

Music city profile: Berlin

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MUSIC
ESTONIA 

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TABLE OF CONTENTS

Preface	4
1. Berlin – a Music City	5
1.1. Why is Berlin a music city?	5
1.2. Music ecosystem and economy	6
1.2.1. Club economy	6
1.2.2. Music industry	6
1.2.3. Challenges	7
2. Music Policy System in Berlin	8
2.1. Legal basis and division of roles	8
2.2. Music and policies	8
2.2.1. Cultural goals and themes in the Senate’s policy guidelines for 2021-2025	9
2.2.2. Creative industry goals and themes	10
2.2.3. Placing music in the broader policy context	11
2.3. Institutional structure for music policy-making	12
2.3.1. Senate department of culture	13
2.3.2. Senate Department of Economic Affairs, Energy and Public Enterprises	14
2.3.3. Musicboard Berlin	15
2.3.4. Sector associations	16
2.4. Music policy budget	18
2.5. Music policy making process	19
2.5.1. From political priorities to policy programmes and projects	19
2.5.2. Mapping the needs of the sector	20
3. Themes in focus	21
3.1. Focus on Musicboard Berlin programmes	21
3.1.1. Funding Programmes	21
3.1.2. Intermediation	22
3.2. Solving the issue of space	22
References	24

PREFACE

Context of this profile report

This report is part of a trio of music policy profiles of three cities: Aarhus, Berlin and Ghent. They are written as additional case studies for a music policy analysis for the city of Tallinn, the capital of Estonia and a UNESCO City of Music from 2022.

The profiles are based on document analysis, including music or more broadly cultural strategies and various reports, and interviews with music sector representatives and city officials. The profiles describe broadly how the city as a political and administrative organisation interacts with the music life in the city, whether through policies and regulations, subsidies and other support, as urban planners and real estate managers or facilitators of local, regional, national or international collaboration. It is clear, however, that a comprehensive review of all the ways that these cities interact with their music life would easily fill a book in each case.

What is music policy?

Most states or cities do not (yet) have explicit music policies. Therefore, the phrase “music policy” as used in these reports refers to a synthesis of all those ways the city impacts the music life in the city, whether through political strategies or administrative regulations, subsidies to organisations and projects, or activities carried out by the city itself. Therefore, even if the city never mentions music explicitly in any policy document, it would, in this view, still have a music policy – it would simply be a set of goals, resources and processes already in place, but not necessarily explicitly articulated within music context.

Descriptive and analytical approach

The profiles are mostly descriptive and only moderately analytical. They mostly describe the ways the city governments have made rhetorical commitments, that are articulated in political strategies why the music ecosystem matters, what value it creates and how the government intends to empower it; and institutional commitments, setting up programmes, projects, committees, units or other structures and committing funding. The reports have not aimed to critically evaluate the implementation of the various policies described as this would exceed by far the capacity allocated. The reports themselves do not have a comparative component and do not reference each other. A separate brief comparative analysis was created for the City of Tallinn and Music Estonia.

1. BERLIN – A MUSIC CITY

Berlin is the capital of Germany with a population of approximately 3,5 million. Berlin is one of the three city-states¹ (*Stadtstaat*) among the 16 federal states (*Länder*) of Germany and is located in the North-East of Germany, in the wide valley of the Spree River, which flows through the centre of the city. Berlin is surrounded by the state of Brandenburg and Brandenburg's capital Potsdam is nearby. Berlin is the centre of a large metropolitan area that extends into the state of Brandenburg. Known as the Berlin/ Brandenburg Metropolitan Region, it's an important economic and cultural hub with a population of about 6,2 million. Berlin's unique history of being literally divided between East and West Germany, with checkpoints physically separating the two halves of the city from 1961 to 1989, has left a legacy, not least in the infrastructural sense, that has deeply shaped the city's cultural landscape.

1.1. WHY IS BERLIN A MUSIC CITY?

Berlin's reputation as a music city is multifaceted and rooted in its appeal to artists, who come from all over the world because "this city is constantly freeing creativity and producing new ideas"². Berlin's cultural vibrancy is driven by its diversity, ranging from traditional cultural institutions, such as the Berliner Philharmoniker and opera houses, to the world-famous club scene. Berlin as a city still has a near-mythical aura of being a place where there is enough room for creatives, even though in the past years the competition for space, both literally and figuratively, has grown significantly.

According to the culture department of the Berlin Senate, the approximately 20 000 professional artists living and working in Berlin, together with the over 160 000 employees in the cultural and creative economy, have made "Berlin a creative centre of global standing. The sheer diversity of cultural events hosted in Berlin, extending across myriad sectors and genres, is unique in Germany. The large number of major cultural institutions, creative scenes, international figures and organisations based in Berlin have made the city the "place to be" for the contemporary arts at both a national and international level."³

Berlin's club culture

Berlin's club culture is legendary. The city's unique history, marked by vacant spaces and a lack of regulation after the fall of the Berlin Wall, provided fertile ground for the development of this scene. As studies on club culture indicate⁴, the availability of affordable and distinctive spaces, coupled with a permissive regulatory environment, played a crucial role in allowing for the club scene to emerge and develop in Berlin in the 1990s. This cultural significance was recognised in 2024 when Berlin's techno scene was added to the UNESCO Intangible Cultural Heritage List, highlighting its contribution to the city's identity and the importance of preserving its traditions.⁵

Diverse Audiences and Grassroots Niches

In addition to the club scene, Berlin is also big enough to have diverse audiences, communities of listeners in many niches able to support the creative process of an unknown artist to build their first small audience, slowly raising their profile. Berlin has a very diverse infrastructure for career development. Starting from the very low informal and semi-professional level and, with sufficient persistence and creative talent, leading all the way to a professional career – there are people, programmes and support available to potentially help them every step of the way. Berlin is unique in being this hotbed for grassroots artistic creativity in Germany.

Renowned music institutions

Berlin is the home of the famed Berlin Philharmonic Orchestra, considered one of the world's top orchestras, performing at the iconic Philharmonie concert hall. There is also the Staatskapelle Berlin, the oldest orchestra in the city, associated with the Staatsoper Unter den Linden opera house, and Deutsches Symphonie-Orchester Berlin, performing at the Konzerthaus Berlin. Berlin also is the home to three opera houses: Staatsoper Unter den Linden, Berlin's oldest opera house; Deutsche Oper, Germany's second-largest opera house; and Komische Oper.

1 With Bremen and Hamburg.

2 Berlin Cultural funding report (2014). Available online: <https://www.berlin.de/sen/kultur/en/cultural-policy/>.

3 Senate Department for Culture and Social Cohesion Department of Culture. Cultural Policy. Website: <https://www.berlin.de/sen/kultur/en/cultural-policy/>.

4 Cf. Dorst, H. (2015), Colomb, C. (2012); and also the comprehensive literature list created by the Clubcommission, available: <https://www.clubcommission.de/wp-content/uploads/sites/2/2019/12/Literaturliste-Clubkultur.pdf>.

5 Ahmed, A. (15.03.2024). Germany adds Berlin's techno scene to the Unesco cultural heritage list. *The Guardian*. Available online: <https://www.theguardian.com/world/2024/mar/15/berlins-techno-scene-added-to-unesco-intangible-cultural-heritage-list>

Music Industry

While in contrast to Hamburg, Berlin is first and foremost known for its vibrant grassroots artistic scene and club culture, Berlin's role as a hub for the music industry should not be discounted. It generates around 1.9 billion euros annually and employs approximately 13 300 people.⁶ The city hosts major music companies like Universal Music Deutschland and BMG Rights Management, streaming services Shazam, SoundCloud, Spotify and Idagio as well as startups like Endel Sound, Holoplot, and Mimi Hearing Technologies.

