



Making Space for Culture in Sydney

Cultural Infrastructure Study

2020

Contents

Introduction	3
Part One:	
Understanding the problem	
Defining cultural infrastructure	4
Cultural infrastructure in the City of Sydney	7
The social value of cultural space	10
The economic value of cultural space	18
Part Two:	
Identifying solutions	
Learning from international experience	26
Shifting the policy dial	27
Funding and finance	28
Planning and culture	32
Space development and provision	36
Identifying the next steps	40
References	44

Introduction

Culture is what makes a city more than the sum of its parts. It gives a place its character, allowing diverse and changing populations to maintain a shared identity.

Yet, globally, there are an increasing number of cities struggling to maintain their distinctive cultures in the face of rapid urban change. The fast pace of residential development, growing populations and increased property prices have had unintended impacts on cultural spaces like live music venues, small theatres, galleries, studios and rehearsal spaces.

Less visible parts of the creative economy have also been impacted. For example, the redevelopment of industrial areas has reduced the supply of workspace for industries such as fashion, craft, media and design. Moreover, rising housing costs have shaped the cultural workforce along socio-economic lines, limiting creativity to those who can afford the rent.

While policymakers have long sought to ensure urban infrastructure incorporates demand for health, housing, education and transport, the provision of cultural infrastructure has not won equal consideration. Additionally, Australian cultural policy has traditionally focused on grants and funding for specific art forms, and has not adequately engaged with urban growth.

The City of Sydney regularly receives feedback from our residents, workers and visitors that existing policies no longer support the cultural values of our communities. Indeed, the loss of creative spaces has become a constant theme in any conversation about urban growth across Greater Sydney.

In response, we have joined more than 40 city governments around the globe through the World Cities Culture Forum (WCCF) to identify approaches to ensure our cultural infrastructure is protected and developed in line with our growing populations.

This study outlines international efforts to make space for culture in cities comparable to Sydney. It considers how the situation has changed in the City of Sydney and across the wider Greater Sydney region. Expanding upon the NSW Government's *Cultural Infrastructure Plan*, it considers potential policy responses, with a particular emphasis on actions for local governments across Greater Sydney.

Most of all, it stresses that Sydney's cultural infrastructure is at a critical point, with ramifications for our social cohesion, identity and economy. This study aims to inform a common understanding of the challenges we face in making space for culture, opening new avenues of dialogue and pathways to explore for solutions.

Part One: Understanding the problem

Defining cultural infrastructure

Cultural infrastructure is increasingly being thought of not as **specific types of buildings**, but as the spaces in which diverse, multicultural populations **exercise their own creative practices and create common cultural identities**.

While cities around the world are considering the need for 'cultural infrastructure', the term itself is relatively new and lacks a uniform definition. In Australia, we have often thought about cultural and creative spaces as synonymous with arts institutions, museums and major galleries, yet the concerns raised by our communities cover a much broader scope. Internationally, cultural infrastructure is increasingly being thought of not as specific types of buildings, but as the spaces in which diverse, multicultural populations exercise their own creative practices and create common cultural identities. In this light, it includes public spaces, housing, workspaces and small and local venues, as well as more traditional institutional buildings.



In 2014, when the City of Sydney developed our *Creative City cultural policy and action plan*, we defined cultural infrastructure as spaces for active participation and professional creative practice, creative enterprises requiring commercial or office spaces, venues for audiences and spectators, and public domain activities.

Subsequently, we undertook a major cultural mapping exercise with Western Sydney University's Institute for Culture and Society. As a result, we have reconsidered our definition to align it with a typology developed by the United Nations Educational, Scientific and Cultural Organization (UNESCO). This gives us a more refined set of parameters:

Performance and exhibition: Spaces for audiences and spectatorship, usually purpose-built in order to facilitate cultural activities and events.

Festival, event and public space: Spaces in the public realm, privately owned spaces accessible to the public, and spaces, such as shopfronts or small retail spaces, used for temporary events and festivals.

Commercial and enterprises: Commercial or social enterprises primarily focused on the operation, creation, production, reproduction and distribution of cultural goods and services.

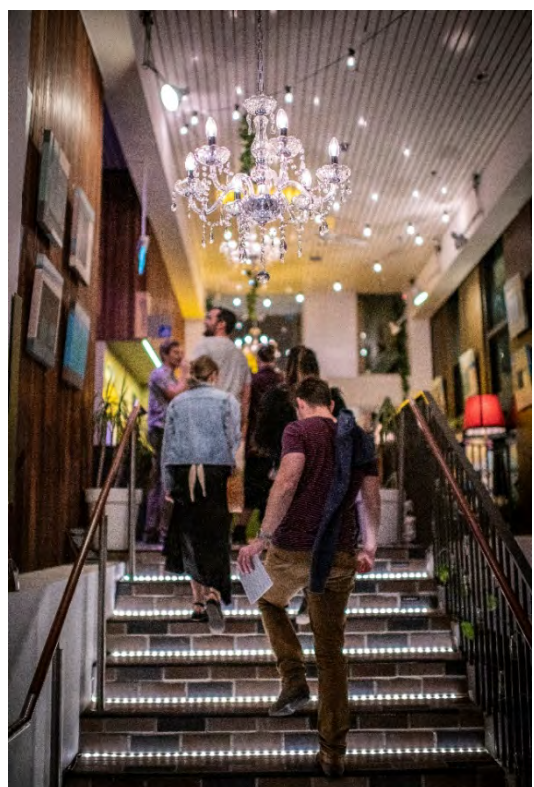
Practice, education and development: Spaces used to provide opportunities for learning, rehearsal or the formation of cultural skills. This category is diverse, ranging from schools to rehearsal facilities and artist-run initiatives focused on supporting artist development and the development of new work.

Community and participation: Incorporating spaces such as libraries, town halls and government agencies focused on a more general community benefit, as well as those spaces, such as clubs and co-working spaces, serving specific communities (UNESCO Institute for Statistics, 2009).

This definition has subsequently been adopted, with minor variations, by the NSW Government's Cultural Infrastructure Strategy.

It is important to note that many creative spaces operate across multiple categories, facilitating numerous activities and serving a variety of creative communities. Indeed, mixed-purpose operating models are often essential to robust and sustainable creative spaces.

As a result, rather than focusing on a type of building or the spatial needs of specific industries, we need to consider the social and economic context in which culture is created, and how we plan for and build suitable spaces into our city.



The City of Sydney is home to iconic cultural infrastructure. **Opportunities to access** internationally renowned art and events are widely available. By contrast, **opportunities to produce** cultural work are less readily accessible. Many people we spoke to expressed concern that Sydney had become a **city at risk of losing its own culture.**



Cultural infrastructure in the City of Sydney

The City of Sydney is already deeply invested in the provision of cultural infrastructure. We provide more than 10,000m² of subsidised space to cultural, arts and creative industries organisations, such as the Hayes Theatre, Eternity Playhouse, Firstdraft, 4A Centre for Contemporary Asian Art and 107 Projects. Our research suggests we are the single largest provider of subsidised creative workspace in the Greater Sydney area. However, the demand for space far exceeds our capacity for the supply of it.

Over the past few years, the City of Sydney has spoken to numerous creative workers, enterprises, policymakers, the private sector and community stakeholders about the types of spaces Sydney needs. We've undertaken a number of research projects and hosted forums with international speakers to identify best practice internationally. Most recently, we've worked closely with JOC Consulting and Left Bank Co. to conduct a series of detailed workshops and interviews.

We've received a great deal of feedback on the barriers that currently exist and the challenges that face us going forward. This information has been vital in understanding the local context, and identifying cities around the world from which we can learn.

Across our forums, workshops and discussions, four themes arose quickly and consistently. These were:

1. The disparity between the culture we produce and the culture we consume

In discussing the problems underlying Sydney's cultural life, stakeholders routinely point to a disparity between opportunities to consume culture – as a spectator, audience member or customer – and opportunities to make it.

Our creative community agrees that Sydney has a strong track record for large events such as Vivid, Sydney Festival and the Biennale of Sydney. They acknowledge the City of Sydney as home to iconic cultural infrastructure, such as the Sydney Opera House, the Museum of Contemporary Art Australia, Carriageworks and the Art Gallery of New South Wales. Opportunities to access internationally renowned works of art and events are, it is suggested, widely available and relatively affordable.

By contrast, the opportunities to produce cultural work are far less readily accessible. The local music sector is a commonly cited example of this. It has been argued that a loss of smaller venues and rehearsal spaces has reduced opportunities for new work to be developed, and the high cost of housing has made careers in the music sector inaccessible to those without other income sources.

Many people we spoke to expressed concern that Sydney had become a city at risk of losing its own culture, with a lack of diversity in the creative professions and an overreliance on the importation of culture produced elsewhere. The implication is that we are losing the spaces, talent and resources to tell our own stories.

Urban growth could be shaped to **increase opportunities** for active creative participation, **address inequalities** of access, and **facilitate cohesive cultural communities**.

The pressing question is: How might this be achieved?

2. The need to harness urban change for positive impact

The growth of Sydney's population, and its increasing diversity, is consistently cited as an asset by our communities. People feel our city attracts smart, talented, and creative people from all over the world, and this is a core part of our social and economic strength.

It is acknowledged that urban development is required to ensure adequate housing for our growing population. However, there is a widespread concern that cultural outcomes have, to date, been inadequately factored into urban development, at the cost of creative spaces.

This is not seen as inevitable: our stakeholders argue that urban growth could be shaped to increase opportunities for active creative participation, address inequalities of access, and facilitate cohesive cultural communities. The pressing question is: How might this be achieved?

In this respect, there is a lack of integration between cultural, arts and creative industries policies and the systems governing the built environment. Strategic planning and urban renewal must embrace the maintenance and growth of a city's culture as a key priority, and cultural policy needs to think beyond the remit of traditional arts funding models.

3. We can be better guided by a clearer evidence base

In our research, it was noted there is limited accessible, reliable information on Sydney's cultural life. As a result, stakeholders find it difficult to see 'the big picture' or to understand how things have changed over time.

Across our engagement, there was a sense that a lack of widely available information made it hard to tell what was working and what wasn't. It is hard to tell what cultural infrastructure exists and which communities it serves, or where unmet need exists and how we might address it.

This is seen as producing two side effects. Firstly, there is a perception that cultural policy and its associated resources, such as grants and funding programs, are focused too narrowly. This has undermined support for further investment and weakened the public mandate required to link cultural and urban planning policies in a meaningful way.

Secondly, it is hard to identify common problems and form a consensus on the kind of policy responses required.

It is not that the data isn't available. Efforts to pool existing data sources held by the City and other agencies could create a consistent and clear evidence base to drive decision-making.

4. Human capital is also cultural infrastructure

Central to conversations about cultural infrastructure are the people who maintain and operate spaces for creative workers, industries and the broader community. Their skills, relationships, resilience and unique working models are key to a creative city.

However, there is a perception that existing cultural space providers lack the *capability* to deliver infrastructure projects, leading to a lack of confidence in investment. Varying stakeholders argue that this is a misconception, an indication of market failure, the result of declining public funds, or a combination of multiple factors.

