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Commission

# Analysis of market trends and gaps in funding needs for the music sector

*Final Report*

Culture

## **EUROPEAN COMMISSION**

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# Analysis of market trends and gaps in funding needs for the music sector



**Panteia**

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## Abstract

The European music sector is rich and diverse but faces many challenges. The EU has a key role to play if it wants to support a competitive, diverse and sustainable music sector, which is challenged by 1) concentration trends in the recorded and in the live music sub-sectors; 2) the fast-evolving consumption habits and; 3) decreasing funding for core musical institutions. The music sector has painfully re-structured after the digital shift, but it remains fragile and requires tailored measures in order to thrive in a competitive global music market. Whilst some support schemes exist at different levels of governments – from local to national and European – they fall short in terms of complementarity. Current European funding is only partially aligned with the strategic needs of the sector. This study investigates possible EU action to address some of these gaps and calls for more appropriate funding and support mechanisms by proposing concrete proposals for actions.

## Introduction

### Context and background

Music constitutes an important pillar of European culture and is probably the cultural and creative sector with the largest audience reach. It is an essential component of Europe's cultural diversity and it has the power to bring positive changes to many levels of society. It also has a strong economic significance: the music sector employs more people than film and generates more than €25bn revenue annually.<sup>1</sup>

Music has benefitted from a more focused approach at EU level since the AB Music Working Group report in 2015, which ultimately led to the establishment of Music Moves Europe<sup>2</sup>, the overarching framework for the European Commission's initiatives and actions in support of Europe's music sector.

This dialogue between the European Commission and music stakeholders has identified several challenges and opportunities for the European sector.

One of the main challenges identified is the so-called "fragmentation" of the European music sector. To begin with, the European music community is diverse by nature. Compared to various other large music markets such as the USA or Canada, European music offers a vast range of different national traditions (28), languages (24), and regional cultural idiosyncrasies.

This phenomenon of diversity, which is unique to Europe and constitutes one of its main strengths, is however reflected in the fragmentation of national market practices within the EU:

- The inherent cultural diversity of the European music sector acquires additional dimensions when considering further contrasts between the live sector, the recording industry, the field of music education, and the wide-ranging social roles of music in different contexts;
- Some Member States use language quotas on television and radio rotation to favour their national language;
- Others use tax rebates and levies to favour specific music genres;

One of the most obvious aspects of this fragmentation within the 28-country bloc is, however, the inconsistency in music sector funding approaches between Member States:

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<sup>1</sup>EY (2014) Creating growth: Measuring cultural and creative markets in the EU. A study commissioned by GESAC, December 2014. Data from 2012. Report.

<sup>2</sup>[https://ec.europa.eu/programmes/creative-europe/actions/music-moves-europe\\_en](https://ec.europa.eu/programmes/creative-europe/actions/music-moves-europe_en)

- Some Member States have equipped themselves with comprehensive toolsets, covering all dimensions of artistic creation, such as live music operators, music-led performing arts, recorded music, tech start-ups, music media, etc.;
- Others have chosen to support only classical music, music-led performing arts or music education organisations;
- In some instances, the support is limited to supporting a national orchestra or an opera house and a concert hall.

In this complex context, the European Union is in a key situation: its role, with respect to the principle of subsidiarity, is indeed to support or complement the actions of the Member States. The EU has been very active in this field over the last two generations of programmes (“Culture” and “Creative Europe”), providing funding lines for music cooperation projects, platforms, and networks at a level amounting to 15% of the overall funding allocated in the context of the “Culture” Sub-Programme of Creative Europe 2014-21 (itself representing around 35% of the overall “Creative Europe” envelope; see 4.2.1 below for further detail).

However, one of the main subjects to which discussion regularly returned during the various stakeholder meetings held by the European Commission since 2015 is the so-called funding gap, in terms of reaching a sufficiently substantial funding threshold to effectively have an impact on the “fragmentations” of the music sector in Europe.

Music is of a comparable scale to audio-visual and is also a driving force behind the significant performing arts sector, as presented in the statistics, which includes a large element of music-based events.

However, music does not benefit from a dedicated funding programme, whereas other sectors benefit from tailor-made support (e.g. the audio-visual sector with the MEDIA sub-programme under Creative Europe). While a similar programme is not realistic for the 2021-2027 period, a more targeted set of measures could contribute to addressing this funding gap.

Therefore, this study is a timely opportunity to identify whether there is justification for upscaling and enlarging the scope of the EU’s support for the music sector to match the scale and effectiveness of funding already in place for other cultural and creative industries.

## **Objectives of the study**

The primary objective of this study is to carry out a study analysing market trends and identifying funding needs for the music sector in Europe. The aim is to develop a better understanding of developmental needs in light of music sector market evolution, responses to which can be considered in relation to Creative Europe and other EU programmes supporting music.

The study thus aims to provide a state-of-the art assessment on current sector trends, ranging from music education, amateur music, the live economy, to digital opportunities and concentration in the music industry. The study assesses for each identified trend:

- 1) What is currently being addressed sufficiently by the Creative Europe programme and other relevant EU programmes and how;
- 2) What is currently not being addressed sufficiently by the European funding instruments and how such aspects could be addressed by its successor programme;
- 3) The overall need for future support on a European level, assessing appropriate scale and scope while taking the principle of subsidiarity and the European dimension into account.

The analysis of market trends also seeks to identify future trends and explore the possible impact of recent developments on the music sector in terms of competitiveness, diversity and sustainability in music supply and consumption.



## Definition and scope – the music sector as an ecosystem

The European music sector is a complex ecosystem, made out of a myriad of actors, national traditions and languages, and driven by regional dynamics in a highly-globalised market. The music ecosystem is in a state of constant evolution and influenced by several levels of governance, from local to the European, which all play a key role in regulating and developing the sector.

The complexity of this ecosystem needs to be unpacked in order to articulate holistic policies and appropriate financial instruments for the sector. We provide below some definitions and clarifications on the different activities of the music sector, which are encapsulated in figure 1 below. A more comprehensive glossary is also provided in annex I of this report.

Figure 1: Representation of the music ecosystem



Source: Sound Diplomacy

## Music as a professional or as a leisure time activity

A first distinction can be made between **professional and amateur** musical practice. Professional amateur practice is made of all the professions inherent to music; from the most obvious, the musician to the sound engineer, the *roadie*, the copyright specialist, the label manager or the music journalist). The music amateurs range from the music consumer to the music practitioner during his free time, as a hobby or as a passion.

## Music as an industry - The value chain approach

The music industry is made out of two distinct but highly interdependent subsectors, the **recorded and the live subsector**. The recorded subsector is based on the monetisation of recorded material either through physical or digital formats. The live subsector of the music sector is an integral part of the performing arts.

A way to grasp the complex relationship of these two highly intertwined and interdependent subsectors is to understand the evolutions of the sector depending on the place of the different actors in the value chain. The value chain's definition is "a sequence of activities during which value is added to a new product or service as it makes its way from invention to final distribution."<sup>3</sup>

**Table 1: Music Value Chain**

Place in the value chain	Type of actors
Creation and performance	Musicians, composers, songwriters
Production, Publication, Delivery	Labels, Managers, Publishers, PR/Marketing
Dissemination, Trade	-Linear distributors (radio & TV), Brick-and-mortar retailers, -Non-linear distribution (Digital Service Providers and user generated content platforms)
Exhibition, Reception, Transmission	Venues and Festivals
Ancillary goods and services	Music education and training, manufacture of music instruments and equipment, support and development services.

Source: KEA (2017)

The first link in the chain (creation and performance) refers to distinct things, the musical composition and the sound creation. The composers and songwriter create the musical compositions, and the sound creation refers to the musicians who perform this musical composition.