1.2. MUSIC ECOSYSTEM AND ECONOMY

As mentioned, according to the Senate's estimates there are approximately 20 000 professional artists and over 160 000 employees in the cultural and creative economy living and working in Berlin.⁷ According to the 2018 "Projekt Zukunft" pamphlet, there are 10 renowned orchestras, 2 concert halls, 4 opera houses, 100 classical ensembles and 880 choirs, 1000 rock/pop bands, 1000 jazz musicians, 1200 DJs, and approximately 3200 students with a focus on music as well as over 40 000 pupils attending 155 music schools in Berlin.⁸

1.2.1. CLUB ECONOMY

The number of clubs and other entities or initiatives making up the Berlin club scene is changing constantly and also depends on the methodology to count them. According to the 2019 study "Club Culture Berlin", 280 active participants in club culture (226 of which had their own venue) were identified. The number of event organisers in the scene is estimated to be significantly larger, particularly if the informal sector is included (e.g. free open airs).⁹ Another useful indicator is that the Clubcommission today has 350+ members. In total, the 2019 study estimated that the number of events organised every year is nearly 58 000. The club scene is an economy in itself with approximately 80% of clubs reviewed in 2018 breaking even or making some profit. However, this economy is driving a much larger economic impact. According to the Club study:

"The market volume [of club events] is relatively small compared to other sectors. If clubs make profits at all, these profits are generally small. Only a few institutions in major cities make big profit margins – and the gap between them and other actors is considerable. However, the knock-on effects for other sectors are immense. The main benefactor is tourism and other sectors such as retail and transport enjoy positive effects too. When examining the figures in Berlin, 168 million euros of direct revenue can be compared with a staggering 1.48 billion euros for tourism"¹⁰

According to the Berlin Nighttime Strategy 2024:

"In 2023, around 12.1 million guests visited Berlin, resulting in 29.6 million overnight stays. This represents an increase of 16 percent in the number of guests and 12 percent in overnight stays compared to the previous year. With 718 accommodation establishments, visitors have a wide range of accommodation options at their disposal."¹¹

For the first time since 2019, the share of international overnight stays rose above 40 percent in 2023 and this growth also benefits the culture and event industry, with theatres and performance venues recording 19% growth in the number of guests.¹²

1.2.2. MUSIC INDUSTRY

According to the estimations of the 2022 Monitoring Report on the Cultural and Creative industries¹³, the music industry in Germany in 2021 employed 84 280 people in 11 462 music companies and generated EUR 6.1 billion in sales revenue with a gross added value of close to EUR 4 billion. There is no consistent yearly data on Berlin's music economy. According to a 2018 estimation, there were approximately 1450

6 These figures are based on 2018 estimates, from "Music industry in Berlin" by Berlin Partner für Wirtschaft und Technologie GmbH. Available online: <https://projektzukunft.berlin.de/en/projekt-zukunft/publications>.

7 Senate Department for Culture and Social Cohesion Department of Culture. Cultural Policy. Website: <https://www.berlin.de/sen/kultur/en/cultural-policy/>.

8 Berlin Partner für Wirtschaft und Technologie GmbH (2018).

9 Clubcommission (2019).

10 *Ibid*, page 13.

11 Clubcommission (2024). Nachtökonomie Strategie Berlin. It is a study commissioned by the Senate Department for Economic Affairs, Energy and Enterprises.

12 *Ibid*.

13 Federal Ministry of Economy and climate protection. (2023). Monitoring report on the cultural and creative industries 2022.

companies with 13 300 employees and a turnover of about 1.9 billion euros in Berlin.¹⁴ A more recent assessment of 2021 data suggests that there were 1510 active music companies,¹⁵ generating sales revenue of EUR 956 410, significantly less than in 2018, which most likely still reflects the pandemic impact.¹⁶

15,1% of music companies in Germany are based in Berlin and the employment share of employees subject to social insurance contributions and the turnover in the Berlin music industry are above average at 13,2% and 17,1% respectively, measured against the national average.¹⁷

Record labels

From the majors, Universal Music has been based in Berlin for a while. In 2020 Sony Music moved its headquarters from Munich to Berlin and in early 2022 Warner Music launched Atlantic Records Germany in Berlin. According to the estimates of GVL, the German collective management organisation for neighbouring rights, there are over 500 recording companies in Berlin, of which around 250 are active. The smaller independent Berlin-based labels of national and international standing include Morr Music, Caroline International Germany, Embassy of Music, K7, City Slang and many others.

Music publishers

There are 195 music publishers based in Berlin, including Universal Music Publishing, BMG Rights Management, and medium-sized companies such as Budde, Meisel and Bosworth Publishing. In 2023, Warner Music Group Germany relocated parts of its publishing operations from Hamburg to Berlin.

Venues

There are over 250 event venues of almost every size in Berlin. From small clubs, Volksbühne (up to 300 people), Kulturbrauerei, SO 36, C-Club (up to 700 people), Postbahnhof (up to 1200), Tempodrom (up to 4000 people), Verti Music Hall (up to 4350 people). Large venues include the Arena and the C-Halle (up to 7000 people), the ICC (up to 9000 seats) and for events with up to 12 000 participants the Velodrom and the Max Schmeling Hall can be booked. Since autumn 2008, the Mercedes-Benz Arena at Ostbahnhof has offered space for up to 20 000 visitors. In addition, there are open-air venues the Wuhlheide (18 000 people) and the Waldbühne (22 000 people).

Promoters

The major event organisers include DEAG with Concert Concept GmbH and “Die Veranstaltungstechnik”, which belongs to the Lieberberg Group. Other medium-sized event organisers include Trinity, Headquarter Entertainment, Loft Concerts, the Hörstmann Group and Four Artists.

1.2.3. CHALLENGES

Despite all the above, Berlin’s music ecosystem also faces challenges. Rising operating costs, particularly for energy and rent, coupled with declining visitor numbers, threaten the viability of many clubs and other creative spaces. The Berlin Night Time Strategy outlines:

*“Despite the upturn in tourism, Berlin’s club scene is facing considerable difficulties. 73% of clubs report a drop in sales in 2023, visitor numbers have fallen by an average of 20 percent compared to before the pandemic, and 89 percent of club businesses are struggling with increased operating costs, particularly due to increased energy costs and rents. A third of clubs are also having problems finding sufficient staff”.*¹⁸

The economic struggles will have a broader effect on all of the music ecosystem, though some parts of the institutional landscape are on a more secure footing than others. However, if the “aim is to position Berlin as an attractive and livable city for visitors, companies and creative talents”¹⁹, as noted in the night-time strategy, the night economy should be strengthened and protected as an essential part of Berlin’s urban identity. This idea of keeping Berlin attractive by safeguarding its cultural vibrancy relates to the club scene, but is also relevant more broadly, including all the independent artists and other operators in the various grassroots scenes in Berlin.

14 This seems to be based on a creative industries report from 2015 covering the Berlin-Brandenburg area. See House of Research (2015).

15 Due to the reporting obligation limits and methodology, these reflect only companies with yearly revenue €22 000 and upwards.

16 Senate Department for Economic Affairs, Energy and Enterprises, “Projekt Zukunft” Office. (2024). Cluster IKT, Medien und Kreativwirtschaft. Auswertung der Berliner Wirtschaftsdaten für das Jahr 2021. Available online: https://projektzukunft.berlin.de/fileadmin/user_upload/PZ-Clusterzahlen-2021_bf.pdf.

17 This and the rest of the chapter is based on: Senate Department for Economic Affairs, Energy and Enterprises, “Projekt Zukunft” Office. (2023). Kurzinformatik Musikwirtschaft Berlin. Die Musikbranche umfasst einen kreativen Kernbereich sowie weitere Wertschöpfungsstufen. Available online: https://projektzukunft.berlin.de/fileadmin/user_upload/Kurzinformatik-Musikwirtschaft_2023.pdf.

18 Clubcommission (2024).

19 *Ibid.*

2. MUSIC POLICY SYSTEM IN BERLIN

As a state in the decentralised federal system of German political organisation, Berlin is to a considerable degree in command of its policies. Berlin is governed by the mayor, corresponding to a Minister President of other federal states. The governing institutions include the Berlin House of Representatives, functioning as the city and state parliament with 141 seats, and the Senate of Berlin as the executive body.²⁰

Cultural policy in Germany is organised along a federal model, following the principles of decentralisation and subsidiarity.²¹ States are free to organise their own cultural institutions and set cultural policy priorities.

2.1. LEGAL BASIS AND DIVISION OF ROLES

The division of responsibilities and competencies between the different levels of government are set out in the German Constitution (Grundgesetz) and as a general principle, the state powers and competencies are assigned to the States, unless specifically articulated otherwise.²² There is no clause stipulating any general responsibility of cultural affairs to the Federal Government and therefore, by default, these are with the States. However, often the local level, i.e. cities and districts, also have a cultural mandate and responsibilities for cultural affairs.

The Federal Government's role in the field of cultural policy is limited to specific areas, such as representation of the state as a whole, establishing a regulatory framework for the development of art and culture, and foreign cultural policy.²³

As one of the 16 States, Berlin, therefore, has its own cultural policy with its legislation, institutions and funding systems. Still, given the capital status, an increased commitment from the federal government is warranted. In 1999 the German Federal Government and the State of Berlin agreed that certain Berlin institutions and festivals would be taken over by the federal government and that the Capital Cultural Fund would be established. The Fund provides funding for significant individual cultural and artistic projects and events in the German capital with an annual budget of €15 million. The administration of the fund is placed under the Berlin Senate Department for Culture and Social Cohesion.²⁴

2.2. MUSIC AND POLICIES

The main political objectives for the Berlin Senate are articulated at the beginning of the new electoral term²⁵ and formulated as the Berlin Senate policy guidelines, currently for the years 2023-2026.²⁶ These guidelines are essentially a thematically organised list of topics and projects that the governing coalition wants to work on and makes commitments to. There is no separate cultural policy strategy that would elaborate the Senate's longer-term vision and ambitions in the field of culture, or for specific fields such as music.

The sub-chapters of the policy guidelines most relevant for music are "Culture" and to a limited degree also "Business". The lack of any further structuring, such as higher level long-term strategic aims broken down into more targeted and actionable objectives give the policy guidelines somewhat of an *ad hoc* character, especially as often concrete projects and initiatives are mentioned which are not necessarily placed in a broader and more strategic context.