Regardless, it is certainly a common suggestion that there is a *capacity* issue related to infrastructure within the cultural sector. Non-profit cultural organisations are often under-resourced to do their current work, without taking on the added burden of leading new infrastructure projects or brokering the establishment of new creative spaces. Many people who manage existing cultural spaces feel they are ‘running to stand still’ in the face of rising property costs and other pressures.

Where these skills and expertise do lie in the creative sector, they reside in a very small number of people, which is, in itself, a risk. Many of those we’ve spoken to feel our city could make better use of its existing talent, invest in capacity building, and provide opportunities for mentorship and knowledge sharing. Additionally, some smaller-scale, lower-risk projects that give emerging players a chance to ‘cut their teeth’ could help introduce more operators into this space.

Summary

The feedback we’ve received is that people believe culture has an intrinsic value to our city, but that existing policies are not supporting it. There was a persistent critique that existing policy concentrates on an overly narrow range of cultural activities, and has not kept pace with the diverse creative practices of our multicultural communities. A lack of information is seen as contributing to a lack of strategy, with policy outcomes inadequately delivering the types of cultural infrastructure valued by our communities.

Many people we spoke to pointed to the social and economic effects of a decline in cultural space. It is important we explore these considerations which often strikingly illustrate the impact a lack of cultural infrastructure can have.



“How to define a collective ‘we’ in ways that cherish plural identities and the shared identity of common citizenship? How to foster the attitudinal and behavioural changes that are required, among ‘us’ as well as ‘them’? How well do city authorities know who is living where, how they live, with whom they interact and on what terms? Whilst some cities may have had decades to adapt to these conditions, others are expected to make the transition in a matter of years.”

– *Culture Urban Future*, UNESCO, 2016.

The social value of cultural space

The social aspects of culture have been the subject of considerable discussion in Sydney as they are so clearly impacted by urban change. As UNESCO's *Culture Urban Future* report notes, "urban development can lead to a standardization of the urban environment and cultural practices whereby cities risk losing their distinctive features" (UNESCO, 2016, p. 21). The flow-on effects of this can include a fractured sense of identity, increased social divisions, the inhibition of development of new ideas, and a cultural life representative of only a small portion of the population. These themes emerged constantly in our conversations with stakeholders.

In our consultations, people regularly raised concerns about the impact of development and housing prices in areas like Redfern, Waterloo and Millers Point, and the subsequent disruption of longstanding communities seen as emblematic of Sydney's heritage. Challenges facing Aboriginal and Torres Strait Islander communities were also a major cause of concern.

Our diverse communities have played an immense role in defining Sydney's identity. However, rapid change has brought about negative impacts which have not been adequately addressed. To understand these impacts, we need to look at the social and cultural composition of our city.

Sydney is growing

Our city has changed very quickly in a relatively short period of time. Between the 2011 and 2016 censuses, the City's residential population increased from 183,281 to 222,717, or 21.51 per cent, much higher than the 8.2 per cent population growth seen for the nation as a whole. Data compiled by the demographic research firm .id suggests the City's residential population almost doubled between 2006 and 2018, increasing by 45.9 per cent. (.id, 2019)

Sydney is diverse and youthful

Not only has our population become larger, it has become more diverse. Around 47.7 per cent of residents were born overseas, compared to 26.3 per cent nationally. Just under 10 per cent were born in China, compared to 2.2 per cent nationally. Indeed, our links to the wider South East Asian and East Asian regions are far stronger than other Australian cities, with 3.2 per cent of residents who were born in Thailand (compared to 0.3 per cent nationally), 2.5 per cent in Indonesia (compared to 0.3 per cent nationally) and 1.7 per cent in South Korea (compared to 0.4 per cent nationally). (.id, 2019)

While overseas migration has been a core driver of growth, so too has internal, domestic migration. Between 2011 and 2016, 35,553 people moved to Sydney from elsewhere in New South Wales, with a further 3,444 from Queensland and 2,976 from Victoria.

The bulk of migration has been driven by those aged 18 to 34. By contrast, for all age groups over 35 the reverse was true, with more people moving away. This is especially notable amongst those aged 35 to 44, who appear to be relocating to suburbs directly surrounding the City, within the Greater Sydney area, or, to a lesser extent, other cities such as Canberra or Brisbane.

Sydney is dense and transitory

Not only are we a diverse city, we also live in much closer proximity to each other. The 2016 census suggests 96 per cent of our residents live in medium- or high-density housing, compared to just 44 per cent across Greater Sydney. More than half of our residents are renting compared to only a third of Greater Sydney's population (id., 2019).

Our close proximity aligns with a highly transitory population. When the City of Sydney conducted its Residential Wellbeing Survey in 2018, it found 56 per cent of residents had lived at their current address for less than three years, only 58 per cent identified with their local area, 12 per cent had never had direct face-to-face contact with other people in their area, and 46 per cent were considering leaving the City within the next five years (City of Sydney, 2018).

These figures paint a picture of a city that is young and ethnically diverse, with a strong population of people who have come to Sydney to work or study. It suggests a place where the best and brightest minds from Australia and the wider Asia-Pacific region have come to live – for a time. We all stand to benefit immensely from the collective effort of this young, talented and energetic population.

However, the same statistics present a city in which people are often isolated from the cultural networks they grew up with, in a place within which they may not feel a strong connection. They may be subject to a difficult work/life balance and high costs of living, and are at risk of social isolation. We need to consider how these barriers are addressed to ensure everyone can contribute to, and benefit from, Sydney's cultural life.

Culture for who?

In 2010, the cultural researcher John Holden offered a blunt appraisal of the traditional focus of many cultural policies:

Legislation has concerned itself with institutional governance, but not with cultural rights. Cultural funding has similarly been directed towards the maintenance of organisations – either that, or to the achievement of targets where people are treated not as individuals with cultural rights, but as clay to be worked on (Holden, 2010, p. 59).

Holden has argued that cultural policy has largely focused on the delivery of artistic goods and services and building an audience of arts consumers, with lesser attention to access to cultural production or more active forms of creative participation.

To explore these themes in a local context, the City of Sydney commissioned Dr Christen Cornell of the University of Sydney to undertake research based on the City's Wellbeing Survey. Like Holden, she found an absence of opportunities for cultural participation. In particular, she found low rates of satisfaction among lower socio-economic groups, younger people and Aboriginal and Torres Strait Islander communities. Efforts to engage these demographics have mainly focused on increasing opportunities for consumption of culture through "audience development" initiatives. She concluded:

Continued efforts to engage particular groups in events at Circular Quay, Carriageworks, or the Powerhouse Museum will not necessarily result in higher levels of participation from groups currently recording relatively low levels of engagement, and may instead simply direct further funding to already established art forms and 'satisfied' groups and/or demographics.¹

At the heart of the issue, Dr Cornell noted that definitions of 'culture' varied significantly between demographic groups and were often closely bound to specific places and communities, limiting the effectiveness of engaging diverse producers and audiences through 'top down' approaches.

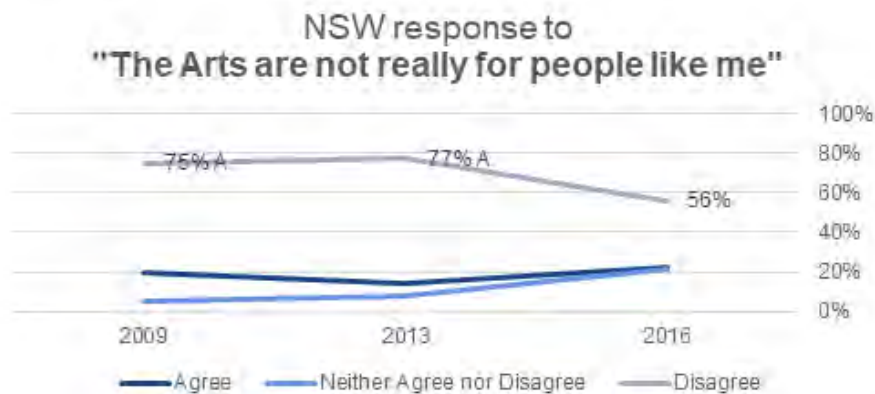
A similar critique is evident in the recent *Beyond Tick Boxes* report, released by Diversity Arts Australia, in which director Lena Nahlous comments:

The statistics tell us that despite the great diversity in Australia and the interest in the arts [by culturally and linguistically diverse (CALD) communities], it's not translating to greater engagement and participation by culturally diverse artists and makers; the content is not diverse enough and the people who are making the decisions are not diverse enough (Cornell, 2017, p. 15).

The report itself presents a picture of an Australian arts sector that is unrepresentative. While 39 per cent of the Australian population were found to have culturally or linguistically diverse backgrounds, comparable representation was not evident within the management of 200 major organisations surveyed. Only 9 per cent of those organisations had leaders from such backgrounds. In some sectors, most notably the performing arts, CALD representation dropped as low as 5 per cent (Diversity Arts Australia, BYP Group and Western Sydney University, 2019, p. 2).

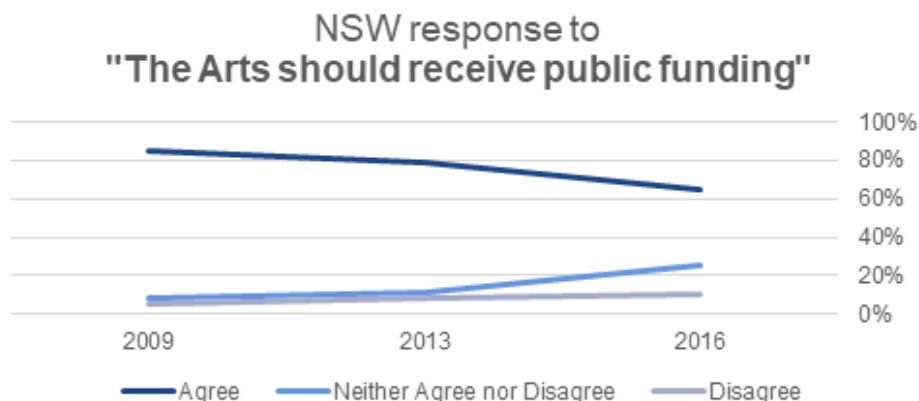
This perspective suggests a marked disparity between the types of cultural activity currently being supported, and the types of culture practised in contemporary Australia more generally. It is possible that we will need to reconsider our understanding of words like 'culture' and 'creativity' to ensure they properly align with the values and composition of our diverse and growing population.

This question of cultural value aligns with a so-called 'trend to ambivalence' identified within the Australia Council's 2016 National Arts Participation Survey. For example, in 2009, 75 per cent of respondents disagreed with the statement, "The Arts are not really for people like me". By 2016, this figure had dropped to 56 per cent (Australia Council, 2017).



However, the number of people who agreed that the arts were "not really for people like me" did not significantly change. The strongest rate of growth was among those who neither agreed nor disagreed, a figure which rose from 5 per cent in 2009 to 21 per cent in 2016. This same trend was evident across multiple questions within the survey.

It is a phenomena with pressing ramifications. In New South Wales, respondents who agreed with the statement, "The Arts should receive public funding", dropped from 85 per cent to 65 per cent between 2009 and 2016. The level of disagreement remained largely static, but 'neither agree nor disagree' responses rose by more than 150 per cent, from 9 per cent to 25 per cent. Ambivalence is clearly on the rise.