The second link (production, publication, delivery) refers to different kinds of actors and actions through which an artist's work is structured and developed as a marketable product. The labels, publishers and managers play different roles in generating revenue potential for the artists either by creating and following a career plan (managers), maximising record and digital sales (labels) or optimising royalties via synchronisations of a sound creation on TV, cinema ads or video games (publishers).

The third chain link (dissemination, trade) refers to the moment where a recorded musical composition is made available for sales / consumption with marketing and promotion playing a crucial in all of these activities. This link concerns only the *recorded* side of the music sector which need either to be sales physically (referring to brick retailers packaging, transport, retail management...) or to be broadcast on radio or TV, or streamed on digital service providers or on user generated content platforms such as YouTube or Soundcloud in order to get royalty payments out of it.

The fourth link (exhibition, reception, transmission) refers to all the unmediated cultural experiences of the audiences by granting or selling access to consume or participate in time-based experiences (i.e. performance). This refers to the wider live music industry, making music an integral component of performing arts. It covers various different realities in terms of scope (local grassroots venues, or large mainstream international music arenas, music festivals, concert halls, clubs...).

The fifth link (ancillary) refers to goods and services that are not directly associated with cultural content, but rather facilitate or enable the creation, production, dissemination or exhibition of cultural works (technology providers and material suppliers such as musical instrument manufacture and sales). It also refers to all the support functions of the music sector, from collective rights management organisations to music education and training providers (formal and informal), as well as music governance and regulation services (including funders) which also form integral parts of the music ecosystem but which are not usually classified as part of the music industry per se.

<sup>3</sup> Botkin and Matthews 1992, p. 26 city by KEA 2017, p. 35.

## The different music genres

A third distinction we could make is the observation of this ecosystem by **genres**. Genre is at first sight a clear way to classify and understand the music ecosystem. Genres originate from different criteria of the music, from the physical aspects (length of a piece, instruments (amplified or acoustic), geographical provenance, social-cultural markers (popular or scholar/art music) and historical context (historical music to very modern / new music). The musical genres are very numerous and continue to develop depending on the influence of contemporary creators. Aucouturier and Pachet (2003) show the advantages and disadvantages of different genre classification methods and no single one of them seems to be appropriate to be used in the scope of such a large study, particularly considering the limited timeframe.

This study therefore observes the music ecosystem via its representative organisations at European level who represent together a substantial, if not comprehensive, cross-section of the European music ecosystem. These organisations form a major part of the advisory board for this study and had many opportunities to provide valuable and comprehensive input and feedback during the drafting of the study. The genre perspective is partially taken into account in the gap analysis (chapter 6).

## How to grasp the evolution of such a vast and complex ecosystem?

Our approach seeks to encompass the diversity of the music sector, with an industry chiefly composed of MSMEs as well as a few giant companies acting at different levels of the value chain (majors, large streaming platforms, and world-leading tech companies), from small concert venues to large stadiums active in different entertainment activities.

Additionally, the music sector includes a myriad of large and small non-profit organisations which often form the bedrock of music life across Europe through amateur practice, small festivals and music events. The live music sector exemplifies well these two facets, as organisations active in this field can be wholly private businesses, non-profit associations (often publicly-funded).

This study therefore takes a holistic view between the different aspects of the music sector, while acknowledging the differences in terms of structuration, purpose and impacts. Due to the extremely fragmented landscape of the music sector, our analysis will chiefly focus on key policy objectives for a European music policy, which are articulated around three objectives:

- promote creativity and innovation;
- safeguard and expand the diversity of European music;
- help the sector adapt to and benefit from digitisation.<sup>4</sup>

Similarly, we understand support schemes in a broad sense, including financial as well as non-financial support provided by the State or any other public organisation. Such support schemes typically cover:

- Direct financial support to music organisations;
- Capacity-building in the music sector, including skills development, support to entrepreneurship, company growth (incubation, networking and clustering), and mobility of students;
- Access to finance such as the Creative Europe Guarantee Facility;
- Tax incentives schemes in a few cases (for example; “credit d’impôt musique” - music tax credit) in France which allows small to medium sized record labels to subtract up to

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<sup>4</sup> [https://ec.europa.eu/programmes/creative-europe/actions/music-moves-europe\\_en](https://ec.europa.eu/programmes/creative-europe/actions/music-moves-europe_en)

20% of their development and productions expenses from their taxes (up to 800 000€ per financial year); or "Credito di imposta per la musica in Italy, which is a similar measure.

- Showcasing, branding, marketing and promotional activities;
- Live tours and artist mobility funding;
- Internationalisation and music exports (e.g. joint trade missions; identification of local contacts and commercial partners; market analyses/reports).

In terms of geographical scope, we chiefly focus on the EU 28 countries, although some insights from third countries are used to enrich the analysis where relevant.

A glossary is also available in the annex of the report to explain some of the most common industry terms.

# 1 The European music sector – state of play and main features

This section explores the different aspects of the music sector to provide a more accurate picture of the size of the sector. It presents key information on the economic weight of the sector, as well as up-to-date information on the state-of-play of the music industry. Following the music ecosystem approach, this section goes beyond the music industry and also provides some insights on the non-profit music sector, although detailed information is scarcer at a pan-European level on this aspect.

## 1.1 The music sector – main economic figures

According to the latest comprehensive mapping of the cultural and creative sectors (CCS) in Europe, the music sector accounted for 1.2 million jobs – the third largest employer in the CCS – and more than €25 billion turnover in the EU.<sup>5</sup>

The music sector is often poorly measured as an economic sector, since 1) it encompasses very different economic activities, sometimes classified in performing arts (activities related to classical music) or entertainment activities (live); and 2) the different statuses of artists and musicians across European countries are not well captured in traditional business surveys.<sup>6</sup>

Ancillary activities such as the fabrication of music instruments are also often not included in the music sector despite their economic importance. In 2017, the European Union's Member States exported musical instruments worth over €1.8 billion (including parts and accessories of such articles). Nearly two-thirds of these (almost €1.2 bn) were traded within the EU.<sup>7</sup>

In addition to this basic overview, additional economic data on the music industry and especially on the recorded music market is presented in sections 2.4 and 2.5 of this report.

## 1.2 Music Education and Amateur Music – the importance of music in European societies

The music sector is not confined to the music industry. There are all sorts of activities taking place outside the music industry that are nevertheless at the very core of its functioning. Europe has indeed an immense musical cultural heritage ranging from classical music to contemporary music, to traditional folk and pop, rock and jazz.

Music education and amateur music are perfect examples of these interlinkages; beyond their undeniable educational and social value,<sup>8</sup> they are also the starting point for preparing future music professionals as well as enhancing music literacy of the society as a whole.

### 1.2.1 Amateur music practice in Europe

An important sub-sector of the European sector is the “amateur” or “leisure-time” music. Amateur music practice is rapidly catching on in European Member States and is arguably a bridge between music education and professional careers. A significant proportion of professional musicians (especially the ones in rock bands, jazz bands...) start their careers as amateur musicians and perform their music in gigs in small venues. Some professionals ‘give

<sup>5</sup> EY (2014) Creating growth: Measuring cultural and creative markets in the EU. A study commissioned by GESAC, December 2014. Data from 2012. Some more recent studies are available but since they are based solely on NACE codes, they provide a very narrow account of the music sector (only 4 NACE codes relate to music and none of them cover live music, or music authors and performers). See for example EIF (2018) Market Analysis of the Cultural and Creative Sectors in Europe – a sector to invest in. EIF, November 2018: [https://www.eif.org/what\\_we\\_do/guarantees/cultural\\_creative\\_sectors\\_guarantee\\_facility/ccs-market-analysis-europe.pdf](https://www.eif.org/what_we_do/guarantees/cultural_creative_sectors_guarantee_facility/ccs-market-analysis-europe.pdf)

<sup>6</sup> KEA (2015) Feasibility study on data collection and analysis in the cultural and creative sectors in the EU. A study commissioned by DG Education and Culture of the European Commission. Brussels, September 2015.