20 Berlin Business Location Center. Government and administration. Website: [https://www.businesslocationcenter.de/en/business-location/berlin-at-a-glance/political-system#:~:text=Germany%27s%20capital%2C%20Berlin%2C%20is%20both,a%20federal%20state%20\(Land.](https://www.businesslocationcenter.de/en/business-location/berlin-at-a-glance/political-system#:~:text=Germany%27s%20capital%2C%20Berlin%2C%20is%20both,a%20federal%20state%20(Land.)

21 Blumenreich, U. (2022). Country Profile Germany. Association of the Compendium of Cultural Policies and Trends, "Compendium of Cultural Policies and Trends," 20th edition 2020. Available under: <https://www.culturalpolicies.net> ISSN: 2222-7334.

22 *Ibid.*, based on Article 30 of the German Constitution.

23 *Ibid.*

24 More information on the Capital Cultural Fund can be found on their website: <https://hauptstadtkulturfonds.berlin.de/en/about-us.>

25 The electoral term in Berlin is usually for five years, but most recently the results of the 2021 elections were annulled when the German Constitutional Court of the city-state Berlin judged that the 2021 state-level parliamentary election had to be rerun because of serious electoral irregularities, see more: <https://americangerman.institute/2023/03/making-sense-of-berlins-extraordinary-election/>

26 The current policy guidelines are available online: <https://www.berlin.de/rbmskzl/politik/senat/richtlinien-der-politik/#11>

However, the lack of a formal strategy does not necessarily mean that such strategic vision is not present in the Senate administration. It can be argued that it exists more informally as working knowledge of the particular politicians and administrative staff on various levels of policy-making. Also, shaped by the representative organisations of the sector through their more formal consultation meetings, private conversations and public advocacy (see also 2.5).

The roots of this can be seen in the relatively good state of cultural funding in Berlin over the decades. There have been enough funds available to develop various programmes for all cultural functions, though this might not always seem so from some of the perspectives from the music scene. Berlin has been drawing in new talent and the general population. The cultural associations in Berlin have a strong and longstanding history of being well-organised, vocal and very active towards politics and policy making. All this has kept the policy-makers busy catering to a vibrant cultural scene. If there is enough direct consultation with the sector and the needs are well understood, and there is funding available to take action, then there might not be enough time, nor the urgent need to articulate highly elaborate policy strategies. Especially in a fast-changing landscape agility is needed and too detailed and agreed-upon policy agendas can actually force rigid scaffolding where flexibility is needed. Of course, this view might not be shared by all representatives of the various Berlin cultural and music scenes, especially those that persist against odds at the far end of the pecking order for public support. However, all things considered, strategising cultural policy in Berlin seems to be more emergent than deliberate,²⁷ more of a process than an “artefact” in the form of a policy plan.

That being noted, the general uncertainty with regard to longer-term planning has mobilised some stakeholders in the cultural sector²⁸ to advocate for a more developed and stable cultural funding law. They note that there are no binding regulations on how Berlin’s cultural development should be discussed in a transparent and predictable manner and with everyone involved.²⁹ This initiative “KULTUR.FÖRDERN. GESETZ” has produced several position papers. The latest in early 2023 points to the Berlin state constitution, which formulates the mandate for cultural policy: “The state protects and promotes cultural life”³⁰, and calls for making this mandate more concrete through a culture funding law for Berlin.

2.2.1. CULTURAL GOALS AND THEMES IN THE SENATE’S POLICY GUIDELINES FOR 2021-2025

Among some of the broader themes³¹ of the Senate:

1. wants to improve social standards in all areas of cultural work;
2. is committed to diversity and inclusion in the cultural and creative industries;
3. aims for more cultural events and infrastructure in districts with fewer cultural offerings;
4. works to ensure that Berlin’s diversity is better reflected in accordance with the applicable legal standards in cultural funding, in juries and offers, but also in management positions and supervisory bodies of the funded institutions.

One prominent theme in the culture chapter is the space to make and experience culture. **The Senate is committed to creating, securing, renovating and modernising spaces for artistic production and presentation.** Also, in the Senate’s view, cultural spaces should primarily be developed in state properties and renting work and rehearsal rooms from private owners or granting a leasehold should only be possible if it is cost-effective. The Senate will therefore expand the “control instruments” for urban development in the area of culture and work on an urban development concept for culture including a cultural register (see also 3.2.). This task is ongoing and has been given to Kulturraum gGmbH³², an organisation with a goal of promoting art and culture in the capital by creating a sustainable spatial infrastructure for artistic work. The Senate also plans on evaluating the efficacy of Kulturraum.

With regards to **music** more specifically, the Senate will prepare a music school law during this legislative period, in order to establish musical education as a public duty.

27 Cf. Mintzberg, H., Waters, J., A., (1985). Of strategies, deliberate and emergent. *Strategic Management Journal*. Vol. 6(3), pages 257-272.

28 Cf. Landesmusikrat-Berlin. Kultur.Fördern.Gesetz. Available on: <https://www.landesmusikrat-berlin.de/musikpolitik/kulturfoerderungsgesetz/>.

29 Landesmusikrat-Berlin. Positionspapier zum Kulturfördergesetz Berlin (2021). Available online: https://www.landesmusikrat-berlin.de/wp-content/uploads/2023-01_17_KFG_Berlin_ARBEITSPAPIER.pdf

30 Berlin State Constitution, Article 20 paragraph 2.

31 This and all other references to cultural policy themes in this chapter are from the policy guidelines document, “Culture” sub-chapter, pages 67-69.

32 Kulturraum Berlin gGmbH was founded in 2020 as a subsidiary of the public Foundation for Cultural Education and Cultural Consulting (Stiftung für Kulturelle Weiterbildung und Kulturberatung) to provide operational support for the Workspace (Arbeitsräume) program of the State of Berlin.

Another theme that is relatively prominent in the “culture” subchapter is Berlin’s **club scene**. Among other commitments, the Senate aims to:

- continue to work at the federal level to ensure that clubs are named as cultural sites in the building use regulations;
- develop a concept for free open-air spaces, which should be legally implemented by the summer of 2024;
- Continue noise protection funds and club registers.

The Senate also notes that clubs that are located on state-owned and district-owned land should receive long-term rental or leasehold contracts and when establishing development plans on the inner-city banks of the Spree, the concerns of club culture must be taken into account. Finally, the Senate is committed to preserving the KulturBrauerei, a complex consisting of six courtyards with 20 buildings in the Prenzlauer Berg district, housing cultural and leisure establishments, from restaurants and a cinema to clubs. SODA Club, one of the biggest clubs in Berlin, is situated in the KulturBrauerei premises.

The policy guidelines also note that Clubcommission and Berlin Music Commission are supported as institutions and that they will evaluate the work of the Musicboard Berlin. It also requests that “if possible, a new funding priority “promoting the international networking of the Berlin music scene” should be developed from the existing budget, including the Music Ambassador program”. What that could mean in practice is currently being thought and discussed in the Musicboard Berlin.

Finally, the Senate confirms that conference formats such as “Most Wanted Music” and “Stadtnachacht” will continue to be financed; and Classical:NEXT, which had its first edition in Berlin in May 2024, is mentioned as well as WOMEX which is anticipated to “take place in Berlin in 2026 if possible”.

All in all, it is a mix of very broad themes, some with actionable steps indicated, and rather concrete projects and initiatives. Possibly, this reflects the effectiveness of the advocacy work of some of the stakeholder organisations over others. What is notable, is that mentions of the premier classical music institutions, such as the orchestras, the opera houses and other organisations as well as support programmes, are conspicuously absent. Perhaps this reveals that these policy guidelines are mainly targeting current issues, ones where political attention and decisions are needed and which otherwise might not receive it. The support to the cultural mainstays is perhaps considered self-evident and beyond doubt, the so-called “justification consensus”, placing traditionally funded cultural institutions per se under protection, regardless of their achievements or their significance for the society.³³

2.2.2. CREATIVE INDUSTRY GOALS AND THEMES

The music sector also has an economic dimension and can thus be counted as one of the creative industries sectors. In the “Business” subchapter of the policy guidelines, some references are made to topics that are relevant also for the music industry. For example, the Senate is expressly committed to Berlin as a trade fair location. A master plan, a strategy process and a congress fund are mentioned, though not elaborated. The congress fund is to be expanded to include a focus on “Trade Fairs of Tomorrow”. Whether this commitment is linked to welcoming Classical:NEXT and WOMEX to Berlin, is unclear. Also, an idea for a new festival fund is being examined.

Perhaps a more strategic and developed commitment is to further develop the “Neustart Berlin” program, initially launched to help the recovery from the pandemic of certain creative industries which were hit harder in the pandemic than most. This includes the music and especially the events industry. The goals of the restart programme³⁴ reflect an awareness of the value and contribution of the creative industries for Berlin more broadly:

- to maintain lively centres through economic policy measures for trade, tourism and the creative industries;
- to expand the economic factor of tourism and to promote the quality of stay for guests and locals alike;
- to (re)position Berlin as an international trade fair and congress location, to attract additional leading trade fairs and national and international congresses and events;
- to strengthen the diverse creative industries in the various subsectors and thus increase Berlin’s international appeal.

