Performance Evaluation of an Export Promotion Agency: Music Finland Case Study

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Abstract

This dissertation focuses on performance evaluation of export promotion agencies (EPA) through a case study on Music Finland, an export promotion agency, and their initiative in the UK. The organization's current actions to promote Finnish music in the UK and the metrics in place are examined in detail, followed by a literature review of extant theories on the related topics of exporting, branding and country-of-origin effect. A new metric of applied service quality gaps analysis is introduced to identify follow-up procedures for the organization to implement in the future.

Within the UK initiative Music Finland promotes Finnish artists through allocating funding, providing marketing assistance, organizing promotional activities and offering training to increase export know-how, which is well in line with the EPA activities identified in the literature. The current metrics are mainly financial and descriptive, with a relatively strong focus on collecting client feedback.

In line with previous research findings in literature that emphasize the importance of a strong organizational brand, service quality and stakeholder relationships, a new metric of service quality gaps analysis is introduced to assess the service quality perceptions of the UK partners and Finnish client organizations.

The management practices and metrics in place together with the service quality gaps analysis can be used as a benchmark for other EPAs on performance evaluation, and can provide basis for further research in the field of performance evaluation of export promotion agencies.

Resumo

A presente dissertação insere-se no âmbito da avaliação de desempenho de agências de promoção à exportação (APE) seguindo um case study sobre a Music Finland, uma agência de promoção à exportação, e a sua actividade no Reino Unido. As acções correntes das organizações para promover musica Finlandesa no Reino Unido e as métricas usadas são examinadas em detalhes, seguido de uma revisão de literatura acerca das teorias existentes nos tópicos relacionados com exportação, marca e pais de origem. Uma nova métrica para análise aplicada de falhas de qualidade de serviço é introduzida para identificar procedimentos de acompanhamento para implementação futura pela empresa.

Dentro da iniciativita no Reino Unido, a Music Finland promove artistas Finlandeses através de financiamento, acções de marketing, actividades promocionais e fornecendo formação para desenvolver conhecimentos à exportação, a qual segue as actividades das APEs identificadas na literatura. As métricas correntes são maioritáriamente financeiras e descritivas, com um foco relativamente forte na recolha de feedback dos clientes.

Em linha com resultados anteriores, os quais enfatizam a importância de uma forte marca organizacional, qualidade de serviço e sólidas relações com stakeholders, a nova métrica de análise de falhas de qualidade do serviço é apresentada para avaliar as percepções de qualidade de serviço dos parceiros no Reino Unido e das organizações de clientes Finlandesas.

As práticas de gestão e métricas em questão juntamente com a análise de falhas de qualidade do serviço podem ser usadas como benchmark para outras APEs na avaliação de desempenho, e servir de base para estudos futuros na área de avaliação de desempenho das agências de promoção à exportação.

Contents

1 Introduction

Exporting a product or a service can appear tempting to find new audiences and increase revenue streams by increasing the size of the market instead of trying to increase the share on the current market. However, there are several obstacles related to entering a new market, such as problems related to product or service acceptance, logistics and operations management, cultural differences and overall business risk (Neupert, Baughn and Dao, 2006). Specifically on the marketing side the challenges can include issues like, for example, adapting the product design or style, accessing the distribution network or operating with foreign middlemen (Leonidou, 2004).

To help companies overcome and deal with the type of issues mentioned, different forms of national export promotion agencies (EPA) and associations have emerged worldwide as part of certain countries' efforts to support different industries. EPA's can focus on a wide range of export products of a certain country (e.g. the Danish Export Association) or specialize in a certain industry or product (e.g. Café de Colombia, Wines of Portugal, Music Finland). According to Lederman, Olarreaga and Payton (2010) the objectives of these agencies are to support exporting companies through services that can be broadly divided into four categories: country image building, export support services, marketing, and market research and publications. On average the EPAs have an impact on exports, but an accurate evaluation of their operations in other terms is challenging (ibid.)

This current research tries to shed some light on these evaluation issues through a case study, by describing the marketing operations of Music Finland and studying how can the success of its current UK initiative be measured. Furthermore, conclusions about follow-up procedures to be implemented after the end of the initiative will be made.

1.1 Music Finland

Music Finland is a non-profit, independent association aiming to create awareness of Finnish music and increase Finnish music export revenue[1]. Its operations include communication and promotion of Finnish music through export projects, sheet music distribution, information services and funding programmes. Music Finland also maintains and develops the competitiveness of the industry through marketing research and identifying emerging

[1] Unless otherwise stated, the information about Music Finland in this dissertation is based on interviews of Riku Salomaa, the project manager in Music Finland's UK initiative. See appendices 1 and 2 for more details.

trends, and then distributing the information to all the players in the field through their website, training and conferences.

The founders and members of Music Finland are associations from different areas of the industry, namely Finnish Composers’ Copyright Society Teosto, Finnish Musicians’ Union, Finnish Music Publishers Association, Finnish Society of Popular Music Composers and Authors ELVIS, Copyright Society of Performing Artists and Phonogram Producers in Finland Gramex, IFPI Finland, IndieCo (association for independent record labels) and Society of Finnish Composers (Music Finland, 2013).

1.1.1 Music Finland UK 2012-2013

In 2012 Music Finland launched a specific initiative for the UK market, aiming to build and fortify relationships with key industry players, to introduce more Finnish acts in the UK and to build stronger presence of Finnish music in the British market overall. This initiative includes several activities: (1) export programmes in the areas of networks & PR, live, and export strategies, (2) promotional entity, as well as (3) providing training and connecting Finnish music professionals with the British market and vice versa.

In order to manage operations in the UK two employees of Music Finland were based in London: the project manager and point of contact for this research Mr. Riku Salomaa and project assistant Ms. Jenni Tuovinen.

1.2 Research topic

As the UK Initiative finishes at the end of the year 2013, reporting the achievements and results becomes of high relevance. Since Music Finland offers services, mainly related to marketing, networking and funding, does not promote any particular product or service, and seeks no profit, measuring the performance and the initiative’s impact on the market is critical, requiring the definition of appropriate metrics.

The ability to measure the performance, results and impact is important for four reasons. First, Music Finland can learn from the implementation of this initiative at an organizational level, as it is likely that similar initiatives will be launched in other locations in the future. Second, the effort that was put into the initiative over the course of two years was to build a foundation for the cooperation to continue in the future. After the initiative ends, the networks and relationships established between Finnish and British music professionals will hopefully continue to flourish and multiply, and as a result it will be easier for new Finnish music talent to break its way into the British market. To ensure this happens, Music Finland needs to be able to identify what were the most effective ways and practices of promoting Finnish music and why, in order to continue supporting these activities the right way after the end of the initiative. Third, as Music Finland is a non-profit organization and its operations are funded by different sources, the results of the activities need to be reported to the funders as well. They want to know how the funding was allocated and what kind of impact the programmes and initiatives had. Fourth, the issue of evaluation is relevant to other export promotion agencies independently of their origin. Some of the findings from the case study can probably be applicable to other EPAs as well, or form a basis for further research.

1.3 Problem statement and research questions

This research has multiple objectives: 1) to understand which activities have been implemented by Music Finland, (2) to identify what have been Music Finland's successes within the UK initiative, (3) to determine what type of follow-up procedures will be required in the following years to get the full advantage of the project and (4) relate these findings to the broader issue of measuring export promotion agencies' performance.

In order to contribute to resolving these issues, the following research questions will be addressed:

RQ1: What types of activities are often implemented by export promotion agencies?

RQ2: What types of activities were implemented by Music Finland to increase awareness of Finnish music?

RQ3: How is the impact of Music Finland UK's promotional activities measured?

RQ4: Of the set of activities implemented by Music Finland in the UK, which were considered as most successful?

RQ5: What implications can be inferred from the case study specific findings to the broader topic of evaluating EPAs?

1.4 Academic and managerial relevance

As academic research draws theory from market setting, the theories should also be backward applicable to the 'real-life' environment they try to explain. Thus, the academic relevance of this research arises from re-applying the theories of performance metrics to an actual, managerial challenge. Additionally, the findings from this particular case study may be relevant for further development of performance metrics for the purpose of evaluating export promotion agencies' operations.

Additionally, managerial relevance of the research arises from the creation of suggestions and recommendations to the challenge at hand, rooted in research and marketing management theory. The results can benefit the numerous export promotion agencies of many different countries, helping them to improve the evaluation of their activities and introducing new processes to boost export revenue generation. For countries planning to establish export promotion operations, this case study can provide a benchmark for successful implementation of this kind of structure.

1.5 Structure of the thesis

The thesis is organized as follows. The next chapter describes the situation with Music Finland and the challenge at hand with their UK initiative through a case study. Chapter 3 provides a literature review of the relevant research findings and theories in the areas of exporting, branding and country-of-origin effect, followed by the teaching note related to the case study in chapter 4. Primary research will be conducted as a part of this thesis and the methodology and findings will be described in chapter 5, before the final concluding remarks and recommendations in chapter 6.

2 Case Study: Music Finland UK Initiative

"The British music market is the most influential music market in the world. --- What happens in the UK has an impact everywhere else."

- Riku Salomaa, Music Finland

"Everyone really cares about music. It's kind of intrinsic in the [British] culture so people want to be part of it. It's an amazing scene, amazing energy."

- Jules Parker, Polaroid Management[2]

In May 2013 Riku Salomaa watched the sea of people cheering as the last drum hits of "*Scars*" reached the audience and Phantom left the stage. He smiled as the spectators burst into roaring applause and shouts of "we want more" echoed in the warm night of Brighton. The guests he had brought to witness this rising Finnish band seemed extremely pleased and he was already looking forward to the media coverage and further festival bookings that the positive response could lead to. Salomaa knew they had come a long way since the kick-off of Music Finland's UK initiative at the beginning of 2012. His hard work had paved the way for numerous Finnish acts to establish relevant connections with industry professionals in the UK and successfully enter the demanding British music scene. Despite the apparent success he could not stop thinking about the next challenge: the end of the initiative was approaching at the end of the year and that meant compiling the final report. Would the metrics they had in place correctly reflect the impact the initiative had had in the market? What was the most effective way to measure the success he knew was there and what follow-up procedures needed to be put in place afterwards to ensure the full advantage of the two years' efforts was carried on?

2.1 Music Finland

Music Finland (MF) is a non-profit association, which focuses on promoting Finnish music both in Finland and abroad. It operates as an export promotion agency (EPA) aiming to increase music export revenue, as well as an information centre to increase awareness amongst industry professionals globally and locally. MF contributes to maintain and develop Finnish music industry's competitiveness by organizing workshops and training on music industry trends and foreign market insights. Additionally, the organization publishes potential composers' music and distributes sheet music.

[2] Jules Parker is a British music industry professional who has a background as a songwriter and an artist, has worked for festivals and Performance Rights Society for Music, and currently works in artist management in his own company Polaroid Management. See appendix 3 for interview details.

The overall objective of Music Finland is to be the flag-bearer and expert in Finnish music in Finland and abroad.

2.1.1 The Music Industry Boosting its Presence

Music Finland was founded in 2012 as a result of the merger of Music Export Finland (Musex) and Finnish Music Information Center (Fimic). Musex was initially established with the support of the Ministry of Employment and the Economy[3] in 2002 by nine organizations operating in the music industry in Finland, including record labels, music publishing companies and other organizations. The aim of Musex was to facilitate marketing, sales and promotion of Finnish music abroad (Musex, 2003; 2011). Fimic, on the other hand, was founded back in 1967 and focused on creating awareness of Finnish music through promotional events, media and professional visiting programme, international communication services, presence at professional events and exhibitions, as well as publishing and distributing sheet music (Fimic, 2012b). Fimic's activities were mainly funded by the Ministry for Foreign Affairs of Finland and the Ministry of Education and Culture, in addition to the music industry itself (ibid.).

Since the membership organizations of Fimic and Musex were almost the same (see exhibit 1) and they were already cooperating on many initiatives, it made sense for the two organizations to merge in 2012, forming Music Finland. The founder organizations and members of Music Finland were already closely knit into the operations of both Fimic and Musex. Music Finland was the Finnish music industry's response to keep itself competitive, create awareness and increase Finnish music export revenues. (Fimic, 2012a; 2012b; Musex, 2011)

2.1.2 Music Finland Business Model

Music Finland receives its funding from three main sources. The majority is (1) public funding and the rest comes from (2) the music industry and (3) partnerships. For example in the UK initiative, roughly 66% of the funding comes from public sources, 25% from the industry itself and the rest from the partnerships (see exhibit 2 for further split down of the figures). Similar funding shares apply in MF's operations in general.

The majority of public funding of MF comes from the Ministry of Employment and Economy and the Ministry of Education and Culture. Public funding is mainly allocated to the clients through export programmes and to support promotional activities. Additionally, public

[3] Formerly Ministry of Trade and Industry (Ministry of Employment and the Economy, 2009)

funding includes the financial support from the Ministry for Foreign Affairs of Finland, which contributes to covering for example the expenses from media and professional visiting programme.

Part of the funding also comes from MF's business partnerships. For example Heineken together with Music Finland takes one Finnish artist performing at Flow Festival in Helsinki, to showcase their talent in London too. The music industry itself also funds the operations of Music Finland, through The Finnish Music Foundation MES and the fees from client organizations as well as their own investment in the projects.

The government support enables MF to carry out activities on a scale that contributes to the increase in export revenues and consequently economic growth, whereas music industry's involvement ensures that MF stays aware of the industry's needs, requirements and development. As the export programme funding is targeted to companies aiming for business growth, the companies' own investment in the project plays an essential role in crafting MF operations.

2.1.3 Music Finland Services Portfolio

Music Finland provides a wide range of services for the music industry, including programmes to support artist internationalization, training and workshops to fortify the industry, and promotion and communication of Finnish music in general.

According to Riku Salomaa, the project manager of the UK initiative, a critical part of the internationalization support is to allocate funding. To encourage Finnish music companies to enter new markets Music Finland subsidizes their internationalization projects to diminish possible losses at the starting phase. The funding scheme includes tour, showcase and composition/lyrics export subsidies, subsidies within country-specific initiatives such as the UK initiative, and subsidies to partly cover travel expenses. Additionally, Music Finland provides advice with planning the strategy to enter a foreign market, and in some cases provides promotional support as well. Promotional support contains for example assistance in marketing planning in the foreign territory and linking the clients' projects with local PR agencies Music Finland works together with. MF is connected to industry professionals in different territories and is able to help client organizations to become acquainted with the relevant contacts and specific markets.

Music Finland also plays a key role in maintaining and developing the music industry competitiveness and know-how in Finland. The organization aims to be on top of the trends and industry structures, conveying information of changes in both to the music professionals locally.

Additionally, Music Finland promotes Finnish artists and the use of Finnish music in different contexts by actively communicating to the target groups and organizations through the website, newsletters and social media.

2.1.4 Client organizations

The clients of Music Finland are companies and organizations operating in different fields of the music market in Finland. For the funding programmes the client is never a band or artist directly, but the promoting organization representing it, such as a record label, a booking agency, or a festival organization. Producers, composers or lyricists can also be clients, as long as they too run a business with a Finnish company identity code. For other services, such as the information centre, the clients can be bands and artists directly as well.

For the funding programmes, the client organization will have to apply to be eligible. A successful application will have to demonstrate professionalism in the internationalization plans and clear objectives must be set for each activity. They must have strong significance to the artist's career and for their internationalization strategy. The applicant also commits to report of the progress and realized objectives of the project as well as expenses incurred. For the companies that become accepted, Music Finland can fund up to 50% of the project expenses.

The reason for operating this way is relatively straightforward. The client organization has to take initiative in starting the internationalization project by drafting and submitting the plans together with the application. This is one way of guaranteeing commitment from the client side and it also works as a risk management tool, as it enables Music Finland to evaluate the motivation and quality of plans of the client. Also by funding a maximum of 50% of the costs means that clients' own investment is required too, which also forces commitment. The process mitigates the risk for the client too, as they can trust Music Finland's expertise in assessing whether the potential for entering a new market exists or not.

2.1.5 Current metrics

Music Finland uses a variety of metrics to evaluate its operations, both overall and within their specific initiatives. In broad terms the metrics include (1) market value of music exports, (2) financial metrics, (3) client base, (4) organizations in export programmes, (5) service production, and (6) client satisfaction (see exhibit 3 for more information).

The first two sets of metrics, *market value of music exports* and *financial metrics,* use data collected from the client organizations and the companies operating in the Finnish music industry in general. They are assessed annually using a survey, in which the organizations report the total value of their exports as well as revenues split down by country and type of revenue (e.g. album sales, live shows or merchandise). These two sets of metrics have a financial focus and evaluate how MF's client organizations as well as the Finnish music industry as a whole develop in terms of export revenue generation.

The second set of metrics includes *client base* and *client organizations in export programmes*. These map the number of clients returning to use MF's services as well as the amount of new clients. If the services produced are good enough, then the clients will return, so it is a useful indicator of service quality. However, it is also desirable that the client base grows and new companies find MF and the support they offer. With these metrics the client organizations also evaluate the increase in their export know-how and the structural development on the client companies is tracked too. As Salomaa points out, every organization is like the whole industry in a miniature size and so changes in several of the organizations depicts the overall trends of the industry too.

The last two metrics, *service production* and *client satisfaction,* assess MF's operations and activities more directly. Music Finland tracks the number and types of services they produce and collect data from their clients on how they perceive the value of those services and what types of results have followed. The clients are asked to fill in a questionnaire (see exhibit 4 for more detail) after each initiative or event they took part in and the results that followed from those activities are compared to the objectives that they initially set and that MF accepted as high enough. The clients are asked to identify for example how many relevant contacts they acquired or what contracts followed. The questionnaires are sent after 2 weeks of the participation, which is problematic in the sense that quite likely not all of the results and consequences from that activity have yet occurred. In the client satisfaction questionnaire feedback on five main aspects is collected: financial support, Music Finland itself, the specific initiative, media attention and the number of relevant contacts.

So Music Finland was collecting a lot of data from their clients and tracking their own activities in several different ways, as well as following up the financial side of operations –

both with their clients and within MF. The metrics in use did show the trends and development in MF's activities, and how the client organizations perceived the services produced, but Salomaa still wasn't sure if these were enough to depict the success of the UK initiative accurately. Was there something more to be done?

2.2 The UK Initiative 2012-2013

Every few years Music Finland (or the preceding organizations Musex and Fimic before) approaches the industry representatives to obtain insights on which foreign market they would like Music Finland to focus on next. In the past the country-specific initiatives have focused on territories where Finnish music already had a foothold of some kind, due to geographic proximity or other reasons. These markets have included the other Nordic countries, Germany and Japan. In 2011 the industry came back with a different response: they wanted to enter the UK.

2.2.1 Objectives

Finland had already been quite active with rock music in the British market, whereas particularly Finnish pop and indie needed a boost – so these were in the focus of the UK initiative. It was created to serve as a kick-off for Finnish music in Britain with the objective to establish effective export processes and networks to build on in the future. These goals connected to the higher, overall objective of gaining media coverage and increasing the export revenue from the UK market.

On a more concrete, daily basis, the objectives were updated according to progress. For example at the beginning of the initiative an objective for a press release was to be picked up by one medium, whereas with more developed media connections later on the aim was to have a media partner in releasing a particular piece of news.

2.2.2 Why the UK?

"It's a no-brainer with the UK because even though it's very difficult, I feel it's also really important for the whole of Europe if you make some impact there".

- Nick Triani, Soliti[4]

According to Salomaa, UK was a logical choice since the British music market is one of the most influential music markets in the world. What happens in the UK music scene has a tendency to trickle down on other markets by building on the artists' credibility. Some

[4] Nick Triani runs an independent record label Soliti in Finland and his label was a client in Music Finland's UK initiative. See appendix 4 for interview details.

relatively well-known, international artists even operate at loss in the British market, in order to for example get the media coverage in the UK and benefit of it in other markets.

2.2.3 Characteristics of the British music market

Jules Parker, a British music professional and artist manager running his own company Polaroid Management, agrees that the music market in the UK has a lot of weight internationally. According to Parker, the long history of successes has contributed greatly to the influence and gravitational pull the UK market has today: *"It's a place that everyone seems to aspire to want to be successful in".*

As music has played such a strong cultural role for decades, also the audience is generally more aware and up-to-date with what's happening in the scene. The enthusiasts really care about finding new artists, but also comfortably switch on and off to new music - and they do it quickly. In other words, the audience is fickle and making a permanent - or any - impression is difficult for the artists. Triani acknowledges this as well and explains: *"They have a lot of indie bands in the UK that do really well, so the attitude tends to be 'why do we need a bunch of bands from Finland that do this kind of stuff*?'".

As there is a lot of demand, there is also a lot of supply, and the sheer volume of music produced and accessible in the UK is massive. This complicates the breaking through of an artist even further. Parker emphasizes the importance of building a strong network of industry professionals in the UK and a team of correct people behind the artist is critical to be able to enter the market – although that alone does not guarantee success.

Additionally, the huge amount of music is challenging not only to the artists, but to the audience too. Music is everywhere and the public has many different means to access it, so how to choose becomes the question. As music discovery becomes difficult amongst all the possibilities, media gains power in turn as the middleman communicating what's currently hot and what's not. Radio, music blogs, and printed and online music magazines all provide a range of opportunities, but a lot of it is split into different music genres and targeting different audiences, so thorough understanding of the UK music media is required in order to approach the right music outlet.