This is not to imply we no longer live in a society which values art, creativity or other values that drive our cultural life. The Australia Council's data indicates the vast bulk of the population, around 75 per cent, agree with statements like "Artists make an important contribution to Australian society." Perhaps the issue is a broader question as to whether or not existing policy is delivering on the cultural values of the broader community.

Culture by who?

It could be argued that declining support for culture relates to the gradual loss of funding for the arts sector. There is some legitimacy to this perspective. A study by Economists at Large, commissioned by the National Association for the Visual Arts, found an "erosion of baseline funding to the visual arts and crafts sector since 2003", with federal funding dropping by 55 per cent between 2008 and 2013, and state funding failing to keep pace with inflation. Notably, local government has remained the only sector to maintain funding levels over time (Economists at Large, 2017, p. 5).

Importantly, the Economists at Large report notes the loss of funding has been uneven across the arts sector, with the small to medium sector receiving the bulk of funding cuts. Of this sector, they found:

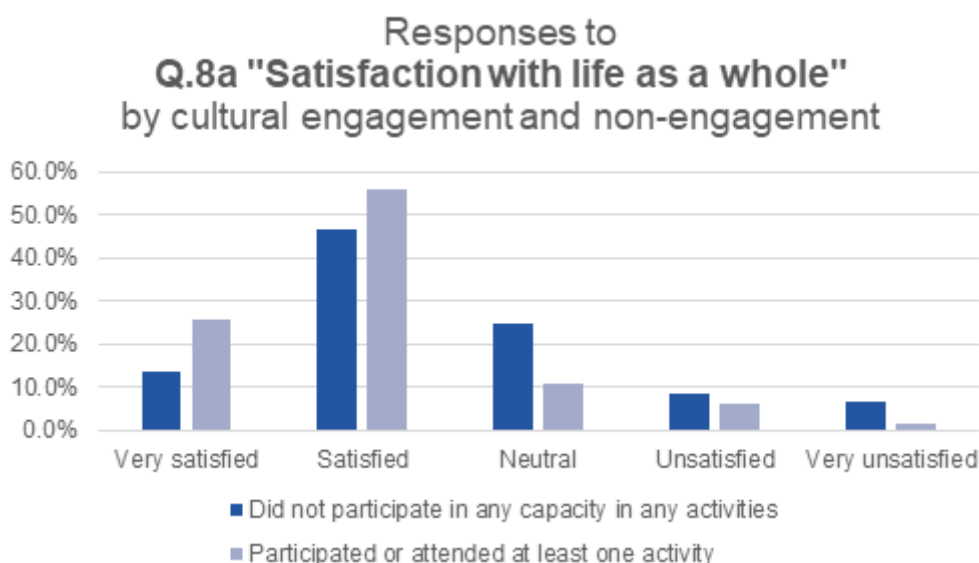
The [Small to Medium] sector facilitate the production of four times as many new works as the major galleries commission and acquire, but operate on a little more than a quarter of their budgets (Economists at Large, 2017, p. 3).

This suggests that the area most weakened by the decline in cultural funding is the same sector best positioned to produce a greater diversity of new Australian cultural content and supply the highest volume of active participatory opportunities.

Culture and wellbeing

Our Residential Wellbeing Survey showed the portion of people who registered as 'unsatisfied' with their sense of community had risen from 14 per cent in 2011 to 19 per cent in 2018. Other core measures, such as satisfaction with life as a whole, and sense of future security, have generally declined over time. The survey also found the decline in satisfaction was markedly higher in specific demographics: Aboriginal and Torres Strait Islanders, those affected by socio-economic disadvantage, residents aged 16 to 29, students, and those who speak languages other than English at home.

These disparities are noteworthy as the City's Wellbeing Study suggests a correlation between cultural participation and a broader sense of wellbeing (City of Sydney, 2018).



For example, those who participated in one or more cultural activities were almost twice as likely to consider themselves ‘very satisfied’ with their life as a whole as those who did not. At the other extreme, those who didn’t take part in any cultural activities were four times more likely to register as ‘very unsatisfied.’

From this, we can see barriers to cultural participation have strong links to a lower general sense of wellbeing, but are also aligned with specific demographic cohorts.

Local cultural infrastructure for our wellbeing

A lack of available longitudinal data makes it hard to track residential wellbeing against the supply of cultural infrastructure. To address this, the City has commissioned its own research.

In 2016, we conducted a cohort study with cultural practitioners, many of whom expressed “a feeling that there had been a decrease in available and affordable spaces for rehearsal, studio work, meetings and exhibitions in the last decade or so in the inner city” (Fisher, 2016, p. 12). It was suggested that a network of local community art spaces had once provided opportunities for local creative communities to form, providing low-cost access to active creative production.

However, practitioners noted that these spaces had primarily occupied former industrial buildings in areas like Chippendale, Waterloo and Green Square. As these areas have been converted into residential apartments, the supply of socially focused, locally specific cultural infrastructure has been reduced.

Notably, the NSW Government’s *Cultural Infrastructure Plan* suggests there is unmet demand for these types of spaces. Their surveys of perceived need found 86.2 per cent of respondents listed “space to rehearse or develop an artistic practice” as important, the highest of any of the infrastructure types they considered. Second, with 85.9 per cent, was community or artist-run galleries, and in third with 84.7 per cent was “flexible space for hire to collaborate with peers”. As a result, the plan includes “access to space for community participation” as a priority (CreateNSW, 2018, p. 42).

The same phenomena appears in research undertaken in comparable cities internationally. For example, the City of Seattle drew a direct connection between rapid urban development and the loss of infrastructure favoured for cultural production. Their 2019 *Structure for Stability* report found:

Cultural spaces overwhelmingly inhabit older buildings and unreinforced masonry buildings, both of which are primary targets for demolition and redevelopment. Cultural users are historically undercapitalized and their spaces are typically located in high-displacement neighbourhoods (City of Seattle, 2019, p. 8).

Similarly, a 2014 study of Greater London noted a substantial decline in the supply of workspaces for local artists that was aligned with the loss of older industrial building stock. As industrial areas were rezoned for residential growth, the supply of available workspace declined. The study warned, “Within the next 5 years, nearly a third of artists’ studios are under threat as operators do not expect to be able to renew leasehold/rental agreements” (We Made That, 2014). The report informed the Mayor of London’s 2019 *Cultural Infrastructure Plan*, which drew attention to a “reduction in provision” of suitable space for cultural production (Greater London Authority, 2019, p. 34).

Sydney, Seattle and London face a similar situation. In effect, residential development has produced a phenomena whereby the increased demand for cultural space caused by population growth corresponds to a decreased supply of space suitable for the active production of culture.

This is something of a new conversation within cultural policy. In the past, when discussing ‘cultural infrastructure’, it was not focused on demographic trends in cultural participation, access to cultural rights, nor the kinds of buildings required for local creative communities to develop.

As our understanding of the relationship between cultural participation and overall wellbeing has improved, addressing the loss of locally specific cultural infrastructure has gained a new urgency.

Summary

In Sydney, opportunities for cultural consumption remain strong, but access to cultural production is increasingly limited by building supply and socio-economic factors, disproportionately impacting on some demographics more than others.

The decline in cultural production is more pronounced in smaller-scale, local entities and is likely related to a reduction in available, affordable and suitable production space. It is possible that this produces something of a vicious cycle. As fewer people are able to access cultural infrastructure, fewer people feel that arts and culture resonate with their experience or values and there is less support for public investment in the cultural sector.

This is alarming as there is a strong correlation between active cultural participation and wellbeing. Infrastructure to produce and participate in culture will be required to improve and sustain the wellbeing of our communities.

To deliver the kind of cultural infrastructure our communities need, we will have to connect with and provide for the cultural values held by our diverse, changing and growing communities. This will mean asking some hard questions about the inclusiveness and relevance of our current investments and approaches.

Examples of cultural spaces Sydney has lost



Blackwattle Studios.

A large former warehouse and boatshed in Glebe was used as an arts space from the 1970s. It eventually housed 110 studios which employed over 250 people. The tenants were mainly artists, artisans, designers and craftspeople. The buildings played host to events, markets and community gatherings.

The buildings were demolished in 2000 and redeveloped as residential apartments.



Lanfranchi's Memorial Discotheque.

An underground arts space operating in a former chocolate and t-shirt factory in Chippendale from 2002 – 2007.

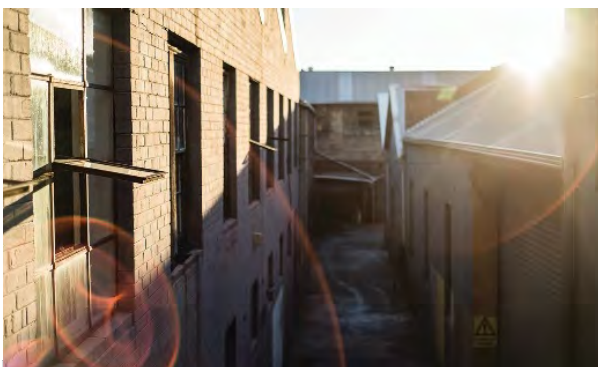
Cobbled together by a collective of artists, the space played host to cabaret, music and experimental performance, as well as some notorious parties.

The tenancy was terminated to make way for residential redevelopment however the space continues to be used as commercial offices.

Frasers Studios.

Occupying three warehouses adjacent a former brewery in Chippendale, Brand X were given temporary use of the buildings while Central Park was constructed on the neighbouring brewery site. The spaces housed multiple visual arts studios, a gallery and function space, rehearsal and performance spaces.

Operating from 2008 – 2012 the spaces provided free and low cost work space for over 20,000 artists. The buildings were redeveloped as part of the Kensington Street dining district associated with Central Park.



The Commune.

Occupying more than 4,000m² over a series of adjacent warehouses and a connecting laneway from 2012-2019, the Commune provided co-working and studio space, predominately for film and photography, as well as a community hub, exhibition hall and event spaces for hire. The site is approved for residential redevelopment.



Hudson Ballroom.

Formerly Plan B and Goodgod Small Club before that, this inner-city basement operated as a live music venue under various guises from 2010 until renovation of the heritage building into a boutique hotel forced the termination of the venue's lease in 2018.

“The loss of cultural spaces threatens the long-term prosperity of world cities, striking at the heart of what makes them unique – their rich cultural offer, their cosmopolitan mix of people, and their ability to innovate.”