33 Mandel, B. (2014). Cultural Beacons and the Alternative Scene: Cultural Funding For a Diverse Population. In: Berlin Cultural funding report 2014. Available online: <https://www.berlin.de/sen/kultur/en/cultural-policy/>

34 The Senate Department for economy, energy and business (2022). “Programm Neustart Wirtschaft”, available for download: <https://www.berlin.de/sen/kultgz/aktuelles/pressemitteilungen/2022/pressemitteilung.1190840.php>.

The dedicated programme for the music industry was carried out between 2022-2023 and included two measures:

1. Expanding the music industry conference “Most Wanted: Music” and supplementing it with additional formats, such as including recruiting events and crossover projects between music and other subsectors of the creative industries.
2. Strengthening the Berlin Music Commission’s “Music Ambassadors” program which promotes international networking in the Berlin music industry and strengthens the internationalisation of the Berlin music industry as a whole.

Again, the programme reflects support for concrete projects and initiatives but articulates no overall strategic vision around the recognised value of the music industry as part of Berlin’s economy.

2.2.3. PLACING MUSIC IN THE BROADER POLICY CONTEXT

The lack of a coherent overall strategic framework for cultural or more specifically music policy in Berlin makes any outside analysis of music in the broader policy context conjectural and interpretive. There is much in Berlin’s music policy landscape that is broadly generic, for example, the asymmetry between funding commitments to legacy institutions, such as orchestras and operas, versus independent cultural operators. Yet, there are also some specificities that help to provide a more coherent perspective.

Music genres as policy categories

Genres are a complex and problematic concept but can be useful to organise and describe the otherwise sprawling diversity of musical expressions. Some music scenes identifying with a specific genre develop well-organised institutional and political representation and thus start to shape music policy in the same categories. In the Berlin music policy discourse, the genre categories in use are classical, early, new,³⁵ and jazz music. The rest, then, is historically considered pop music and has in the past been unproblematically associated, even equated, with commercial intent and purely market dynamics. This level of simplification is untenable in the current climate of upholding the values of diversity and inclusivity. Therefore, in Berlin, also “pop” music has found its way to policy attention and funding. While in the past this funding was very limited, it has grown in volume and gained more cultural policy legitimacy after the creation of Musicboard Berlin.

It is probably the practice of endowing the music genres of classical, early, new, and jazz music with the exclusive political privilege of funding in the past, that has shaped the particular commitment to support “pop” music by the Musicboard, defined as “all genres of popular music as well as cross-genre or experimental pop music that cannot be clearly assigned to the categories of jazz or classical and new music”. At first reading, this might strike as exclusionary language, but given the above, it can be read as precisely targeted inclusion of those groups previously excluded from music policy attention.

Independent scene” or *Freie Musikszene*

“Independent” is a frequently used and somewhat ambiguous term that generally refers to diverse communities of musicians, bands, labels, venues, and initiatives that operate outside of either the “mainstream” music industry or the big institutions, such as opera houses. Independent music scene actors are often characterised by a DIY ethos, experimentation, and focus on artistic expression rather than commercial success. It is natural to speak of independent labels as those that distinguish themselves from the “majors” by emphasising artistic creativity vs profit motive.

It is worth noting that, specifically in Berlin, the notion of “independent” is used slightly differently. “Independent scene” or *Freie Musikszene* is a term used frequently in the various policy documents and other texts in the context of Berlin’s cultural policy. The “free” seems to relate to two freedoms: “free” as in not working for an institution (such as an orchestra) and therefore leading a potentially precarious professional life; and “free” in terms of artistic ambitions that are not subjugated to commercial logic. What gives the Berlin usage a specific edge, is that the truly independent artists are historically considered those from classical, new, early and jazz music scenes. They are not working for the big orchestras and opera houses, nor are they motivated to do their creative work (first and foremost) to achieve commercial success. “Pop” music, however broadly defined, was in the past not included in the *Freie Musikszene* notion, because it was seen as commercial in its intent and therefore precarity, for example, was not an issue per se. While today Berlin club scene is seen as part of the *Freie Musikszene* by many, certain programme or policy documents, when using the same term, might actually mean specifically classical, new, early and jazz music scenes, excluding implicitly everything else (as “pop” music).

35 These – classical, early, new – are often grouped together as “serious” music (*ernste musik*).

Institutional vs project funding

Musical diversity is celebrated in the policy guidelines and in other official texts on the Senate's website, but when looking at the real budget allocation, the asymmetry between the traditional institutions and various alternative forms of music culture is striking. The orchestras and choirs rooted in the historic performance culture of European classical music receive 90+% of music funding and are resting on a more secure foundation whereas funding for some of the independent actors are at best on a tenuous project-based footing. This is, of course, common across Europe and harks back to the legacy distinction between high culture and entertainment with cultural policy concerned only with the former, often to fight back against the alleged adverse influences of the latter.

The precarity of the *Freie Musikszene* actors, the musicians not having stable employment in the "institutions", while still making valuable art, led the Senate to develop various funding programmes for independent artists and creators. Over time "pop" musicians were also included. In sum, while the legacy institutions still claim a substantial share of the funding pie, the diversity of the many support programmes provided by the Senate's culture department as well as Musicboard Berlin provides a fairly comprehensive support system for all crucial elements of an artists' journey to professional success.

Arts & culture vs industry

In the music ecosystem, the dimensions of artistic expression, economic viability and commercial success are organically intertwined. The best example of this is the club scene, where cultural value and diversity are cherished and now recognised, even by UNESCO. Clubs that provide artistically interesting and diverse programming contribute to the cultural diversity of the city while bearing the commercial risks. At the same time, the club scene is also a business sector whose marginal local profitability manages to drive a much broader tourist economy. Berlin's world-famous cultural vibrancy (which is largely due to the club scene) draws in tourists and makes it an attractive destination for living, working and running businesses. This line of argument, also recognised in some policy documents (cf. Neustart Berlin), reflects a more nuanced understanding of the value of the music industry (and CCI more broadly). It's not only just another business sector where the value for the city roughly equals the sector's revenues, gross value added, taxes paid and jobs created. It's a sector that, if thriving, powers Berlin's overall image of cultural vibrancy.

To nurture a creative industry such as the music industry, however, can be tricky for policy-makers. There are regulative fault lines between what can be done in terms of support for non-profit cultural institutions and causes, and for for-profit companies. Therefore, in the Berlin music policy landscape, there is, at least in principle, a clear line between policies for artists (the "creative side"), and the music industry (the "business side"). In practice, these issues of principle are overcome by pragmatic solutions, such as the label fund operated by Musicboard Berlin. However, for a more sustained effect, these paradoxes would need a more structural and strategic policy solution.

2.3. INSTITUTIONAL STRUCTURE FOR MUSIC POLICY-MAKING

As described above, music as a policy theme is divided between the policy domains of culture and creative industries. The former is overseen by the Senate Department of Culture and the latter by the Senate Department of Economy.³⁶ Through the Culture Department, the Berlin State funds several music institutions directly. These include seven orchestras and two choirs³⁷, among them the famous Berlin Philharmonic, and three opera houses, funded through the Opera Foundation. Also, Musicboard Berlin is funded structurally.

There are also important bottom-up sector-led associations that unite various groups, provide services, consult the sector for interest representation and organise advocacy activities. These include the Club Commission, Berlin Music Commission, IG Jazz, Initiative Neue Musik, and the Berlin State Music Council (Landesmusikrat Berlin), among others. Also, the major multinational music companies, such as the Universal Music Group, Warner Music Group and Sony Music Entertainment are actively representing their interests towards the political and policy-making levels, sometimes directly, sometimes through their federal body (BVMI).

³⁶ The policy fields and, therefore, the names of Senate departments change with the political cycle. Currently these are the Senate Departments of culture and cohesion, and for Economic Affairs, Energy and Public Enterprises, respectively.

³⁷ These are: the Berlin Philharmonic, the Konzerthausorchester Berlin, and the two radio orchestras Deutsches Symphonie-Orchester Berlin and Rundfunk-Sinfonieorchester Berlin under the umbrella of Rundfunk-Orchester und -Chöre GmbH (ROC GmbH). The two choirs Rundfunkchor Berlin and RIAS Kammerchor also belong to ROC GmbH. Finally, there are also the orchestras of the three Berlin opera houses. See more information: <https://www.berlin.de/sen/kultur/kultureinrichtungen/orchester/artikel.32413.php>

2.3.1. SENATE DEPARTMENT OF CULTURE

The Department of Culture within the broader administration unit of the Senate Department for Culture and Social Cohesion oversees the funding system and funding programs of the State of Berlin in the area of culture. Funding is provided in the form of grants or subsidies. In principle, only non-profit projects and organisations are funded, though private contribution is also expected as co-funding. Commercially operating cultural providers and projects are expected to turn to the Department of Economic Affairs and its subunits. In practice, though, the lines are not always that clear. For example, the Senate department together with Musicboard Berlin supports the Club Award.

