averaging across cultural infrastructure types.
- ²⁴ Source and method as above, but using figures for the percentage of residents responding, "more than 30 minutes" to the question "how far are you willing to travel to participate in the following arts and cultural activities: attending live music and dance, visiting a museum or gallery, using a creative space to participate in cultural production, or visiting a public library?" and averaging across activity types

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²⁴ Source and method as above

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