2.2.4 Activities

The challenges the UK music market pose are what Music Finland looks to overcome by helping their clients start their success stories as new players in the market. The services the

UK initiative provides for the client organizations includes three sets of activities: export programmes, the promotional entity and training (see exhibit 5)

Export programmes

The export programmes are the core of the UK initiative. For a client organization, being part of an export programme translates into receiving funding and personalized consultation on different aspects related to entering the market or gaining stronger presence in it. The client companies receive assistance in getting in touch with the relevant key media, venues, agents, managers, and marketing and public relations agencies. Additionally, the Music Finland team also coaches and spars in crafting the export strategy. Whereas in the funding programmes outside the UK initiative Music Finland subsidizes a maximum of 50% of the costs, in the initiative the percentage can go up to 65% to encourage organizations to start operating in the UK market.

The UK initiative export programmes include three different funding formats, each focusing on different phases of the export process: Networks & PR, Live, and Export strategies. *Networks & PR programme* focuses on marketing and promotion activities. A lot of the cases are album releases and the funding is used for marketing campaigns and other promotional costs. *Live programme* on the other hand supports live events, including tours, showcases and single gigs in the UK. *Export strategies* is a broader and more flexible programme, and the funding can be used in varied ways. The clients within export strategies programme can also include Finnish festivals wanting to create publicity in the UK or record labels building on label credibility, as well as for example Finnish songwriters traveling to London to network and collaborate with other songwriters.

Promotional entity

The promotional entity focuses on two main types of activities: media and professional visiting programme, and events in the UK.

The media and professional visiting programme includes inviting British media representatives and other professionals to attend different events and festivals in Finland. The programme aims to give the British music professionals an idea of the Finnish music scene on a broad level, but also to for example gain publicity as the media guests are expected to write articles about Finnish artists or events in return.

Music Finland cooperates closely with the Finnish clients in identifying who or what type of professional and media representatives they wish to be invited. For example if there are on-going contract negotiations between a Finnish artist and British agents, the agents may be invited to Finland to see the artist perform at a festival. Identifying the 'right' guests requires UK market knowledge and understanding the Finnish music scene, but also staying up-to-date who is negotiating with who at any given time.

Music Finland also cooperates with the other Nordic music export agencies in bringing guests to the Nordics. Festivals wise for example, Sweden's Way Out West, Norway's Oya Festival and Finland's Flow Festival take place over the same weekend with a lot of the same headliners, so Music Finland may collaborate with Music Norway to share the costs of bringing a guest to attend the festivals in both countries. The festivals and events where media and professionals are invited cover all the main music genres and extend throughout the year.

The *UK events* then include a wide range of different activities. Music Finland helps the Finnish bands to, for example, get the best possible performance slots and more than one show per event at different showcase festivals and professional events. In support of the festival appearance they also always coordinate marketing campaigns targeting mainly the British music industry, but sometimes the wider public too.

Music Finland is also arranging club events in London to showcase Finnish talent. "Ja Ja Ja" is a Nordic club event, organized together with the other Nordic export promotion agencies. It's organized 6 to 7 times a year and focuses on indie pop/rock and electro music from the Nordic countries. "Echo Chamber" is Music Finland's own club event, which presents newer Finnish acts that are just starting their careers in the UK, but who have shown a strong potential and are able to convince the event venue's team. The club is organized 4 to 5 times a year and is not very strictly confined to any one genre. The third club event "Feel The Spirit" focuses on hard rock and metal genres and is organized 1 to 2 times a year on a bit bigger scale in comparison to the other two events, but with a similar purpose: to introduce Finnish music to the British people.

In addition to these two bigger sets of activities, MF also supports other types of promotion. Amongst these are for example world folk and experimental music festival "Lifem" in London, which will have a Finland theme in 2013, or the London visit of Alexander Stubb, Minister for European Affairs and Foreign Trade of Finland. For Record Store Day[5] in April 2013 Music Finland released a 10” vinyl EP, which included six tracks from six Finnish artists, hand-picked by The Line of Best Fit[6]. The promotional release was distributed for free through participating Record Store Day stores mainly in the UK, but also in other territories. Music Finland also produces other promotional releases (see exhibit 6) to be distributed for example in the context of different events.

Training

As a part of the UK initiative Music Finland has been contributing towards increasing the Finnish professionals’ UK market and export knowledge through training. There are 3-4 training sessions a year and each of them focuses on a particular music genre or on an area of expertise and delves deep into that area in the context of the UK market. There have been workshops on for example legal issues and media & PR, as well as on the genre side on jazz and classical music.

2.2.5 Partners

All of the mentioned activities would be impossible to carry out without the network of partners MF has in the UK. Music Finland’s most important partners are The Finnish Institute in London and the Embassy of Finland in London. The Finnish Institute provides the office space for Music Finland’s London-based employees and some communicational support, whereas The Embassy of Finland has particularly good listing of for example local media contacts.

When it comes to operating in the market, the other Nordic export promotion agencies are an important group of partners. Some of them have been present in the UK for a longer time already and possess a lot of information about relevant contacts in the music industry.

The partnerships established through the UK initiative are particularly valuable. For example, the venues that organize festivals and club events, as well as media partners such as The Line of Best Fit, who collaborate together with Music Finland in arranging events and publishing content on their website are critical in guaranteeing the success of future activities. These partners are the ones through which the messages about the Finnish bands actually go to the British public and so are an essential gateway to effective promotion. As

[5] Record Store Day is held annually to celebrate and spread the word about independent record stores globally. (Record Store Day, 2013)

[6] The Line Of Best Fit is an independent online music magazine based in the UK (The Line Of Best Fit, 2013)

Salomaa points out: *"We have to be able to see that who are the key players in a genre and who can help us the best to reach certain objectives".*

2.2.6 Attitude towards Finnish music

Currently there has been a lot of interest in Nordic design, fashion, food, architecture and music in the UK, and Salomaa, Parker and Triani all recognise this. However, the three also agree that a country itself isn't automatically interesting, unless the content is interesting and of high quality.

According to Triani, a different kind of acceptance for Finnish music has emerged within the past five years in the UK. The manner in which a Finnish artist is being promoted still has to be very content-first, and the way and extent to which the country of origin is highlighted depends on the case. The 'Nordic boom' in the UK shows in for example proneness for certain media to introduce Nordic acts and so these artists can benefit of the boom by identifying and approaching these media as the primary channels of communication to the masses.

In an ideal situation the attitude towards Finnish music in the UK would shift towards the one currently experienced in Japan, where Finland is considered to be a very interesting and appealing country. When a country is considered interesting, it automatically adds on the attractiveness of the artists from that country too. The audience actively seeks Finnish music and keeps itself updated on what is happening in the Finnish music scene. In order for this to happen in the UK, it is likely to require a line of successful artists to emerge and to break through in the market.

2.3 The next steps

A lot had happened in the course of the initiative: networks had been established, effective partnerships evolved, contracts signed, and numerous Finnish bands had appeared at festivals and clubs in the UK. Feedback from the clients had been positive. In the words of Nick Triani: *"The fact that somebody's based in London actually doing that work is incredible. You have someone on the ground there, I think that's really great. --- I hope they can keep it going a while, it's essential for Europe. --- No doubt about it that they [Music Finland] have been doing a really good work."*

Even with the metrics in place the success of the initiative would really only become explicit in the next few years as more companies in the Finnish music industry would benefit from the established networks and processes. This got Riku Salomaa pondering: what more could be done now to define what was really working? What type of additional metrics could be implemented to understand what was relevant to develop further? How should Music Finland proceed after the initiative was ending and the London-based operations shut down? What other type of activities could a country like Finland implement to promote the exports in a particular sector?

2.4 Exhibits

Exhibit 1. Member organizations of Fimic, Musex and Music Finland

	Member of Fimic	Member of Musex	Member and founder of Music Finland
IFPI Finland	✓	✓	✓
Finnish Independent Record Producers' Association Indieco		✓	✓
Finnish Musicians' Union	✓	✓	✓
Finnish Composers' Copyright Society Teosto	✓	✓	✓
The Finnish Society of Composers and Lyricists Elvis	✓	✓	✓
Copyright Society of Performing Artists and Phonogram Producers in Finland GRAMEX	-	✓	✓
The Finnish Music Publishers' Association	✓	✓	✓
Society of Finnish Composers	✓	-	✓

Sources: Fimic, 2012b; Musex, 2011; Music Finland, 2013

Exhibit 2. Music Finland UK initiative funding sources

	Funding use	2012	2013	Total 2 years
Ministry of Employment and Economy	Funding allocated to the client organizations, i.e. export programmes	325 000€	190 000€	**515 000€**
	For general expenses incurring from running the initiative, e.g. hiring personnel	95 000€	90 000€	**185 000€**
Ministry of Education and Culture		n/a	n/a	**220 000€**
Ministry for Foreign Affairs of Finland	Media & professional visiting programme			~5% (rough estimate within the initiative)
The Finnish Music Foundation		45 000€	~25 000€	**70 000€**
Client organizations	Part of the funding in export programmes (MF does not fund 100%)			**~500 000€**
TOTAL (rough estimate, the initiative still ongoing)				**~1.5M€**

Exhibit 3. Current metrics of Music Finland

Metric	Example	Data collection	
		From clients	From MF
Market value of music exports	• Total market value of exports • Division amongst territories and types of revenue (album sales, live, merchandise)	Annual survey to companies operating in the Finnish music industry	
Financial metrics	• Financial figures from clients' operations: revenue share from exports, export growth	Survey to client organizations	Data from Music Finland
Client base	• Total number of clients • Amount of new clients • Repeated use of services • Development of client organizations		Data from Music Finland
Organizations in export programmes	• Types and resources of organizations in the export programmes • Development in export know-how	Survey to client organizations	Data from Music Finland
Service production	• Number and types of services and events produce • Value and results for the clients	Survey to client organizations	Music Finland records the data from their events and services throughout the year
Client satisfaction	Importance and satisfaction on: • Export funding • The specific initiative or action the client was involved with • Amount of media coverage • Number of industry contacts gained • Music Finland's operations in general	Survey to client organizations	

Exhibit 4. Example of a form used to collect feedback from client organizations (translated from Finnish)

Music Finland

SUOMALAISEN MUSIIKIN ELIVOIMAA JA MENESTYMISTÄ ·

Feedback Form – The Great Escape, Brighton, United Kingdom 16.-18.5.2013

Which company did you represent at the International Live Music Conference event?

Responding to the survey is a prerequisite for receiving the Ministry of Employment and the Economy's subsidy for travel expenses. In order to be able to target the reminders to the correct parties, we need to identify who has fulfilled the requirement. The responses are treated confidential and are not connected to the respondent, unless otherwise stated on the feedback form.

Significance of the funding from Ministry of Employment and the Economy

1=not significant 2 3 4 5=very significant

Significance of the Ministry of Employment and the Economy's funding to your business

Choose the correct alternative on a scale from 1 to 5, where 1=poor and 5=very good

1) Music Finland's activities in the initiative helped in achieving good results

2) Music Finland brought innovative and functional ideas to improve international operations

3) The commitment and level of professionalism of Music Finland staff

4) Music Finland's client communications before the event

5) Music Finland's client communications during the event

6) The encouraging effect of the initiative on your organization's export operations

7) Significance of the initiative on your organization's internationalization and consequently business growth

8) The initiative's impact on the increase of your export know-how

9) How many international professionals did you meet during the event (estimate)?

10) How many of the aforementioned were new contacts?

11) What results or overtures likely to lead to results you achieved during the event (e.g. contracts, offers, important new contacts or new ideas)? NB: This feedback is particularly helpful in crafting reports to the funders.

12) If your artist performed at the event, how many booking offers or deals did you gain as a result of the showcases?

13) How much audience on estimate was present in your artist's showcase event?

14) How was your showcase artist noted in the media before, during and after the even (please attach links to the articles)?

15) We would be very grateful if you could write a little about the effectiveness of the initiative. We use the quotes in in our marketing and promoting funder relationships, so we hope to have your name at the end of the quote.

16) Your suggestion on how to improve and/or change the initiative.

Exhibit 5. Music Finland's UK activities

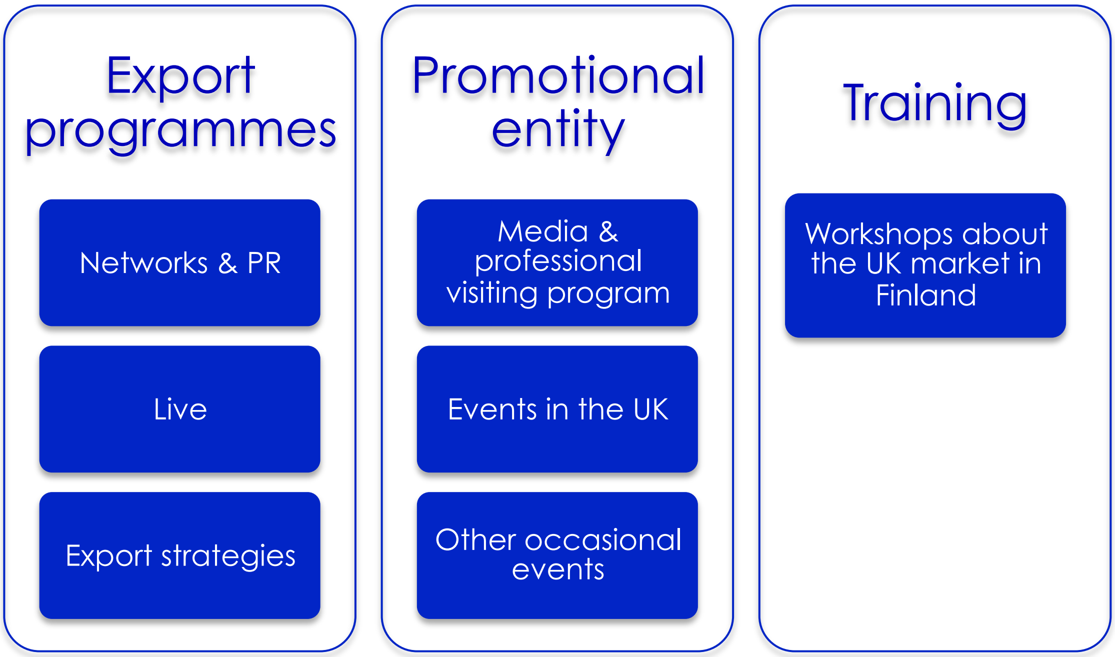


Exhibit 6. Examples of Music Finland's promotional releases

Promotional vinyl single for Echo Chamber event

6-track 10'' vinyl EP produced for The Record Store Day in collaboration with The Line of Best Fit

3 Literature review

To understand Music Finland's operations better it is necessary to explore some concepts and theories from previous research and existing literature. The topics reviewed in this section include exporting, branding and country of origin. Exporting in this case is what MF's client organizations pursue to do and Music Finland operates as an enabler and promoter in between the client and the UK music market. Branding is an important concept to understand in most business contexts as it can be used as a differentiation factor to create competitive advantage. Country of origin (COO) and the COO effect needs to be properly understood as it may have an impact on how a particular brand needs to be built and communicated of in a foreign market. This also relates to the topic of branding in general.

3.1 Exporting

Exporting can seem tempting to companies for several reasons. At the firm level, instead of gaining share from competition on the markets the company is currently present, the firm can increase the size of the market and contribute to corporate growth through export operations (Smith, Gregoire and Lu, 2006). In some cases exporting might help utilize excess production capacity and generally diversifies business risk (Leonidou, 1995). Exporting has also been the most popular method of new market entry (Leonidou, Katsikeas and Samiee, 2002).

On a broader, macroeconomic level exporting can help battle trade deficit, contribute to economic growth by increasing foreign exchange reserves, and increase employment as well as enhance the country image abroad (Smith et al., 2006). However, before achieving these benefits there are often barriers to overcome.

3.1.1 Export barriers

Leonidou (2004) defines exporting barriers as "*all those constraints that hinder the firm's ability to initiate, to develop, or to sustain business operations in overseas markets*". Vast amount of research over the past decades has focused on identifying these constraints in different contexts, such as in transitional and developed economies, in initiating and on-going export stages (Neupert, Baughn and Dao, 2006), in different country settings (Bell, 1997) and in a range of different industries. Despite the efforts to find inter-group differences and intra-group similarities in these contexts, it has been suggested that importance, intensity, frequency and type of barriers perceived by an exporter can vary according to the firm's export stage, industry context and background, amongst other things (Bilkey, 1978; Leonidou, 2004; Smith et al. 2006))

Export barriers have been categorized in different ways by different researchers. For example, Leonidou and colleagues (2002) underlined five major groups of variables affecting export performance: (1) managerial variables, (2) organizational variables, (3) environmental variables, (4) targeting variables and (5) marketing mix variables. On the other hand, the sources of export barriers can also be classified into (1) export knowledge, (2) internal resource constraints, (3) procedural barriers and (4) exogenous variables (Cavusgil and Czinkota, 1990).

Another useful approach is the classification into internal and external export barriers by Leonidou (2004), who synthesized findings from several previous researches. The *internal* export barriers refer to any exporting issues that stem from the exporting company's capabilities and resources, and are further split into informational, functional and marketing barriers. *Informational* issues include problems in for example information gathering and data collection from the target market in order to thoroughly analyse the market and identify business opportunities (ibid.). Bilkey (1978) also identified inadequate knowledge of foreign sales practices as one of the export barriers. Generally, the informational barriers tend to be higher to smaller exporting companies as they have more limited resources than the larger firms (Katsikeas and Morgan, 1994).

The *functional* issues relate to problems arising from different functions within the firm, for example human resources (inadequate or untrained personnel) or financing export operations (Bilkey, 1978; Leonidou, 2004). *Marketing barriers* then again include all the exporting challenges in different aspects of the marketing mix, namely product, price, distribution and logistics and promotion. These may be related to for example adapting the product to meet the requirements of the target market, pricing the product correctly with respect to both competition and the customers' expectations, arranging logistics and overcoming distribution issues, and adjusting promotional activities to correspond with different cultural setting (Bilkey, 1978; Leonidou, 2004; Neupert et al., 2006).

On the other hand, the *external barriers* can be divided into procedural, task, environmental and governmental barriers (Leonidou, 2004). The *procedural* barriers cover for example issues with communicating with customers and problems with exporting procedures and documentation whereas *task* barriers refer to customer and competition issues including different customer habits and attitudes, and the strength of competition. *Governmental* barriers relate specifically to challenges with the home government, in terms of for example lack of incentives to exporting. *Environmental* barriers contain the remaining external barriers, primarily political-legal, economic and sociocultural (Leonidou, 2004). Neupert, et al. (2006) also identified a similar set of barriers.

The companies that are not yet exporters tend to perceive high barriers in initiating exporting operations, whereas companies already exporting emphasize operational, procedural and market-related problems (Smith, Gregoire and Lu, 2006). Suárez-Ortega's (2003) findings somewhat support this, as the author concluded that for non-exporting companies knowledge barriers are the most significant, whereas exporting firms tend to face procedural barriers.

3.1.2 Export promotion agencies

In order to overcome part of the export barriers, some countries have established national export promotion agencies (EPAs). Structurally these agencies can be formed in different ways: they can be fully private, semi-autonomous and reporting to for example a ministry, or be a sub-unit of a ministry. Lederman and colleagues (2010) in their analysis divided the services of EPAs into four main types: (1) country image building, (2) export support services, (3) marketing and (4) market research and publications. These services together cover areas of training, collecting and distributing export market information, promotional assistance, financing exports and the like (Genctürk and Kotabe, 2001; Lederman et al., 2010). This is well in correspondence with the barriers identified in the literature.

From the assessment and evaluation point of view, Lederman et al. (2010) highlighted that EPAs have an impact on country's exports, especially in the cases where export barriers are high. Their results also suggested that exports increased as the amount of executive board seats held by the private sector and as funding share from the public sector increased. Additionally, an increase in EPA's budgets contributed towards increase in exports. This is also supported by Kang's (2011) findings, however both of the papers acknowledge possible endogeneity problems and potential reversed causality.

In fact, according to Sousa (2004), the majority of research in the field of export performance evaluation is focused on financial indicators and even though indisputably important, it's not the only export objective. For example Durmuşoğlu et al. (2012) studied the impact of export promotion services on not only financial goal achievement, but also on stakeholder relationship, strategic and organizational goal achievement, and discovered a positive relationship. Volpe Martincus and Carballo (2010a) acknowledged the high initial costs of entering a new market due to the amount of market data required. Their findings suggested that EPA activities were associated with higher probability of including new target countries as well as higher probability of introducing new differentiated goods. They also concluded that bundling export promotion activities that guide the exporting firm from the start to establishing relevant connections in the target market are more effective than isolated export promotion actions alone (Volpe Martincus and Carballo, 2010b). However, they also point out the issue with identifying the strength of causality between export promotion activities and export growth.

In order to promote its clients' brands, an EPA needs to gain a strong foothold with different partners at the export market and branding becomes of great importance in this context. The related theories are explored further in the next section.

3.2 Brand equity and branding

Brand equity has been one of the most widely studied areas of marketing since 1960s (Chen, Su, Lin, 2011) and according to a popular definition by Keller (1998) it's the added value of a brand that forms part of a product created in the minds of consumers in response to past investments in the marketing of the brand. In other words, the perceptions the different stakeholders have about the brand create value to it through assets like, for example, brand awareness, emotional bonding and sense of exclusivity (Kapferer, 2012, 7).