Around 90% of the budget is dedicated to long-term institutional funding for over 70 cultural institutions. Around 10% is spent on individual and project funding.

Funding system³⁸

The state budget regulations distinguish between temporary (artist and project funding) on the one hand and permanent (institutional) funding on the other. The latter is decided by the House of Representatives when drawing up the double (2-year) budgets, thus providing a “democratic consensus” for this funding. The culture department manages a total of 17 funding programmes, many of which have several sub-programmes.

For the **music sector**,³⁹ funding is available for projects and scholarships in the fields of new music (contemporary music, classical modernism, sound art), early music, jazz (all styles) and choral music. Providing support for professional “pop” musicians is delegated to the Musicboard Berlin. There are 10 programmes specifically for music (specifically for classical, new and jazz music). In addition, music projects are also supported in interdisciplinary programs (open funding, intercultural projects, international cultural exchange, Capital Cultural Fund).

The music funding programmes are:

- Fellowships for serious music and sound art – to promote the diversity and quality of artistic and curatorial works produced in Berlin and to contribute to strengthening early music in Berlin. Each scholarship is worth €12 000. Research scholarships are worth €8000
- Basic Jazz Promotion – for artistic development and strengthening of the profile, and improving the working situation of jazz groups of at least 5 musicians in the core lineup. The maximum is €50 000 per applicant per funding year.
- Basic funding for serious music – similar to the Basic Jazz funding, but without thresholds for number of musicians in the lineup nor any ceiling to the funding amount.
- Choir support – for choirs and vocal ensembles of at least 12 people to help them present choral-symphonic works and innovative choral projects in Berlin to a wider public. Funding can be structural or project-based.
- Jazz Prize Berlin – since 2017, the prize of 15 000 euros has been awarded by the State of Berlin and Rundfunk Berlin-Brandenburg.
- Cultural exchange scholarships from the State of Berlin – Music: Paris – for the artistic development of professional artists. The stay abroad should enable them to gain an understanding and knowledge of the culture of the place of residence, to study developments in the local scene, to make contacts, to exchange ideas, to gain inspiration and to realise an artistic project on site. The scholarship is a monthly flat rate of €2500 and includes rent-free use of the studio apartment in the Cité Internationale des Arts in Paris.
- Project funding for serious music – early music – for time-limited and non-commercial projects by professional artists and curators in the field of early music. Funding will be provided to the extent that is necessary for the implementation of the project.
- Project funding for serious music – new music – to promote projects in the field of new music and sound art. The funding is managed by INM – Initiative for New Music Berlin.
- Project funding Jazz – for time-limited and non-commercial projects by professional artists and curators in the field of early music. Applications can be submitted by groups, individuals, institutions (e.g. associations) or production locations, as well as by third parties (e.g. event organisers, clubs, associations) whose projects take the above-mentioned group of people into special consideration.
- Jazz Fellowships – for artistic development support for professional artists, groups and curators who work in the field of jazz. The work grants are worth €8000 each. A detailed cost plan is not required.
- Allocation of recording dates – in cooperation with the Marzahn-Hellersdorf district office and the “Tune in Studio Berlin” of the Hans Werner Henze Music School, opportunities to

38 Funding programmes for culture: <https://www.berlin.de/sen/kultur/foerderung/foerderprogramme/>

39 Music funding programs: <https://www.berlin.de/sen/kultur/foerderung/foerderprogramme/musik/>

- carry out your own productions in a professionally equipped recording studio are offered.
- **Allocation of practice rooms** – Kultur Räume Berlin allocates subsidised work, production and presentation spaces for artists and cultural workers in Berlin as part of the workspace program and in cooperation with its partners (see more in 3.2.).

Funding for pop music, defined as everything not strictly classical, new or jazz music, is operated by Musicboard Berlin (see 3.1. for a further overview).

2.3.2. SENATE DEPARTMENT OF ECONOMIC AFFAIRS, ENERGY AND PUBLIC ENTERPRISES

The Senate Department of Economic Affairs, Energy and Public Enterprises also oversees two “branches”: Creative Industries and Communication, and tourism. Music is seen as one of the creative industry sectors⁴⁰, including the music companies and also the club scene. In contrast to the culture department, there are no specific and regular funding programmes for music projects and organisations available, with the exception of the **noise protection fund**, launched in autumn 2018 by the Department for Economic Affairs. The programme aims to reconcile the interests of the clubs and the residents. €500 000 is available annually for this purpose and, for example, as of October 2023, around EUR 1,58 million in funding had been distributed.⁴¹ In general, programmes for creative industries are rather created or adapted from pre-existing ones for other sectors, such as a coaching or a venture capital programme for the creative industries. Funding and collaboration for the music industry is more needs and project-based. There are funds available for general activities, such as networking or for so-called lighthouse projects. These can be then allocated yearly, based on plans that very often are based on direct discussions and ideas proposed by the sector through their representative organisations.

Communication and collaboration with the creative industries sectors are overseen by advisors with the different sector portfolios divided between them. These advisors possibly work with one sector for longer periods and therefore build up valuable networks and knowledge. Important sectoral partners for the Senate Department of Economic Affairs are, among others, Clubcommission, Berlin Music Commission, Federal Music Industry Association (BVMI) and Association of Independent Music (VUT).

For example, the Department for Economic Affairs supports the music conferences MOST WANTED: MUSIC and Stadt Nach Acht as well as various other projects, for example, the “Music Ambassadors” and “Listen to Berlin” (see also 2.3.5.).

Also, EU funds have been used, such as for the “Projekt Zukunft”, co-financed by the ERDF. The music industry was one of the sectors targeted with various activities, ranging from studies⁴² to funding networking events, such as the above-mentioned MOST WANTED: MUSIC, and more.

2.3.3. MUSICBOARD BERLIN

<https://www.musicboard-berlin.de/>

Musicboard Berlin is a funding institution for the pop-cultural music scene, created as a joint initiative between the Berlin music scene and the state of Berlin. Musicboard Berlin (MBB) was founded in 2013 and is a unique institution in Germany. It aims to support a diverse and multifaceted musical landscape and serves as a funding institution, contact point, counselling centre, and mediator between the cultural and political sectors. MBB focuses on pop music, defined as encompassing all genres and varieties of popular music that are not otherwise clearly categorised as classical, jazz or new music.⁴³

Since 2015, MBB has operated as a state-owned limited liability company and since 2017 it has been administered by the Senate Department for Culture and Europe (currently Culture and Cohesion) of the State of Berlin. MBB is on paper the partner of Music Cities Network together with the Senate.

40 There is a theme page for music, available online: <https://www.berlin.de/sen/web/en/economics-and-technology/branches/creative-industries-and-communication/music/artikel.447816.en.php> However, it is clearly out of date and written no later than 2014, based on the reference to Berlin Music Week, which was discontinued after 2014.

41 Senate Department for Economic Affairs, Energy and Enterprises, “Projekt Zukunft” Office. (2023). Kurzinfor Musikwirtschaft Berlin.

42 These include a few publications produced by the project itself, <https://projektzukunft.berlin.de/projekt-zukunft/publikationen> as well as funding several other studies, such as the comprehensive 2018 study “Club Culture Berlin” by the Clubcommission.

43 Musicboard Berlin, annual report 2023. Available online: <https://www.musicboard-berlin.de/en/annual-report-2023/>.

MBB operates under a contract with the Senate that outlines its primary functions. Based on these, MBB has developed its own strategic plan, which was most recently updated in 2021. To ensure accountability and transparency, MBB holds an annual meeting with the Senator and regular meetings with the Senate administration. These meetings also serve as a formal channel to convey the needs of the sector to policymakers and political leaders. In 2021-2022, MBB commissioned an external evaluation to assess the impact of its activities.

Measuring success in development work is inherently challenging, as the effects can be long-term and complex. MBB utilises regular monitoring tools to query data from funded projects, gaining insights into target groups reached and other key metrics. However, monitoring and analysing long-term effects beyond one year remains outside their current capacity.

The budget of MBB has been and is set to remain for the 2024/2025 period between 4,5-5 mln euros, out of which approximately 3 mln euros is redistributed through funding programmes. For example, the budget for 2024 is €4 467 292. Among other incomes, €3 070 616 is from the Berlin State, €702 600 is in the form of grants from the federal government and other states, and €350 000 in grants from third parties. Out of the budget, €3 303 916 is distributed as grants through funding programmes.⁴⁴

MBB has seven funding programmes: (1) Scholarships, (2) Residencies; (3) Support Tour Funding; (4) Label funding; (5) Festival funding; (6) Karrieresprungbrett Berlin; and (7) Pop Im Kiez; and several kinds of intermediation activities (see 3.1. for a more detailed overview).