<sup>7</sup> Eurostat (2018) Culture Statistics 2018 edition. <https://ec.europa.eu/eurostat/web/products-eurostat-news/-/EDN-20180429-1?inheritRedirect=true&redirect=%2Feurostat%2Fweb%2Fculture%2Fpublications>

<sup>8</sup> See for example the European Agenda for music: <http://europeanagendaformusic.eu/key-themes/shaping-society/>

back' to the grassroots in unpaid capacities at later stages of their careers; many 'amateur' groups hire professional musical directors or other guests to enhance their programme of activity.

Such practice of music can also be part of a social/community engagement reaching out to a considerable number of people. It can thus be a way to help bring communities together across generations, social classes, and different economic backgrounds. It can have local economic implications by keeping the venues going and having audiences spend money locally on transport, food and drink, as well as being an opportunity for music experimentation and innovation.<sup>9</sup>

Since the information available on non-professional and amateur music is somewhat limited, quantitative data at EU 28 level on this specific aspect is scarce, especially for Central and Eastern Europe countries. The number of amateur and leisure-time music groups seems however to be increasing all over Europe, also thanks to the increasing number of projects that are being launched at local, national and European levels. The significant increase in self-produced artists<sup>10</sup> is a sign of the continuous development of amateur music, with these players now able to produce music via home studios.

According to the data of Making Music, a UK organisation for leisure time music, there are thousands of amateur music groups across the UK. The amateur music sector in the UK is rapidly increasing in size and economic significance (it generates around £100M in spending per year). Making Music members alone are around 170.000, capturing a quarter of all voluntary music groups in the UK. This means that there are nearly 700.000 citizens in the UK actively engaging with and participating in music.<sup>11</sup>

Similarly, in Germany, as of 2010, with an estimated seven million singers and musicians, amateur music making is one of Germany's most popular leisure-time activities.<sup>12</sup>

At the European level, several associations and projects have a clear focus on supporting amateur music. Some key examples include:

- The European Orchestra Federation (EOFED):<sup>13</sup> an association uniting the amateur and other types of non-professional orchestras and counting 33 members in 18 European countries;
- The European Choral Association (ECA):<sup>14</sup> a network of organisations, choirs and individuals in the field of collective singing in Europe, which is directly representing more than 2,5 million singers, conductors, composers and managers, and reaching out to more than 37 million people in continental Europe;
- The AMATEO Project:<sup>15</sup> a European Network for Active participation in Cultural Activities that promotes people's participation in the voluntary and amateur arts. It includes more than 30 national and regional associations from EU Member States and programme countries.

### 1.2.2 Music Education: an overview across Member States

Music education in European Member states is characterized by a great variety in terms of school curricula, hours dedicated to the study of music and non-formal or informal music education. Moreover, music education is not restricted to what happens inside a school class

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<sup>9</sup> Treasurers' Survey 2013: Summary Report [https://www.makingmusic.org.uk/sites/makingmusic.org.uk/files/Documents/Resources/Treasurers\\_Survey\\_Summary\\_Report\\_Final.pdf](https://www.makingmusic.org.uk/sites/makingmusic.org.uk/files/Documents/Resources/Treasurers_Survey_Summary_Report_Final.pdf) )

<sup>10</sup> Agence Phare (2019), Etude exploratoire sur l'autoproduction des artistes de la musique, Direction Générale des Médias et des Industries Culturelles, Ministère de la culture, Paris.

<sup>11</sup> See Supra

<sup>12</sup> Astrid Reimers, « *Amateur Music-making* », Deutsches Musikinformationszentrum 2011 [http://www.miz.org/musical-life-in-germany/download/05\\_Amateur\\_Music-Making.pdf](http://www.miz.org/musical-life-in-germany/download/05_Amateur_Music-Making.pdf)

<sup>13</sup> <http://www.eofed.org/eofed-members.html>

<sup>14</sup> <https://europeanchoralassociation.org/>

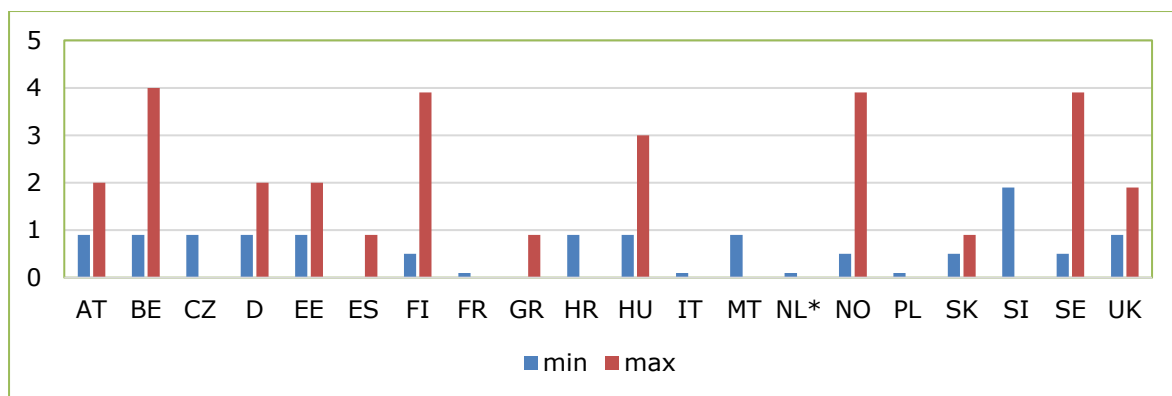
<sup>15</sup> <https://amateo.org/about/>

but also includes what an individual learns from activities taking place outside educational institutions such as participation in concerts, choirs, music bands or even the simple listening to music at home, among friends or family.

In European countries there is a very strong framework for music education, although it varies across countries. Differences in curricula and hours allocated to music education across countries can be observed, such as:

- overall volume of music education: in Hungary up to three hours are earmarked to music education per week, and up to two hours for Slovenia, Spain, and Malta
- different starting ages for primary and secondary school;
- the great level of independence by schools on how to allocate time to music (e.g. in the Netherlands);
- the cultural heritage of a given country as well as the way music subject is addressed among countries: sometimes music is part of a broader “arts curriculum” and sometimes it is addressed separately.

**Figure 2: Indicative compulsory time for music/week at secondary school**



Source: Time allocated to music in primary and secondary education

<http://menet.mdw.ac.at/menetsite/english/topics.html?m=1&c=0=lang=en>

\* In NL schools can decide how much time they devote to music as part of their Arts education Programme.

The Music Education Network (meNet) analyses the starting ages for kindergarten, primary and secondary school in 20 European countries.<sup>16</sup>

Figures show that music is a compulsory subject in primary schooling in all the 20 countries analysed. However, music teaching in secondary schooling varies more from country to country. In general, it is compulsory until 13/14 years of age and optional after this age.

In a minority of countries, such as Austria, Czech Republic, Slovakia and the Netherlands, students are asked to continue with some kind of art education throughout their higher level of secondary school, usually choosing between visual arts and music.<sup>17</sup> In some other countries like Finland, Norway and Sweden, the number of hours to dedicate to music is usually prescribed, but then individual schools can decide how to spread them through the years (whether to spread them evenly or to concentrate them within a smaller time). Schools in many countries also offer music hours outside the normal curriculum, for example through vocal or instrumental ensembles, such is the case in Estonia, Slovenia and Italy<sup>18</sup>, where such ensembles and orchestras are a common feature and classes are usually conducted outside normal school hours and generally during afternoons.