– *Justine Simons OBE, Chair, World Cities Culture Forum*

The economic value of cultural space

Since the publication of Charles Landry's *The Creative City* in 1995, it has become something of a truism to talk about the role of creative industries in a modern, globalised knowledge economy. More than 20 years ago, Landry wrote:

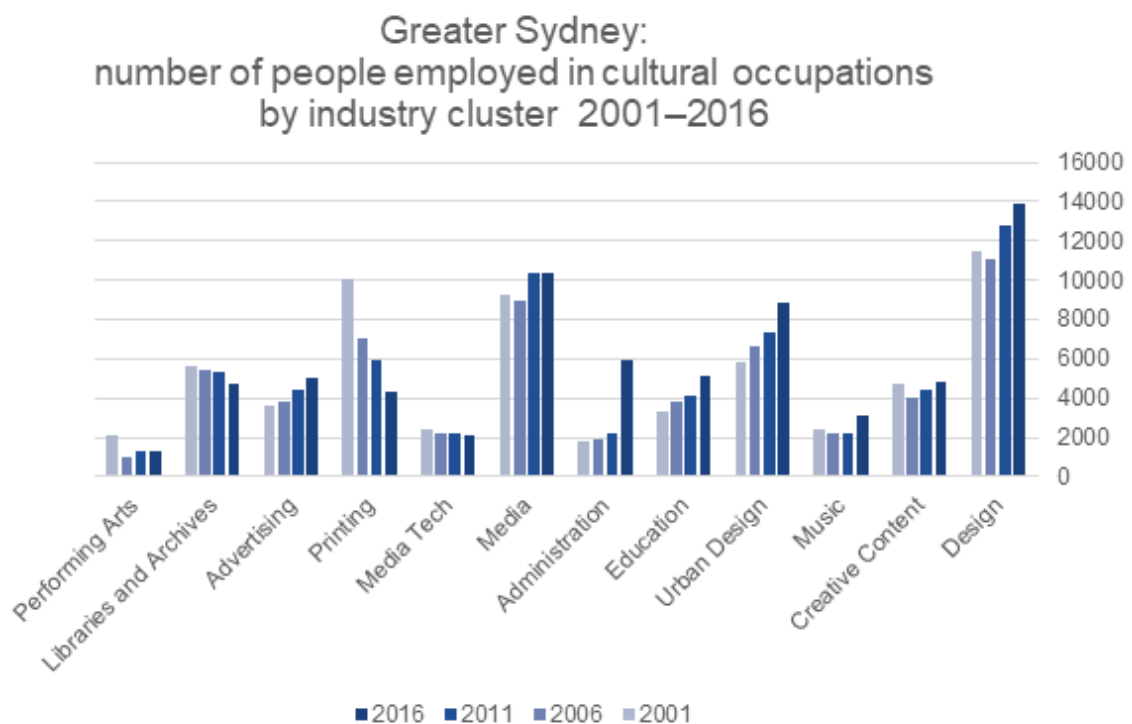
Whereas the dominant industries of the nineteenth and twentieth centuries depended on materials and industry, science and technology, the industries of the twenty-first century will depend increasingly on the generation of knowledge through creativity and innovation (Landry & Franco, 1995, p. 12).

Yet in Australia today, there is no policy on the creative industries at a federal level and Victoria is the only state with a Ministry for Creative Industries. This is despite clear evidence of the importance of the creative industries to the current and future economy, most recently outlined in the Department of Communications and the Arts' report, *Creative Skills for the Future Economy* (Bureau of Communications and Arts Research, 2019).

This is an issue of particular relevance to both the City of Sydney and the Greater Sydney area. We are home to almost a third of the nation's cultural workforce, the largest concentration in the country. Embedded into numerous other industries, they drive our capacity for innovation, adaptation and experimentation, and are a major part of our ongoing economic strength.

Sydney's creative industries

In surveying longitudinal census data, the City has found the growth of Greater Sydney's creative industries has been uneven, and punctuated by periods of stagnation. Much of our growth has been driven by the clusters of Design, Urban Design (including fields such as Architecture), Media and Advertising.



Source: Australian Bureau of Statistics.

By contrast, those clusters associated with the creation and production of new cultural products, including Music, Performing Arts and Creative Content, which includes Visual Arts and Writing, have been either static or declining.

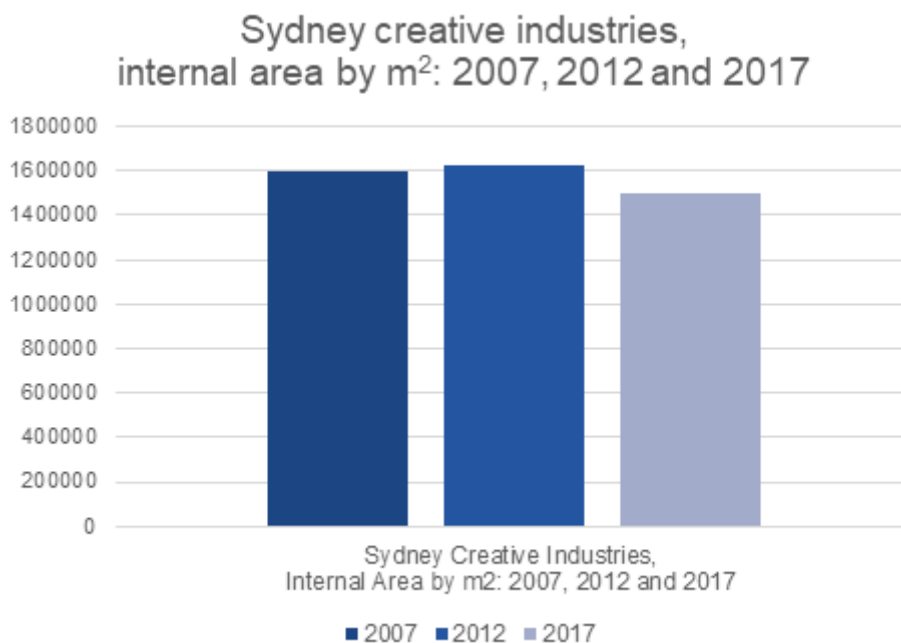
In a recent report to the NSW Department of Planning and Environment, the internationally recognised economist Professor Greg Clark considered Sydney's cultural position across a range of global indices. He noted:

Greater Sydney is a metropolitan region in evolution. There are multiple dimensions to the changes in train that suggest important roles of culture and cultural investment into the future. As many regions in this report show, culture plays a key role in helping cities and whole societies to evolve, change, accommodate growth, and retain core values as they transition into unknown futures. (Clark, Moonen, Moir, Morrissey, & Nunley, 2018, p. 7)

However, when assessed against comparable cities internationally, he argues "the Greater Sydney region performs less well in measures of cultural quality, cultural production, cultural economy and regular cultural access and attendance" (Clark, Moonen, Moir, Morrissey, & Nunley, 2018, p. 7). This aligns with the City's review of census data that found we have a strong cultural economy, but those occupation clusters engaged in the production of new creative content have not grown in line with employment or overall population increases over time.

Infrastructure for Sydney's creative industries

In considering Sydney's cultural infrastructure, it is worth reviewing the findings of the City's Floor Space and Employment Survey (FES). This was a detailed survey of all buildings within the City of Sydney local government area, gathering data on their internal area and the kinds of activity they house. Over a 10-year period, the FES found an overall reduction in the supply of space used for creative industries within the City area, a decline of more than 100,000m². (City of Sydney, 2017).



Source: City of Sydney Floor Space and Employment Survey.

The impact of this reduction in space differs significantly across industry types. As a general rule, those industries reliant on office or retail space have reduced the amount of floor space used per

worker, but job growth has continued. Those sections relying on industrial space have generally reduced in both internal area and employment.

To some degree, lower growth in fields like printing and media corresponds to the impact of digitalisation, with formerly labour-intensive industries reshaped by newer technologies. However, neither digitalisation nor the decline of manufacturing explains the overall decreases across the creative industries.

Again, this is an area where residential development has had a profound impact on the City's economic life. Many of those we spoke to raised concerns that the creative industries were perceived as entirely "clean" and highly mobile, requiring little more than a desk and a laptop. Those working in the creative industries felt strongly that this reflected a vastly simplified, faddish understanding of the infrastructure needs of their sector. As the Institute for Culture and Society's study concluded:

[T]here is a perception that empty shopfronts in the City can be used by artists or creative enterprises on a temporary basis. However, this kind of 'pop-up' space can only work for certain types of activity, such as small creative retailing. It will not be suitable for artists or creative enterprises, such as a sculptor, radio station or a music studio, which generally prefer longer-term space due to the high installation and relocation costs of equipment. (Ang, et al., 2018, p. 73)

We found creative professionals felt core parts of their supply chains have been reduced by the loss of industrial building stock. They suggested this was not an issue of industries in transition, but one of market failure. It was argued that this failure arose from a property market that undervalues essential long-term infrastructure due to price signals associated with the quicker returns of residential development.

Similarly, a recent, federally funded report, produced by a project called 'Urban Cultural Policy and the Changing Dynamics of Cultural Production' argues:

Together, creative industries and manufacturing form a significant sector of investment and employment for Sydney, while contributing to city vitality and liveability. Australian manufacturing firms are increasingly diverse, innovative, more micro-enterprises. Much of this growth in small manufacturing is tied to design, cultural and craft-based production industries... (Gibson, Grodach, Lyons, Crosby, & Brennan-Horley, 2017, p. 8)

Their report, *Made in Marrickville*, noted a mixture of smaller-scale industrial activities strongly embedded in local supply chains, servicing clients ranging from Apple, Hewlett Packard and Lamborghini to the Art Gallery of NSW, Commonwealth Bank and the ABC. They noted an assumption that such industries would move outward into the suburbs as gentrification altered the face of the inner city and its surrounds. However, the researchers found no evidence of this, concluding:

This assertion overlooks the evolving and dynamic nature of the urban manufacturing/creative industries interface, as well as its actual needs. Many enterprises indicated that, should suitable space no longer be available locally, they will either cease trading or leave Sydney altogether. This would constitute a significant loss of enterprise, jobs, industry experience, and talent, unlikely to be offset by projected temporary job creation in construction, and casual work in retail. (Gibson, Grodach, Lyons, Crosby, & Brennan-Horley, 2017, p. 10)

The Institute for Culture and Society drew the same conclusion, writing:

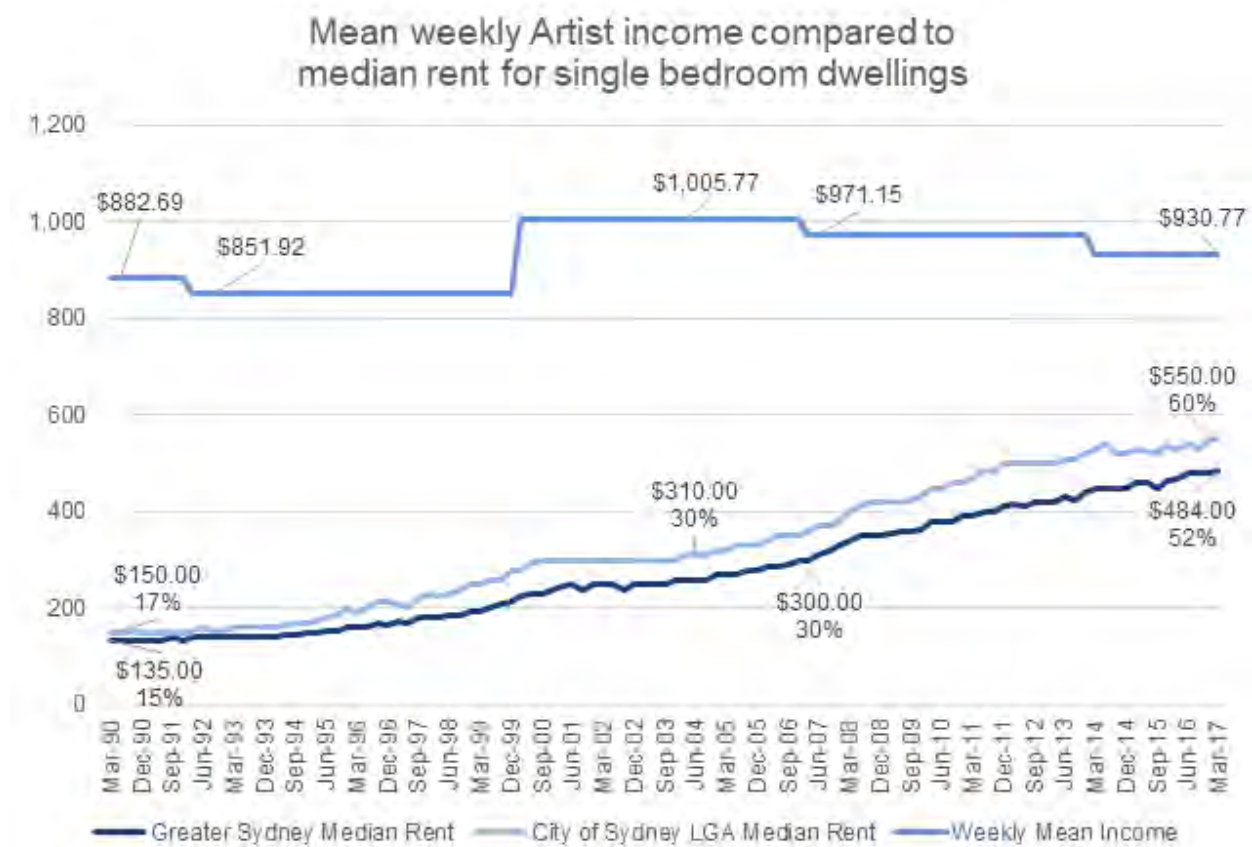
There is a common assumption that the lack of affordable and suitable creative space in inner Sydney can, to some degree, be mitigated by the compensatory availability of such spaces in the broader