MBB also organises two festivals⁴⁵:

- Pop-Kultur – organised since 2015 the Pop-Kultur festival has been creating a discursive, diverse and inclusive setting through concerts, talks, readings, films and commissioned works. The festival is a hyphen between the perspectives of artists and the society they engage with. It facilitates dialogue and initiates long-term conversations that go beyond the music itself. The Pop-Kultur festival is funded by the Senate Department of Culture and Social Cohesion of the State of Berlin with funds from the European Regional Development Fund (ERDF), also Initiative Musik and the Federal Government Commissioner for Culture and the Media (BKM).
- Fête de la Musique Berlin – The Berlin edition of the international event has been organised and produced by Musicboard Berlin since 2018. The 2023 edition attracted tens of thousands of visitors and featured more than 1000 artists performing at over 600 concerts. Almost 200 stages showcased the city's musical and social diversity in all 12 of the capital's districts. Fête de la Musique is an event produced by the state of Berlin. The Senate Department for Culture and Social Cohesion commissions the Musicboard Berlin GmbH to organise it.

MBB has a staff of ten people⁴⁶ and the managing director is accountable to the Senate. MBB also has an advisory board, appointed for 2 years on a voluntary basis. The advisory board does not have executive power and is in an advisory role only. Out of the current 13 members, three are suggested by the Club Commission, three by the Berlin Music Commission and the rest is chosen by the MBB themselves. The Berlin Senate is also represented by guest members in the advisory board, currently four, representing different Senate departments.⁴⁷ Thus, the advisory board is a well-rounded group of various perspectives and a range of expertise. It can provide timely and relevant insights and updates on the various needs and challenges of the music sector and thus inform MBB's activities.

2.3.4. SECTOR ASSOCIATIONS

Clubcommission

<https://www.clubcommission.de/>

As the mouthpiece of the Berlin club scene, the Club Commission works to ensure that the interests of Berlin club culture are taken into account by politics, administration and business. Founded in 2001, the Clubcommission is the network for club culture in Berlin. With more than 350 members, the Clubcommission is the world's first and largest regional association of club operators and event organisers. The focus of their work is the preservation and development of a diverse and sustainable club landscape. On the one hand,

44 Senatsverwaltung für Finanzen. Haushaltsplan von Berlin für die Haushaltsjahre 2024/2025. Band 8. Einzelplan 08. Kultur und Gesellschaftlicher Zusammenhalt. Available online: https://www.parlament-berlin.de/adosservice/19/Haupt/aktuelles/Band%2008_2024_2025_Epl%2008.pdf.

45 MBB Annual report 2023 <https://www.musicboard-berlin.de/en/annual-report-2023/>

46 All staff members are listed on the MBB website: <https://www.musicboard-berlin.de/en/about-us/team/>

47 All Advisory Board members are listed on the MBB website: <https://www.musicboard-berlin.de/en/about-us/advisory-board/>

the Clubcommission functions around the urgent issues of the club scene, trying to find solutions through advice, information exchange, mediation and moderation, and then communicating these solutions towards the political and city administration levels as well as the civil society. On the other hand, they advocate broadly for club culture as a part of culture and as a relevant cultural driver in the music ecosystem.

The beginning of the Clubcommission goes back to the late 1990s when a group of mainly club owners started to discuss informally how to deal with the common challenges facing the Berlin club culture, which had grown into the grey zones and free spaces left over after the unification of Germany. As city control, regulation, increased police raids and eventually general gentrification issues accumulated, collective action and voice was needed. While the Berlin club culture has had a near-mythical status, it has also been stigmatised and stereotyped, not seen as part of culture at all. The Clubcommission has done much to help reframe and shape the general understanding of club culture. By now much has changed – as part of its policy guidelines the Berlin Senate has committed to fight for a cultural status for clubs across Germany and the Berlin techno scene has received the UNESCO intangible heritage status.

However, the situation after the pandemic and in ongoing crises of rising costs and economic downturn is dire for many clubs. According to a recent internal survey, 30% of respondents indicated they might need to close the doors. Structural support is needed to keep many of the clubs going, especially those that maintain culturally diverse programming policies which are risky business-wise. The Clubcommission has advocated for such support, but in the current political landscape, it has gone missing in the general noise of problems with the economy.

The Clubcommission is an association of members who are paying a membership fee. They mainly work with the members, but also develop a lot of projects which are funded from a mix of sources, including various departments of the Berlin Senate⁴⁸ and federal as well as European funding. The organisation is active in many fields, having departments focused on awareness of anti-discrimination, young talent and promotion of youth, developing space and free open-air events, and mental health. The Clubcommission is also active on the political and policy-making front having a department dedicated to the political dimensions of club culture, working with political decision-makers at all levels, at the district, state and federal level.

The CC has a board working on a voluntary basis, an executive board of four people and an extended board of eleven people. The team consists of almost 20 people. The board is elected every two years. In order to get elected one needs to be active in the Berlin club scene. This gives the association an immediate connection to the current needs of the scene. Input is also gathered through informal surveys and round tables. The CC communicates mainly through its newsletter and social media.

CC organises the Tag Der Club Kultur – launched in 2020 by the Club Commission, the Senate Department for Culture and Europe and the Musicboard Berlin, the event was originally conceived as a sign of life for Berlin's clubs in times when their existence was threatened due to the pandemic. By now, the event has developed into an established cultural award and festival that annually honours the cultural and artistic commitment of Berlin's clubs and collectives. It is now sponsored by the Senate Department for Culture and Social Cohesion and the Musicboard Berlin.

It is also connected to the Club Award. Launched also during the pandemic to keep the clubs from closing, the award, which is given yearly to 40 clubs with 10 000 euros each, has continued beyond the COVID crisis.

Berlin Music Commission

<https://www.berlin-music-commission.de/en/start/>

Berlin Music Commission (BMC) connects, supports and represents companies and actors from all areas of the Berlin music industry, from live and recorded music to music technology, education and media, from established companies to innovative startups, from associations to freelancers. Currently, BMC has 218 members. While launched as a non-political cooperative in 2007, the BMC became a network with an advocacy function, driven by a gap between how important the music industry in Berlin is for the city, for example as a driver of cultural tourism due to the club scene, and how little that value has been recognised on the political level.

The team consists of 7 staff plus interns. BMC has a Board of Trustees and a Supervisory Board.⁴⁹ BMC runs five lines of activities, achieved through various projects and initiatives. The activity lines include:

- **Training and development** provided through a multi-project portfolio of workshops,

48 These include the departments of Culture and Social Cohesion, Urban Development, Building and Housing, Economic Affairs, Energy and Public Enterprises, and Labour, Social Services, Gender Equality, Integration, Diversity and Anti-Discrimination

49 More info on staff and members of the boards is available on the BMC website: <https://www.berlin-music-commission.de/en/who-we-are/team/>.

- consultations, music tech labs, networking events and working groups. BMC offers spaces for knowledge transfer, B2B networking, critical discussion and creative solutions.
- **Advocacy** by representing the interests of BMC members state and nationwide, in relation to politics and other sectors. This is mostly achieved through BMC being involved in various committees and associations, such as Landesmusikrat Berlin, the Jazz Advisory Board, BV Pop and the Agenda music industry, the Society for Music Industry and Music Culture Research e.V. and Creative Germany.
- **Networking** by connecting actors and potential partners through a range of projects, such as [BMC Backstage](#), Music Ambassador, [musicBwomen](#), MOST WANTED: MUSIC conference & festival, and various [working groups](#).
- **International activities** organised through the “[Music ambassador](#)” programme, aimed at all active participants in Berlin’s music scene – Artists who set up economic cooperation projects to the actors behind the scenes, such as labels, publishers, management and other companies. Funding is provided via an open call for international travel projects to the individual applicants, with the task of representing Berlin abroad. On top delegations are organised to targeted events (such as WOMEX in 2023) and through open calls delegates are selected and provided with a flat fee subsidy to help cover the costs. Beyond that matchmakings are coordinated (such as German x Estonian matchmaking at RBF23) and incoming delegations are supported in connecting with Berlin companies.
- **Working groups**, currently four groups: Working Group Connecting Smart Music Cities and Regions, Working Group Sustainability, Working Group Music2030, aimed at maintaining favourable framework conditions for the creative industry and countering current developments such as gentrification, etc.; and Expert-Group Event Industry.

A key event organised by the BMC is the [MOST WANTED: MUSIC](#). Launched in 2014, as a conference with a live showcase added in 2019, the MW:M has become the most important music business event in Berlin and the second-largest conference for music and creative industry professionals in Germany.

The BMC is funded by various projects. The Berlin Senate Department of Economy supports BMC’s office via the annual “Centre of Excellence for the Music Industry” project. It also supports the project Listen to Berlin, consisting of an annual [award ceremony](#), a [compilation](#) with [live showcases](#) (with a budget provided by the Senate of Culture) and an [event series](#) & summit focused on youth.

Berlin State Music Council

<https://www.landesmusikrat-berlin.de/>

The Berlin State Music Council is an umbrella organisation of most, though not all⁵⁰, Berlin’s music institutions and associations, placing particular emphasis on musical education for both young people and adults. The Berlin State Music Council has, according to its website, 76 institutional and 9 (living) individual members.