<sup>16</sup> Source: School Structures in 20 European Countries

<http://menet.mdw.ac.at/menetsite/english/topics.html?m=1&c=0=lang=en>

<sup>17</sup> <http://menet.mdw.ac.at/menetsite/english/topics.html?m=1&c=0=lang=en>

<sup>18</sup> <http://menet.mdw.ac.at/menetsite/english/topics.html?m=1&c=0=lang=en>



Finally, studies have shown how music education in schools often mirrors a country's cultural heritage.<sup>19</sup> Such is the case in Estonia for instance, where singing as part of the educational offer is seen as a way to preserve the country's cultural heritage and traditions. Following a similar pattern, choral education in Slovenia is regarded as a way for younger generations to reconnect to the Slovenian intangible cultural heritage.

### 1.2.3 Higher music education in Europe

There is only partial data available about higher music education in Europe. The European Association of Conservatories, music academies and Musikhochschulen (AEC) gathers data from its member organisations. The gathered data allows scoping the total number of higher music institutions (music teaching and musicians) in 17 member states as well as the number of music students in higher music education in 18 countries.

**Table 2: Number of higher music education institutions and music students at university level in the EU**

	AEC - Total number of higher music education institutions (music teaching and musicians)	AEC - Total of music students at university level
Austria	n.a.	n.a.
Belgium	n.a.	n.a.
Bulgaria	n.a.	n.a.
Cyprus	n.a.	n.a.
Croatia	n.a.	n.a.
Czech Republic	15	2500
Denmark	4	1200
Estonia	2	700
Finland	21	3000
France	60	average of 4000
Germany	24	22000
Greece	n.a.	n.a.
Hungary	7	2000
Ireland	7*	1500
Italy	79	n.a.
Latvia	1	600
Lithuania	4	860
Luxemburg	n.a.	17000
Malta	n.a.	n.a.
Netherlands	9	5350**
Poland	n.a.	577
Portugal	n.a.	n.a.
Romania	9	4000
Slovakia	n.a.	n.a.
Slovenia	2	400
Spain	16	8619
Sweden	6	3000
UK	9	6000

Source: AEC website

\*only performance

\*\*half are international students

### 1.2.4 Increased diversity in music education

Music education is also working with more diverse types of music. Music institutions, and especially higher music institutions have for a long time kept a "conservative" approach towards music education (mostly classical music, jazz, then pop and folk genres). In the last decades however this trend started changing, and the impact of the changing multicultural

<sup>19</sup> José A. Rodríguez-Quiles y García, Konstantina Dogani, "Music in schools across Europe: analysis, interpretation and guidelines for music education in the framework of the European Union", January 2011



European society on the educational offer has become more and more remarkable. An increasing number of European Higher Music Institutions started tackling the issue of cultural diversity not only in the curricula offered but also in a more socially-diverse student population.

Not surprisingly, some of the pioneering institutions are found in places which have long been multicultural cities. Some relevant examples are: The Guildhall School of Music and Drama in London, the Vienna University of Music and Performing Arts, the Rotterdam Conservatory of Music, the Birmingham Conservatory and the Conservatory of Amsterdam, The World Music Centre in Serpa, Portugal. Over the last 20 years, national and local governments in these countries have dedicated a great deal of money and effort in order to integrate “minority arts” in their cultural institutions. The first contact with different musical cultures from around the world is usually made through workshops, extracurricular projects, introductory classes and demonstrations as well as lectures and training courses which eventually developed so as to make world music a permanent part of the institutions’ curricula. Within the undergraduate curriculum of the Conservatory of Amsterdam for instance, multicultural music literacy has become an integral part of the curriculum, with a 15-20% commitment to World Music.<sup>20</sup>

### **1.3 The European Live music sector – rich, diverse but hard to quantify**

The European live music sector is composed by two main type of actors, the music venues and the music festivals. This section provides an overview of the few available data at the European level and presents its main features.

#### **1.3.1 Music Venues**

The European network Live DMA, gathers 19 national networks of live music venues, representing in total 15 countries, and including 13 EU member states. (Belgium, Denmark, Finland, France, Germany, Italy, Lithuania, Netherlands, Spain, Sweden). Live DMA collects data via a member survey that allows grasping the size and the importance of live music venues and clubs in Europe.

Some key results can be highlighted from this survey:

- There is a great variation in terms of live music venues and clubs in Europe, with many have a limited capacity (of less 400), some large venues welcoming tens of thousands of music fans, and some other or encompassing various sizes of concert halls inside one venue.
- Only 17% of the venues organise exclusively live music events which means that many venues have a multidisciplinary function, making them a fundamental pillar of rural areas and cities’ cultural lives.
- Most music venues are supported by volunteers, mostly during concert hours, making music venues not only vibrant cultural places but also the place for social engagement and social cohesion.

Live DMA’s survey helps to show the difference in terms of structuring of the live music ecosystem in the different EU countries. It is worth noting that the live music industry from Western Europe is better represented in the survey sample, as the only eastern EU country part of Live DMA is Lithuania.

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<sup>20</sup> Association Européenne des Conservatoires, Académies de Musique et Musikhochschulen (AEC) , « *Music Education in a Multicultural European Society* » <https://www.aec-music.eu/userfiles/File/aec-wg-report-first-report-music-education-in-a-multicultural-european-society-en.pdf>

### 1.3.2 Music Festivals

No proper comprehensive dataset about the number and impact of festivals exists neither at the European level nor at the national level. However, music professionals and researchers all note that the number of festivals is undergoing an unprecedented period of growth. Emmanuel Negrier, a French researcher specialised in the festivals in France and in Europe even states that the number of festivals increased by 90% in the last 20 years in France. This trend is regularly reported in the specialised or non-specialised press<sup>21</sup> and is not only relevant in France. Many countries, including Portugal, Czech Republic and Slovenia, identified this as a major recent transformation of their music sector in the various rounds of consultations carried out for the study.

Popular music festivals represent the vast majority of these, and music represents the most important festival activity in Europe.<sup>22</sup>

The reality of music festivals across Europe is very diverse. Festivals mainly happen in the summer but a large offer is available all year long. They take place both in rural and urban areas, either as yearly or biennial event but also as an addition to the regular programming of a cultural institution. A great diversity can be observed between festivals representing different genres. There is less difference between two festivals of the same genre in two countries than between two festivals of different genres in the same country or region.<sup>23</sup>

This increasing festival activity is triggered by different factors:

- Lower fixed costs than a venue in a city;
- Mobilisation of volunteers which reduces the production costs;
- Easier attraction of sponsoring and private funds for a specific event than for concert venues;
- Good showcase for a particular city and/or region (to strengthen its branding and territorial attractiveness), often supported by local or regional authorities;
- Easier access of the public generally as compared to the day-to-day music offer due to economies of scale on pricing from a consumer perspective, as multiple acts can be accessed within one intensive package.
- Generative of audience loyalty and marketable as part of the growing “experience economy” due to their immersive nature.