3.2.1 Branding in B2B environment

Branding and brand management have been slow in being transferred to business-to-business (B2B) setting, since generally B2B buyers have been contrasted to being rational, unlike of the emotional individual consumer (Bendixen, Bukasa and Abratt, 2004). As the world markets become more open and integrated, and global competition increases, gaining competitive advantage becomes increasingly difficult and branding becomes critical for the survival of the firms, also in the B2B sector (e.g. Kapferer, 2012, 7; Mudambi, 2002; Townsend, Yeniyurt and Talay, 2009).

Already Lehmann and O'Shaughnessy (1974) proposed that reputation is at the core of B2B decision-making. Mudambi, Doyle and Wong (1997) concluded that in the rational and systematic B2B environment where competing on price or product quality alone is impossible, branding can play a vital role. According to Bendixen et al. (2004) the brand dictates 16% of the decisions made on business-to-business markets.

Bendixen et al. (2004) also concluded that quality is the main brand-equity-generating variable, although the high actual product or service quality must be transformed into high perceived quality for the clients too. According to Alvarez and Galera (2001), quality and service, including personal contact, are important factors in B2B setting and form the basis of competitive advantage. The results of Chen et al. (2011) slightly contradict this, as their findings suggested that there isn't a significant relationship between perceived service quality and industrial brand equity. However, they also proposed that there is a significant relationship between product quality and industrial brand equity, and that the brand awareness is linked to buyer-based brand equity, meaning that branding can help in creating advantage over competition in B2B markets.

3.2.2 Importance of branding in exporting

Branding also has its benefits in exporting. Brand reputation - consisting of the perceptions individuals hold about the brand - derives from and can be developed through marketing efforts (Fombrun and Shanley, 1990), meaning that these efforts need to be carefully constructed by organizations to contribute to the building of positive company image to all stakeholders (Bendixen et al. 2004).

Zou, Fang and Zhao (2003) defined branding advantage as the *"degree to which an export venture achieves a more favorable brand image among export customers than its rivals' brands do"* and according to Spyropoulou, Skarmeas and Katsikeas (2011) branding advantage leads to improved export performance. They also suggest that the source of branding advantage is company communication capabilities, which in turn is achieved through export venture financial and experiential resources.

The experiential resources refer to process and market knowledge as well as experience deriving from the venture's operations in a specific market (Morgan et al., 2003). Social relationships are an important contributor to the relationship quality between the exporters and intermediaries, which in turn can fortify the resource build-up (Solberg, 2008) and consequentially enforce the branding advantage.

3.2.3 Umbrella branding

With umbrella branding the custom of selling several products under one brand name is meant and the concept is based on quality similarity implication (Miklós-Thal, 2012). Products under the umbrella brand do not necessarily possess high quality nor is it implied (Hakenes and Peitz, 2008), but the quality experience amongst the brands under the umbrella should be consistent as in the cases of different levels of perceived quality the more negative experience might have diluting effects on the higher quality brand (Erdem and Chang, 2012).

The rationale for a multiproduct firm to use umbrella branding is that it can use its existing reputation as a quality cue when introducing new products (Wernerfelt, 1988). On the consumer side, there is a correlation between product quality perception and the evaluation of other product under the same brand (Erdem, 1998) and umbrella branding can reduce perceived risk and uncertainty associated with the new product (Montgomery and Wernerfelt 1992; Wernerfelt, 1988)

In international markets brand equity and brand image are linked to country-of-origin (COO) effect on consumers' and buyers' evaluations and purchase intentions. The next section develops this concept further.

3.3 Country-of-origin effect

Country-of-origin impacts the buyer's perceptions through the image the country in question has. COO image is the "*picture, the reputation, the stereotype that businessmen and consumers attach to products of a specific country. The image is created by such variables as representative products, national characteristics, economic and political background, history and traditions*" (Nagashima, 1970). Roth and Romeo (1992) proposed country image to be defined as the consumers' perception of the products of a country based on their previous experience on the production of that country and marketing strengths and weaknesses, including four dimensions of design, innovativeness, workmanship and prestige.

Diamantopoulos, Schlegelmilch and Palihawadana (2011) studied COO as both country image and product category image associated with a country, and discovered that COO did not have a direct impact on purchase intentions of a brand, but instead affected indirectly through influence on brand image. Over 60% of brand image variance was explained by COO effects and brand familiarity. Their results also suggested that country image is not only reflected in specific capabilities in an industry or product category, but also relates to broader ability of producing good brands in general. Pappu, Quester and Cooksey (2007) examined the relationship between consumer-based brand equity and micro and macro images of the country of origin of the brand. Similar to the distinction made by Diamantopoulos et al (2011), with *macro* the economic stage of the country was meant, whereas *micro* comprised associations of products produced in the country. Their results confirmed a significant relationship between consumer-based brand equity and micro and macro country images of the brand, meaning that marketers should manage the country reputation at both of these levels.

Additional aspects of these and other studies generated conflicting results on the relationship between COO and purchasing behaviour, as pointed out by Godey et al. (2012). These authors suggested that this is due to the use of different types of products from different sources or the previous studies combining several factors in one research. Even in their own study they acknowledge that the results show that factors driving consumer choice are significantly different depending whether the products were luxury products or non-luxury products. However, their results also show that in both these product categories brand had higher influence on purchasing behaviour than COO. Both brand and COO however are important factors in crafting consumers' quality perceptions (Chu, Chang, Chen and Wang, 2010).

Similar findings have been obtained elsewhere in the literature as well. Jo (2005) suggested that COO could act as the primary quality cue in the case of a weak brand, which is in conjunction with Ofir and Lehmann (1986) who concluded that in the case of the brand not being very well-known, the country image of the product category will dominate as the decision-making criteria. Other research has suggested somewhat contradicting results. According to Chu et al (2010), negative COO image is equally harmful for both weak and strong brands, thus even a strong brand cannot diminish the negative impact.

3.4 Discussion

The literature reviewed translates into several meanings for Music Finland's operations.

Despite all the research efforts towards export barriers, there hasn't been a clear, explicit definition of existence of certain type of barriers in certain countries, companies or settings. Overall a relatively fixed set of barriers have been identified for all existing exporting situations, including informational, functional, marketing, procedural, task, governmental and environmental barriers (Leonidou, 2004). Thus, in order to understand which of these are the most dominating ones for the music industry in Finland, a specific research on the organizations operating in the industry is required.

However, looking at the EPA service classification by Lederman, Olarreaga and Payton (2010), Music Finland's services can indeed be classified into (1) country image building, (2) export support services, (3) marketing and (4) market research & publications. *Country image building* in a sense serves as the backdrop for everything MF does, as all the interaction with foreign partners slowly builds and transforms this image. Particularly the media and professional visiting programme contributes to this, as the visitors become immersed in the Finnish culture and music scene during their visit. *Export support services* include all the export programmes Music Finland provides in the UK initiative, namely Networks & PR, Live and Export Strategies as well as training. *Marketing* on the other hands is covered through the marketing and promotional support for the client organizations as well as the initiative's promotional entity, with its visiting programme, UK events and other occasional events. Then again the findings from *market research & publications* are distributed to the industry representatives through the Music Finland website.

In terms of performance evaluation, Music Finland is focusing on financial and other type of numeric indicators, as well as collecting data from the client organizations. According to the findings of Durmuşoğlu et al. (2012), export promotion services contributed to export performance in not only financial terms, but also stakeholder relationship, strategic and organizational goal achievement. This is one aspect of performance evaluation Music Finland is already implementing through surveying their client organizations. Additionally, Music Finland's decision to provide a wide range of activities for client organizations in different phases of exporting is well supported by Volpe Martincus and Carballo's (2010b) conclusion of bundling activities being more effective than offering standalone services.

What comes to branding, Music Finland helps the client organizations to achieve branding advantage by enforcing their financial and experiential resources and consequently improving their communication capabilities (Zou, Fang and Zhao, 2003), but there has been less focus on fortifying Music Finland's own brand. Music Finland is operating at the B2B market in the UK, where their 'buyers' are the partners they collaborate with, namely media partners in getting exposure to the Finnish artists and the venues to organize promotional events and showcases with. Based on the literature review, quality and service, including personal contact are in the core of creating competitive advantage (Alvarez and Galera, 2001) and quality is argued to be the main brand-equity-generating variable as long as high quality is transformed into high perceived quality as well (Bendixen et al., 2004). On the other hand, findings by Chen et al. (2011) seemingly contradict this by stating that there is no significant relationship between perceived service quality and industrial brand equity. However, the service quality in this context relates to support services of the core product and as Chen et al. also propose that the relationship between product quality and industrial brand equity is significant, it is not clear what the relationship between the service quality and brand equity is in the case where the core product is in fact a service, like with Music Finland.

Additionally, Music Finland can also be considered as an umbrella brand for the Finnish music brands of their client organizations. MF already screens the organizations before accepting them into the export programmes, so 'consistent quality' in that sense is ensured. Music Finland can then use the reputation built on quality as leverage when introducing new Finnish acts to the partners and this way lower the perceived risk related to new artists.

As stated before, the interaction MF has with the foreign partners all contributes to the country image of Finland for the partners and thus the type of interaction between them becomes important. The case study presented the situation in Japan, where Finland as a country is so interesting that it drives interest towards Finnish music and new artists as well, and this would be desirable in the UK as well. Finland's country-of-origin image of course rests in not only Music Finland's hands, but as the COO is likely to affect the brand image of the artists (Diamantopoulos, Schlegelmilch and Palihawadana, 2011) especially more so in the case of new artists (Jo, 2005) it should also be carefully managed.

Thus, Music Finland should add emphasis on their organizational brand and the perceived quality of their services from the partners' point of view. If partners in the UK perceive Music Finland's service quality high, they're more likely to prefer them over other content sources or event partners, which in turn can be speculated to result in higher exposure for Finnish artists and consequently contribute to increased export revenue.

4 Teaching note

4.1 Case synopsis

This case study focuses on Music Finland, an export promotion agency (EPA), and their initiative to promote Finnish music specifically in the highly influential UK music market for 2012-2013. The key issue is to identify relevant metrics for an export promotion agency and to emphasize the importance of performance measurement, in this case to measure the success and performance of Music Finland within the initiative. Importance of branding and country of origin are topics also covered in the case.

Music Finland's operations regarding the UK initiative are described in detail in the case, as well as the different stakeholder groups of the organization. Additionally, the music scene in the UK and its specific characteristics are unravelled together with the prevailing position of Finnish music in the UK to provide context for the initiative. Special attention is given to the metrics currently in place, to serve as the basis for improvement and discussion.

Music Finland is a non-profit organization, which within the initiative is mainly focusing on allocating government funding to the clients, providing marketing assistance in the UK market, helping the clients to establish relevant connections with the British music industry professionals and distributing market insights and knowledge. The main objective of the initiative is to increase the value of Finnish music exports, but in addition there are several promotional and other smaller goals in it for both Music Finland and the client organizations.

The case is set in the spring of 2013 and its protagonist is the UK initiative project manager Riku Salomaa. He is pondering the performance metrics of the initiative as the project approaches its end, as well as the activities to be implemented after the initiative finishes.

Key words: *Export promotion agencies (EPA), marketing metrics, branding, country-of-origin effect*

4.2 Topical Areas

This case can be taught as a part of an undergraduate, master or MBA course in for example marketing management, international business, brand management, B2B marketing or services marketing. Additional contexts can include courses focusing in exporting or performance/marketing metrics.

The prerequisite for studying this case is basic understanding of marketing dynamics and familiarity with the concept of branding. If this case study is taught as a part of an introductory marketing course, the case study should be posited towards the end of course, so students will have established the required understanding first.

4.3 Teaching objectives

The case study focuses on the different activities an export promotion agency can undertake to promote exports and how to evaluate the EPA operations.

The teaching objectives of the case study are to have students understand:

1) The importance of identifying appropriate performance metrics in any given business context in order to be able to change and develop processes that contribute to future success
2) That branding can help create competitive advantage also in B2B and exporting settings
3) The impact of service quality, umbrella branding and country of origin can have on the perception of a brand
4) The different internal and external export barriers a firm might face and how an export promotion agency might help in overcoming them through export support services, marketing and research.

4.4 Student Assignments

4.4.1 Timing

It is advisable to have students study the case before class by reading and preparing assignment questions. Additional preparation can include studying the suggested readings as well to guide thinking and increase understanding of the issues presented in the case. Depending on the extent of beforehand preparation and the format of class exercises, 45-60 minutes of class time should be allocated to teaching the material.

4.4.2 Suggested readings

In addition to the case study itself the following journal articles can be assigned to students as additional readings on the topics related to the case:

Export barriers, export performance and export promotion agencies:

Lederman, D., Olarreaga, M. and Payton, L., 2010. Export promotion agencies: Do they work?. *Journal of Development Economics,* 91(2), pp.257-265.

Leonidou, L.C., 2004. An Analysis of the Barriers Hindering Small Business Export Development. *Journal of Small Business Management,* 42(3), pp.279–302.

Sousa, C.M.P., 2004. Export Performance Measurement: An Evaluation of the Empirical Research in the Literature. *Academy of Marketing Science Review,* 9(12), pp.1-23.

Branding in B2B and export environments, umbrella branding:

Bendixen, M., Bukasa, K.A. and Abratt, R., 2004. Brand equity in the business-to-business market. *Industrial Marketing Management,* 33(5), pp.371-380.

Hakenes, H. and Peitz, M., 2008. Umbrella branding and the provision of quality. *International Journal of Industrial Organization,* 26(2), pp.546-556.

Miklós-Thal, J., 2012. Linking reputations through umbrella branding. *Quantitative Marketing and Economics,* 10(3), pp.335-374.

Mudambi, S., 2002. Branding importance in business-to-business markets: Three buyer clusters. *Industrial Marketing Management,* 31(6), pp.525-533.

Spyropoulou, S., Skarmeas, D. and Katsikeas, C.S., 2011. An examination of branding advantage in export ventures. *European Journal of Marketing*, 45(6), pp.910-935.

Country-of-origin effect:

Chen, Y.-M., Su, Y.-F., Lin F.-J., 2011. Country-of-origin effects and antecedents of industrial brand equity. *Journal of Business Research,* 64, pp.1234-1238.

Diamantopoulos, A., Schlegelmilch, B. and Palihawadana, D., 2011. The relationship between country-of-origin image and brand image as drivers of purchase intentions. *International Marketing Review,* 28(5), pp.508-524.

4.4.3 Study questions

INDIVIDUAL STUDY QUESTIONS

These questions can be given to the students to be prepared together with reading the case before the class. The questions can then be used as the basis for class discussion.

1. What export barriers exist that impair firms' abilities to enter new markets? How can an export promotion agency (EPA) help in overcoming them?
2. How would you evaluate Music Finland's current metrics? What is good about them? Who of the stakeholders are interested in the results? What else could be measured or how could the existing metrics be improved?
3. Should Music Finland fortify its own organization brand? Why/why not? If yes, how could MF strengthen the brand?
4. See the questionnaire form in exhibit 4. How efficient do you think it is? What does it measure and what conclusions can be drawn from the results? What actions can be implemented as a consequence? How would you improve the questionnaire?
5. If you were Riku Salomaa, what would you do? How to determine what measures to implement after the end of the initiative? Draft a plan for Music Finland to continue their operations in the UK after the specific initiative ends and the MF employees return to Finland. What challenges will you face?

GROUP EXERCISE

This exercise is a group exercise to be carried out in class and can be used to replace the individual questions 1 & 3. The class should be divided into groups of 4-6 students, one third of the groups representing Music Finland, the second third the clients of Music Finland, and the last third the UK media and venue partners of Music Finland. The division in groups and giving the assignments can be done on the previous class from the actual case discussion class, when students can prepare their assignment outside class time. Alternatively, students can be given the case study and possibly additional readings beforehand, but the group phase will be carried out entirely in class time. Groups can either present their answers in front of class or the tutor can collect responses on whiteboard.

The assignments of the groups are:

Finnish client organizations: Imagine you are a small record label in Finland and believe one of your artists has huge potential to succeed in the UK market. Think of the establishing export operation to the UK (without MF) – what type of export barriers and challenges do you think you would face? Which are the most severe and which more minimal?

Music Finland: Imagine you are working for Music Finland in the UK. How would you strengthen the organization's brand? Why is the organization brand important?

UK partners: Imagine you are a big music media partner of Music Finland in the UK. Music Finland is one of the several partners offering audio, video and news content to your music website. What is going to affect on your decision to cooperate together with MF instead of numerous other possible partners and content providers?

4.5 Teaching plan

The case can be approached by identifying and clarifying the key points of the case study in class discussion. For example the following questions can be used to guide thinking.

1. *What is it exactly that Music Finland's UK initiative is about? What are the activities?*

   Objective of the initiative is <u>to increase Finnish music exports to the UK</u> by getting the Finnish bands, artists, songwriters, festivals etc. media coverage, concert bookings, album sales and relevant contacts in the UK market as well as increasing the Finnish companies' export know-how through training.

Responses about the activities can be structured on the whiteboard/on a slide like this:

Export programmes	Promotional entity	Training and workshops
• To allocate funding to client organizations • Never 100% funding to enforce client commitment • Assistance in marketing strategy planning • Help in finding the right contacts in the market	• To support client organizations in gaining visibility & publicity in the UK • Ensuring the right UK professionals see/discover the right Finnish acts • Serves to promote contract negotiations	• To increase the UK market knowledge of the Finnish organizations • To enhance the export know-how of the Finnish clients
• Can be focused on *Networks & PR, Live, Export strategies*	• Consists of media & professional visiting programme and UK events	• Can be about different genres in the UK or for example legal issues or British music media

2. *Identify the stakeholder groups in the case. Looking from the perspective of each of the stakeholder groups, what metrics are important and why?*

The stakeholder groups to be identified should include the government/ministries, Finnish client organizations and UK partners.

a) The ministries as funders are likely to be more interested on the financial metrics, how the funding was allocated, what was the money used for and what possible results it lead to – as well as the increase in export revenue of course, although this is likely to occur only later on.
b) The client organizations are probably more interested on the measurability and effectiveness of the marketing and promotional activities done for their

artists in the UK as well as the financial results too, since they have their investment in the project too.

c) The partners in the UK are likely to be interested in for example how many visitors the Finnish music content brings to their website or how much audience a Finnish band can garner in their concert venue, so past figures of related cases might be relevant.

For Music Finland all of these will be important, as they all are indicators of how well they are performing as an EPA.

After these ‘warm-up’ questions the discussion could be guided to the individual study questions that the students have prepared outside class time. They can be covered either as an open, class discussion topic by topic or students can be divided into groups to discuss their responses together and then present their findings to the rest of the class.

The group exercise can be carried out alternatively or additionally. If students are to have prepared the individual study questions before the class and they are covered as an open class discussion, followed by the group exercise, then the individual questions 1 and 3 can be left out as they are about the same topics as part of the group exercise.

5 Methodology and results analysis

5.1 Research problem and approach

As identified in the literature review section of this work, brand is of great importance also on B2B markets. Country of origin, reputation, service quality and the brand image of other brands under an umbrella brand help in constructing the corporate brand image, which, if carried out successfully, can lead to competitive advantage. As concluded in section 3.4, Music Finland is likely to benefit of a stronger organizational brand.

As service quality is a factor in corporate brand image, it is important for Music Finland to learn how it is perceived by the partner organizations in the UK. This will also help to craft an action plan to be implemented after the end of the UK initiative.

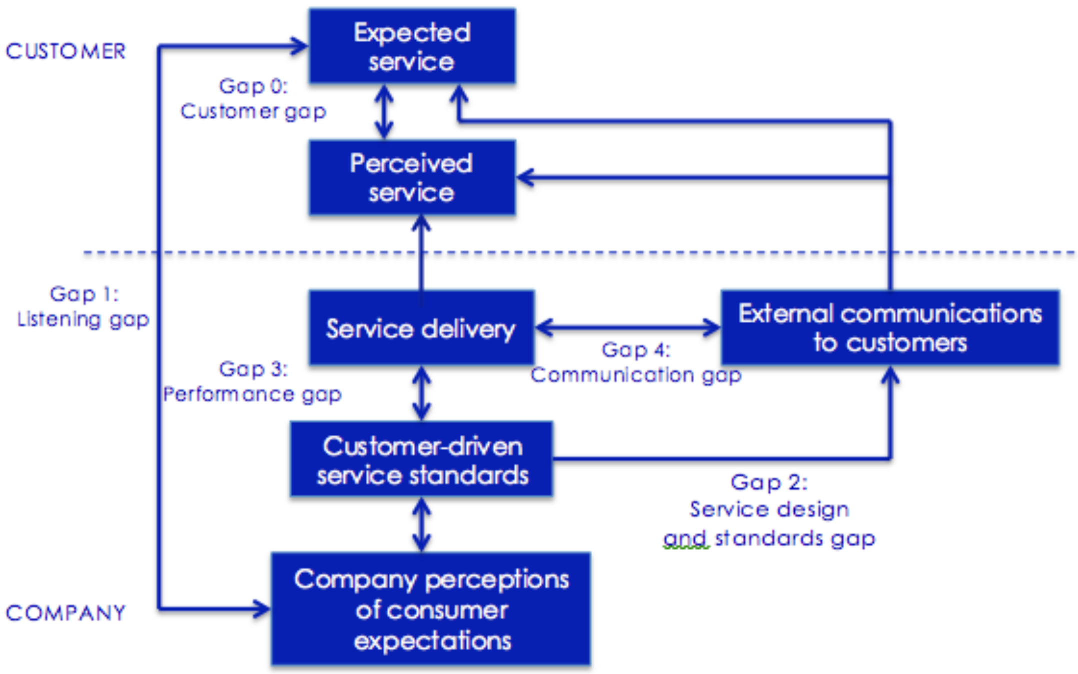
To understand the service quality of Music Finland in the UK initiative an applied gaps model of service quality analysis is carried out. The gaps model is normally used to measure customer perceptions and expectations, but in this context the methodology was adapted in order is to measure both Finnish client organizations' and UK partners' expectations and perceptions of Music Finland's service provision. Music Finland is also self-assessing the quality of the services they provide, in order to identify where the perceptions differ.