In the broadest terms, the aim and task of the Berlin State Music Council is to ensure that music as an artistic and cultural form of expression receives the attention it deserves in all areas of society. Among its many tasks, promoting music education, professional music practice and amateur music-making is mentioned as the first in the Statutes.⁵¹ Influencing music policy-making is a prominent focus of the organisation. Among its many position papers and resolutions⁵², the Music Council’s most recent articulation of priorities is from late 2022 and focuses mainly on the issues of music education and music in general education, structural funding for instrumental amateur music, and secure and sustainable funding for the Music Council itself. The broader initiative of culture funding law for Berlin State is also mentioned.

IG Jazz Berlin

<https://www.ig-jazz-berlin.de/>

IG Jazz Berlin represents players from the fields of jazz and improvised music in the sphere of cultural policy. IG Jazz has currently about 350 members, representing the interests of Berlin’s diverse scene - not only musicians but also organisers and other players in the field of jazz and improvised music.

INM – initiative neue musik berlin

<https://www.inm-berlin.de/ueber-uns>

Initiative neue musik berlin eV brings together and represents the interests of the actors in the Berlin scene vis-à-vis politics and administration. It provides [funding](#), provides [rehearsal spaces](#) and runs the [field notes](#) programme, consisting of a magazine, a comprehensive qualification programme, and advisory services. INM has an active role in cultural policy work. In a constant exchange with actors in the scene

50 A notable exception from the ones highlighted in this report, for example, is the Club Commission.

51 Berlin State Music Council Statutes §2(2)1, available online: <https://www.landesmusikrat-berlin.de/ueber-uns/satzung/>.

52 These can be found on the website: <https://www.landesmusikrat-berlin.de/musikpolitik/papiere-und-beschluesse/>

they represent, they identify needs, formulate demands, and bring them to the cultural policy discourse.

2.4. MUSIC POLICY BUDGET

The Berlin state creates budgets for two years. The total expenditure for 2024 in the 2024/25 “double” budget is approximately €39,3 billion. Culture and Religion chapter is about €1,2 billion, around 3% of the total, and music support (*Musikpflege*) makes up ca €63,5 million, around 5,2% of the cultural budget and about 0,5% of the overall budget (See figure 2).



FIGURE 1. THE BUDGET DIVISION VISUALISATION FOR THE “CULTURE AND RELIGION” BUDGET OF THE BERLIN SENATE⁵³

In addition, the music budget of €63,5 million pertains to what the Department of Culture and Europe uses for both institutional and project support (see table 2). There are additional means available in the creative industries budget from the Department of Economic Affairs. The 2024 budget for creative industries is €18 330 000 and €2 334 240 is allocated to music-related projects. In addition, the Department of Economic Affairs allocates funds for the “Listen to Berlin” programme and from the “Music, festivals and club culture” budget line, support to BMC and CC (€100 000 each). Finally, there are some budget lines for music support that are not categorised as “music support” in the budget. In total, funding for music in 2024 can add up to €68 541 680 (table 1). In comparison, the institutional funding in 2024 for the Opera Foundation, an umbrella organisation for the three opera houses, is €165 468 000.

Description	Sum for 2024	Source
Konzerthaus Berlin	€23 339 000	Dept. of Culture
Orchestras, choirs and other classical/new music ensembles	€33 061 000	Dept. of Culture
Support to “pop” music (as defined by MBB)	€4 628 000	Dept. of Culture
Support to events	€999 140	Dept. of Culture
Music industry (from Creative Industries budget)	€2 334 240	Dept. of Economy
Other	€1 003 000	Other
Other support for musicians	€3 177 300	Other
TOTAL	€68 541 680	

TABLE 1. TOTAL ALLOCATIONS TO MUSIC-RELATED FUNDING IN 2024.⁵⁴

⁵³ Berliner Haushaltsdaten Website: <https://haushaltsdaten.odis-berlin.de/visualisierung>.

⁵⁴ Own calculations based on: Senatsverwaltung für Finanzen, Budget 2024/2025, available online <https://www.berlin.de/sen/finanzen/haushalt/downloads/haushaltsplan-2024-25/artikel.1414232.php> and Senatsverwaltung für Finanzen. Haushaltsplan von Berlin für die Haushaltsjahre 2024/2025. Band 8. Einzelplan 08. Kultur und Gesellschaftlicher Zusammenhalt. Available online https://www.parlament-berlin.de/adosservice/19/Haupt/aktuelles/Band%2008_2024_2025_Epl%2008.pdf.

Recipient	Sum for 2024
Grant for Konzerthaus Berlin	€23 313 000
Grant for Konzerthaus Berlin for Investments	€26 000
Grant for Rundfunk Orchester und Chöre gGmbH Berlin	€9 225 000
Grant for Stiftung Berliner Philharmoniker	€21 039 000
Grant for Berliner Symphoniker	€309 000
Other grants for choirs and orchestras	€2 488 000
Music, Festivals and club culture	€1 600 000
Grant for Musicboard Berlin GmbH	€3 028 000
Grants for events (music-related only)	€584 140
Events	€415 000
Other	€3000
Music support (Musikpflege) total	€62 030 140

TABLE 2. BREAKDOWN OF THE MUSIC SUPPORT CATEGORY IN 2024.⁵⁵

2.5. MUSIC POLICY MAKING PROCESS

Every five years, at the beginning of the new electoral term, the Senate outlines its political commitments in a policy guidelines document. As described above, this is not a typical strategy, but rather a somewhat ad hoc set of practical themes and projects the Senate wants to do. Based on this the Senate administration prepares the draft budget plan which is done for two years, the current plan is 2024/2025. The preparation of the draft budget includes many consultations with sector representatives and the many needs of various sectors are integrated into the draft. Eventually, after negotiations and amendments with the Senate Department of Finance and the political level, the draft budget moves to the parliament, where some amendments might also be requested and made and then the budget is approved for the two year period.

2.5.1. FROM POLITICAL PRIORITIES TO POLICY PROGRAMMES AND PROJECTS

The funding of many institutions is detailed in the budget plan and this comes with agreements of various sorts that shape what the funding can or cannot be used for. In cases where the beneficiary is a private entity, even if Senate-owned, such as the Musicboard Berlin, the Senate cannot earmark or prescribe the use of funds, but they do set long-term goals and priorities. MBB developed the latest strategy to implement these in 2021. The strategy is not publicly available, however, the focus areas for the strategy are, broadly speaking, co-creation, mediation, diversity, interdisciplinarity, financial/existential security, and localisation. The strategy needs to stay broad and allow for flexibility in implementation as circumstances are changing rapidly. During some years the focus needs to be more on maintenance, in others it can be focused on development.

The various departments of the Senate have the flexibility to design policy programmes and fund projects, often on only very general points in the policy guidelines that can be interpreted broadly. The shaping of the programmes and projects is done in regular, more or less formal communication with many sector stakeholders, often in one-to-one conversations. Since around 2015, the Senate culture department has had regular meetings with key stakeholder organisations, such as IG Jazz, INM, etc. This is accompanied by active informal communication between the sector associations and the Senate departments on multiple levels, up to the political levels, with the Committee for Culture, Engagement and Democracy Promotion of the Berlin parliament⁵⁶, as well as directly with politicians. By now, for example, every democratic party in Berlin has at least one spokesperson for the club scene. While much of this process is fairly obscure to the public eye, it can leave much-needed room for flexibility. The success of this arrangement hinges on the degree to which the sector is able to inform the Senate administrators and politicians about key issues and priorities and engage them to find solutions. While it might not be obvious to an outside

⁵⁵ *Ibid.*

⁵⁶ The website of the Committee for Culture, Engagement and Democracy Promotion of the Berlin parliament: <https://www.parlament-berlin.de/Ausschuesse/19-ausschuss-fur-kultur-engagement-und-demokratieforderung>.

viewer, there are civil servants in the Senate administration who are highly committed to the sectors they work with and have accumulated valuable insights and networks over their many years of service.

2.5.2. MAPPING THE NEEDS OF THE SECTOR

The various music scene representative organisations as well as the Musicboard Berlin are crucial for consulting the various music sector actors and collecting insights about the needs and synthesising it into more or less coherent signals for policy-making.

Musicboard Berlin is in a unique position between the Senate and the music scene. It can thus be aware of the needs of the sector not only to inform its own programmes and activities but also to channel them to the Senate. MBB has an open door policy and everyone can approach them with their concerns or ideas. Such contact can happen on a daily basis. When developing new programmes, the MBB team often takes a collaborative approach and consult various members and groups from the music scene. Having no dedicated person on staff for community outreach, these consultations happen very informally. As mentioned above, the advisory board is another, more formal way to consult the sector as they also give their input to programme development.

In some cases, a new programme is developed because of input from the sector. For example, the label funding programme was developed after discussions with Berlin music labels. A useful reference was a similar programme in Hamburg. A valuable source of information are the reports from the funding beneficiaries which can contain useful insights and signals about their needs. In other instances, the impulse for a new programme can come from the political level, for example, the recent emphasis on internationalisation – a vague concept that MBB aims to give a more concrete shape and meaning.