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<sup>21</sup> See for example Ronström, Owe (2014) *Festivals et Festivalisation*. Cahiers d'ethnomusicologie

<sup>22</sup> Négrier, E.; Bonnet L.; Guérin, M. (2013) *Music Festivals, a Changing World, An International Comparison*

<sup>23</sup> Idem

## 1.4 Europe is the world leader in terms of royalties collected

The European music sector accounts for 52.2% of the global collections of royalties in 2017, according to CISAC<sup>24</sup>. In 2017, collections for the musical repertoire reached €8bn, up 6.0% year-on-year from the previous year and have been rising continuously over 2013-2017. Since 2013, music collections have risen by almost €2bn (+ 28.3%).<sup>25</sup>

Europe's leading position is largely due to countries representing a significant share of total global collections, such as France (10.6%), Germany (9.7%), the UK (8.1%), Italy (5.5%) and the Netherlands (2.3%). The three main sources of royalties stem from:

1. TV & Radio yielded €1,987bn in royalties, with a year-on-year growth of 1.3%. Over the last 5 years (2013-2017), collections have grown by 11.6%
2. Live & Background yielded €1,855bn in royalties, with a year-on-year growth of 3.0%. Over the last 5 years (2013-2017), collections have grown by 10.6%.
3. Digital subscription services yielded €535 bn in royalties, with a year-on-year growth of 20.5%.

Over the last 5 years (2013-2017), collections have grown by 157%, reflecting the growing importance of digital revenues for the music industry.<sup>26</sup>

Data on royalties clearly mark a Western market dominance in Europe. Almost 40% of the observed growth was generated by Germany, followed by the UK at 11.9% and France at 10.5%. In terms of absolute value, these three countries also made up more than half of the region's total, with France collecting €1.2bn – the largest amount in Europe.

## 1.5 The recorded music market in Europe: a state-of-play

Comparable EU-wide data on the music sector is often very incomplete, which is why we ground a large part of our analysis on the only data which is widely available and comparable at EU level through IFPI data.<sup>27</sup> We especially focused on the following research questions:

- What is the state-of-play of the EU28 recorded music market?
- Where is the 'EU28' market in the global market?
- What are the main differences across music markets in Europe?

This section has been written in 2018 as one of the first steps of the drafting this report. The section 2.5.6 provides further analysis with the latest data.<sup>28</sup> Also, this section is used for sizing-up the European recorded music market. The IFPI data includes performing rights which is not specifically linked to the recorded music market as it includes "Revenue from the use of sound recordings in broadcast and public performance"<sup>29</sup>

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<sup>24</sup> While CISAC deals with several cultural and creative sectors, music actually accounts for 87.0% of their total global collections.

<sup>25</sup> CISAC (2018) Global Collections Report, 2018 edition. (latest report available)

<sup>26</sup> *Ibid.*

<sup>27</sup> Note on the methodology:

There is a methodological limitation to this analysis: The IFPI Global Music Report does not provide data for the Republic of Cyprus, Luxembourg, Malta, Romania and Slovenia. Hence, this analysis does not include these countries. Also, Latvia, Lithuania and Estonia are put under one category (Baltics).

This analysis has been reviewed and enriched in May 2019, following the publication of the 2018 IFPI Data.

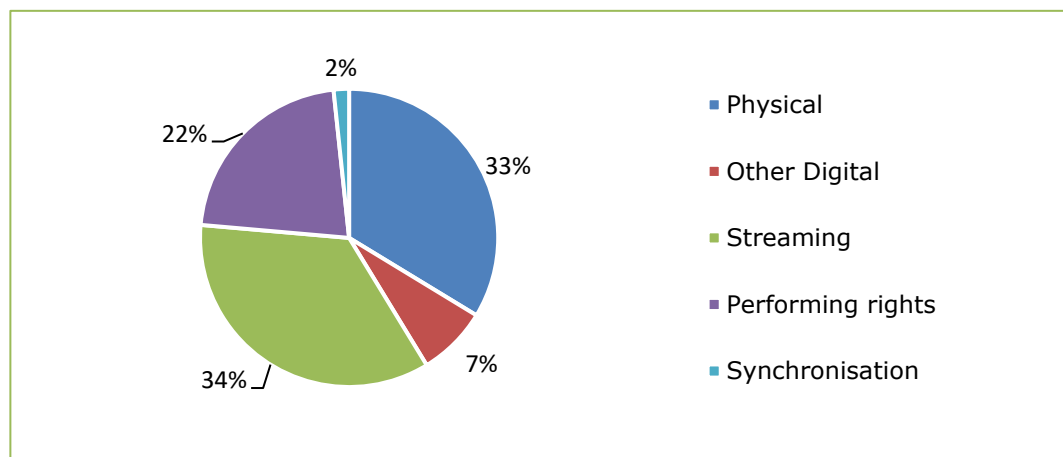
<sup>28</sup> Since different conversion rates were used between 2018 and 2019, it was not possible to simply add the latest data to the analysis provided in sections 2.5.1 to 2.5.5

<sup>29</sup> <https://www.ifpi.org/music-for-broadcast-and-public-performance.php>

### 1.5.1 The EU28 recorded music market in 2017

In 2017 the EU28 recorded market revenue was around EUR 4.7 billion. Streaming represented the main revenue sources followed closely by physical which are still sizable. Overall, the total of the digital revenues (Streaming + downloads) amounted to 41% of the total revenues.

**Table 3 EU28 revenue sources (2017)**

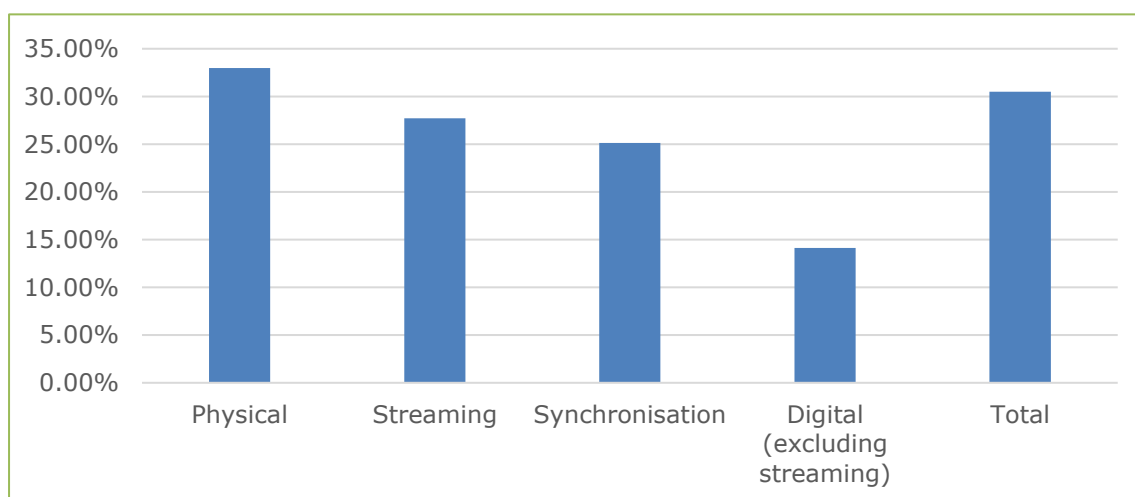


Source: IFPI Report 2018, own calculations

### 1.5.2 Share of the EU 28 recorded market in the global market

The EU 28 recorded music market revenues represented 30.51% of the global recorded music market revenues. The EU28 recorded music market ranks as the second recorded music market worldwide, behind the US market.