metropolitan area, such as Western Sydney. This is something of a misconception. (Ang, et al., 2018, p. 78)

They note such space is neither as widely available as commonly supposed, nor within the price range of smaller creative enterprises. Both studies suggest the driver for declining space has not come from waning industry demand, but from the loss of suitable buildings brought about by increased residential development, and sharply rising property costs.

The workforce

In many of our forums, the City encountered the suggestion that the high cost of housing had inhibited workforce growth and retention. The City tested this perception by reviewing longitudinal median rent in the City of Sydney and Greater Sydney areas to estimate artist incomes collated by Macquarie University's Professor David Throsby.



This data suggests rental costs increased by more than 250 per cent over a 30-year period, while artist income grew only 5 per cent, lower than the rate of inflation. Assuming housing stress occurs when rental costs consume more than a third of income, the City of Sydney and the Greater Sydney region became unaffordable to artists between 2004 and 2007.

It is difficult to assess how these trends play out across the cultural workforce more generally due to a lack of readily available and consistent data. However, Queensland University of Technology's most recent fact sheet on the creative economy noted lower wage growth across the cultural sector, including those employed primarily in cultural professions, as well as those in creative roles within the wider workforce:

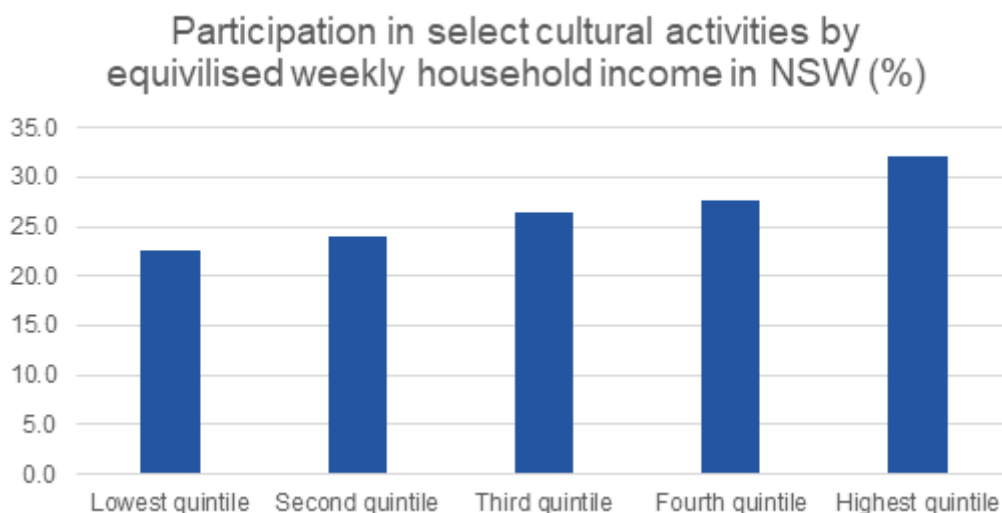
Between 2011 and 2016, the real rate of growth (adjusted for inflation) was lower for both all employment in creative industries and specialist employment in creative occupations, at 0.6 and 0.5 per cent per annum respectively, than for the total Australian workforce at 0.8 per cent (Digital Media Research Centre, 2018).

Again, it is hard to apply these trends across the wider creative industries workforce due to a lack of data. However, qualitative research undertaken by George Morgan and Julian Wood has drawn attention to the relationship between rising costs of living, stagnant wage growth in many creative professions, and decreased diversity within the cultural sector:

Creative workers usually have to find ways of cross-subsidising their primary careers (family support, day jobs, etc.) and especially while they are seeking to establish themselves. Those from disadvantaged backgrounds are rarely able to ‘tread water’ for too long and many reframe their ambitions towards less precarious fields (Morgan & Wood, 2013, p. 68).

Morgan and Wood’s research argues this is felt particularly acutely during the early phases of a creative career, when income is generally lower and employment less stable. They argue that, without family or other sources of financial backing, pursuing a career in the cultural sector is often untenable.

This corresponds to the City’s review of data from the Australian Bureau of Statistic’s Multipurpose Household Survey, which suggests a strong correlation between household income and active cultural participation. In simple terms, the wealthier one’s household, the more likely one is to actively participate in cultural activity.



Source: Australian Bureau of Statistics Participation in Select Cultural Activities, 2013–2014.

This suggests there has been a shaping of the cultural workforce along socio-economic lines. This is a subject of significant concern which has not often been considered within cultural policy. It has implications regarding socio-economic barriers to the production of Australian culture, as well as the degree to which our creative industries are underpinned by the necessary depth of skill and talent to compete in a global economy.

The workspace

A 2013 study, produced by SGS and the Creative Industries Innovation Centre, reviewed the industries employing the largest number of creative workers. They found manufacturing held the greatest share, with some 14.35 per cent of the total. By contrast, Arts and Recreation Services, the area most commonly considered a ‘cultural’ field, employed 2.5 per cent (SGS Economics and Planning, 2013, p. 41). The same report noted the creative industries generated more than \$90 billion across the broader economy, spurring innovation and supplying unique skills across a range of other industries.

Yet the spatial needs of this sector have been largely absent from discussions of Sydney's growth. The City's work with Left Bank Co. and JOC Consulting heard from smaller and independent creative enterprises who noted policy definitions of 'culture' were often out of date with contemporary cultural work, did not adequately incorporate the commercial sector, and focused primarily on the delivery of events and the management of institutions. As JOC's summary report noted:

The term 'culture' has often been used synonymously with 'the arts', connecting a typology of art forms and infrastructure types associated with a particular social and historical tradition. Changes in demographics, social expectations, and the growth of the Creative Industries have altered how we think about 'culture' but this has not always been reflected within relevant policy frameworks. (JOC and Left Bank Co, 2019, p. 3)

We can see cultural workers and the creative industries have been a longstanding part of Sydney's growth and economic resilience, but an unintended consequence of that growth has been the loss of core parts of our creative industries supply chain. Our policy frameworks have largely failed to recognize this as their remit has been too narrow.

This is an issue with pressing economic implications. In his report for the NSW Government, Greg Clark asserted:

The creative and cultural industry contributes to the diversification and resilience of the economy as the industry is accessible to people with varying skill and qualification levels. Across Europe, for example, regions with a higher share of cultural and creative occupations were more resilient to the economic downturn since 2008 (Clark, Moonen, Moir, Morrissey, & Nunley, 2018, p. 19)

Sydney's creative economy currently enjoys a very strong economic position, but this is not something we can take for granted. As our city continues to grow, to maintain our strong creative industries into the future, it will be necessary to ensure an adequate supply of workspace and cost-of-living conditions favourable to cultural workers.

Summary

Sydney has historically been the centre of the creative industries in Australia, and the creative and cultural sector has played an important role in our city's sustained growth and economic vitality.

However, a decline in industrial space in the inner city is leading to a narrower mix of creative industries operating in Sydney. This has impacts across the entire supply chain for the cultural sector and the broader economy.

There is no evidence that the loss of affordable industrial space in the inner city is being offset by space further outside the City area, such as the Inner West or outer suburbs. Businesses and workers do not appear to be relocating. It is more likely they are either shutting down or moving interstate.

Beyond the issue of workspace, housing in Sydney is not affordable for the average cultural sector worker. In this respect, we are at a competitive disadvantage, losing both the supply of skilled workers and the supply of workspace. Both of these factors act as a disincentive to the creative industries and the knowledge economy investing in New South Wales.

Culture is key to what makes cities attractive, creative and sustainable. History shows that culture is at the heart of urban development, evidenced through cultural landmarks, heritage and traditions. Without culture, cities as vibrant life-spaces do not exist; they are merely concrete and steel constructions, prone to social degradation and fracture. It is culture that makes the difference.

– *Culture Urban Future*, UNESCO, 2016.

Part Two: Identifying solutions

Learning from international experience

The challenges Sydney faces are not unique. Over the past two decades, cities all over the world have undergone a period of profound change. Factors such as economic globalisation and technological innovation have had immense social and economic ramifications. Industrial areas once considered inherent to a developed city have largely disappeared, disrupting longstanding inner city communities.

On top of this, changes in finance markets have altered the valuation of property, with flow-on impacts on housing costs. The rise of the knowledge economy has aligned with population growth in major urban centres, while many smaller cities and towns have languished.

There have been many positive outcomes from these changes. Our cities have become more multicultural, more productive, and better positioned to foster the intelligence that will guide us into the future.

However, the negative impacts are equally striking: disparities in economic and social capital, gentrification, a declining sense of wellbeing and a loss of cultural cohesion.

UNESCO's *Culture Urban Future* report provides guiding principles on developing urban policies to manage the cultural impact of major change. The report notes:

Culture is key to what makes cities attractive, creative and sustainable. History shows that culture is at the heart of urban development, evidenced through cultural landmarks, heritage and traditions. Without culture, cities as vibrant life-spaces do not exist; they are merely concrete and steel constructions, prone to social degradation and fracture. It is culture that makes the difference ... Cultural expressions give people the opportunity to identify themselves collectively (UNESCO, 2016, p. 17).

However, knowing these problems exist in other cities does not necessarily help us respond. Even when multiple demographic and economic similarities exist, patterns of land ownership, property prices, financial systems and governance structures vary wildly between places.