The gaps model as presented by Zeithaml, Bitner and Gremler (2008) was used as the basis of the research and is visualized in figure 1. This is a very robust model that has been used worldwide to help organizations identify where they are failing in terms of service provision and to define the what are the best measures to be implemented. The gaps model of service quality includes analysis at five levels:

Gap 0: Customer gap
Gap 1: Listening gap
Gap 2: Service design and standards gap
Gap 3: Service performance gap
Gap 4: Communication gap.

The *customer gap* (Gap 0) assesses the difference between the customers' expectations of the service and perception of the actual service. In an ideal situation the perception will match or exceed the expectation, which will leave the customer happy with the service experience, so it's important for a company to understand both expectations and perceptions.

The gaps 1-4 are so called provider gaps and they all contribute to the customer gap. The *listening gap* occurs when the company believes it knows what the customers expect, when in fact it does not. Therefore, it is the difference between customer expectations on the service that is offered and the company's perceptions of those expectations. The reasons for this gap can be the lack of marketing research carried out to understand the customers, the company management not interacting with the customers or inadequate emphasis on the relationship with the customers. The *service design and standards gap* assesses to what extent the organization designs and defines their services and standards in accordance to the expectations the consumers have. This gap derives from, for example, undefined service designs or lack of service standards. The *service performance gap* measures to what extent the way the service is delivered matches the previously defined standards and the sources of this gap can be in inadequate training of personnel, failure to match demand and supply or customers' lack of knowledge of their roles and responsibilities. The last gap, *communication gap*, occurs between service delivery and external communications to customers and originates from, for example, lack of integrated marketing communications or ineffective management of customer expectations.



Source: Zeithaml et al., 2008

Figure 1 Gaps model of service quality

The gaps model was adapted to help measure Music Finland's service quality to the client organizations in Finland as well as the partners in the UK.

The specific research questions (marked as SQRQ=service quality research questions to distinguish from the dissertation research questions) this research tries to shed light on are:

SQRQ1: What are Music Finland's strengths and challenges in service provision within the UK initiative?

SQRQ2: What can be inferred from these strengths and challenges to be the most important activities to be implemented after the end of the initiative?

5.2 Research design

The research includes two studies. As the services and collaboration between Music Finland and the UK partners is different than that with the Finnish clients, the first study is about Music Finland's service provision to the UK partners and the second study about MF's service provision to the Finnish client organizations.

5.2.1 UK partner study

The target population of the partner study was the UK partners of Music Finland. Convenience sampling was used to select three main partners with which MF had operated extensively during the initiative and who would have formed opinions of how it generally is to cooperate with Music Finland.

An online survey was developed on an online survey tool Qualtrics to measure the partners' perceptions on different aspects of the five gaps of the gaps model of service quality (see appendix 5 for the questions). The majority of the questions were closed questions to be answered on a 10-point Likert type scale, mainly anchored with 1=poor/poorly and 10=excellent/excellently. Additionally, depending on the responses the respondent gave, open-ended questions followed to gain more insight on the topic in question.

In order to compare the perceptions of the partners with the perceptions of Music Finland, two people from MF answered to the same closed questions than the partners did, assessing their own service provision performance.

5.2.2 Finnish client organization study

The target population of this study was the Finnish music companies that were clients in Music Finland's UK initiative. Convenience sampling was used to detect clients that had been using a wide range of services within the initiative and thus could provide deep insights on MF's service provision. The sample size was three.

Qualtrics was used to develop an online survey, to measure the clients' perceptions on the five gaps (see appendix 8 for questions), in a similar way than with the UK partners' survey. As the services to these groups were different, also the questions were different as well. Again the majority of questions were closed with the answer options on a 10-point Likert scale with endpoints 1=poor/poorly and 10=excellent/excellently. In certain questions if the client rated a statement less than 10, an open-ended question was added to understand the response better.

To be able to compare the possible differences in perceptions between the client organizations and MF, the two people from MF responded to the same closed questions about their service provision performance than their clients did.

5.3 Data analysis

The collected data will be analysed the same way in both of the studies. Following the methodology developed by Zeithaml and colleagues (2008), a percentage score was calculated for each gap. For example, if the respondents answered 10=excellent/excellently on all of the questions in that gap, the percentage would be 100. If there are responses less than 10=excellent/excellently the percentage score is lower, revealing a service quality gap. In each of the questions the percentage is based on the mean of the responses. Additionally, as MF will evaluate the statements as well, their percentage score can be compared with the UK partners in the first study and the Finnish client organizations in the second study. This analysis is useful in highlighting the differences in perceptions.

The analysis will pinpoint the most critical areas of Music Finland's service quality with both the partners in the UK and the client organizations in Finland.

5.4 Results

5.4.1 UK partners

Data was collected from three UK partners and two representatives of MF as planned.

The total gap scores for each of the five gaps and their sub-gaps were:

	Partners	Music Finland	Difference (in percentage points)
Gap 0: Partner gap	**95%**	**78%**	**17**
Gap 1: Listening gap	**81%**	**81%**	**0**
Market research orientation	79%	80%	1
Relationship focus	83%	85%	2
Service recovery	82%	80%	2
Gap 2: Service design and standards gap	**79%**	**82%**	**3**
Systematic service design	77%	75%	2
Presence of customer-defined standards	80%	85%	5
Gap 3: Service performance gap	**90%**	**88%**	**2**
Effective role fulfilment by customers	83%	85%	2
Alignment of demand and capacity	97%	90%	7
Gap 4: Communication gap	**88%**	**82%**	**6**
Integrated marketing communication	88%	82%	6

Table 1 Total gap scores of the UK partner survey

As presented in table 1, the lowest gap score based on partners' responses was in service design and standards gap with 79% and the highest in partner gap with 95%. Rearranging the different gaps from lowest to highest gap score would give: 1) service design and standards gap, 2) listening gap, 3) communication gap, 4) service performance gap and 5) partner gap. See details of the total gap scores as well as the sub-gap and factor scores in appendix 5.

In the *service design and standards* total gap score there was a difference of only 3 percentage points between the evaluations of partners (79%) and MF (82%). Looking at the sub-gaps, the partners' evaluations of *systematic service design* and *presence of customer-defined standards* were not remarkably different, with sub-gap scores of 77% and 80% respectively. The lowest factor score of 77% in these sub-gaps was in *Music Finland's ability to provide partners with guidelines on how each case of collaboration will work,* which contributes to the *systematic service design* sub-gap. The three partner responses forming this score were somewhat dispersed, the lowest being 5 and highest 10= excellent (see appendix 6). Music Finland's own assessment wasn't far off from this with the score of 75%. On the second sub-gap both the factors, *definition of service standards* and *the standards* *matching with partner expectations,* the partners scored at 80%, whereas MF assessed themselves at 85%. So both of these sub-gaps would require almost an equal amount of attention, with *systematic service design* being slightly more urgent.

Listening gap total score was the second lowest with 81%, in both partners and MF's assessments. According to the partners' assessment, the sub-gap that is open the most is *market research orientation* with a score of 79%, compared to *relationship focus* score of 83% and *service recovery* score of 82%. In the factors forming the *market research orientation* score the partners expressed that the *amount of feedback collected by MF* was on a quite good level (90%) as well as *MF succeeding in using the feedback to improve the services* (87%). An alarmingly low score of 63% was given in the factor *how well does Music Finland manage to offer partners relevant content and proposals for collaboration*, however looking at the individual responses to this question (see appendix 6) two respondents scored as high as 9 and one respondent 1=poorly. These results suggest that mostly MF is doing well in offering relevant content and collaboration proposals, but now the focus should be in standardizing this experience so that it applies to all of the partners. Also in the open question one respondent answered: "*I think my main issue previously was the acts they were picking to break in the UK. However that seems to be more nuanced and appropriate now they have stronger knowledge of the music market here",* indicating that overcoming the issue with offering relevant content is becoming slightly easier as the organization progresses on the learning curve. However, the second lowest factor score in this sub-gap with partners was in *how well did MF initially define the type of collaboration with the partners to ensure it matched their expectations (*77%), implying that perhaps if the collaboration and mapping of partners' expectations is carried out thoroughly at the beginning, it will help MF to provide more relevant content to the partners since the beginning. In the sub-gap *relationship focus, offering services that are tailored better* would require more attention (80%), whereas in the sub-gap *service recovery* both of the factors of *MF planning for setbacks and changes* and *MF's ability to overcome challenges* scored close to each other with 83% and 80% respectively. Music Finland's self-assessment in all of the sub-gaps was very close to their partners' evaluations. For more details on individual responses of MF representatives see appendix 7.

Communication gap total score even though being the third lowest, was already very high at 88%. Partners scored *communications corresponding with the level of service quality* at 87%, *MF's communications about what will be provided to partners* at 90% and *appropriateness* *of the tools MF uses* at 87%. Music Finland scored themselves slightly lower in all of these aspects: 80%, 80% and 85% respectively.

The two highest total gap scores given by the partners were in *service performance gap* (90%) and *partner gap* (95%). The scores in both these gaps were remarkably high, indicating that Music Finland is on a good level of *effective role-fulfilment by customers* (87%) and specifically with *alignment of demand and capacity* (97%) in the *service performance gap*, and generally *understanding their partners' expectations* (93%) and *perceptions* (97%). MF's own evaluations of the partner gap were significantly lower than the partners', with 85% and 70%, respectively.

5.4.2 Finnish client organizations

Only two of the three selected organizations responded the survey within the time frame, so the analysis was carried out with the responses of two clients and two MF representatives.

The total gap scores for each of the gaps and their subgaps were:

	Clients	Music Finland	Difference (in percentage points
Gap 0: Customer gap	**88%**	**83%**	**5**
Gap 1: Listening gap	**81%**	**83%**	**2**
Market research orientation	85%	83%	2
Relationship focus	77%	85%	8
Service recovery	83%	80%	3
Gap 2: Service design and standards gap	**74%**	**86%**	**12**
Systematic service design	78%	85%	7
Presence of customer-defined standards	70%	88%	18
Appropriate physical evidence and servicescape	70%	85%	15
Gap 3: Service performance gap	**82%**	**82%**	**0**
Effective role fulfilment by customers	80%	75%	5
Alignment of demand and capacity	83%	85%	2
Gap 4: Communication gap	**78%**	**86%**	**8**
Integrated marketing communication	78%	86%	8

Table 2 Total gap scores of the Finnish client organization survey

As can be seen from table 2, the lowest score among the gaps based on the clients' responses was in the service design and standards gap with 74%, whereas the customer gap score was the highest with 88%. Ordering the gaps from the lowest score to the highest would result in 1) service design and standards gap, 2) communication gap, 3) listening gap, 4) service performance gap and 5) customer gap. See appendix 8 for details about the total gap scores, sub-gap scores and the factor scores.

As *service design and standards gap* score was the lowest, this means that Music Finland has the most work to do with the sub-gaps in this gap to close the overall customer gap. Interestingly, this gap score was the highest – together with the *communication gap* score – in Music Finland's responses. Music Finland's perception of the state of the factors within this gap was constantly higher than the clients' rating (see the full analysis in appendix 8), creating the biggest difference of 12 percentage points between the gap scores. Looking at the sub-gaps and factors contributing to this difference in detail, the sub-gaps *presence of customer-defined standards* and *appropriate physical evidence and servicescape* were open the most with both evaluated at 70% by the clients. What is specifically notable in these sub-gaps is that MF's self-assessments were remarkably higher, at 88% and 85%, creating a percentage point difference of 18 and 15 between the assessments of clients and MF. The clients assessed all of the factors in both of these sub-gaps at 70%, namely *service standard definition, service standards matching with client expectations* and *attractiveness of the promotional releases*, meaning that all of them should be improved equally. In the sub-gap of *systematic service design* the total gap score was 78%, with the statement *how well are MF employees aware of the services the organization provides* scoring the lowest at 75%, whereas *MF's ability to develop new services* and *service definition for the clients* were evaluated at 80%.

The second lowest client score and also the second biggest total gap score difference of 8 percentage points between clients and MF was in the *communication gap*. In the question *How well did Music Finland succeed in communicating to the clients about what will be provided to them in terms of service*, where clients had to separately evaluate communications about *export programme, media & professional visiting programme, showcases & events in the UK* and *training and workshops in Finland,* the two first got a relatively good score of 85%, but the last two got 60% and 75%, respectively. Music Finland's evaluations of these four were very close to the clients' in the first two (85% and 90%), but 20 percentage points higher, 80%, in *showcases & events in the UK,* and 85% in *training and* *workshops.* Also in the overall evaluation on *Music Finland's ability to deliver on what was agreed with the clients in the UK initiative* clients' score was 75% and Music Finland's 90%. Additionally, another relatively big difference (15 percentage points) between clients' and MF's evaluations occurred in *appropriateness of the communication tools MF uses with clients*, where clients' score was 75% and MF's 90%. Both client's and MF scored MF's *communications corresponding with the level of service quality* at 85% and *communications expressing one, consistent message* at 80%.

The third lowest client score was in the *listening gap*, with 81%, whereas MF's evaluation was 83%. In the sub-gaps the *relationship focus* scored the lowest with 77%, *service recovery* being the second with 83% and *market research orientation* being the highest with 85%. Also the biggest difference between clients' and MF's evaluations occurred in *relationship focus,* where MF's self-assessment was 8 percentage points higher at 85%. Within this sub-gap *MF's focus on building a relationship with clients* was on a relatively good level of 85%, whereas *understanding different client groups* would require the most attention with the score of 70%. *MF's ability to offer tailored services* scored at 75% and should be improved as well. Also in the open question of "*How could MF fortify the relationship with the clients?*" one respondent had answered, "*By offering more tailored services*". In the sub-gap *service recovery* the clients indicated that *MF's planning for setbacks and changes* was on an acceptable level of 80%, but their *ability to overcome challenges* (70%) should be improved. In the *market research orientation* sub-gap again the *amount of feedback collected by MF* was scored remarkably high at 90%, but *using the feedback to improve services* again lower at 80%.

The second highest total gap score by clients was in the *service performance gap*, where both clients' and MF's evaluation was 82%. The sub-gaps of *effective role fulfilment by customers* and *alignment of demand and capacity* were assessed at 80% and 83%, with the factors in the range of 80%-85% making this gap well balanced.

The highest client total gap score of 88% was in the *customer gap*, where MF's score was 83%. The two factors of MF *understanding the clients' expectations* and *clients' service perceptions* were rated at 90% and 85% by the clients, respectively. MF's assessments of these factors were 85% and 80%. For details of individual responses of Music Finland representatives please see appendix 10.

5.5 Conclusions

An interesting finding in these two studies is that the perceptions of service quality of Music Finland can vary quite a lot between MF and the clients, as well as between MF and the partners. Looking at the results on a broad level, what is striking is that in majority of the factors related to the partner study, Music Finland's own assessment was lower than the assessment of the partners, whereas in the client study MF's self-assessment on the majority of the factors tends to be higher than the clients'. The implication of this difference between these assessments is that if unaware of this difference between perceptions, there is a risk that resources are being incorrectly allocated. The bigger the difference between the assessments, the higher the possibility that resources are being wasted by trying to 'fix' the wrong things.

In the partner study, in statements where MF scored their service quality lower than the partners did, MF might allocate personnel and financial resources to improve aspects of their operations that in fact do not need improving in the partners' eyes. Simultaneously, there might be areas where the perceptions differ to the opposite direction, i.e. the partners perceptions of a certain aspect of service quality are less favourable than MF's – meaning that these aspects that would indeed require improving and developing, are not getting the attention and resources they require. In the long run this can turn out to be detrimental to the corporate reputation and brand image. This is why the results of the client survey are more alarming than the partner survey, as in the majority of questions MF's perception of the service quality was more positive than the clients'.

On the partner survey, MF's service quality was rated quite high by the partners. However, there is still room for improvement and the results suggest that MF should focus on closing the *service design and standards gap* first. Music Finland should particularly improve in defining the cases and projects of collaboration better and provide guidelines to partners, as well as generally clarify their service standards and ensure that they match with partner expectations.

Closing the *listening gap* with the partners should be second on the agenda, after the service design and standards gap. The results suggest that the partners were relatively pleased with the amount of feedback collected from them to understand their expectations (gap score 90%), but the lowest partner evaluation of the whole survey was in Music Finland's ability to offer partners relevant content and proposals for collaboration (63%). The low score was a result of one of the respondents scoring a 1=poorly, while the two others scored the statement at 9 (see appendix 6 for details). This also suggests that service standards should be in place for MF to be able to deliver the same level of service quality and to replicate the positive service experience with all of the partners. Additionally, in order to close the listening gap the results indicated that a more thorough and clear initial definition of the nature of the collaboration might be required.

As the collaboration and service provision is likely to be different with each partner, i.e. the service must be tailored, the standardization should be applied to the process of understanding how exactly the partners expect the service to be tailored. This can mean for example constructing a framework of key issues to be identified with the partners at the beginning of collaboration, such as what type of content they wish to receive, how do they wish to receive it, which means of communication they prefer or what frequency of communication is the most convenient for them.

On the contrary, the partner gap total score was remarkably high, so partners perceive that MF understands their expectations and perceptions relatively well. Also the service performance gap score was high, indicating that MF's service delivery is perceived to be on a good level. Also the open questions indicated a good level of satisfaction, with one comment stating:

"I think they're a very impressive organization, full of creative, funny and friendly people. They're excellent at approaching all aspects of the music business, regarding media and live promotion, hospitality, understanding musical trends, interacting with musicians, labels and journalists and so on. Subsequently I think they're steadily achieving what they set out to do: promoting awareness of new Finnish music outside of Finland in an interesting, authentic and savvy way."

The client survey gap scores were comparatively lower than the scores in the partner survey, indicating that improving the service quality in services to client organizations should be emphasized. As on the partner side, *service design and standards gap* score was the lowest, with the biggest concerns being the presence of customer-defined standards and the attractiveness of the promotional releases. Looking at the individual responses (see appendix 9) in the factors, in all of the statements there was one high evaluation at the range of 9-10 and one lower score between 4-7, bringing the statement scores and the total gap score down. This response pattern again fortifies the conclusion that Music Finland should indeed be able to define service standards better in order to deliver a similar, high quality service experience to all of the clients consistently.

The *communication gap* would also require attention with its second lowest total gap score. Communicating about the four different types of services within the UK initiative was a bit of an issue for some parts, as was the appropriateness of communication tools MF uses with clients. Arguably, the communication issues are likely to partially result from the service standardization issues. As the service standards become more clearly defined, also communicating about the services will become easier.

The findings suggest that defining the activities within the initiative should be further emphasized, in order to ensure that the clients' expectations are aligned with the reality of what the initiative can offer. For example communicating about what will be offered with *showcases and events in the UK* scored only 60% and generally Music Finland was evaluated to be able to deliver on what was agreed with the clients regarding the services within these activities only at 75%. Additionally, Music Finland's employees being aware of the services they provide was scored at 75%, suggesting that the activities and services require clearer internal defining first, followed by more thorough clarification to the clients. I would also suggest similar kind of approach to service standardization as with the partners: a standard process to define the service factors that make a difference to the clients and tailor the service accordingly. For example the appropriateness of communication tools MF uses was rated at 75%; probably not all the clients prefer to use the same tools for communications, so the preferred tools could be identified and prioritize the use of the preferred tools with each client.

Like with the partners, the highest total gap scores were in the customer gap and service performance gap, indicating that generally MF understands their clients well, and role definition as well as alignment of demand and capacity are on a good level.

In terms of the research questions, the findings of the research suggest that with in response to SQRQ1 Music Finland's greatest challenge with both clients and partners is in providing standardized service. With partners the second biggest challenge is in listening the partners better: the amount of feedback collected was perceived to be on a good level, but transforming this information into 'partner intelligence' and actually using the information to provide tailored services requires attention. With clients, communication was perceived to be the second biggest challenge, which can be argued to at least partially result from poorly defined service standards. Strengths with both clients and partners were in generally understanding their expectations and perceptions as well as providing service in a timely manner and defining roles.

Addressing SQRQ2 about the activities to be implemented next, the most important thing is to firstly determine if the current methods of collecting feedback from the partners and clients is effective and secondly to determine how to process the collected data in a way that leads to service provision that's tailored to the partners' and clients' needs, but standardized in the sense of consistently high quality service provision. There might be a problem with the *type* of feedback collected, which makes it difficult to transform it into services that the clients and partners feel match their expectations. Additionally, to contribute to closing the communication gap with the clients perhaps another survey could be administered focusing on precisely the communication needs of the clients, in order to understand how that could be developed. Alternatively, if data about clients' communication preferences exists, it needs to be processed and transformed into client insight, which will be used to develop Music Finland's communications further.

5.6 Limitations

The biggest limitation of this study arises from the small sample sizes. In each of the surveys the sample size was 2-3 respondents and as the gap scores are expressed as percentages, it must be acknowledged that one person's responses have a relatively strong impact on the final percentage scorings.