**Figure 3: Share of the EU 28 recorded music revenues in the global recorded music revenues (2017)**



Source: IFPI report 2018, own calculations

Table 3: Ranking of the EU28 recorded music market by segment 2017

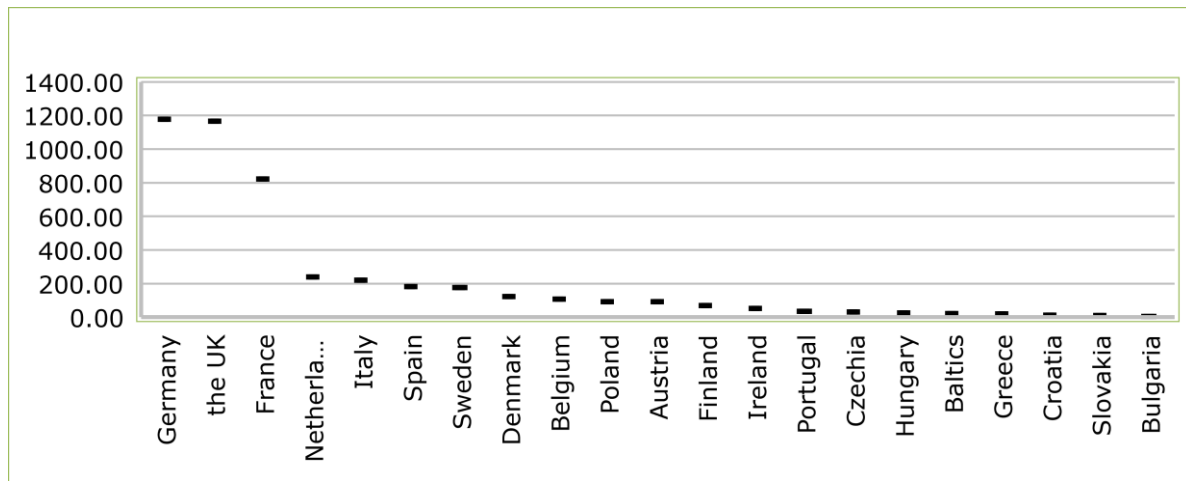
	US	Japan	EU28
<b>Physical</b>	3	1	2
<b>Digital streaming) (excl.</b>	1	3	2
<b>Streaming</b>	1	3	2
<b>Performance Rights</b>	2	3	1
<b>Synchronisation</b>	1	3	2
<b>TOTAL</b>	<b>1</b>	<b>3</b>	<b>2</b>

Source: IFPI report 2018, own calculations

### 1.5.3 The EU recorded music market is spearheaded by three countries...

The EU28 market is chiefly driven by three countries, Germany, France and the UK.

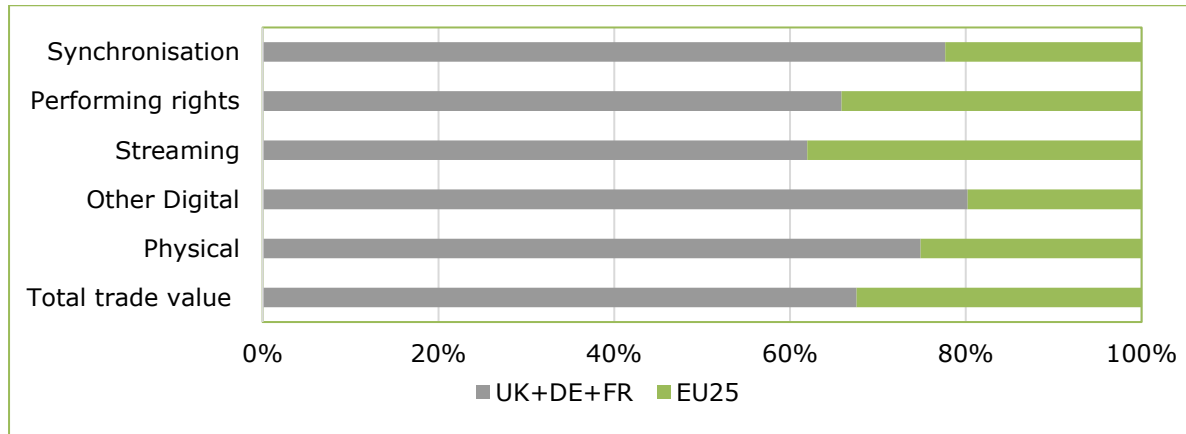
Figure 4: 2017 EU28 recorded music market trade value in EUR million



Source: IFPI 2018, own calculations

In 2017, they represent together **68%** of the total recorded music market revenue of the EU28 and around two-third of the EU28 revenue for each type of revenue for the recorded music industry.

Table 4: Share of the three main recorded music market within the EU28 revenues



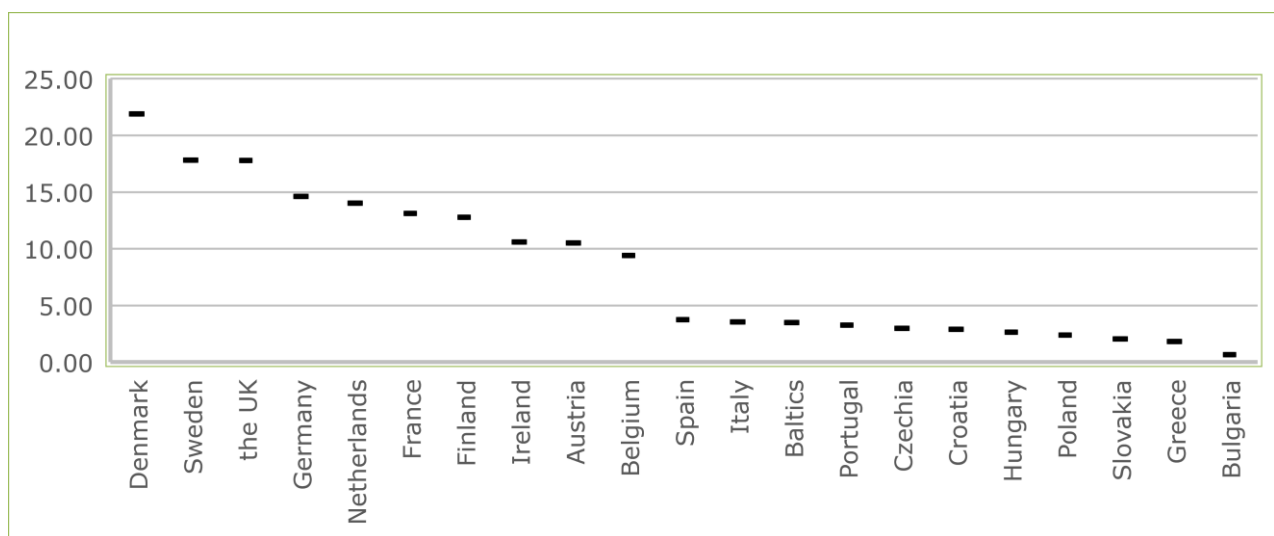
Source: IFPI 2018, own calculations

#### 1.5.4 Spending on music is mainly “western”

A deeper analysis of the music revenue per capita<sup>30</sup> shows that the EU28 recorded music market can be split in two distinct categories. One category concerns the north-western European countries, where spending per inhabitant is significantly higher than in other EU countries. The first category concerning the first 10 countries represent 82.9% of the music revenue per capita within the EU28, whereas the other 11 countries represent only 17.11% of it. This repartition is biased by different economic factors, i.e. the spending power, but it is a useful entry point we are using to analyse the structure of the European market in the following paragraphs.

The recorded music market of the EU28 is hence not only driven by France, Germany and the UK but comparatively also by north western EU countries. They represent together 86% of the total recorded music market of the EU.

Figure 5: Music revenue per capita in EUR (2017)



Source: IFPI (2018) , own calculations

#### 1.5.5 An heterogeneous market structure

A closer look at the EU28 national markets share by types of revenues shows that the national markets are structured in very different ways.