Failure to understand these differences can produce flawed strategies and failed projects. In 2010, Bas van Heur of the Brussels Centre for Urban Studies drew attention to a phenomena he called 'fast policy transfer', or the assumption that urban policies on the cultural and creative sector could be easily transferred from one place to another. He argued such an approach oversimplifies the locally specific nature of 'culture':

[A]uthorities, generally under pressure of urban development and growth, and inspired by success stories, tend to minimise the importance of the basic nature of creativity and the cultural historical assets of their cities... (Inteli, 2011, p. 48)

This doesn't mean city governments need to invent solutions from scratch. There is much to be learned by considering how different policies have responded to comparable problems, provided we remain aware of the things that make our cities unique.

To achieve this, we need to progress beyond overarching principles and consider specific policies operable at the local government level. It is for this reason the City of Sydney joined city governments internationally to establish the World Cities Culture Forum. Extending from UNESCO's work, our intention is to establish workable policies to ensure the growth of our cities enhances their cultural fabric.

In addition to this, the City has hosted forums and sought partnerships with other local governments in New South Wales and Australia, through which we are working to form policies specific to the Australian context. The following are the broad directions we have identified.

Shifting the policy dial

In consultation with local governments across New South Wales, there is a strong sense that our existing policy approaches – focused mostly on project funding for arts events and activities – are too limited in scope to deliver on the cultural values of our communities. It is acknowledged that we need to shift the policy dial.

Fortunately, there are already some established international models for helping us do this.

The World Cities Culture Forum has published revised policy levers for increasing access to cultural space and participation, outlining the following three areas for action:

1. Funding and finance

While traditional funding programs, such as operational grants to cultural organisations, will remain important, other levers, such as tax incentives, capital loan guarantees, property tax and organisational structures which facilitate sustainable resourcing for creative spaces, are becoming increasingly important.

2. Planning and policy

The World Cities Cultural Forum has found it will be necessary to pursue far greater integration between cultural policy and urban planning frameworks. This will require improved mapping of cultural assets, regulatory protections for creative employment areas, and streamlining of the time and cost associated with approvals for small creative enterprises.

3. Space development and provision

While there are already a number of city governments providing subsidised access to space, there has been growing interest in initiatives like social purpose real estate entities, the facilitation of development partnerships, and embedding cultural facilities in the heart of major regeneration projects.

Based on the learnings from the World Cities Cultural Forum, it is worth considering how city governments have pursued these directives in new and innovative ways, and what they tell us about options for our own city.

Funding and finance

By far the most common mechanism to support a city's cultural life is grant funding programs, usually focused on operational funding for arts organisations and, to a lesser degree, artists. There is also an established tradition of major public investment in the provision of infrastructure and cultural collections such as museums, libraries, galleries and the like.

The City of Sydney has been highly active in this sphere. The City's Grants program awarded \$4.5 million in cultural grants in the 2018/19 financial year, plus a further \$1.7 million as in-kind support.

When we launched our *Creative City* cultural policy in 2014, our grants programs were directed primarily to not-for-profit groups and cultural events, especially festivals and events. The City has since broadened its funding to support for-profit ventures, allocating funding to venues seeking to increase their offering of music and performance opportunities, and supporting industry-led research and development projects.

This increased remit is being found in local governments across Australia. As cultural funding at other levels of government has shifted, the onus on local governments has increased. For example, the Australia Council, the major national arts funding body, faced substantial funding reductions in 2015. Most of these cuts impacted on small to medium arts organisations and individual creative practitioners, many of whom subsequently turned to state and local government for support.

In response, over the last decade local government per capita cultural spending has increased by 11 per cent, in contrast to 3.9 per cent at the state government level, and a decrease of 18.9 per cent in federal investment (A New Approach, 2019, p. 32).

Like many cities internationally, the effectiveness of our funding programs has been further impacted by the scale of urban change. For example, rising property costs have reduced the effectiveness of organisational funding to small arts organisations as larger parts of their overall budgets are redirected into rent or leasing costs.

As a result, there is a need to consider how cultural funding responds to diverse and changing populations, as well as to seek out financial resources commensurate to the size of the problem.

Public investment in cultural diversity

There are examples of alternate approaches in comparable policy environments in other parts of the world. For instance, the Warwick Commission's review of UK funding has outlined the positive impact of changes to human resources and content development spending among publicly funded organisations. They draw attention to major cultural organisations, such as the BBC, "ring-fencing production budgets to incentivise diversity and representation in the creation and content of work", and funding systems which make "public investment dependent on diversity" (Warwick Commission, 2015, p. 38).

In effect, greater access to cultural participation has been achieved through methods such as organisational hiring and procurement. This has been achieved by placing an onus on publicly funded organisations to ensure their management and content creation reflects the demographic diversity of the populations they serve.

Similarly, New York's *Create NYC* cultural plan mandates "action-oriented diversity, equity, and inclusion plans with measurable goals" for all organisations operating in City-owned property and in receipt of operational support (City of New York, 2017).

It is worth considering how this approach might play out in Greater Sydney and across Australia more generally. Noting Diversity Arts Australia's survey on the homogeneous nature of

management in the Australian Arts sector, linking funding outcomes to demographic representation is one option to ensure public funding connects to public value.

However, increasing the diversity of decision-makers within existing organisations does not, on its own, address the pressures placed on funding bodies by growing populations. For this, we need to consider methods to better assert the value of culture within both the public and private sectors.

Tax and investment incentives

To this end, the Warwick Commission identified various alternate methods for securing resources. For example, in the UK it is possible for cultural and creative enterprises to leverage investment through the national government's Enterprise Investment Scheme and the Seed Enterprise Investment Scheme. These two initiatives offer tax rebates to those investing in cultural ventures, including emerging and start-up enterprises. This is comparable to the existing tax concessions in Australia associated with 'Deductible Gift Recipient' status, but not limited to non-profit and 'charitable' ends.

The commission also notes the use of collective investment schemes, such as venture capital (VC) trusts and bonds. For example, in Finland the IPR.VC is a venture capital trust focused on "investing in European filmed entertainment – TV, film, and interactive content – a sector with little exposure to VC funds due to its specialised nature" (IPR.VC, 2019). Rather than trying to attract investment to a single production, it raises capital for the entire industry, creating returns through long-term royalty and intellectual property payments. In this way, it has moved beyond seeking tenuous and high-risk start-up capital and draws its investment from much more stable sources, such as superannuation funds.

Similarly, in 2018 the City of Austin approved a bonds proposition to secure investment into acquisitions of, and improvements to, creative spaces. The proposition called for the formation of a US\$12 million bond program to "create long-term city assets that can be used over many decades for creative spaces" (City of Austin, 2018). In return for long-term, reliable returns, such mechanisms can secure finances from investors outside the public sector, while delivering services focused on the public good.

The Canadian not-for-profit Toronto Artscape Foundation has been using these sorts of tools to deliver affordable housing and workspaces for cultural workers over the past 30 years. They are currently making use of the Creative Co-location Facilities property tax subclass, a by-law passed by the City of Toronto in February 2018. This exempts qualifying creative enterprises from paying commercial tax rates on City-owned properties or on spaces with 40 or more tenants. Instead, the rate is reduced to 50 per cent for creative tenants, making a welcome contribution towards the reduction of annual recurring costs.



SPACE runs 20 affordable arts studio buildings across seven London boroughs, consisting of 22,500 square meters of creative workspace hosting 800 artists and creative micro-businesses. SPACE is a social enterprise and registered charity, allowing for income earned through sub-letting space to be supplemented by philanthropic investment.



Artscape Triangle, a former factory that was home to a number of artists whose live/work spaces were not legally zoned. Artscape's redevelopment of the site allowed for 48 live/work studios to be purchased through an affordable ownership program.

Artscape also uses a rebate program which offers proportional tax reductions over 10 years, i.e. 90 per cent for the first year, 80 per cent for the second, 70 per cent for the third, etc. The tax subclass also sustains affordable space for arts and culture by incentivising Below Average Market Rent (BAMR). Each property must charge below average market rent to creative enterprise tenants to be considered eligible.

The applicability of such models to Australia, or Sydney specifically, is hard to assess. City governments do not have control over tax systems in Australia, and growing demand for services makes it less feasible to reduce commercial and residential council rates.

However, internationally, many of these initiatives have been driven by agencies outside of the public sector, often acting as not-for-profit or social enterprises. City governments in Australia may be better positioned to help these sorts of organisations, adding weight to help them attract investment, or backing advocacy for tax reform at the state or federal level.

Land trusts

Comparable to Artscape, the Community Arts Stabilization Trust (CAST) was established in San Francisco in 2013, with a US\$5 million seed fund provided by the Kenneth Rainin Foundation. Using this initial investment, they were able to acquire buildings within the San Francisco area and work in partnership with local cultural organisations to transfer ownership to them over time. CAST simultaneously works to improve the capacity of small, local creative groups to attract the resources required to buy, maintain and manage appropriate buildings.

CAST's structure has allowed it to leverage tax offsets through the US Department of Treasury's New Market Tax Credit scheme, which provides incentives for investment in low-income communities. It has also aligned with the Northern California Community Loan Fund. In effect, CAST's structure has enabled it to draw fixed assets out of an overheated property market, provide resources for upgrades and renovations through tax incentives, and leverage public funding to support local cultural enterprises to purchase property in the longer term.

While CAST began with a philanthropic donation, a similar model has been initiated by the Mayor of London, focused on artists' studios and workspaces. London's Creative Land Trust was established in 2018 with public funds to purchase properties in the Greater London area, take receipt of



The Luggage Store, a long running artists run space in central San Francisco was purchased by CAST, continued as an arts space, and protected from redevelopment.

properties transferred by public or private partners, and work with existing providers of artists' studios on the joint purchase of buildings and land.

Both CAST and the Creative Land Trust are based on a pre-existing model of community land trusts, a community-led development model set up to develop and manage housing as well as other assets.

In the UK, this model has been widely used through members of the National Community Land Trust network, started in 2010. In the US, the same model has a longer history, originating during the Civil Rights Movement. In Australia, the model is far less common, and has had much less success. A 2017 study by Ernst and Young, commissioned by the Australian Government, found one of the major reasons for this disparity was the absence of suitable finance sources, particularly capital bonds:

Internationally, Community Housing Providers (CHPs) are able to access long term finance via capital markets. In Australia, the Community Housing sector has yet to access this capital source, instead relying on shorter term bank debt (typically 3–5 years). Longer term capital markets finance can lower interest costs and better match the sector's asset life – a core principle of good corporate finance practice – and can therefore make a meaningful contribution to the Australian sector's growth in scale and sophistication (EY, 2017, p. 8).

Creating an appropriately controlled market for capital bonds in Australia would, it is suggested, require a bond aggregator, a function now undertaken by the National Housing Finance and Investment Corporation, which can issue social bonds in alignment with criteria associated with the UN Sustainable Development Goals (SDGs) (National Housing Bond Aggregator, 2019)

Ostensibly, a comparable approach could be adapted for cultural infrastructure, providing space for creative activity in new developments, and securing the tenure of existing spaces.

Summary

It is unlikely that any one of these approaches can be adopted 'as is' from overseas. Leveraging the resources required to secure cultural space requires us to consider how existing funding systems, such as grants, align with tax incentives, industry investment, and organisations such as trusts which are capable of holding assets and working across the public and private sectors.

It is probably some combination of these factors that can be employed in Sydney, although only if cross-governmental support is assured and suitably skilled social enterprises or not-for-profit agencies are identified.