6 Concluding remarks

This chapter summarizes the findings from the case study, extant literature and the service quality gaps analysis through addressing the research questions set at the beginning.

RQ1: What types of activities are often implemented by export promotion agencies?

Literature proposes that the main objective of EPAs is to act as an external provider to help exporters find and understand new markets for their products through services of *country image building export support services, marketing* and *market research and publications* (Lederman et al., 2010). *Country image building* can include for example promotional events and advertising, whereas *export support services* comprise of exporter training, export financing, sales leads and capacity building as well as information on pricing or trade finance. *Marketing* activities on the other hand can mean trade fairs or follow-up services by the EPA representatives abroad. Information about the target market in the form of market surveys and publications encouraging firms to start export operations form *market research and publications* (Genctürk and Kotabe, 2001; Lederman et al. 2010).

RQ2: What types of activities were implemented by Music Finland to increase awareness of Finnish music?

As concluded in the section 3.4, Music Finland's activities fall under the classification of Lederman et al. (2010) quite smoothly. *Country image building* is a perpetual activity that consists of all the activities and interactions between Music Finland and foreign counterparts. Music Finland is not actively promoting Finland as such, but the artists, as mentioned, with a very content- first approach. However, of course events such as Lifem festival 2013, that has a completely Finnish line-up, is likely to contribute to the country image building more, as the country of origin is emphasized in the festival subtitle – *The Finnish line* - and possibly in the marketing materials as well. On the other hand, Lifem 13 having an all-Finnish line-up in the first place is quite likely the result of positive country image created through other high quality music from Finland, so it's a cyclical process feeding on itself. However, there had been little focus on Music Finland's organizational brand. As the organization is very strongly branded as Finnish through its name and as it serves as an umbrella brand for the Finnish artists, it will arguably contribute to the country image as well, thus making a strong organizational brand essential.

Music Finland's export programmes and training represent the *export support services*. With the export programmes Music Finland encourage the Finnish organizations operating in the music industry to start exporting by offering market information, building exporter know-how and allocating funding. The different export programmes are for companies with different support needs and in different exporting phases: the programmes can be used in support of album releases, touring abroad, festival promotion, songwriter collaboration and travel expenses. In addition to funding the programme includes assistance in planning and crafting an entry strategy. One of the key things MF provides is the network of industry contacts at the target market. Training takes place in the form of workshops around different themes related to the export target market and can be focused on a certain music genre or an area of music business, and how it's dealt with in the target market. There is room for improvement in providing these services though: on the service quality gaps analysis the clients assessed the communication of the export programmes being on a relatively good level, but communication about the training and workshops should be improved. As concluded earlier, this is arguably linked to the issue of service definition, which needs to be addressed first.

On the *marketing* side Music Finland is carrying out several activities. MF invites target market music & media professional to visit different festivals and events in Finland, to become accustomed with both the Finnish artists and the music scene in general. This also contributes strongly to the country image building aspect. MF also arranges club events together with the other Nordic EPAs as well as on their own, to showcase Finnish artists at the target market. MF also assists the clients in campaign planning around festival appearances and for other purposes. With all these areas of marketing the partners in the target market are of great importance. Music Finland works with venues in event production, media partners in content collaboration and creating publicity, marketing agencies to create campaigns and the other EPAs to share ideas with and produce events. MF also initiates other types of promotional campaigns, such as The Record Store Day vinyl EP which was distributed through record stores to promote Finnish music. Music Finland has a great set of activities in place, but as with the export support services, also the service definition and communication of these activities needs to be improved. It can also be speculated that more effective brand management of the organizational brand would lead to more successful marketing for MF's client organizations.

On the *market research and publications* frontier Music Finland is a valuable source of knowledge on different foreign markets, but also on developments in the music industry in general as well as in the Finnish music industry. MF publishes a range of reports and information on their website to serve the Finnish music industry.

RQ3: How is the impact of Music Finland UK's promotional activities measured?

Music Finland has a set of metrics in place for performance evaluation detailed in exhibit 3 of the case study. The metrics focus on financial performance, namely market value of music exports per territory, type of exports and client. Additionally, MF tracks changes and developments in the client base in terms of total number of clients, number of new clients, and repeated use of services, as well as development in the clients' export know-how. MF also follows service production metrics, meaning the number and type of services produced and their value for the clients. Feedback from clients is also collected on satisfaction on MF services and the results they have gained.

There had been little attention to assess the quality of interaction and collaboration with the partners and their satisfaction on the service MF provides them, which was addressed in the current research by carrying out a service quality gaps analysis. The results revealed differences in service quality perceptions between MF and the partners, and pinpointed the aspects requiring further development. The study suggested that the partners were reasonably satisfied with their collaboration with MF, although improvements were needed in defining service standards and listening the partners' expectations better.

Despite all these metrics in place however, the impact on the market through different promotional activities is not really measured and the causal relationship between a specific promotional activity and the gained results remains unidentified.

RQ4: Of the set of activities implemented by Music Finland in the UK, which were considered as most successful?

One way of assessing this could be comparing clients' feedback on different activities and base the success evaluation on their satisfaction. However, as the overall objective of the UK initiative is to increase export revenue, the performance evaluation should be able to identify those exact actions that contribute to reaching that goal the most effectively. Causality or even correlation between the activities and the increase in export revenues is extremely difficult to prove, as there is a multitude of activities carried out for one artist at any given time, and since the results in terms of export revenue are likely to occur after a longer period of time. Arguably, the results in this sense are indeed a consequence of a combination of activities and thus challenging to trace back on the impact any one activity had. The current research fails to address this research question further.

RQ5: What implications can be inferred from the case study specific findings to the broader topic of evaluating EPAs?

The extant literature has mostly focused on financial metrics used in evaluating EPAs, however Durmuşoğlu et al. (2012) identified a positive relationship between not only export promotion services and financial goal achievement, but also stakeholder relationship, strategic and organizational goal achievement too. To balance out the financial and descriptive metrics MF already had in place, a new metric to evaluate MF's performance was introduced in the current research: the service quality gaps analysis addressed MF's relationship with two stakeholder groups, the Finnish clients and UK partners, and how they perceived the service quality of Music Finland.

The financial metrics surely need to be in place in order to track development of export revenue from different markets and report back to the funders. Also the other metrics Music Finland was already using are necessary: tracking the service production, collecting client feedback and following changes in their client base. From a branding perspective there was a need to address the partner side of operations too.

It is probable that these metrics are applicable to a large extent to other EPAs with a similar structure and business model than Music Finland, however further research on the topic is required. Stakeholder groups are likely the same with other EPA's as well, making these metrics relevant for them too. The current research does not however suggest that this set of metrics is applicable off-the-shelf to any EPA operating in any country and industry context, nor does is propose that the set of metrics exclusively and automatically fits an EPA with a similar structure and operating environment.

6.1 Further recommendations

As outlined in section 5.4.3, Music Finland should focus on strengthening the organization brand by improving service quality of services to both Finnish clients and the UK partners. Service standards were identified to play a key role in achieving a higher level of service quality.

In order to address RQ4 that remained unanswered, the relationship between the activities Music Finland is carrying out and growth in export revenue should be identified. As for the aforementioned reasons this is a challenging, if not impossible task, an alternative approach should be developed. Supposedly the aspects leading to increased export revenue would be in the audience becoming acquainted with the Finnish artists and their music, which is somewhat more approachable in terms of measurability. Thus, a metric to determine the correlation between the activities and visibility, publicity and audience engagement gained in response should be put in place.

As the range of activities and the consequent results are so varied, a unique, standardized metric to is not likely to accurately reflect the nature of the relationship and really capture the different dimensions of the activities. I therefore suggest that MF should consider developing specific metrics for bigger events and campaigns to measure their impact. In cases such as The Record Store Day campaign, where one track from six different artists appeared on the promotional EP, i.e. despite the somewhat different starting points of the artists they were exposed to the same promotional activity, specific analytics could be defined to follow-up the audience's response to the activity. The analytics to be tracked could include for example the amount of artist website visitors, artist Facebook page visits, peaks in album and track purchases and streams, video views, amount of concert ticket purchases and so on. If similar audience behaviour patterns are identified among the, in this case six, artists, it may be possible to conclude that a relationship between this type of promotional activity and audience engagement exists. The same follow-up process can be applied to for example artists attending the same festival or club event.

Another possible approach could be to choose 2-3 artists who are participating in the export programmes and track the analytics available throughout the different activities that occur within the programme. Some of the activities are likely to be the same and some of them are probably different between the artists, but again conclusions on what generates an audience response and engagement, and consequently what less so, can be drawn from the analytics figures.

Additionally, a satisfaction survey could be executed to the foreign participants of the media & professional visiting programme. Their visit to Finland with all its aspects contributes greatly to the country image they have, and as they are likely to interact with other music professionals in their home country, it would be essential that the message they spread about Finland is indeed a positive one. Conducting a satisfaction survey would help Music

Finland to contribute favourably to the country-of-origin effect by ensuring that the visitors' overall experience is positive and spotting the possible areas of development.

In the UK, as the initiative ends, Music Finland should focus on creating service standards and ensure the collaboration with the UK partners matches what the partners expect, especially now when MF representatives will no longer be based in London. As for the future initiatives, emphasis should be added in defining the service standards for the services being offered to the client organizations, as well as developing a process to follow-up the impact of key activities on audience engagement through the different analytics available.

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Appendices

Appendix 1. Riku Salomaa. 2013a. Summary of interview about Music Finland (translated from Finnish). Interviewed by Leena Lamberg. [Personal interview] London 5 May 2013.

MUSIC FINLAND

1. **What does Music Finland do exactly? What is its mission?**

Music Finland is a new organization, founded last year (2012), as a result of the merger of Music Export Finland and Finnish Music Information Center FIMIC. The objectives of these two, previously existing organizations were very similar; to promote Finnish music and increase music export, but the means were somewhat different. Music Export Finland was more business oriented partly because of the main funder being the Ministry of Employment and the Economy, whereas the main funder of FIMIC was the Ministry of Education and Culture, emphasizing the cultural role of music and promoting it. Now Music Finland combines these two, so roughly we're both an export promotion agency and information center. We also play a strong role domestically in maintaining and developing the industry's know-how and capabilities.

We are the flag-bearers and experts of Finnish music both in Finland and abroad.

2. **How is the organization structured? Who owns it and who funds it?**

We're owned by eight organizations that operate in the music industry in Finland. Ownership is split equally between them and one member of each owner organization sits in our board. Executive director is in charge of the organization, under his supervision there are the head of communications and promotion and the head of international, and the teams underneath them.

Funding comes mainly from the Ministry of Employment and the Economy and the Ministry of Education and Culture. Additionally the Ministry for Foreign Affairs of Finland funds some promotional activities, such as members of the UK media visiting Finland. Export project funding is always from the Ministry of Employment and the Economy, whereas the promotional activities are funded by the Ministry of Education and Culture. But what's key here is that when we fund companies' internationalization projects, we don't fund full 100%, but a maximum of 50% and the rest of the investment comes from the client organization itself or from a local partner. It's essential that they are willing to invest and commit to the project on a high level. But now with this UK initiative we're funding a maximum of 65% of marketing and promotion, which is more than normally, to really incentivise the organizations to start investing on the UK because the financial support is now higher. We always charge a fee from our services from the clients, but it's minimal. It's important to understand though that not all the money is public, but there's always the client's investment too.

Additionally we have some business partnerships as well, for example currently with Heineken, who will bring one Finnish artist from Flow Festival in Helsinki to perform in London too. The industry itself funds our activities too through the Finnish Music Foundation MES.

3. **How much funding is allocated annually?**

The funding can only be allocated to organizations with the Finnish company identity number, so never directly to artists or individuals. Just with the UK initiative we've been allocating 250 000€ per year so 500 000€ in total. Then funding for album release tours, showcases and travel costs of songwriters are about 400 000-500 000€ annually. Then we also fund industry professionals' travels to industry events, such as MIDEM, but the amounts need to be checked.

4. **How much staff is there in Finland/UK/elsewhere?**

We're quite a mobile bunch and travel a lot, but Jenni and I are the only people more permanently located outside Finland (in the UK). Normally we're all based in Helsinki, from where we travel around.

5. **How are Music Finland's activities and operations evaluated?**

We have a list of metrics, but generally most important ones are the growth of Finnish music organizations' investments abroad, the volume growth of Finnish music exports, the amount of Finnish artists, the amount of their gigs/performances, the amount of their releases and media visibility.

MUSIC FINLAND UK INITIATIVE

6. **Why was the UK chosen as the target market for the initiative? Why now and not earlier?**

The British music market is the most influential music market in the world. It's kind of funny in the sense that it's the third or fourth largest. What happens in the UK has an impact everywhere else. There are a lot of quite big, international artists operating at a loss in the UK market just to get the press coverage and the media on their side, which makes it easier to expand their fame elsewhere, for example in the US. This was an obvious target market for the initiative as it is so important.

Finland has a strong history in Germany, Japan and in the other Nordics, so they have been logical choices for the previous target markets for these initiatives. We always ask from the industry that where they want us to focus on next and these other markets have been on that list before the UK.

7. **Why is UK so influential in the music scene?**

It's such a special and strong music market. People are very aware musically and this is a kind of a tastemaker market independently of genres: from classical to jazz and indie, pop, rock. They've achieved so much respect through their musical heritage, with all the super bands and all. Also the British music media has risen to a certain gatekeeper status, it has a huge impact on not only the audience but also other professionals and other media when they write about an artist. The UK as a country in general, both financially and historically is one of the great powers in the world as well.

8. **What objectives were initially set for the UK project? Have they been updated since?**

What's notable is that Finnish haven't been that active in the UK before, except in classical music and jazz to some extent. For pop, indie and electro genres this initiative could be seen as a kick off for Finnish music in the UK. The biggest objective is and has been to establish good processes for our clients, get things going and build a solid foundation and then create continuity. Generally of course the key is to increase music exports and get media coverage.

Of course as there is progress and milestones reached, also the bar is raised. For example if with a press release we used to aim for having one media to pick it up and respond, now we aim to having a media partner to do a story with us.

Personally and as an organisation we have quite high expectations, but we've managed to exceed them specifically with the media. I knew we have knowledgeable people in Finland and that their level of planning and know-how is high. I was counting on the good results with these funding schemes and resources, but specifically the achievements with media have been successful.

9. **What activities are included in the UK initiative?**

Let's start with the export programmes. Three different forms of funding are included to cover different parts of the export process. These funds go to Finnish companies and organizations to promote their artists, songwriters or music products in the UK. Being a part of any of these funding programmes means being prioritised in our other activities as well, namely helping with introducing them to the right contacts in different phases. In export programmes in addition to the funding, there's also coaching and sparring included to craft an optimal export strategy. The programmes are Networks & PR, Live and Export Strategies. Networks & PR is marketing focused, a lot of the cases are album releases and support actions to which they can have the 65% funding from us plus all the other help. Live is purely tours, showcases and gigs. Export strategies is a wider concept, the funding in this category can be used more widely for different needs. For example fortifying an entire label's presence in the UK or gaining publicity for a Finnish festival. There are also songwriters in the export strategies programme, who get funding for expenses to for example travel costs to the UK.

The export programmes play an essential role in the initiative. All activity starts from the industry players themselves, so we don't try to do things for them but support them in what they wish to achieve. We ask them a lot that what kind of assistance they would want and need from us. Of course if we see a good match between a media partner and an artist we will propose that, so some things are initiated by us as well. But the projects have to start out of the clients' own interest.

The second thing is the promotional entity. The biggest part of that is the media and professional visiting programme. We invite different players of the music field in the UK to Finland, to attend different events and become acquainted with the scene. These people need to be identified well, that who are the correct people to attend each festival or event, to get the most out of it. If we invite media and pay for them to attend festivals in Finland, we do expect to get visibility in that media in return. The ultimate goal extends a little further than that though. We try to paint an overall picture of the music scene in Finland and give an idea of the level it's at. At the end of the day it's relatively cheap marketing, if the people have been identified correctly. We also stay posted of contract negotiations between Finnish artists and British professionals to make sure we bring those people to see the bands' festival performances and so on. The events we invite people to cover all the genres.

Then there are the showcases and professional events in the UK. We always coordinate a promotional package for the artists that attend these events. As soon as artists are confirmed to perform at an event, we try to get them the best possible slots and preferably more than one show.

Then we also have our clubs here in London. We have Ja Ja Ja, the Nordic club, together with the Nordic sister organizations. This is still our most important club and will be. It's a great platform for us to have, to know we can bring interesting artists to perform there. It's also good for the audience and the professionals, that they know and can trust to see high quality bands and interesting bands there. Genre wise Ja Ja Ja is indie, pop, rock and electro. It's been on for four years and this year there will be a Ja Ja Ja festival as well. Then we have our own club Echo Chamber, that's more of a credible, underground club platform. We use it to introduce a lot of upcoming artists, who may have not done anything in the UK yet but who we and our partners believe have what it takes. Then we have a new club as well, Feel The Spirit, which is to be a hard rock/heavy focused club. It'll be a bigger one, even the venue is for 500-600 people. They'll be bigger events maybe once or twice a year, whereas Ja Ja Ja is 6-7 times and Echo Chamber 4-5 times a year. The different genres work a little differently, indie & poprock people are used to having and going to a lot of gigs, whereas rock and heavy moves slower.

In the promotional entity we have other things as well, like for example LIFEM festival later in the year. It's a world folk, a little jazz, experimental music festival, which will be done with a Finland theme this year. Another example is the Finnish foreign minister Alexander Stubb's visit to London.

Third, we have the role domestically that we keep the UK market knowledge up-to-date and increase export knowledge. We had three workshops last year and now the second this year is coming. In each workshop we present one genre or area of the UK market and delve deep in it, for example a workshop about legal issues is coming next and we've had workshops on classical music, jazz and media &PR.

BRITISH MUSIC MARKET

10. What are the specific characteristics of the British music market?

Media is in an exceptionally strong role here. Of course it's strong everywhere, but here it's even more essential. You can tell because there are relatively big, international artists operating at a loss at the UK market just to get the media coverage, which will then trickle down to other markets.

Also this market moves very fast. Not only media, but also the audience is very selective and generally well aware. Here knowing what's happening in music, what is the hottest, coolest stuff right now is quite important to people. It also makes this incredibly challenging, because if you're late, specifically with indie or mainstream pop, the right time window closes quickly. This means that we have to follow closely what's happening on and off the charts to think about the timings of the projects.

11. Could high volume of artists be one reason of the UK being such an influential music market?

Maybe other markets think that let's wait for the British to discover the new talent and we'll see what we'll follow. The high volume isn't challenging only to the artists, but it's also challenging to the audience and makes music discovery difficult. There are 75 gigs per night in London, how do you choose? Competition is really tough.

When we go to other genres, with classical and jazz there's public funding coming in. Orchestras or concert halls are being supported, although the amounts are smaller than for example in Finland. This means that there's more emphasis on marketing and attracting audiences, and for example orchestras try to educate children to learn to listen to classical music at an early age.

12. **What challenges does adapting to these characteristics pose?**

We have to follow the market very closely as that's exactly the kind of questions we're receiving from our clients. Part we can answer ourselves, part we ask help from our local UK partners. We're supposed to be the people who will have the answers. Because of the special characteristics this is a very challenging market.

13. **What are or should be the first steps for a Finnish artist trying to enter the UK market?**

Follow closely what's happening in the market and with the audience, but also be organized and plan ahead. You can do great things with small budgets too. You have to have the right team, both the team in Finland and especially the team in the UK. You'll need at least a booking agent and a PR agency and they need to be just right for you. The more systematic and professional your and your team's actions are, the better chances you've got.

Here you have to do a lot of gigs to build reputation. In an ideal situation the band would live in London for few months around the album release just to be able to do gigs and become known in this scene. It's also possible to get pretty far without a record label as well, as long as the quality of album production is high enough, as that's in the core: good quality music.

MARKETING COMMUNICATION

14. **What tools do you use for marketing communications?**

We are an information centre so our in-house promotion is strong. Primarily we're a B2B organization and communicate to businesses, and only after that the individuals. We use online, print, radio, why not TV. Social media is of course important.

15. **You're communicating to different countries, to media, venues and partners about different genres. How do you ensure the correct messages reach the correct people?**

Our CRM database has taken years to build. That's why we have specialists in different genres in our staff, someone who knows classical, someone who knows world folk, jazz, few pop. Both Musex and FIMIC have built their databases earlier, just storing the contacts, interests, genres and areas of music of people they've met around the world in professional events. We have different newletters for different genres. And this is important in the UK, if you offer music from a 'wrong' genre to a contact, you easily lose face and can be considered an amateur. So you have to know the respondent well. The database consists of perhaps around 10 000 contacts around the world and it's constantly updated. We might also hire a local consultant from a specific market to update the database on his sector or genre.

We use the database as CRM but with the mailer as well or if we do a mass posting we use it to combine bits and pieces of information that who receives what information. Ideally with a CRM system you could search for example UK, jazz, agency and get a listing of contacts, and this is exactly how our database works.

These are kind of our tools, but additionally four PR agencies have been working with us and of course they have their own tools and databases for contacts.

Social media is very important, if you check our Facebook page we've got around 1500 likes, which doesn't sound like much but is actually. We don't communicate to the big audiences, but the 1500 are industry professionals and media contacts, so it's a good amount of people. We try to maintain a balance amongst genres with what we post out on Facebook and also how often.