Average of the EU28's market share on the recorded music market:

- Average market share for the physical market: 27.7%  
Max: 50% Poland, Min: 7% Denmark
- Average market share for the digital market: 42.07%  
Max: 72% Sweden, Min: 5% Croatia
- Average market share for performing rights: 29.1%  
Max: 75% Croatia, Min: Sweden 17%
- Average market share for synchronisation: 1.3%  
Max: 7% Greece, Min: 0% Finland & Netherlands

<sup>30</sup> The music revenue per capita is an indicator used by the IFPI to have an idea of how much an average person in a country is spending in recorded music. It is calculated by dividing the overall national recorded music market revenue by the number of inhabitants of the country.

Hence, European music markets should not always be analysed as a single entity. For this purpose, we propose a short analysis of recorded music revenues in 'Western' and 'Eastern' Europe. "Western" countries include Denmark, Sweden, UK, Germany, Netherlands, France, Finland, Ireland, Austria and Belgium. The "Eastern" ones are Spain, Italy, Baltic States, Portugal, Czech Republic, Croatia, Hungary, Poland, Slovakia, Greece and Bulgaria.

**Table 5: 2013-2017 Growth rates of the different revenue sources for the "Western" and "Eastern" European recorded music market**

	"Western" Europe	"Eastern" Europe
<b>% Aug. Total</b>	<b>8,56%</b>	<b>30,64%</b>
<b>%Aug. Physical</b>	-27,45%	-9,93%
<b>%Aug.Streaming</b>	294,50%	237,07%
<b>%Aug. Perf. Rights</b>	20,37%	41,67%

Source: IFPI (2018), own calculations

The "Eastern" European music market, despite its smaller market share, is expected to be an up-and-coming market. This assumption can be statistically verified. The global growth of the "Eastern" market from 2013 to 2017 was 30.64% while the "Western" grew at a slower pace, by 8.56% on the same period. The only subcategory of the industry which is experiencing a faster growth in the "Western" market is the streaming. It is interesting to note that physical format sales are experiencing a relative slower decline in the "Eastern" market. This is mainly due to high growth rates of revenue from physical sales by countries such as Poland (+18.85%) and Slovakia (+25%).

Arguably, this can be explained by a more recent adoption of the latest technological innovation across the "Eastern" market. This assumption helps to forecast market developments for the coming years. In particular, the streaming revenues are expected to grow, since many popular digital services launched recently in some EU countries (e.g. Spotify was launched in 2018 in Romania and is still not available in Slovenia and Croatia).<sup>31</sup>

## 1.6 European Music Repertoires: high diversity but limited circulation

Given European cultural diversity and cultural behaviour, music repertoire is very varied across Europe. The European repertoire is also growing every year: in 2016, GESAC reported 2.2 million new musical works were registered across Europe.<sup>32</sup> However, the market share of non-national European repertoires (European repertoire excluding the domestic one) remains weak, with European markets dominated by the Anglo-Saxon repertoires and local repertoires.<sup>33</sup>

The cross-border flow of European artists is far from reflecting the notion of one single market. Although there exists a solid local market for domestic artists, most of their songs do not cross-borders, especially if they sing in a language that is not English.

<sup>31</sup> [https://support.spotify.com/us/using\\_spotify/the\\_basics/full-list-of-territories-where-spotify-is-available/](https://support.spotify.com/us/using_spotify/the_basics/full-list-of-territories-where-spotify-is-available/)

<sup>32</sup> GESAC (2016) EU authors' societies in numbers. Annual data report. Brussels, 2016.

<sup>33</sup> Although not so recent, studies have analysed respectively digital downloads and top charts/airplays. See: JRC (2014) What's Going On? Digitization and Global Music Trade Patterns since 2006. Institute for Prospective Technological Studies Digital Economy Working Paper 2014/04; and Legrand, E. (2012) Monitoring the cross-border circulation of European music repertoire within the European Union. A report commissioned by EMO & Eurosonic Noorderlag. Brussels, January 2012.

The trends we have observed show that:

- In general, the number of European artists capable of transforming a local success into a cross-border success is quite limited;
- The only music that crosses borders without limitations is US-based repertoire;
- Even UK repertoire has difficulties crossing borders, as few British artists have pan-European success;
- Countries from Southern and Eastern/Central Europe are less likely to have cross border successes than countries from northern Europe;
- In each European country, English-language repertoire heavily dominates the airwaves and digital downloads, with shares of local language music varying by country, but never over 25%;
- European music genres that cross borders are usually in the Dance and Pop fields;
- Rock, as a music genre, is almost non-existent in the cross-border European listings.<sup>34</sup>

The effects of streaming on a diversified music consumption in terms of genre seems to offer promising opportunities to foster the circulation of repertoires.<sup>35</sup> However the lack of aggregated data about streaming consumption at the European level is still lacking in order to assess it with more precision. Whilst streaming offers opportunities, it also creates a rude competition to attract the consumers' attention and the effects of the automated curated to algorithm seems to concentrate listening on top hits.<sup>36</sup>

## 1.7 Key takeaways and policy implications

The European music ecosystem is vast and encompasses many subsectors and sub-areas. This first chapter attempts to draft its main features in order to size it up. It demonstrates that the European music ecosystem is characterised by great disparities, fragmentation and gaps in data:

- Music education in Europe is very diverse throughout Europe. It plays an important role and is a dynamic field that continues to develop and adapt to technological change.
- The live music subsector is very diverse and fragmented. First of all its two sub-components (the music venues and the music festivals) rely both on a myriad of different realities depending mainly on their size, their location and the main genre they are playing. The same applies for festivals as there is more similarities between festivals of the same genre but in different countries rather than two different festivals in the same country. Moreover, the live music subsector is less structured in the east than in the west of Europe.
- The section on the recorded music subsector also highlighted the diverse structure of the industry in the different European countries. There is no such a thing like a typical European recorded music market. Some are in a phase of stabilisation and still trying to get along with the restructuration of the industry following digitalisation, some seem to have found already equilibrium, while others are still emerging. However, taken as whole the European music market is the second worldwide after the USA and before Japan.

<sup>34</sup> Emmanuel Legrand, "Monitoring the cross-border circulation of European music repertoire within the European Union", January 2012

<sup>35</sup> Dandan Niu (2018) Music consumption in a changing ecosystem. Economics and Finance. PSL Research University, 2018

<sup>36</sup> Michael Hann (2019) How Spotify's algorithms are ruining music. Financial Times, 06.05.2019. <https://www.ft.com/content/dca07c32-6844-11e9-b809-6f0d2f5705f6>



Despite all these differences it is possible to state three things:

- 1- Music is a major artform in many European countries. Music is learned and played everywhere.
- 2- Music plays an important role in society, strengthening civic engagement and reinforcing social cohesion of volunteers in the live music sub-sector.
- 3- European diversity in terms of repertoire is big but has a limited circulation across borders.

The state of play of the European music sector has the following policy implications:

- Need to address gaps in available live music data sets, particularly in the east of Europe;
- Potential for initiatives to address infrastructural gaps between eastern and western sectors, especially where this restricts diversity;
- Potential for initiatives to address barriers to cross-border circulation of repertoire.

## **2 Analysing key trends in the music sector**

This section goes beyond the main evidence available on the music sector and the current state-of-play, and seeks to analyse the main trends affecting the sector, including some long-term tendencies and some more emerging trends.

Music is a diverse sector, which encompasses both recorded music (resulting in a product which can be sold physically or digitally) and live music, where music is performed and is part of the experience economy. Key trend affecting the music sector both include the distribution of cultural content (digitisation), the fast-evolving consumer behaviours related to cultural content consumption and live performances and the demand for new experiences.

The music sector has deeply suffered from the digital shift and was the first cultural and creative sector to experience the impact of widespread digital piracy, and the ensuing plummeting of physical sales. The recorded music industry underwent a painful restructuring, with the development of new distribution channels with different monetisation logics (first with the “download-to-own” model with iTunes and other digital stores, then with the development of the streaming platforms). After a decade of decline, the global music market achieved saw the light at the end of the tunnel in 2015, as digital revenues surpassed revenues from the sales of physical formats. This shift was – and still is – spearheaded by the advent of digital streaming and the shift to mobile-friendly business models and consumption.