Planning and culture

Land use planning incorporates a mixture of strategic planning for future jobs and population growth, the granting and enforcement of consents associated with new and existing sites, and regulatory functions, such as environmental health and building compliance. It is a dense and complex field which can differ radically across local, state and national boundaries.

Many other policy areas, such as health, education and transport, have specialist planners, who determine the necessary supply of hospitals, schools and roads associated with growing populations. This is not true of the cultural sector.

The World Cities Culture Forum cites land use planning as essential to the provision of cultural infrastructure, yet it found the two policy areas are frequently disconnected:

Departments within city governments – including culture, urban planning and economic development – often set priorities, policies and investment independently of each other (World Cities Culture Forum, 2019, p. 40).

This disconnect is one of the core problems driving discussions around cultural infrastructure. It is one area most obviously impacted by the conflation of ‘culture’ with specific art forms and institutions. Many of the issues facing the broader cultural sector have been simply invisible because they have fallen outside the remit of any public policy framework.

There are models from other areas which suggest how we might plan for culture in the future, and a growing number of examples through which planning levers have been used to facilitate cultural benefits.

Planning and regulation for cultural space

In recent years, there has been a great deal of discussion on the impact of land use planning and the regulation of spaces such as live music and performance venues. Often this has been provoked by new residential development and the increased potential for impacts on amenity, such as noise.

Similarly, rising rental prices and a reduced supply of suitable buildings has driven many community and artist-run spaces to adopt innovative business models which do not readily conform to existing planning frameworks. The use of older industrial buildings often proves extremely expensive when they are assessed against contemporary building, disability access and fire safety standards.

In New South Wales, these issues have been brought to a head by alterations to liquor licensing law and the subsequent closure of a number of music venues. However, it is not a problem we face alone. For example, Greater London has released figures to the effect that the city has lost 35 per cent of its grassroots music venues due to a mix of liquor licensing, property prices and noise complaints.

There have been various attempts to alter the regulatory environment to address the loss of cultural spaces: the adoption of ‘Agent of Change’ or ‘Order of Occupancy’ principles, streamlined regulation for creative enterprises, specialist planning staff, funding for advocacy bodies, and the appointment of representatives to liaise between cultural industries and government stakeholders.

Unfortunately, the effectiveness of these measures is difficult to track due to the lack of longitudinal data. Within the World Cities Culture Forum, the City of Sydney’s work has been identified as a frontrunner in this area, although local government in Australia generally has fewer regulatory powers than comparable city governments internationally.

In our 2015 *New Ideas for Old Buildings* discussion paper, the City released research showing the costs of turning an old warehouse into a community theatre were in excess of \$160,000. In one example from Victoria, a pub with a long history of hosting live music was required to undertake \$200,000 in upgrades due to a mixture of noise complaints and liquor licensing requirements.

The City's 2017 *An Open and Creative City* discussion paper proposed regulatory mechanisms for responding to many of these issues. However, our research shows further progress is complicated by two factors.

Firstly, there is no clear and consistent evidence base, making it hard to form a common understanding of the problem, or how planning policies might be altered to address it. Secondly, the pace of development has reduced the supply of suitable buildings. While better regulatory mechanisms are still necessary, land use planning can support new spaces for culture by providing clearer regulatory pathways and guidance.

For example, the City's new Local Strategic Planning Statement integrates culture into the land use planning framework. It establishes planning priorities for a "creative and socially connected city" and "developing diverse business clusters", describing how creative industry and cultural hubs, infrastructure and regulatory reforms will support and develop the city's cultural life. The planning statement will guide future changes to the City's land use planning framework, thereby embedding the consideration of culture into land use planning.

Development and infrastructure funding

Planning systems in other parts of the world have mechanisms for collecting contributions from development to fund the infrastructure needed for new and growing communities. These mechanisms can be used to fund and deliver cultural infrastructure.

For example, Section 106 of the UK's Town and Country Planning Act has been used to facilitate the delivery of new cultural infrastructure into major urban redevelopment programs. It does this by requiring developers to provide resources to local government based on the scale and impact of their developments. These resources might include either in-kind or financial contributions, one-off or phased payments, or payments for the maintenance of community assets. In some cases, local governments may pool contributions across multiple developments to deliver community infrastructure across a wider geographic area.

A similar provision exists under Section 37 of Ontario's Planning Act, and has been used successfully to deliver infrastructure such as affordable housing for cultural workers. The provisions of Section 37 are triggered when a development exceeds a site's zoned density and height limit, with developers making contributions as in-kind floor space and facilities or as 'cash-in-lieu', either as a single contribution towards a community benefit or pooled for future use for a major investment. Funds are to be used within the immediate ward of the development, rather than city-wide.

An example of this in practice was the Weston Community Cultural Hub in Toronto, built with Section 37 in-kind contributions from the developer Rockport Group as part of a larger development project in the area. In this instance, Artscape worked with Rockport and local government, taking on management and ownership of both the cultural hub and 26 affordable live/work units for cultural workers.



Weston Common, a community hub and live/work units, is being built with pooled developer contributions.

Making Space for Culture in Sydney

To maximize the initial capital, the Section 37 contribution was pooled with funds from across the wider development. In addition, the City allowed revenues, fees and charges normally payable by the developer to be retained to fund the construction of the community/cultural hub and live/work units on behalf of Artscape. The Investment in Affordable Housing for Ontario program (IAH) was also used to support the development of the live/work units.



Daniels Spectrum is a non-profit joint venture between subsidiary corporations of Toronto Community Housing, The Daniels Corporation and Artscape.

Artscape holds a 50-year lease to operate the facility as a mix of below market rate workspace, galleries and performance venues.

Comparable systems do exist in New South Wales. They can be used for a range of infrastructure including community facilities, roads and open space, as well as cultural infrastructure. Planning agreements are used in New South Wales to secure public benefits associated with a development or changes to planning controls, and development contributions are commonly leveraged from new developments.

However, there are notable limitations. Planning agreements are voluntary and rely on a proponent making a public benefit offer that is aligned with a council's needs. Development contributions must be spent in the provision of infrastructure associated with the development from which it has been drawn, and their scale is capped by NSW legislation.

In both cases, the high demand for space and the stringent nature of the planning process require a clear evidence base upon which to base decisions. This is common when considering the use of development contributions in delivering transport or social infrastructure. The delivery of cultural infrastructure is more complicated as a comparable evidence base has not been produced or implemented in a consistent manner.

Delivering cultural infrastructure through planning agreements could be assisted by identifying cultural infrastructure priorities and developing a clearer evidence base on the needs and types of space our communities require.



The Western Front is one of Vancouver's oldest artist run spaces, founded in 1973. In 2016 the City of Vancouver granted the organisation \$1.5m to purchase the building. The grant was part of \$4.5m fund to "secure, enhance or expand existing artist production spaces" derived from Community Amenity Contributions (Developer Contributions) from a nearby condominium development.

Planning for cultural wellbeing

As noted above, the link between land use planning and cultural policy is hindered by the lack of clear measures of community need, economic benefit, or maps of existing cultural assets.

There have been varying attempts to establish such measures internationally. Central to this has been UNESCO's 2009 *Framework for Cultural Statistics*, which provides a data standard for measuring employment across the cultural sector. This approach was influenced by the *Creative Industries Mapping Documents*, developed by the UK's Department of Culture, Media and Sport in 1998. These have been used to help understand issues such as the geographic spread of creative industries employment, and changes over time. The City uses this approach in its Floor Space and Employment Survey.

There are also examples of planning policies that list 'cultural wellbeing' as one of their objectives. For example, the UK's National Planning Policy Framework lists it as an objective of sustainable development within the National Planning Policy (Ministry of Housing, Communities and Local Government, 2019, p. 5). Closer to home, New Zealand's Ministry for Culture and Heritage has developed cultural wellbeing measures for local government. (Ministry for Culture and Heritage, 2019)

In an effort to understand the location of cultural sites, the Mayor of London has released a Cultural Infrastructure Map, tracking a broader array of civic and community facilities, and building on earlier attempts to map artist workspaces. In many ways, this is comparable to the work the City of Sydney has undertaken through its Floor Space and Employment Survey and the cultural mapping project undertaken by Western Sydney University's Institute for Culture and Society.

These sorts of measures have a two-fold impact. Firstly, they give us vital information on the forms of cultural activity evident within a particular area. Secondly, they provide transparency in how the word 'culture' is being defined, and how decisions are being made about it.

Summary

There is ample room to improve the connection between cultural policy and land use planning. The City has devoted substantial resources to this area, and our consultation with other local governments has found enthusiasm for doing so is widespread.

However, to do so, we will need to improve the quality and reliability of data associated with cultural wellbeing, the community need for cultural infrastructure and the broader economic requirements of the creative industries. While the City of Sydney has produced significant research in this area, a broader evidence base will be essential to improved policy integration.

Space development and provision

Financing, regulatory and land use planning mechanisms can provide a supportive environment for cultural spaces and activities. However, developing and operating the physical spaces requires highly skilled organisations to be able to connect creative communities, funding sources, public and private stakeholders, and the property sector.

As noted, the best international examples of such organisations are usually not-for-profit or social enterprises. These sorts of organisations are better positioned to work across the divisions between the public and private sectors, pool resources from multiple sources, adapt quickly, and pursue innovative responses to the changing nature of our cities.

However, this does not mean governments or private sector stakeholders can shirk responsibility. The risk associated with securing, developing and managing space is significant, and cannot be devolved entirely to the not-for-profit sector. Accruing the necessary mix of skills, resources and opportunities to increase the supply of cultural infrastructure is, in the majority of cases, a group effort.

The World Cities Culture Forum identifies a variety of approaches adopted by city governments internationally, as described below.

The use of city-owned buildings and facilities

Some city governments with large building portfolios have used them to provide space for cultural enterprise. In some cases, those spaces have been run by government agencies and, in others, they are leased at below market rate to a range of creative enterprises.

This latter approach has been the City of Sydney's primary avenue of support for the cultural sector. We supply 54 subsidised spaces, and a further 7 live/work spaces for creative workers through our Accommodation Grants and Creative Spaces programs. A recent audit of these programs found the City provided more than 10,000 m² of affordable workspace, hosting 140 micro businesses and 170 full-time and 250 part-time creative workers.

These programs have housed a number of small, locally specific creative enterprises, including some of the City's last small galleries such as Firstdraft and the 4A Centre for Contemporary Asian Art, multipurpose spaces such as 107 Projects, more established entities such as the Australian Design Centre, and numerous office spaces and shopfronts.

In 2018, a review undertaken by the University of Tasmania found our creative spaces programs had a 1.4:1 return to investment to the New South Wales economy, and a 17:1 return on the City's investment, facilitating innovative new cultural enterprise and addressing a market failure within our creative industries supply chain brought about by unaffordable property costs. (Carter & Muller, 2018)

The report concluded that many smaller enterprises supported through our creative spaces programs would not otherwise exist due to the restrictive costs of rent, a lack of suitable space, and the cost and complexity of regulatory barriers associated with planning approval.



The City of Sydney repurposed former nurse's accommodation on the site of South Sydney Hospital to make the Joynton Avenue Creative Centre which now houses multiple local arts organisations

However, the City's provision of space has its limits. The City's Creative Spaces database had 1,959 subscribers, substantially more than the supply of space available. We provide more than 10,000m² of cultural space, yet the loss of creative floor space in the City of Sydney between 2012 and 2017 was over 100,000m² (City of Sydney, 2017).