16. **How do you ensure that the relevant messages reach the relevant audiences?**

If we want to get a press release through to media, then of course it's not enough that we just send it out. With every press release we identify the key media, usually it's one to three. We contact them before and offer the story, if they're interested they'll pick it up, in which case it's just a notice to everyone else. Some press releases we don't really expect any medium to pick up, but it's more just to keep them up to date on the issue in question. Depends a lot and has to be considered case by case.

We have to formulate the contents of the message so interesting, that the media buys it.

MARKET RESPONSE

17. **What's people's response to Finnish music in general? Is there a country of origin effect?**

The country itself, be it Finland or any other country is not interesting, if the content is not interesting. The country becomes interesting only afterwards, if the content is special and of high quality. For example this Record Store Day campaign we did, a 10" vinyl record is a classy format, it's interesting and music enthusiasts dig vinyls. They will see that it's been compiled by The Line Of Best Fit. So here it was the format, packaging and the media partner that brought in the interest. Reading the articles about it on media a lot of the mentioned that there are a lot of interesting bands coming from Finland at the moment, so the country comes in after there's enough high quality content coming from there. Like Iceland, first it was just Björk and then people got thinking that what the heck it's like 200 000 people country, how can there be so much good stuff coming from there.

Sweden is an exception since they had their first breakthroughs so early on. Norway has been doing well for a few years already, they've been working systematically to improve their presence here.

Country of origin can't be the key message, if the artist is good enough, the country image will then strengthen as a result. Just like with Japan currently. Finland itself is very interesting and over a period of 30 years over 100 Finnish artists' albums have been released there. That's the other extreme and of course that's what we'd like to see elsewhere too.

There is a certain Nordic boom on right now, Nordic design, food, architecture, fashion and music as well is interesting, but that alone is not enough.

Also there are differences between genres. Finnish classical music is well-known here in the UK since Finland has a long history and traditions within that genre. And of course Esa-Pekka Salonen, the principal conductor of the philharmonia orchestra in London, he's a great figurehead for it all. Jazz the same and world folk, as well as rock and metal, it's a good reference that the band comes from Finland. Then if we go to the pretty deep electro scene, like really credible electro artists, then there's of course skweee, a whole music genre that was invented in Finland. Then for example Teeth, a big underground, post-dubstep artist, he's considered an artist specifically from Helsinki, not Finland, but particularly Helsinki. So maybe to some genres being Finnish does add something to it.

18. **What's the importance of an existing artist brand? Is it desirable to bring the existing artist brand from Finland to the UK or re-build it to match the UK market requirements?**

That's complex. Basically, if a band already sold gold in Finland, doesn't matter here, other than for the fact that probably then the level of professionalism is already rather high. So that the capabilities and know-how is there. But for the audience it might not matter. Sometimes it might even be considered negative, as the tastemakers want to be the ones to discover an artist and if it already sold gold in Finland then that's not the case. It's a double-edged sword.

These things go case-by-case and artist-by-artist, so might be that in metal genres might work as a good reference that you've built a solid foundation in Finland already and the 'right' label at the background, but then again if we think about Phantom then that was an ideal start, having The xx spot them first and have Pitchfork pick the story up. It was also challenging since of course they have to find the right ways to fully take advantage of it all.

But that's what makes this industry so fascinating, that there are no absolute answers.

PARTNERS

19. **Who are Music Finland's partners in the UK?**

Well the most important ones, on a practical level, are our Finnish partners. The Finnish Institute is offering us the office premises and some promotional, communication support as well. The Embassy has an important role especially with the media contacts, they have good listings available. It's more practical, back-office support, but really important to us.

What comes to support with operating in the market, our Nordic partners, the other Nordic export agencies are overall an important group of contacts, especially since many of them have been active on this territory longer than we have.

Then partners through this project are mainly related to the events. Venues are important and the festivals. The Line of Best Fit of course, they've been partners with us in Ja Ja Ja and they're very aware of new, cool music and on top of what's happening and an appreciated medium amongst music fanatics. They're also known to support Nordic music and that's why they've become one of our partners. It's a win-win really, they get a lot of content through us whereas we get credibility and publicity here. You have to know what to offer them though. Now the relationship is strong, but it's required a lot of work to get here.

In general you can't offer the 'wrong' bands too many times or you'll quickly lose face. Just like in any marketing or selling, it requires social understanding that what you offer to who and packaged in which way. Now if we would want to work with other media partners, we would have to evaluate what would that do to our relationship with The Line of Best Fit.

20. **How were these partners selected?**

We have to be able to see that who are the key players in a genre and who can help us the best to reach certain objectives. Like for example the Record Store Day campaign, we wanted to gain credibility so did this cool, exclusive thing and the partner was in an essential role. Then again with Feel The Spirit rock event, Spinefarm is an appreciated label so they are the right partner there, kind of a quality guarantee for the audience.

All of this, it's just the basic laws of marketing. Of course every industry has their own characteristics and you have to be an expert of those characteristics to be able to do marketing, but that's how it goes in every industry. In the music industry you have to be really on top of what's happening in the field as so is the audience.

21. What promotional activities have been the most successful?

Well the Record Store Day campaign was a success, even though it was kind of a niche thing. More of a profile facelift within the industry people, we are a B2B organization after all. Of course in the long run it benefits reaching the public too, since every time we do something like this, it lowers the threshold for a Finnish artist to get publicity.

22. Would you see that Music Finland is an umbrella brand?

Well, as an organization we don't need to market ourselves. We're more the tool than the organization being marketed. Knowing the Finnish clients is important, not all of them want to become labelled or emphasized as Finnish. People operating in the industry know us and respond, like with the Record Store Day, people called from Japan and the US that how do we get the vinyl for sale on our store. So of course if they see that we're on top of our game it will promote what we're doing. So in a sense yes, we are, somewhat automatically.

This type of export agency thing is building up to become its own sector within the industry. Normally it's the smaller countries that have these agencies, but then for example countries like France start having theirs too. Creative industries have a lot of growth potential that also the public sector wants to support, and working for an export agency you're in between: you have to understand the creative, music industry and then the world of public funding on the other side.

What we are for the Finnish music market, we're also a competitive advantage. If a British promoter wants to book a Finnish band to perform at a festival it'll be more expensive than booking a British band. So even though our subsidies always go to the Finnish clients, the key idea is that at the end of the day the promoter can book the Finnish band with the same expenses than booking a British band.

23. How do partners perceive and welcome new Finnish artists?

Normally they're interested and if they see us as a good partner, they trust us to have the latest info on who's potential and active in the field. They're interested in discovering new music, but don't have the time for it.

I have a shortlist of Finnish artists in each genre, from where I can pick the most up-to-date artists for a given purpose. Like if a venue wants an artist or like the Record Store Day campaign where The Line of Best Fit picked the artists, they pick them from a shortlist I compile for them.

But again we have to know what to offer who, so the foundation has to be there.

Appendix 2. Riku Salomaa. 2013b. Summary of interview about funding and metrics of Music Finland (translated from Finnish). Interviewed by Leena Lamberg. [Skype interview] 18 June 2013.

1. How much funding is coming from the different funders?

The total amounts are yet to be confirmed, as we don't yet know the total amount of funding allocated last year and this year. We will only have the total amount from last year a bit later on, and the amounts of this year at some point next year. But let's use the numbers and estimates from the UK initiative as it's anyway the biggest project we have, the most funding we're allocating currently is within this initiative. Also the initiative funding is the best to depict the funding structure of Music Finland, as figures from the previous years are from the time of Musex and Fimic separately.

So the funding from the Ministry of Employment and the Economy is allocated to the client organizations through the export programmes. Last year they granted 325 000 and this year 190 000, so in total 515 000€. In addition they have granted funding to the overall expenses of running the project, to employ staff, travel expenses and so on. Last year that was 95 000 and this year 90 000, so in total 185 000€. So that's their share.

Ministry of Education and Culture granted 220 000€ in total for the whole two years.

Then the Ministry for Foreign Affairs of Finland, they don't directly allocate funding to us, but they support specific activities, like within the media & professional visiting programme they pay the expenses of inviting certain people to Finland. That's a little difficult to estimate what the total amount is, but in this project it's around 5%. So it's remarkably lower than the other ministries.

Then from the music industry, The Finnish Music Foundation granted 45 000€ last year and this year around 25 000€.

In addition the client organizations always have their own investment as well, so in total the funding from the ministries and The finnish Music Foundation is around 1M€ for the two years and on top of that the clients' investment. The total amounts we'll only know next year, but roughly we're talking about a project of around 1.5M€.

Part of the client's projects might only have 20% of public money so that varies a little, but the 1.5M€ is quite an accurate estimate. That gives an idea that what calibre are we talking about, that within two years the Finnish government and the music industry together are investing around 1.5M€ to the UK only. That's a lot of money in this industry and shows that we're serious.

2. How are the metrics used and what and how is being measured?

The overall market value of music exports and division amongst different revenue streams is essential and it's measured annually through a survey to the Finnish organizations. The information we receive we add up to see how much of their revenue is coming from abroad. We also ask them to specify that from which markets in particular the revenue comes from and from what activities, so if it's live, album sales, merchandise and so on.

Number and types of services and events produced, that's clear, we see what we've done and try to develop that, we have all the information about that ourselves. Value for the client, that we also ask from the clients project by project, whether it is individual events or projects or the whole UK initiative for example. We compare it back to the objectives the companies had set for themselves. They have specified the objectives for their projects in their applications and if we have accepted them into the programme, then the objectives are high enough. Then we evaluate afterwards that how well did they achieve those objectives. From our activities we ask about specific things, such as how many new contacts did you gain through this activity or event and how many of them were new. But so all of the information is coming from the clients as they are the people who we're doing this for.

Is the information collected through a questionnaire?

Yes. They can give the feedback anonymously or with their names. Additionally we ask them for example what contracts they've done as a consequence of the programmes. What's problematic is that often the results occur later on, and we send out the questionnaire two weeks after the event took place. Very rarely at that point the outcomes are clear. Although, sometimes if the contract negotiations are quite far it might not take long after the event to get everything signed, but normally these things take a longer time.

Then service users per user group and size, we follow how does our client base develop. Of course what's important is that the clients would return to use our services. If we produce good enough services they will want to use them in the future as well, so we track that. But we also make sure that we get new companies involved. Also we record the changes in different sectors, one company in a sense is like the whole industry in a miniature size, so how does the company develop. In the previous years a lot of the record labels have transformed towards the 360° model, so these things and how have our services affected that. This is also the information we readily have as we work closely together with the companies all the time.

Types, resources and increase in export know-how of organizations in export programmes, this we get from the same questionnaires.

How do you evaluate the increase in export know-how? Sounds like something that's difficult to assess?

It is and the only way to do it is through the questionnaire.

So is it the company's own assessment of the increase?

Yes, of course we also assess it constantly as we see how their business develops, but of course we need to have the assessment from an external source as well, since we use that in reporting too. In some years we have executed a sort of good will survey, where we have asked the industry professionals abroad to evaluate the development of the Finnish music industry. It was obvious then that once a year was too often, as there was little development in that time but also the respondent weren't willing to contribute that often. That would be one thing to consider, that how could we collect that information outside Finland.

Then types and resources again depend on the surveys. We can follow how the revenue of an individual company develops and what share of that increase is coming from abroad, also if the amount of their staff is increasing and so on. These are the things that are included in the general development and growth.

The same things with the financial metrics, we depend on the client organizations to provide us with that information.

Client satisfaction survey then is to develop our operations. We ask, roughly, about the importance of funding in export programmes, Music Finland's operations, the impact of the initiative to the client company, the amount of contacts and contracts, and media coverage or publicity. So basically five things; funding, Music Finland, the initiative, media coverage and contacts.

So the questionnaires are the main data collection method?

Yes. We interact a lot with different players in the industry to plan our activities. Every now and then we arrange workshops where we invite around 50 people for one or two days a year to discuss and plan our services and initiatives for the future. Of course also in these contexts we're open for feedback, but it's not always easy to have people give feedback face to face. Confidential feedback and information is best acquired through the questionnaires.

Appendix 3. Jules Parker, Polaroid Management. 2013. Summary of interview about the British music industry Interviewed by Leena Lamberg. [Personal interview] London 27 May 2013.

1. **Can you tell me about your background, what have you done within the music industry and what are you doing now?**

I started out as a songwriter and a performer, an artist, the first professional band, we got signed to BMG Publishing in about 1998, long time ago. We did various tours and bits and pieces. And from that, I did some session-based work, I wrote for other people as well, I wrote to some people who were signed to Warner Brothers and worked with a production company doing songwriting at Air studios, a big studio in North London and that was more for, more commercial pop stuff, that was alright. Then played with some other bands, then created my own thing ,where we did some independent releases and we had some songs on various films, played a lot. Lasted a very long time. Then gradually got to the business part of it, I ended up managing what we were doing and doing the production. Then I started working for festivals, there's a small festival here in London, they do new bands, very grassroots stuff, aspiring acts and artists. Then from that I started working at PRS for Music, which is your equivalent of Teosto.

My department, I've just finished a month ago, it was artist relations and promo work for the acts that we looked after, so I was working with a lot of new bands and artists. I set it up, the primary things we can do, showcasing and feature artist stuff we did, like exposure online. We could have podcasts and interviews and just informally with the industry, making contacts, helping various acts and artist and songwriters make more connections and advising managers and also help with music export. So when an act's at a certain level you kind of help them get more connections when they go different places, like Eurosonic in Holland and we did reception stuff and networking things, business to business meetings. For SXSW we have bigger things, like fully branded British music embassy and so all that kind of stuff. So just being a rep for PRS really. Being visible, that's what I did. The same time I started a management company, which is what I do now, so I do a bit of consulting for a couple of companies and managing a fantastic band and a very very good songwriter as well. So that's where I'm at right now.

2. **How much and what kind of experience do you have from markets outside the UK?**

Actually the music export stuff led on to that. So I got to know a lot more about the Nordic area, America and Germany, France and Holland. Don't know much about many other places.

3. **What's you knowledge about Finland and the Finnish music scene?**

More than I had this time last year. More than I had the start of last year because I went over. I think there's been a good focus with Music Finland, because they're obviously promoting, helping to export the acts, there are more people aware of bands.

4. **What would be your overall opinion of the music scene and the music thing going on in Finland?**

Well, it's a small market so there aren't that much opportunities, but I find it quite interesting that there aren't, or there doesn't seem to be many professional managers. If there was an act it was looked after by the label, which I found quite bizarre. Cos here your first point of contact is the manager, that's what you do, you have a manager to work with you, to develop what you do. It's, I like Finland so I want to make sure the band I work with goes to Finland but many international acts probably it's not the first place to go. There seem to be a lot of opportunities for live music if you take the time to actually play there. And it's a big country so you have to make the connection, but it seems to be thriving pretty good companies. Fullsteam I think is a good company.

5. **How did you end up working with Music Finland and what is it that you do together?**

Well I guess I had this natural affinity for Finland and I knew, and Jonas was a good friend of mine and Music Finland talk to Music Norway, so that's they introduced me. And so we had some more, kind of informal, just going over to Finland and do workshops, just I just see people out and about, I'm happy to be there as a resource as well and if I can put people in touch with each other that's great. And Ja Ja Ja night is very good and I know that Finland has a different night as well.

6. **What special characteristics does the music scene in the UK have?**

First of all it's got a history. It's a place that everyone seems to aspire to want to be successful in. And it has the kind of audiences that people, everyone really cares about music. It's kind of intrinsic in the culture so people want to be part of it, it's an amazing scene, amazing energy. People want to find about music, which also means that it's kind of a bit schizophrenic, cos you have just a lot of different people switch on to things very quickly and off again, so there's lots of new stuff that comes through and lots of scenes that happen and lots of people go "ohh this is amazing" and then you kind of move on. There aren't that many acts to get to go to more widespread mainstream audience. It's probably the kind of catch of being successful here, it has a lot of weight internationally. If you do well then it leads to other things happening.

7. **You mentioned the history aspect, do you think that's the reason why the UK market is so influential globally?**

I think so. Because it had so many kind of globally successful acts in the past and also because rock'n'roll hasn't been, the commercial kind of rock'n'roll, hasn't been around for that long and because they were the forefront of it. It's like Abba in Sweden. Everyone thinks of Sweden because of Abba…or Roxette. But yea I'd say it has a big part to play in it.

8. **You also said that about the audience here that they are kind of very aware and very into music… Do you think it's definitely something that the audience here and the public here is more aware and knowledgeable about music and follow more what's happening?**

Yea, not necessarily just everyone out on the street, but the people that care about it really care about it. And there's a good system of blogs and access to music and ideas. Yea, people really get into it. And there are ways to access the things that you like quite easily and it's quite easy to create a little world where you like that particular kind of music or particular band.

9. **Well how about the role of media then, how would you see that?**

Well in the UK it's again different than other places as well, the big thing for more mainstream success, to actually kind of breakthrough and become a big name, you need to have radio 1 or radio 2 support and that's fairly difficult as those are the biggest things, they're the only things, so there are two. You go to France and you've got like 8 different options for the national radio stations that actually have a bearing on your music career, but here there's probably just two. For more mainstream success anyway.

Press is, it's huge. There are just so many music magazines and split up into so many different genres and different worlds, so you've got the written press, which all have an online thing, so you might have Rock Sound for rock stuff and Kerrang! as well for a particular kind of thing, or you'd have Fake DIY which is a pretty good blog, they now have a print version of that, so they've done the reverse, first they had the blog and now they have the print thing.

There are so many different options, be it just online, be it press stuff, written things, and then radio is the kind of goal for everybody to actually make some money. But there are actually not so many options when it comes to radio, or influential radio. Amazing Radio is good for newer acts, but then again not necessarily dance-y stuff, then you have, it's interesting, cos the songwriter I look after, he does lots of stuff, but at the moment things going pretty well is EDM stuff, he's doing lots of toplines for EDM. It's such a separate world. That seems almost as British --- they're still going to be British acts but where they get the press is very different than for an indie band. But you have the opportunities. If you know what music you do, if you know what…and you take the time to do the research you can find out which are the best outlets for that. Then you always got press and PR companies to help.

10. **Going on from there, you also said how music is moving on fast-forward and people are switching on and off from stuff in a quite rapid kind of pace. What do you think is the importance on music discovery for example print media, online media, radio?**

It depends what kind of music fan you are. If you're someone who likes, if you like The Script and you like The Voice, then you're not going to get it from an indie blog. You're gonna get it from The Sun music thing, or you're gonna get it from Marie Claire or you know. That's where you get your information. Someone a bit less into everything might get it from The Guardian or just from the national newspapers, or you get a Sunday times thing, or if you're really avid fan you'll get updates online all the time, you'll be checking The Line Of Best Fit for the Nordic thing. You'll have your own sources, you'll come across stuff that just makes sense to you.

11. **Well we already briefly spoke about this, but how about the role of managers? That does seem to be different here, what you said about Finland is for sure true that artists are normally managed by the label people and there are very few individual managers as such. Also about, what's the role of managers and lawyers here? Lawyers seem to be quite into the artists' businesses as well?**

With the lawyers it depends what you want from a lawyer… you're right that people do now actively source bands and I was just having a meeting last week with some people who have some acts and I might perhaps do some co-managing with him, but he's being fed most of his acts from a lawyer. Which I find slightly odd cos… It does happen. But I think the lawyers should be kind of sorting out the contracts and making sure that actually works rather than being up all night sourcing acts, but they're a source of information, definitely. I don't know what's the case in Finland but you do find lawyers here in different companies and probably each company will have someone they will employ who will be out looking for new people they can represent because it's a tough business for lawyers, because you have to find acts you think will be good to make some money in the end.

But we managers, I mean I would say this because that's what I'm interested in, but I think it's a really interesting field and job because you have a position to work directly with the artist, or the act or the songwriter, to create something right from the start and actually build your own team and develop things, which is a role that doesn't happen anymore like at major label. So you have the chance to create your own business, you'll have your own hub that will be, hopefully, successful. And you can employ different teams, people from marketing, or for press or for distribution or recording the stuff in the first place and developing it. So I think you get to be the hub of everything that goes on, which again doesn't happen in Finland, so as far as I can see, which is why… The label isn't necessarily always your friend as an artist. Especially now when you have the royalties that come from a recording contract, might take in a lot of other things, not just the recording. So yes, you have all these different sources of income going through the label rather than, here I'd say you've got everything coming through your company, the management company. That's probably the difference, you've got more independence or acts and artists are more independent if you have a good manager, or that's not necessarily with every manager, but you have the chance to do that.

12. **So how would you say, where do you draw the line as an artist or in general how does it work here, what does the manager do, what does the record label do? And to what extent is the record label needed anymore?**

Record labels are definitely needed still because they have a lot of expertise. It's, I think the key is to make sure that they care enough about the acts they look after, to use that expertise for the benefit of the artist. So I mean you've got international networks from a big record company and you got people on the ground in every country.

If you're on a normal major label contract then you will have the normal functions, A&R, distribution, the marketing, press as well, radio, in-house. So they would, if you did that contract then they would be in control of that. But it would depend on your contract that how they'd do it and you'd have to, hopefully with a manager you'd have more control over how they approach. So if you're discussing with all those teams at the label, then the band and the manager would go no, we actually want to do this this and this, so you'd have more of control of what you do. And you could also campaign, which is what a lot of people here do, we've done this but we're going to licence it to you, to just do how we want. You can distribute it, you can work with us, we're in control of the product and how it eventually comes out and how it looks and also perhaps they go well actually we don't want your in-house marketing team to be in control of this cos they might not give a damn. We want to employ this company that will definitely care. I think that's the main difference, the choice and the control.