The **Clubcommission** (CC), **Berlin Music Commission** (BMC), **IG Jazz** and **INM** are all important conduits of the needs and current issues of the sector and have evolved the capacity to synthesise this input and insert it into broader policy discourses. As mentioned above, the CC collects information through surveys, roundtables and other informal ways of consulting their membership. Also, having active club scene operators actively participating through board member status is another valuable input. The CC has initiated and been involved in a considerable number of reports about the Berlin club culture⁵⁷, such as “Club Culture Study” (2019), “Club Monitoring” (2021, collecting information about how the clubs are faring during the pandemic), and most recently an executive summary of a brand new “Berlin Nighttime Strategy” (2024). These provide policy recommendations framed in ways that highlight the value of club culture and complement it with actionable data and insights, from the economics to the cultural and social dimensions of the club scene. The CC as well as the BMC are regularly represented in consultation and committees and appoint representatives to the Musicboard advisory board. The BMC, as mentioned above (2.3.5), does its political work through membership in various groups and boards.

For music to be considered a creative industry worthy of public investment, the case for it needs to be built with evidence and insight. The Senate Department of Economic Affairs, mostly through the “Projekt Zukunft” has commissioned, funded and made a number of studies⁵⁸ to describe the music industry as a sector and provide arguments and basic facts for policy-making.

⁵⁷ These can be found here: <https://www.clubcommission.de/#downloads> (though the list is not updated as of the writing of this report).

⁵⁸ There are materials on the “Projekt Zukunft” website: <https://projektzukunft.berlin.de/en/projekt-zukunft/publications>

3. THEMES IN FOCUS

3.1. FOCUS ON MUSICBOARD BERLIN PROGRAMMES

3.1.1. FUNDING PROGRAMMES

<https://www.musicboard-berlin.de/en/funding/>

Musicboard Berlin provides funding through six programmes (scholarships and residencies are considered one programme, though communicated separately). As mentioned above, when developing new programmes, the MBB team always takes a collaborative approach and consults various members and groups from the music scene. The MBB annual reports give a thorough outline of all those programmes, including figures with regard to the number of applications, sums applied and allocated and brief descriptions of all projects that received funding. Funding is awarded through Musicboard upon recommendation of independent juries of Berlin-based pop experts. Four different juries of 3-6 members work on the different programmes.⁵⁹

In 2023, the total numbers of funded projects and artists were: 123 directly funded acts, 651 total funded acts, 46 funded projects, 930 individual events, and 31 166 visitors for all projects.

2023			Applied	Awarded	Success rate
Scholarships & Residencies	€296 614	14.0%	739/258	53	7.2%
Support Tour Funding	€93 964	4.4%	55	42	76.4%
Label Funding	€65 661	3.1%	105	16	15.2%
Festival Funding	€330 700	15.6%	58	14	24.1%
Karrieresprungbrett Berlin	€348 632	16.5%			
<i>Projects</i>	€250 827		103	20	19.4%
<i>Co-financing Music Pool Berlin</i>	€97 805				
Pop im Kiez	€937 656	44.3%			
<i>Projects</i>	€107 592		70	10	14.3%
<i>Support to Clubcommission</i>	€172 000				
<i>"Tag der Clubkultur"</i>	€500 000				
<i>Administration of Rockhaus</i>	€158 063				
MBB goes international	€42 311	2.0%			
TOTAL	€2 115 538				

TABLE 3. MUSICBOARD BERLIN FUNDING IN 2023.⁶⁰

The MBB funding programmes include:⁶¹

- Scholarships - support Berlin pop musicians and bands aiming for artistic or professional development with a music project within a given timeframe. The funding is intended especially to acknowledge up-and-coming talents and the innovative strength of Berlin musicians in the pop music sector. As part of the project scholarship, musicians also have the opportunity to apply for individual coaching tailored to their needs. This was used in 9 cases in 2023.
- Residencies - gives Berlin pop musicians the opportunity to work creatively in a new setting, whether in Germany or abroad. With co-creation residencies, Musicboard also welcomes international musicians to stay in Berlin. In 2023, co-creation residencies were awarded, for example, in Accra, Detroit, Kampala and Tel Aviv.
- Support Tour Funding - supports up-and-coming Berlin pop musicians in their

⁵⁹ MBB annual reports can be found here: <https://www.musicboard-berlin.de/en/about-us/annual-reports/>.

⁶⁰ Own calculations based on MBB annual report 2023.

⁶¹ Based on the MBB website and the 2023 annual report.

- plans to go on a national or international tour with a more established act. 42 bands in 2023 had the opportunity to go on tour with a bigger act.
- Label funding - funds independent labels in Berlin, providing up-and-coming Berlin pop musicians with professional development opportunities in marketing. Three times a year ca five labels get support for additional promotional services for artists who live in Berlin.
- Festival funding - supports Berlin pop music festivals with the aim of generating perspectives for action and planning. Out of 58 applications, 14 festivals were selected in 2023.
- KARRIERESPRUNGBRETT BERLIN - funds projects and platforms – from concert and club series, workshops and talks to interdisciplinary formats – that support up-and-coming artists and other newcomers from the pop music business and help boost their careers on a national or international level.
- Pop Im Kiez - funds projects – whether pilots, campaigns or a series of initiatives – that increase the acceptance of live music in the pop music domain within a particular neighbourhood in Berlin. The programme is a response to the current displacement of subcultural spaces in Berlin

3.1.2. INTERMEDIATION

<https://www.musicboard-berlin.de/en/intermediation/>

- Counselling Centres & Networks - Berlin has many counselling centres, initiatives and networks offering advice and making connections among pop-cultural players in the city. Musicboard provides information about important contact points for locally-based musicians, clubs, promoters and the music industry.
- Rehearsal Spaces - Musicboard provides pop-oriented musicians with information on current initiatives relating to Berlin’s rehearsal space infrastructure as well as the existing options for private and subsidised rooms.
- Qualification Opportunities - Information on qualification for Berlin-based music makers in all stages of their development, such as training and further education.
- Other Funding Opportunities - This funding guide published by Musicboard offers information on applying for funding, with useful tips, from the project’s conception to its completion. Individual consultation and further information (in German) on cultural funding and financing are available to Berlin’s cultural producers via Kreativ Kultur Berlin’s Cultural Funding Consultation and Creative Industries Consultation.

3.2. SOLVING THE ISSUE OF SPACE

The issue of space for making and experiencing culture is one of the key concerns of cultural policy in Berlin. As the Senate culture department notes:

*“The existence and condition of the spatial infrastructure for the production and presentation of art and culture are just as much a subject of cultural policy as the financial and legal framework. The House of Representatives and the Senate have therefore made the development of the cultural infrastructure a priority”.*⁶²

The Senate created the “Workspace” programme to counteract the dynamic of less profitable uses of real estate being pushed out of the market. Initially created for visual arts workspaces in 1993, the programme was expanded to enable studios, theatre, dance and music rehearsal rooms to be rented by a general tenant and the rooms to be passed on to artists at subsidised prices. In 2016, the Senate and House of Representatives commissioned the cultural administration to secure a total of 2000 rooms by 2021 (there were around 600 rooms in the existing inventory in 2016) and to set up the workspace program more effectively.⁶³

Since the beginning of 2021, the Workspace program has been operationally implemented by Kulturraum Berlin gGmbH in close cooperation with actors from the administration, real estate industry and the independent scene. The Workspace program includes various instruments, such as directly funded spaces based on sector-specific funding guidelines, indirectly funded spaces (usually rented at cost, e.g. for existing artists), state guarantees, purchase of workspace locations and in the

⁶² Senate Administration for Culture and Social Cohesion Website. Cultural infrastructure. <https://www.berlin.de/sen/kultur/infrastruktur/>.

⁶³ Senate Administration for Culture and Social Cohesion Website. Workspaces. <https://www.berlin.de/sen/kultur/foerderung/foerderprogramme/arbeitsraeume/>

future possibly also new construction of workspaces and promotion of cooperative sharing.⁶⁴

One of the projects, outlined also in the Senate policy guidelines, is to create a registry of cultural spaces. The task of developing a concept was given to Kulturraum Berlin, which has released versions 1 and 2 of the concept paper and has already begun the development of the register (*Kulturkataster*) with the hopes of making the first digitally available version available in 2025.⁶⁵

The cultural registry was inspired by the club registry (*Clubkataster*) created by the Clubcommission to secure the existence of Berlin's clubs and music venues. The tool shows the locations of clubs and music venues as well as current development plans and redevelopment areas at a glance, providing early warning of possible conflicts. This allows threatened clubs to be supported, network and for their participation in urban politics to be promoted.

64 *Ibid.*

65 Kulturraum Berlin Website. (06.06.2024). Konzept 2.0 für ein Berliner Kulturkataster. <https://kulturraum.berlin/aktuelles/konzept-2-0-fuer-ein-berliner-kulturkataster/>.

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