In this light, while the provision of space is a useful way of supporting small and low-profit enterprises, it is not enough to meet demand in a large and growing city, and other avenues must be pursued.

Studio providers and social purpose real estate

The organisations which are most effectively responding to the need for cultural space primarily operate outside the government sector. Some of these are very well established, and have been achieving impressive results for many years.

Australia has seen some successful partnerships between property owners and the cultural sector, such as the Renew Newcastle model and Brand X's activations of commercial and industrial space earmarked for redevelopment. In these cases, underutilised property is provided temporarily to cultural activation while areas undergo renewal. These projects have contributed short-term benefits to the sector but are often impacted by the slow pace of building and planning approvals and do not work for creative enterprises requiring specific infrastructure or medium- and long-term stability.

For lasting impact, it will be necessary to progress local projects beyond the temporary. As an example, the US-based Artspace has been operating since the late 1970s. Starting as an advocacy organisation, it shifted to become a developer in the 1980s, purchasing and developing land across the United States to provide more than 2,000 affordable live/work spaces.

The World Cities Culture Forum has a relationship with a comparable organisation, Toronto-based Artscape, whose development projects were discussed above. Established in 1986, the organisation grew from providing and managing leased artist studio spaces to becoming a landlord in its own right and, over the past 10 years, has formed partnerships with developers to secure ownership of purpose-built cultural facilities and affordable housing projects.



Youngplace represents a shared ownership model that leveraged multiple funding options without public subsidy

Developed and operated by Artscape, Youngplace is a commercial condominium in the West Queen West neighbourhood of Toronto. The site is an adaptive re-use of the former Shaw Street School, and consists of artists' studios and spaces for community organisations, under the terms of full ownership or short- to long-term leases. The project represents the delivery of a shared ownership model that leveraged multiple funding options, and ultimately enabled affordability in perpetuity with little to no public subsidy.

The total project cost was C\$19 million (A\$20.14 million), a portion of which was an equity contribution from artist studio

purchasers, with the rest funded through diverse sources of capital, including impact investment, mortgage financing, government support and philanthropic contributions.

To assist in securing finance for the development costs, the City of Toronto became a guarantor for the capital of a loan of C\$5.8 million (A\$6.15 million). This was a security requirement of the lender in order to approve the loan. Public assistance was also granted through the building's

purchase at below market rate from the Toronto District School Board and the Toronto Lands Corporation.

Looking to the ongoing ownership and affordability of Youngplace, the site has been established as a non-residential condominium corporation with 20 owners in total, i.e. 19 unit purchasers and Artscape (holding a majority share of 75 per cent). Units were sold to qualified applicants at below market rates, with a no-interest, no-payment second mortgage held by Artscape. To create a closed-loop and perpetually affordable model, the resale of units is administered by Artscape at a below market rate, and units are only sold to other artists and not-for-profit arts or community organisations.

It is important to note that the site's ownership model functions separately to the operational model. An affiliated entity, Artscape Youngplace, upholds the site's ongoing operations and vision, while Artscape itself remains the property owner. Operating costs are predominantly serviced by studio rental (at 50 per cent of the market rate) and event business revenue.

With the capital project completed, the site runs on a self-sustaining cost-recovery model with no ongoing public operating subsidy. So, in this respect, the role of the city government was in the initial start-up phases of the project. Once the project was developed, the entity managing its operations made use of more traditional grants and funding opportunities.

The City of Seattle has explored a comparable model in which government plays a more active role. They have considered the formation of a 'public development authority' (PDA), 'a quasi-governmental independent organization' with the authority to issue bonds and undertake real estate transactions. In this model, an entity is established with the capacity to operate as a not-for-profit, subsidiary, limited-liability corporation to own specific properties.



Pike Place Market is a nine acre district in Seattle housing the local farmers and artisan markets, low income housing and several social and community services. The district is preserved through a Public Development Authority (PDA). Under Washington state law, a PDA is a non-profit trust established by the City to hold and operate land and property for community benefit. The City of Seattle is exploring a similar approach to preserving creative spaces.

Comparable to Sydney, Seattle has a 'hot' property market, in which rapid growth has undermined a long-term urban planning strategy. As the City of Seattle noted, "preserving affordable cultural space in this context requires a market to act against its own short-term interests and to instead invest in long-term strategies" (City of Seattle, 2019, p. 9).

In Seattle, a PDA has the power under state law to receive public funds, such as revenues from City levies and grants, accept tax-deductible donations, and benefit from ongoing business ventures such as property leasing, but also issue tax-exempt bonds to secure wider investment (City of Seattle, 2019, p. 28).

However, the state laws which allow city governments to form not-for-profit development entities in Seattle do not easily transfer to the Australian context. With this in mind, it is worth considering what international models have achieved, as distinct from how we might copy them. Artscape is of particular interest to the City of Sydney as it operates in Toronto, a city with a similar property market, and with comparable tax and land ownership patterns. It also shares a similar history, population size and demography. However, as such an entity has not formed organically in Sydney, it may be necessary to consider what we might learn from Seattle about the role of city governments in establishing development agencies driven by a social purpose.

Summary

As a large city government, the City of Sydney is fortunate to have the resources to provide space to a variety of cultural enterprises. Yet the scale of urban growth has rapidly increased the demand for space well beyond the possible supply which could be achieved by even the most well-resourced councils. An approach relying purely on local councils providing access to space is unsustainable.

It is heartening to see many of these themes addressed within the NSW Government's Cultural Infrastructure Strategy. This has codified a useful statewide perspective and correctly identifies local governments as a core stakeholder. It will be necessary for both state and local governments to think across their boundaries to identify existing buildings which might be repurposed for cultural infrastructure, as it is not possible for the City of Sydney to act alone.

State and local governments will also need to work together to open up avenues for non-government stakeholders, similar to Artscape, to develop within New South Wales. This will require us to consider what resources we might leverage, but also how we might support new and innovative organisations to reach the scale required to secure long-term space in new developments well into the future.

Sydney's culture is not something we can import from elsewhere. Culture is both the foundation and the by-product of a healthy and productive community, developing organically when we make space for it.

Identifying the next steps

The rapid urban growth of our city has had unintended impacts on our cultural lives, reducing the supply of small and local cultural spaces, increasing the costs for those that remain, and pricing out many creative people from working and living spaces. This is an issue of concern for many of the residents, workers and visitors of the City of Sydney.

The negative cultural impacts of urban change have been unevenly distributed. Certain types of cultural activity have continued to proliferate, and certain creative communities are thriving. Sydney remains home to major festivals and large-scale art events of extremely high quality. We continue to be the centre of Australia's creative industries.

Yet other parts of our cultural ecology face substantial barriers. High property costs and a lack of suitable building stock make Sydney highly uncompetitive as a place to work and live. Many creative workers can no longer afford to live in the Greater Sydney area, and must either move away or change professions.

Moreover, the growing diversity of our population has brought about fundamental changes in the types of cultural activity we value, and the spaces in which we create and connect. We need to make space for culture in Sydney, but we also need to make the right kinds of space.

Moving forward, there are four areas of work required:

1. Refresh our cultural policy and priorities based on current evidence

The City of Sydney's *Creative City Cultural Policy and Action Plan 2014–2024* was developed more than five years ago. The culture of our city, like that of other capital cities worldwide, has been impacted by a crisis of affordability. We now have clear evidence of the impact of this crisis; the need to address the issues arising has become more urgent.

To deliver cultural infrastructure, we must rethink how we define the word 'culture' to ensure it aligns with the values of our rapidly growing, and increasingly diverse, population.

The value of culture takes both social and economic forms, but can be treated neither as a purely social nor purely economic issue. We need to better articulate the long-term value of culture to a city's viability and sustainability with definitions that treat creativity as more than a funding problem, allowing us to leverage other policy areas, such as urban planning.

In this context, we need to emphasize that Sydney's culture is not something we can import from elsewhere. Culture is both the foundation and the by-product of a healthy and productive community, developing organically when we make space for it.

Our renewed cultural policy approach will emphasise:

- Facilitation of opportunities for active creative production and participation
- An invigorated focus on inclusion and diversity
- Interventions to retain our cultural workforce
- A mandate to support the cultural rights of our citizens.

2. Pursue new avenues for integrating cultural policy and urban development

Many of the barriers facing Sydney's creative life – housing and property prices, the cost of living, a rapidly growing population, long working hours, and changes in the supply of suitable buildings – are not traditionally considered as 'cultural issues'.

We need to better integrate cultural policy with other policy arenas, particularly urban planning. To do this, we need a strong evidence base, a common understanding of the problems we face, and a consensus on the directions we should pursue.

We also need to accept that our existing policy frameworks have not delivered the results our communities expect. Similarly, the existing property market is ill suited to providing the kind of cultural infrastructure required, leaving us with a lack of employment land for the creative industries and the risk of long-term, embedded social issues. Large-scale interventions need to be considered to circumvent the evident and potentially long-term negative impacts to our city.

These could include:

- Identifying specific cultural infrastructure needs, including priority uses, locations and building specifications
- Prioritising creative workspaces and locally specific cultural infrastructure in parts of our city
- Forming relationships between government and private partners to purchase, lease or develop suitable space
- Better supporting protections and means of preserving existing cultural spaces and their uses, such as 'no net loss' and 'agent of change' policies, and alternative regulatory solutions
- Developing an evidence base to inform planning decisions and guide the use of planning agreements and development contributions
- Continuing to leverage the strategic use of City-owned properties in support of cultural activities
- Identifying pilot projects that can bring together State Government and inner Sydney local governments to work together on new mechanisms and models.

3. Build knowledge and capacity

Our research has made it clear that no single government, private sector or community group currently possesses the answers to how to build and safeguard cultural space, and none have the resources to act alone at the necessary scale. As a major stakeholder in the provision of cultural space in New South Wales, the City of Sydney can play a role in building the knowledge and capacity of all stakeholders and sectors associated with cultural infrastructure. The City can:

- Help connect the cultural and property sectors and invest in the capability and compatibility of both to work towards common goals
- Look to the efforts of cities like Seattle and Austin, and actively work to establish a non-profit, non-governmental third-party organisation to be responsible for cultural infrastructure projects
- Spearhead a consistent methodology for the long-term collection of data across multiple agencies and sources to develop a practical evidence base for cultural infrastructure needs
- Continue to play an active role in the World Cities Culture Forum, engaging with and applying the learnings of our peer cities to our own challenges.

4. Commit to researching and trialling Sydney-specific solutions

Although we can learn a lot from cities elsewhere in the world, there are no off-the-shelf models we can simply copy. We will need to research, troubleshoot and trial new approaches that are right for Sydney. These may include a local adaptation of the Community and Creative Land Trust model or innovative means of funding and financing third-party projects such as bonds, loans and tax incentives.

This is a complex challenge and requires all of us, the City, the NSW Government, property developers, philanthropists, creative workers and cultural organisations to work together. For example, with this study as our guide, the City of Sydney needs to connect with industry experts and invest in a more thorough exploration of international examples and new approaches and how they might be applied in our city, to make space for culture and to develop, support and expand Sydney's cultural infrastructure.

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