13. **How about then, is there a consumer segmentation of the music market?**

I'm not a marketing demographic expert… But you would have the more up-to-date fans who would come to every show, you would have the people who would occasionally come to see a show, you'd have the, have you heard the phrase of the "50-pound guy" (£50), there's supposed to be this certain kind of older male demographic who is very happy to go and spend £50 on a box set, but isn't going to see a gig every night. And the people who just buy one cd a year and they still buy cds, people still buy cds. Definitely there are different ones but I'm not an expert in that.

14. **How would you see Finland and Finnish music is perceived in the UK? Would you say there's a country of origin effect?**

To be honest, I think most people wouldn't have a clue. If you'd ask them to name a band from Finland they wouldn't know. I mean even people who are really into say rock music probably don't even know Mike Monroe. Probably most people don't even know that he's Finnish. I guess, I also think that where things come from isn't as important as the music and because most acts sing in English anyway. If they just like the music then they'll probably be just surprised that they come from somewhere different. I'd say if you have a good marketing or press person they could use that as your advantage. Hey they're really interesting, and they come from Finland as well! But first they have to buy the music, there has to be good songs to back it up.

It could be very interesting on the back of, if someone really likes stuff, if they go "this is amazing" and then you can use it then absolutely, it gives you an edge. It's a small population, like two thirds of London, and how many bands come out of London that do very well, it's not really that many.

15. **In your opinion, what would be the key things to have in place when trying to enter the UK market?**

I think the main thing is just to have contacts, people you know. If you were looking after an act, and I think you'd have to make sure you have a rep, so you have a manager or you have an agent, whoever it is. I'd just make sure you go and talk to people a lot and build a groundwork of people to talk to. The industry is relatively small and you could go and meet people. Most people are ok, most people are fine. More for today's industry, people are more collaborative than the older guard that you might find. And I think people are interested if you have an act that's good, then people are happy to talk, it's jut being outgoing and say "right, let's go and talk about this". I wouldn't be too pushy, I'd just make sure you do the research. I remember at the workshop we were just saying: take the time and go to The Great Esacape, to meet people, find a couple of people who you know, see if they can introduce you to a lot of people and just build a network before you even try and bring anyone over. You need people to feel good about working with you and you need to know more about the market before you can come here. Unless you have people on the ground already. Which is possible, you can find people to work with, you can find a lawyer or a business company or a co-manager, that could actually be that gateway, but the first thing is to come here and talk to people.

16. **How important is it to include touring in an early phase?**

Unless there's a huge amount of press, unless you've been on the front page of lots of blogs, unless there's a huge kind of storm, there's no point because it's fun, but from a business point of view you want to make sure that you generate some interest beforehand, so that would be either lots of press, but even for that I'd say you have to come over first and actually just start talking to people and introduce it. But once you do, once you met all those new friends, tell them about what you're going to do in six months time. That would be the best way of doing it, cos then at least you'd know that there will be people at that gig, otherwise you'll play at a really poor venue.

17. **Is there any relevance on the artist brand that's been built in, Finland in this case, or is it better to re-build the brand image, the band image, here to correspond to this market better?**

I'd say if you have a band or a brand image, then you probably want to keep that. Cos if it works well in Finland, it probably works well here as well. If it's based on being a great conversationalist, but they can't speak English very well, that probably won't be useful, but if it's like very image-led in picture, or whatever the brand is then that should work. I think you should keep the individuality of that particular act, cos there's no point of coming here and being an UK indie band, cos there are so many terrible UK indie bands already. So you want to be a good band from Finland. And actually by coming from Finland with a brand already created, then it's probably a different kind of brand. But it can be quite an individual brand compared to other acts here.

18. **How about in the case, since music discovery and being in the forefront of discovering new music is important for the public here, what if the band has already sold platinum in Finland… Does it communicate well or does it communicate poorly?**

Perhaps there is a tendency to go "oh really, platinum in Finland, okay?", I'd say you probably have to do your press, I think it would work, it probably works well the other way, unfortunately, if you say you've gone platinum in the UK then people in Finland would go "cool". But here people would just go "nah".

I think you have to build it from the grassroots up, you need the support of press and loads of those blogs and those tastemakers who will be a music discovery point for other people. You kind of need them to really get into it. For that you probably have to start relatively small. But saying that, but that's just more how it's perceived than how you actually do it. If there's a label or if there's a company who knows you've sold huge in Finland, then they have that in the back of their minds, "okay we know these guys could probably sell lots of records, but let's do it this way" they could introduce it in a different way, they just don't say, "hey – big in Finland". They'll just go this is a great band and they'll feed it to the right people, hopefully to the right tastemakers, the right media outlets, the right music discovery points.

19. **How about differences between genres, like indie is very fast-forward moving, how about other genres?**

I think every genre is fast-moving. Dance, new DJs come often, there are lots of new sectors, different subgenres that come and go very very quickly and that can translate into a more mainstream thing quite quickly. Every genre moves quickly. Maybe not classical, maybe not jazz. Pop, rock, indie, dance, urban stuff, it all comes and goes fairly quickly. Just because there's an appetite for new music, there's an appetite for new coverage.

20. **What does this mean then from the artist point of view, because of course it makes music discovery difficult for the music enthusiasts, but it's also going to make it difficult for the artist to breakthrough.**

Absolutely. I really don't know. I think you just have to do it slowly, build it up. The band that I look after, the last 6 months we've spent working on songs, on live sound, on touring outside London, cos you don't want to play in London too quickly because you don't want people to see it when it's not ready. That's one aspect the fast-moving people tend to give it a chance up to a certain point, but if they see it too early then you can't really go back again. So we've been working on how things look, not necessarily for them, but the imagery around them. We're doing some very nice footage on where they come from, seascapes and landscapes and stuff and tie that to the music. We, I've got a gig tomorrow night, trying to do it in an ok venue, just invite people down to it, but you don't want to invite all people down to it, you have to invite certain people, so cos you don't want the labels come to see it now. So I haven't told any of those people, I've told some agents, people I know, supporters, cos I want to build it up and have a plan to go through. I haven't really told the press either, it’s too early. We’ve got a marketing company working for us. We’ve got potential investors, so I want to get some money first, so we can invest that in the right press, marketing team. And I want to get an agent or more support from live areas, so we can actually then just build that up and up and up. Actually we have to find out what the market is. I know vaguely, but I don’t necessarily know how actually a band or an act would go down. We’ve got our demographic insight from Facebook and Next Big Sound, but you don’t necessarily know exactly what might work.

21. **Even with the demographics, that might be a part of the truth, but there might be other groups to reach outside that demographic?**

We could also try different markets as well, we’ve got different kinds of songs, that we could try with different people. With more ambient kind of cooler stuff to feed to XFM, then more kind of pop-ey stuff towards the labels. It’s an ongoing plan… We’re trying to go to places that are not on the normal tour circuit.

Audience is fickle, but if you get past to a certain point then they will stick with you. If you can get into the mainstream, then people will still be into that band. If you can get into more mainstream stuff then people will still like that. There are a lot of niche markets as well.

22. **How about music consumption in general, do you know if people here they buy more music, how about the split between physical and digital formats, is there a difference compared to other markets?**

Well everything is in the state of flux, there’s more streaming access and people are making more money out of streaming, so companies are actually seeing some return of that. The digital I think is about 50% at the moment and there’s more digital albums being bought as well as a bundle and not just digital tracks. I think that compared to Nordic countries there’s perhaps more iTunes purchase than just streaming, but perhaps that’s changing as well. I think it’s a good timing, it’s been declining but I think it’s about go up again. Everyone loves music. Everyone wants music. People want music, it’s just making sure people can access it and pay for it as well. And also finding out better ways of working with brands as well, cos they have the money to invest in music, but they don’t really understand how the music industry works. I think you always have to translate what people in the music company think to say another company. It doesn’t seem to make sense to anyone in any other industry.

There are a lot of opportunities, if you’ve got a good team around an artist, you can develop opportunities. It’s still a lot of going out and talk to people face to face and then that would lead to more and more opportunities, especially if you’re again coming from another country.

Appendix 4. Nick Triani, Soliti. 2013. Summary of interview about Music Finland's UK initiative from a client's perspective. Interviewed by Leena Lamberg. [Skype interview] 5 June 2013.

1. **If we can start with Soliti, so can you briefly summarize the idea behind the label and what type of artists you look to represent and what is it in your words that you do?**

Basically, I'm running a record label called Soliti, I'm working with artists, I have eight artists on the label, Cats on Fire, Big Wave Riders, Black Twig, Black Lizard, Astrid Swan, Delay Trees, Paper Fangs and The New Tigers. So we launched the label two years ago this week, the idea was to have an artist-driven label, it's all master deals artists sign their own recordings and it's 50/50 split. Slowly but surely the idea is to export the label, so there's a certain kind of artist on the label and people identify those artists with the Soliti brand and so far it's been going quite well. This year we're concentrating more on actually international and getting the brand abroad, we've actually had a lot of coverage abroad but now we're in the process of organizing distribution deals in various countries. That's what's happening with the label.

2. **So it's not only the UK initiative?**

No it's all over, Germany as well and France we're looking at, Scandinavia and eventually the US, but that's later on, I think. UK is the major territory of all those.

3. **So with Music Finland, Soliti is a part of the UK initiative's export strategies, right? Can you tell me what kind of activities have been included in this entity and implemented over the course of the project so far?**

Well straight off there's been two bands playing the Ja Ja Ja club, Delay Trees played it in March this year and The New Tigers played it last November. That's been one thing. Then I think there's been this Notting Hill Arts Club thing, the Echo Chamber, Big Wave Riders played that last year, I think they did the first one actually with French Films and Music Finland did a 7" that went with that, and then just last months I had a Club Soliti night in London at the Old Blue Last and I had three bands over at that and they played gigs surrounding that in London as well, so I had The New Tigers, Black Twig and Big Wave Riders playing, and then straight after that there was a series of five gigs I think in four days or something like that from the Monday to the Thursday and on the Thursday Big Wave Riders went to Brighton and played The Great Escape and then I had another band come for that, Black Lizard, who also played in Brighton. So that's what we've been doing so far, it's just been gigs basically.

4. **So what have been the roles of you both, that what parts of these projects have been Soliti's responsibility and what has been that Music Finland has been doing?**

I think that it's been quite close the relationship in the sense that the Ja Ja that has come through Music Finland, I think, and the Echo Chamber, I think those things came through them. Setting up the Soliti Club which we did in May and the surrounding gigs that was more me working with the promo company that I hired in the UK, which I met through Music Finland. Actually I met them at Music & Media event in Finland a couple of years ago. And I think in The Great Escape Music Finland was quite involved with, the bands that were selected. I think in other ways of course there's the money that you can apply for, so that's quite essential for any of this happening. I think without that I just wouldn't be doing these things. Then I think also Music Finland helped a lot in promoting the events and with getting some promo people involved in all those events. I know they hired Debbie Hall to do Ja Ja Ja and she's working specifically for Music Finland, so she's been giving us stuff as well, which is great, cos this all just, it's very much a cooperation, I see. It's been very useful, it hasn't really existed before. The fact that somebody's based in London actually doing that work is incredible. So you know you have someone on the ground there, I think that's really great. So it's definitely been a collaboration with Music Finland, as opposed to me just doing my own thing and them somehow being involved, I think they've been heavily involved.

5. **So what do you think have been the most successful activities so far?**

Well actually they've all been pretty successful I have to say. The Ja Ja Ja's, I went to both of those and they were really well attended and we got loads of exposure for the bands and subsequently from that for the label as well, got good exposure. I didn't go to the Echo Chamber event with Big Wave Riders, but I heard it went really well and there was some interest that came from that. The whole week where we had this Soliti Club and this round of gigs, that was really great and we got lots of promo from that and actual Soliti Club night was really well attended and the gigs went really well. The Great Escape, the gigs were again really well attended. I think from all of this we've picked up some stuff along the way, so it kind of accumulates different interest from different people and possibilities for bands going back and from my perspective more awareness of what the labels do.

6. **How big of an event was the Soliti Club night?**

It wasn't a huge venue it was at the Old Blue Last in Shoreditch, I'd say there was about 200 people, it was really well attended and the gigs went rather smoothly. Industry wise, there were some industry people there and some papers, we got really good coverage in the US, bizarrely, Prefixmag covered the whole night, it was really good in that sense, as far as exposure goes. I think we were bit worried about it but in the end got really good exposure. Haven't got any complaints.

7. **So is there still something in the plans, kind of upcoming activities planned within the initiative?**

Well, I'm just talking now with a distribution company about getting launch with the label in September in the UK and hopefully that's going to happen.This is all kind of building up. Already in September I've got Black Lizard coming back to the UK and we're now looking for more dates. With the launch of the label we have now a promo company involved that's going to do promo in the UK. So now it's just about doing the practical stuff of launching the actual label. Hopefully once the records start to be released that will kind of increase interest in the bands and they will be coming back for more shows. At this point it's only Black Lizard that are planning to go back, but that's in September. And hopefully the album will be out that time as well. It's kind of slow, but at the same time it's been already a lot going on this year.

8. **So if you think of your expectations before starting to work together with Music Finland, how would you evaluate the results and what you have been able to achieve?**

I think, I'm totally satisfied, I think in the past without their initiatives I think there's, I don't want to knock it but I've not quite understood why certain markets have been approached and stuff like that. I think it's a no-brainer with the UK cos I feel, although it's very difficult I feel it's also really important for the whole of Europe if you make some impact there. I think it's great, all my expectations have been kind of satisfied in a sense, I'm realistic how difficult it is there, but I think it's been a good start for us and I'm kind of pleased that Music Finland have this thing going on there. So that's the main point. I hope they can keep it going a while. It's essential for Europe, I think.

9. **Well you just mentioned that it's a difficult market, but it's very influential in Europe. What would you say, based on your experience, what are the biggest challenges in entering the UK music scene or the music market?**

I think it's actually geography in a sense, I mean it's really expensive to get bands there, so I think if you were a UK label and you were interested in a Finnish band, your reality is that you'd be looking at just spending a lot of money in getting the band present in that market and that's really off-putting for a lot of UK labels. On the other hand at the moment it's a real wave of especially in the UK, and there are specific websites, like The Line Of Best Fit, which just seem to be big fans of Scandinavian music so they're really pushing that sound and it seems to be spreading into more mainstream media as well. I think the time is right for this to happen, I think it's just, it's like any market but UK is also quite, so strong domestically in what it has and it's also a market leader not just in volume, but in this style of music that I'm exporting. You know they have a lot of indie bands in the UK, they do really well, so the attitude tends to be why do we need a bunch of bands from Finland that do this kind of stuff. So I think these are kind of problems that we face. So it just means that whatever we delivered is of the top quality and comparable if not better.

10. **That's an interesting topic in general, that of course it has to be like you said the quality needs to be very good and you have to go content first, but apparently the kind of Nordic boom that's there right now is helping?**

I think in the indie market I think now there's a different kind of acceptance for music from Finland than there was five years ago. I think no one was looking at the indie sector and go okay we're waiting for the next big thing out of Scandinavia. But I think Finland has really caught up in that respect and I think the bands that are coming out of Finland are as good as anywhere else and I think they've had as good critical acceptance as the Swedish bands, which are normally the ones that get breaked about in the UK media. I think people respect Finland now in a way that they didn't five years ago. I think it was more for heavy music or the odd novelty pop hit. It wasn't on the map in a credible sense.

11. **Do you think that it's Music Finland who's been speeding up the process of Finnish music becoming more accepted?**

I think so, I think it's a combination of things. I think it all starts what's happening in the domestic market and I think in Finland now it's very tough for a lot of those bands that sing in English. Especially for the indie sector cos there isn't much indie culture here, although it's changing slowly. There still hasn't been really a massive indie band that's been successful domestically. So a lot of those artists they see going abroad as an obvious avenue out and of maybe having a career and in making some money, so I think the UK is an obvious place to start with that. There's already an audience for what they do there and a much more favourable market. In that respect it makes perfect sense to me. But I think it is dictated by what happens domestically. I think as far as Music Finland goes no doubt about it that they've been doing a really good work. And like I said earlier because there are people actually based on the ground in the UK, they're actually able to meet people and get to know those people and have some influence and in that respect some of the Music Finland people are becoming like the tastemakers for Finland in the UK, which I think is great and there hasn't been that before.

That's definitely an important point that Finland is a small market in general and then the indie sector within that market is still quite niche. So it's difficult to gain share in the domestic market in Finland so it makes perfect sense to expand the whole market by entering other territories.

Also, I do think that any success that happens abroad it does in some form come back to Finland and people take notice of that, especially if it's a big success or some really popular international media or something like that covers your band I really think that does have an impact.

12. **Are you able to pinpoint what would be the most valuable support that you've received within the UK initiative?**

I think there's two things, obviously the financial support makes things possible, I think the fact that there's money there to use and actually bring bands over, but also it's also I think Music Finland has kind of accumulated quite good people in the industry that trust what they do so they come to the events, so that kind of social aspect of it, that you go to an event in the UK, there's quite influential people coming those events and you get to know them and that opens avenues to me to push my stuff actually. So I think the social aspect and the networking aspect is really good now, over the course of two years there are people who I know now that are actually in quite key positions in the UK market, certainly in positions to help what I'm doing. So a lot of that has come through relationships that Music Finland has already built from being based there.

13. **Picking up the point that you said, the financing that you can get through Music Finland, what do you think, if there wasn't the financing part, do you think that you would still be doing this in the UK?**

Yea, I mean, it's a key market for me, so I have to enter that market if I want my label to survive in any meaningful sense. I mean it might be a disaster I don't know, but at least I've got to try. Think it's really important to give it a go. So of course yea. And there's been a lot of coverage I mean now without any releases that have had a hell of a lot coverage in the UK, so it just seems an obvious place to release the music.

14. **In general you sound that you're very happy with the initiative, so would you recommend working with Music Finland to other companies?**

Yea yea of course and I do, I tell people they should do stuff there because it seems to be really working, from my experience.

15. **So what do you think will happen after the initiative, the specific UK initiative ends?**

Yea I mean I think from my perspective I hope I've exploited it enough that I've already established enough through that initiative that it's, the people that I'm interested in working with are aware of me, I know them, I'm actually even working with them on some level, so that it's, cos for me it's been more like an introduction to some of these people that maybe know stuff about what I do, but they haven't been able to put a face to it, but now they know. And I think that's quite important especially in this e-mail world we live in, if you could put a face to an e-mail that comes to your inbox it's always better than a shout out of the dark. So I think I've got the most out of this initiative. I think it's a shame when it stops, but I hope they do something similar in that area. I do think also with other labels using it, it's got to be consistent approach, if after the initiative people just go okay that's the initiative done and that's as far as we've got, it's still only a start, I don't think that anyone's kind of infiltrated the market to a degree where okay we're king of the --- here or we're really established here. It's just been kind of baby steps, but it's needed that initial introduction which I think Music Finland has supplied.

16. **So it's kind of worked as a kickstarter for getting a lot of things done and establish the channels and networks in the market?**

Yea, and it is, you can't just dabble in, I think if you're serious about it then you really have to… Like I said, I'm launching the label there so it's going to be an ongoing concern to me, and in reality the amount of money I'm going to be investing in it I have to sell records, it's like in any territory, I can't just have some kind of vague presence there. The objective is that we actually sell records, establish the label and the bands. So that's the objective.

17. **We've covered everything I had on my list of questions, do you have anything that you feel would be key to mention about your collaboration with Music Finland or about the UK initiative or the UK market in general?**

I think that last point I made is quite important. It's great that the Music Finland initiative is being there, but I think it's from the label's perspective or the artists or management or agents, whatever, I think it's really important that they look at it as, you know, I'm sure people have got all the different kinds of stuff from it, context, whatever, but it isn't, sometimes some of the problems with the initiatives tend to be that once they end, people think okay that's me trying to do something in that market and if they don't see immediate results, then they give up. I think in the UK you have to try and maintain presence there, so you can't just borne a few shows and expect everyone to go hey great we know them now and they're on our Christmas card list, its going to take a lot more than that. So I think, I hope that people that have been involved in will continue to try to do stuff there, that's the main thing. If not, then it's been quite futile. That's my general feeling.

Appendix 5. UK partners service quality gap analysis

	Partners	MF
Gap 0: PARTNER GAP		
How well does Music Finland understand the partners' expectations on the collaboration?	93%	85%
How well does Music Finland understand the partners' perceptions of the actual collaboration?	97%	70%
TOTAL GAP SCORE	95%	78%
Gap 1: LISTENING GAP		
Market research orientation	***79%***	***80%***
How would you rate the amount of feedback collected from partners by Music Finland to understand the partners' expectations?	90%	70%
How well does Music Finland succeed in using this feedback to improve the service/collaboration with the partners?	87%	80%
How well did Music Finland initially define the type of collaboration with the partners to ensure it matched their expectations? Think about the very beginning of your collaboration.	77%	85%
How well does Music Finland manage to offer partners relevant content and proposals for collaboration (e.g. in terms genres, interesting artists for their target groups, campaign and other collaboration ideas)?	63%	85%
Relationship focus	***83%***	***85%***
How would you rate Music Finland's focus on building a relationship with partners?	87%	85%
How well is Music Finland able to provide a service that's tailored to the partners' needs?	80%	85%
Service recovery	***82%***	***80%***
How well does Music Finland plan for setbacks and unexpected changes?	83%	75%
How would you rate Music Finland's ability to overcome challenges?	80%	85%
TOTAL GAP SCORE	81%	81%

Gap 2: SERVICE DESIGN AND STANDARDS GAP		
Systematic service design	***77%***	***75%***
How well is Music Finland able to provide partners with guidelines on how each case of collaboration will work?	77%	75%
Presence of customer-defined standards	***80%***	***85%***
How well defined are Music Finland's service standards?	80%	85%
How well do service standards match with partner expectations?	80%	85%
TOTAL GAP SCORE	79%	82%

Gap 3: SERVICE PERFORMANCE GAP		
Effective role fulfilment by customers	***83%***	***85%***
How clear is the role definition (i.e. who does what) in projects with partners? 1=not clear, 10=very clear	83%	85%
Alignment of demand and capacity	***97%***	***90%***
How would you rate Music Finland's ability to provide service in a timely manner (i.e. advancing projects, responding to e-mails etc.)?	97%	90%
TOTAL GAP SCORE	90%	88%

Gap 4: COMMUNICATION GAP		
Integrated marketing communication	***88%***	***82%***
How well do Music Finland's communications correspond with the level of service quality?	87%	80%
How well does Music Finland communicate to the partners that what in each case of collaboration will be provided to them?	90%	80%
How would you rate the appropriateness of the tools Music Finland uses with partners (e.g. for communications, for sending audio/video etc.)?	87%	85%
TOTAL GAP SCORE	88%	82%

Appendix 6. Individual responses from the UK partners

Gap 0: Partner gap										
	1 Poor	2	3	4	5	6	7	8	9	10 Excellent	%
How well does Music Finland understand your expectations on the collaboration with them?	0	0	0	0	0	0	0	1	0	2	93%
How well does Music Finland understand your perceptions of the actual collaboration?	0	0	0	0	0	0	0	0	1	2	97%
TOTAL GAP SCORE											**95%**
Gap 1: Listening gap											
Market research orientation											
How would you rate the amount of feedback collected from you by Music Finland to understand your expectations?	0	0	0	0	0	0	0	0	3	0	90%
How well does Music Finland succeed in using this feedback to improve their service/collaboration with you?	0	0	0	0	0	0	1	0	1	1	87%
How well did Music Finland initially define the type of collaboration with you to ensure it matched your expectations? Think about the very beginning of your collaboration.	0	0	0	0	1	0	0	1	0	1	77%
How well does Music Finland manage to offer you relevant content and proposals for collaboration (e.g. in terms of genres, interesting artists for your target groups, campaign and other collaboration ideas)?	1	0	0	0	0	0	0	0	2	0	63%
Sub-gap score											79%
Relationship focus											
How would you rate Music Finland's focus on building a relationship with you as a partner?	0	0	0	0	0	1	0	0	0	2	87%
How well is Music Finland able to provide a service that's tailored to your needs?	0	0	0	0	1	0	0	0	1	1	80%
Sub-gap score											83%
Service recovery											
How well does Music Finland plan for setbacks and unexpected changes?	0	0	0	0	1	0	0	0	0	2	83%
How would you rate Music Finland's ability to overcome challenges?	0	0	0	0	1	0	0	0	1	1	80%
Sub-gap score											82%
TOTAL GAP SCORE											**81%**
Open question: In which ways could Music Finland improve in overcoming problems and plannin for setbacks?	I think my main issue previously was with the acts they were previously picking to break in the UK. However that seems to be more nuanced and appropriate now they have a stronger knowledge of the music market here Music Finland are also similarly more experienced in picking the right personnel to promote shows and represent gigs, so they've been able to overcome problems in campaigns that way too										

Gap 2: Service design and standards gap											
Systematic service design											
How well is Music Finland able to provide you with guidelines on how each case of collaboration will work?	0	0	0	0	1	0	0	1	0	1	77%
Sub-gap score											77%
Presence of customer-defined standards											
How well defined are Music Finland's service standards?	0	0	0	0	0	0	2	0	0	1	80%
How well do service standards match with your expectations?	0	0	0	0	0	0	2	0	0	1	80%
Sub-gap score											80%
TOTAL GAP SCORE											**79%**
Gap 3: Service performance gap											
Effective role fulfillment by customers											
How clear is the role definition (i.e. who does what) in cases you collaborate with Music Finland? 1=not clear, 10=very clear	0	0	0	0	1	0	0	0	0	2	83%
Sub-gap score											83%
Alignment of demand and capacity											
How would you rate Music Finland's ability to provide service in a timely manner (i.e. advancing projects, responding to e-mails etc.)?	0	0	0	0	0	0	0	0	1	2	97%
Sub-gap score											97%
TOTAL GAP SCORE											**90%**
Gap 4: Communication gap											
Integrated marketing communication											
How well do Music Finland's communications correspond with the level of service quality?	0	0	0	0	0	0	1	0	1	1	87%
How well does Music Finland communicate to you that what in each case of collaboration will be provided to you?	0	0	0	0	0	0	1	0	0	2	90%
How would you rate the appropriateness of the tools Music Finland uses (e.g. for communications, for sending audio/video etc.)?	0	0	0	0	0	0	1	0	1	1	87%
Sub-gap score											88%
TOTAL GAP SCORE											**88%**
Open question: Would you have any improvement suggestions for Music Finland's communications to you?	Best Music Export office I've worked with - no complaints. Amazing bunch.										
Open question: Finally, is there any other feedback you wish to give regarding your collaboration with Music Finland? What have you been satisfied with the most? How about unsatisfied?	All awesome!	I think they're a very impressive organisation, full of creative, funny and friendly people. They're excellent at approaching all aspects of the music business, regarding media and live promotion, hospitality, understanding musical trends, interacting with musicians, labels and journalists and so on. Subsequently I think they're steadily achieving what they set out to do: promoting awareness of new Finnish music outside of Finland in an interesting, authentic and savvy way.									

Appendix 7. Individual responses of Music Finland representatives on the UK partner survey

Gap 0: Partner gap											
	1 Poor	**2**	**3**	**4**	**5**	**6**	**7**	**8**	**9**	**10 Excellent**	**%**
How well does Music Finland understand the partners' expectations on the collaboration?	0	0	0	0	0	0	0	1	1	0	85%
How well does Music Finland understand the partners' perceptions of the actual collaboration?	0	0	0	0	0	0	2	0	0	0	70%
TOTAL GAP SCORE											**78%**
Gap 1: Listening gap											
Market research orientation											
How would you rate the amount of feedback collected from partners by Music Finland to understand the partners' expectations?	0	0	0	0	0	0	2	0	0	0	70%
How well does Music Finland succeed in using this feedback to improve the service/collaboration with the partners?	0	0	0	0	0	0	0	2	0	0	80%
How well did Music Finland initially define the type of collaboration with the partners to ensure it matched their expectations? Think about the very beginning of your collaboration.	0	0	0	0	0	0	0	1	1	0	85%
How well does Music Finland manage to offer partners relevant content and proposals for collaboration (e.g. in terms genres, interesting artists for their target groups, campaign and other collaboration ideas)?	0	0	0	0	0	0	0	1	1	0	85%
Sub-gap score											80%
Relationship focus											
How would you rate Music Finland's focus on building a relationship with partners?	0	0	0	0	0	0	0	1	1	0	85%
How well is Music Finland able to provide a service that's tailored to the partners' needs?	0	0	0	0	0	0	0	1	1	0	85%
Sub-gap score											85%
Service recovery											
How well does Music Finland plan for setbacks and unexpected changes?	0	0	0	0	0	0	1	1	0	0	75%
How would you rate Music Finland's ability to overcome challenges?	0	0	0	0	0	0	0	1	1	0	85%
Sub-gap score											80%
TOTAL GAP SCORE											**81%**

Gap 2: Service design and standards gap										
Systematic service design										
How well is Music Finland able to provide partners with guidelines on how each case of collaboration will work?	0	0	0	0	0	0	1	1	0	0	75%
Sub-gap score											75%
Presence of customer-defined standards											
How well defined are Music Finland's service standards?	0	0	0	0	0	0	0	1	1	0	85%
How well do service standards match with partner expectations?	0	0	0	0	0	0	0	1	1	0	85%
Sub-gap score											85%
TOTAL GAP SCORE											**82%**
Gap 3: Service performance gap											
Effective role fulfillment by customers											
How clear is the role definition (i.e. who does what) in projects with partners? 1=not clear, 10=very clear	0	0	0	0	0	0	0	1	1	0	85%
Sub-gap score											85%
Alignment of demand and capacity											
How would you rate Music Finland's ability to provide service in a timely manner (i.e. advancing projects, responding to e-mails etc.)?	0	0	0	0	0	0	0	0	2	0	90%
Sub-gap score											90%
TOTAL GAP SCORE											**88%**
Gap 4: Communication gap											
Integrated marketing communication											
How well do Music Finland's communications correspond with the level of service quality?	0	0	0	0	0	0	0	2	0	0	80%
How well does Music Finland communicate to the partners that what in each case of collaboration will be provided to them?	0	0	0	0	0	0	0	2	0	0	80%
How would you rate the appropriateness of the tools Music Finland uses with partners (e.g. for communications, for sending audio/video etc.)?	0	0	0	0	0	0	0	1	1	0	85%
Sub-gap score											82%
TOTAL GAP SCORE											**82%**

Appendix 8. Finnish client organizations service quality gap analysis

	Clients	MF
Gap 0: CUSTOMER GAP		
How well does Music Finland understand the clients' expectations regarding the services?	90%	85%
How well does Music Finland understand client perceptions of the services?	85%	80%
TOTAL GAP SCORE	88%	83%
Gap 1: LISTENING GAP		
Market research orientation	**85%**	**83%**
How would you rate the amount of feedback collected from the clients by Music Finland to understand their expectations?	90%	90%
How well does Music Finland succeed in using this feedback to improve the services?	80%	75%
Relationship focus	**77%**	**85%**
How would you rate Music Finland's focus on building a relationship with clients?	85%	95%
How well is Music Finland able to provide a service that's tailored to the clients' needs?	75%	85%
How would you rate Music Finland's understanding of different client groups (live, merchandise, labels)? Rate high if you feel all groups are equally well understood and low if some groups are less understood than others.	85%	75%
Service recovery	**83%**	**80%**
How well does Music Finland plan for setbacks and unexpected changes?	80%	75%
How would you rate Music Finland's ability to overcome challenges?	70%	85%
TOTAL GAP SCORE	81%	83%

Gap 2: SERVICE DESIGN AND STANDARDS GAP		
Systematic service design	**78%**	**85%**
How would you rate Music Finland's ability to develop new services?	80%	90%
How well are new services defined for clients?	80%	85%
How well are Music Finland employees aware of the services the organization provides?	75%	80%
Presence of customer-defined standards	**70%**	**88%**
How well defined are Music Finland's service standards?	70%	90%
How well do service standards match with client expectations?	70%	85%
Appropriate physical evidence and servicescape	**70%**	**85%**
How would you rate the attractiveness of the promotional releases that have been distributed in the UK (e.g. The Record Store Day 10", Echo Chamber 10", Come Hear Finland, etc.)?	70%	85%
TOTAL GAP SCORE	74%	86%

Gap 3: SERVICE PERFORMANCE GAP		
Effective role fulfilment by customers	**80%**	**75%**
How clear is the role definition (i.e. who does what) between Music Finland and the clients within the UK initiative? 1=not clear, 10=very clear	80%	75%
Alignment of demand and capacity	**83%**	**85%**
How well is Music Finland operating under a busy period, compared to a quieter one?	80%	85%
How would you rate Music Finland's ability to provide service in a timely manner (i.e. advancing projects, responding to e-mails etc.)?	85%	85%
TOTAL GAP SCORE	82%	82%

Gap 4: COMMUNICATION GAP		
Integrated marketing communication	**78%**	**86%**
How well do Music Finland's communications correspond with the level of service quality?	85%	85%
How well do communications in different channels and by different people of Music Finland express one, consistent message?	80%	80%
How would you rate the appropriateness of the communication tools Music Finland uses with the clients?	75%	90%
How well did Music Finland succeed in communicating to the clients about what will be provided to them in terms of service within:		
Export programme	85%	85%
Media & professional visiting programme	85%	90%
Showcases and events in the UK (Ja Ja Ja, Echo Chamber, The Great Escape etc.)	60%	80%
Training and workshops in Finland about the UK market	75%	85%
How well has Music Finland been able to deliver on what was agreed with the clients regarding service provision within the UK initiative? *	75%	90%
TOTAL GAP SCORE	78%	86%

* only one response from MF

Appendix 9. Individual responses of the Finnish client organizations

Gap 0: Customer gap											
	1 Poor	**2**	**3**	**4**	**5**	**6**	**7**	**8**	**9**	**10 Excellent**	**%**
How well does Music Finland understand your expectations regarding their services?	0	0	0	0	0	0	0	0	2	0	90%
How well does Music Finland understand your perceptions of the services?	0	0	0	0	0	0	0	1	1	0	85%
TOTAL GAP SCORE											**88%**
Gap 1: Listening gap											
Market research orientation											
How would you rate the amount of feedback collected from you by Music Finland to understand your expectations?	0	0	0	0	0	0	0	0	2	0	90%
How well does Music Finland succeed in using this feedback to improve their services to you?	0	0	0	0	0	0	1	0	1	0	80%
Sub-gap score											85%
Relationship focus											
How would you rate Music Finland's focus on building a relationship with you as a client?	0	0	0	0	0	0	1	0	0	1	85%
How well is Music Finland able to provide a service that's tailored to your needs?	0	0	0	0	0	1	0	0	1	0	75%
How would you rate Music Finland's understanding of different client groups (live, merchandise, labels)? Rate high if you feel all groups are equally well understood and low if some groups are less understood than others.	0	0	0	0	1	0	0	0	1	0	70%
Sub-gap score											77%
Service recovery											
How well does Music Finland plan for setbacks and unexpected changes?	0	0	0	0	0	0	0	1	1	0	85%
How would you rate Music Finland's ability to overcome challenges?	0	0	0	0	0	0	1	0	1	0	80%
Sub-gap score											83%
TOTAL GAP SCORE											**81%**
Open question: How could Music Finland fortify the relationship with you?	By offering more tailored services.										

Gap 2: Service design and standards gap											
Systematic service design											
How would you rate Music Finland's ability to develop new services?	0	0	0	0	0	0	1	0	1	0	80%
How well are new services defined for clients?	0	0	0	0	0	0	1	0	1	0	80%
How well are Music Finland employees aware of the services the organization provides?	0	0	0	0	0	1	0	0	1	0	75%
Sub-gap score											78%
Presence of customer-defined standards											
How well defined are Music Finland's service standards?	0	0	0	0	1	0	0	0	1	0	70%
How well do service standards match with your expectations?	0	0	0	0	1	0	0	0	1	0	70%
Sub-gap score											70%
Appropriate physical evidence and servicescape											
How would you rate the attractiveness of the promotional releases your artists have been on for UK distribution (e.g. The Record Store Day 10", Echo Chamber 10", Come Hear Finland, etc.)?	0	0	0	1	0	0	0	0	0	1	70%
Sub-gap score											70%
TOTAL GAP SCORE											**74%**
Gap 3: Service performance gap											
Effective role fulfilment by customers											
How clear is the role definition (i.e. who does what) between you and Music Finland within the UK initiative? 1=not clear, 10=very clear	0	0	0	0	0	0	1	0	1	0	80%
Sub-gap score											80%
Alignment of demand and capacity											
How well is Music Finland operating under a busy period, compared to a quieter one?	0	0	0	0	0	0	1	0	1	0	80%
How would you rate Music Finland's ability to provide service in a timely manner (i.e. advancing projects, responding to e-mails etc.)?	0	0	0	0	0	0	0	1	1	0	85%
Sub-gap score											83%
TOTAL GAP SCORE											**82%**

Gap 4: Communication gap											
Integrated marketing communication											
How well do Music Finland's communications correspond with the level of service quality?	0	0	0	0	0	0	0	1	1	0	85%
How well do communications in different channels and by different people of Music Finland express one, consistent message?	0	0	0	0	0	0	1	0	1	0	80%
How would you rate the appropriateness of the communication tools Music Finland uses with you?	0	0	0	0	0	1	0	0	1	0	75%
How well did Music Finland communicate to you about what will be provided to you in terms of service within (answer all that you are/were involved with):											
Export programme	0	0	0	0	0	0	0	1	1	0	85%
Media & professional visiting programme	0	0	0	0	0	0	0	1	1	0	85%
Showcases and events in the UK (Ja Ja Ja, Echo Chamber, The Great Escape etc.)	0	0	0	1	0	0	0	1	0	0	60%
Training and workshops in Finland about the UK market	0	0	0	0	0	1	0	0	1	0	75%
On those activities you were involved in, how well has Music Finland been able to deliver on what was agreed with you regarding service provision?	0	0	0	0	0	1	0	0	1	0	75%
Sub-gap score											78%
TOTAL GAP SCORE											**78%**
Open question: Would you have any improvement suggestions for Music Finland's communications to you? Would you prefer other communication tools?	Accounting could be faster in funding.										
Open question: Finally, is there any other feedback you wish to give regarding how could Music Finland improve their services either within the UK initiative or generally? What have you been satisfied with the most? How about unsatisfied?	Many thanks for big help in promoting Finnish music internationally!										

Appendix 10. Individual responses of Music Finland representatives on the Finnish client organization survey

Gap 0: Customer gap											
	1 Poor	**2**	**3**	**4**	**5**	**6**	**7**	**8**	**9**	**10 Excellent**	**%**
How well does Music Finland understand the clients' expectations regarding the services?	0	0	0	0	0	0	0	1	1	0	85%
How well does Music Finland understand client perceptions of the services?	0	0	0	0	0	0	0	2	0	0	80%
TOTAL GAP SCORE											**83%**
Gap 1: Listening gap											
Market research orientation											
How would you rate the amount of feedback collected from the clients by Music Finland to understand their expectations?	0	0	0	0	0	0	0	1	0	1	90%
How well does Music Finland succeed in using this feedback to improve the services?	0	0	0	0	0	0	1	1	0	0	75%
Sub-gap score											83%
Relationship focus											
How would you rate Music Finland's focus on building a relationship with clients?	0	0	0	0	0	0	0	0	1	1	95%
How well is Music Finland able to provide a service that's tailored to the clients' needs?	0	0	0	0	0	0	0	1	1	0	85%
How would you rate Music Finland's understanding of different client groups (live, merchandise, labels)? Rate high if you feel all groups are equally well understood and low if some groups are less understood than others.	0	0	0	0	0	0	1	1	0	0	75%
Sub-gap score											85%
Service recovery											
How well does Music Finland plan for setbacks and unexpected changes?	0	0	0	0	0	0	1	1	0	0	75%
How would you rate Music Finland's ability to overcome challenges?	0	0	0	0	0	0	0	1	1	0	85%
Sub-gap score											80%
TOTAL GAP SCORE											**83%**

Gap 2: Service design and standards gap										
Systematic service design										
How would you rate Music Finland's ability to develop new services?	0	0	0	0	0	0	0	0	2	0	90%
How well are new services defined for clients?	0	0	0	0	0	0	0	1	1	0	85%
How well are Music Finland employees aware of the services the organization provides?	0	0	0	0	0	0	0	2	0	0	80%
Sub-gap score											85%
Presence of customer-defined standards											
How well defined are Music Finland's service standards?	0	0	0	0	0	0	0	0	2	0	90%
How well do service standards match with client expectations?	0	0	0	0	0	0	0	1	1	0	85%
Sub-gap score											88%
Appropriate physical evidence and servicescape											
How would you rate the attractiveness of the promotional releases that have been distributed in the UK (e.g. The Record Store Day 10", Echo Chamber 10", Come Hear Finland, etc.)?	0	0	0	0	0	0	0	1	1	0	85%
Sub-gap score											85%
TOTAL GAP SCORE											**86%**
Gap 3: Service performance gap											
Effective role fulfilment by customers											
How clear is the role definition (i.e. who does what) between Music Finland and the clients within the UK initiative? 1=not clear, 10=very clear	0	0	0	0	0	0	1	1	0	0	75%
Sub-gap score											75%
Alignment of demand and capacity											
How well is Music Finland operating under a busy period, compared to a quieter one?	0	0	0	0	0	0	0	1	1	0	85%
How would you rate Music Finland's ability to provide service in a timely manner (i.e. advancing projects, responding to e-mails etc.)?	0	0	0	0	0	0	0	1	1	0	85%
Sub-gap score											85%
TOTAL GAP SCORE											**82%**

Gap 4: Communication gap										
Integrated marketing communication										
How well do Music Finland's communications correspond with the level of service quality?	0	0	0	0	0	0	0	1	1	0	85%
How well do communications in different channels and by different people of Music Finland express one, consistent message?	0	0	0	0	0	0	0	2	0	0	80%
How would you rate the appropriateness of the communication tools Music Finland uses with the clients?	0	0	0	0	0	0	0	0	2	0	90%
How well did Music Finland succeed in communicating to the clients about what will be provided to them in terms of service within:											
Export programme	0	0	0	0	0	0	0	1	1	0	85%
Media & professional visiting programme	0	0	0	0	0	0	0	0	2	0	90%
Showcases and events in the UK (Ja Ja Ja, Echo Chamber, The Great Escape etc.)	0	0	0	0	0	0	0	2	0	0	80%
Training and workshops in Finland about the UK market	0	0	0	0	0	0	0	1	1	0	85%
How well has Music Finland been able to deliver on what was agreed with the clients regarding service provision within the UK initiative?	0	0	0	0	0	0	0	0	1	0	90%
Sub-gap score											86%
TOTAL GAP SCORE											**86%**