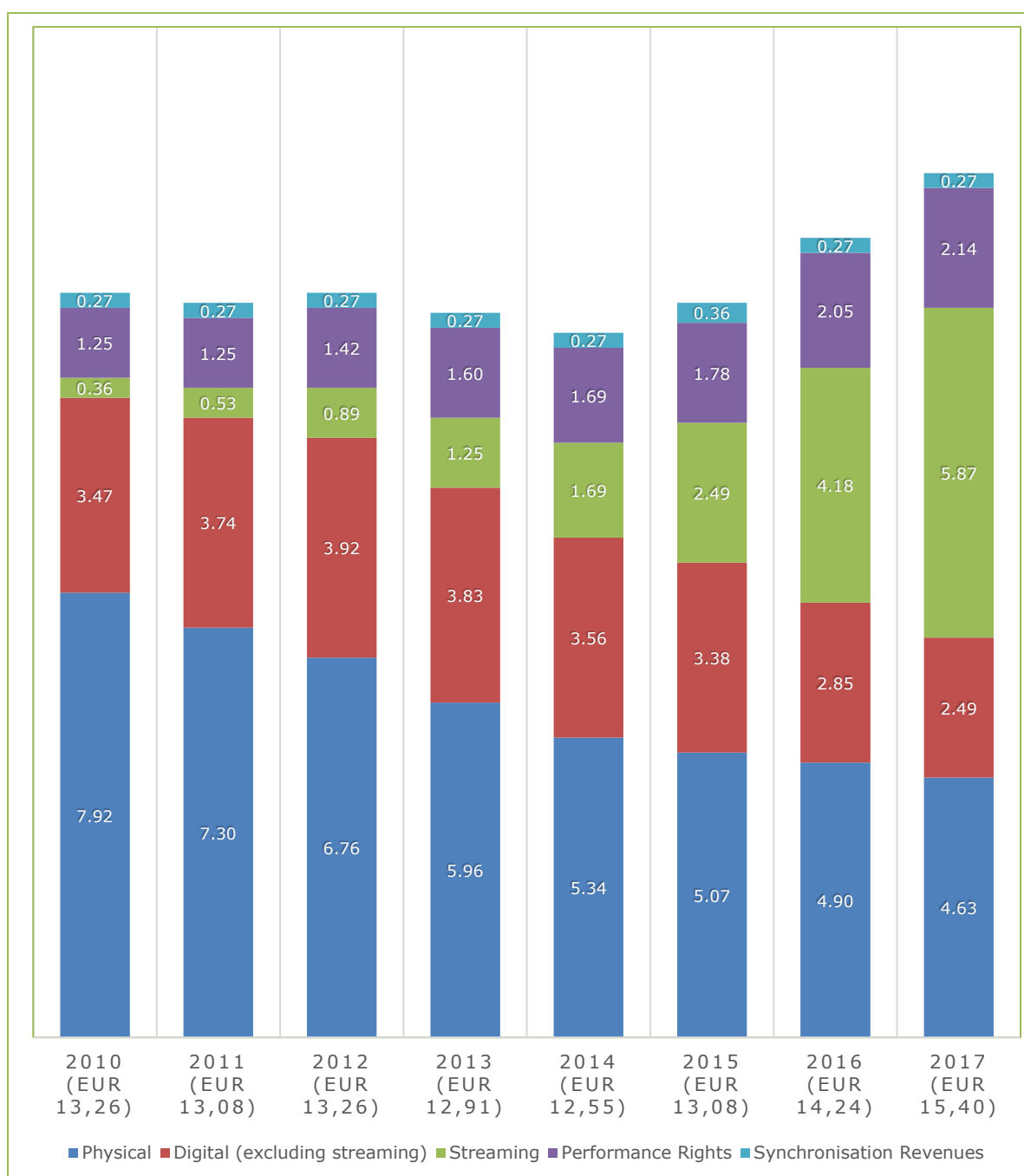
This section looks into the main trends beyond this digital shift and explores where the sector as a whole is heading, with drastic changes happening at a fast pace, whereas some characteristics of the sector have not changed as anticipated in the 2000’s. This section is based on finding from desk research and extensive consultation of the sector in form of interviews, workshops, events, panels from international music showcase festivals as well as an online discussion with the advisory board and some additional stakeholders, representing most of the music value chain.

## 2.1 From ashes to stream: a healthier European Recorded Music industry?

### 2.1.1 A healthier European and global recorded music industry

The revenues of the global recorded music industry grew substantially in recent years. After some hard times in terms of finding new growth opportunities following the digital shift, the recorded music industry finally has grown again from 2014 onwards, driven by the extensive growth of streaming revenues that began to cover the loss in revenues from the decline of physical sales.

**Figure 6: Global recorded music industry revenues 2010-2017 (€ billions)**



Source: IFPI (2018), own calculations

This growth is expected to continue. Recent prospective studies of Ernst and Goldman Sachs<sup>37</sup> about the future of the music industry indicates that the industry could almost double by 2030. This growth will be due first of all to a very significant increase in streaming revenue (+907.1%) and in live revenue (+72.2%).

**Table 6: Prospective growth rate by industry segment (2015-2030)**

	2015	2030	Evolution
Recorded Music	23.8	56.3	136.50%
Streaming	1.4	14.1	907.10%
Physical	2.9	0.7	-75.90%
Live	24.7	103.9	320%
Publishing	5.4	9.3	72.20%
Radio	29.5	23.8	-19.30%
<b>TOTAL</b>	<b>53.9</b>	<b>103.9</b>	<b>92.70%</b>

*Source:* Goldman Sachs Research (2016) *Music in the Air, Stairway to heaven* & Goldman Sachs (2016) *Music in the Air, Paint it Black*.

The European music industry is chiefly following the tendency of the global market. It returned to growth already in 2013, a year before the global music industry. This was also driven by important growth rates of streaming.

**Figure 7: Evolution of the EU28 Recorded Music revenues 2013-2017 (in EUR Millions)**



*Source:* IFPI (2018), own calculations

<sup>37</sup> Goldman Sachs Research (2016) *Music in the Air, Stairway to heaven* & Goldman Sachs (2016) *Music in the Air, Paint it Black*.

### 2.1.2 But a less dynamic European recorded music market

If the evolution of the EU 28 recorded music market is compared with the evolution of the revenues of the global music market, it seems that the EU 28 recorded music market is less dynamic and its global market share is decreasing.

Table 7: Share of the EU28 music market in the global market

	2013	2014	2015	2016	2017
EU28 recorded music revenues (in EUR millions)	4,149.58	4,210.15	4,404.97	4,500.82	4,688.39
Global recorded music revenues (in EUR millions)	12,910	12,550	13,083	14,240	15,397
<b>EU / Global revenue (%)</b>	<b>32.14%</b>	<b>33.55%</b>	<b>33.67%</b>	<b>31.61%</b>	<b>30.45%</b>

Source: IFPI report 2018, own calculations

The growth rates of the EU 28 music market between 2013 and 2017 are lower than global growth. The worldwide recorded music market grew by 18,49% whereas the EU 28 total revenue grew by 12,98%. The EU28 streaming market revenue growth between 2013 and 2017 (+286.62%) is also lower than the growth of streaming revenues (+371.43%) of the global market. Performing rights revenues follow a similar pattern.

Table 8: Evolution of global and the European recorded music market revenue between 2013 and 2017 disaggregated per type of revenue

	Global	EU 28
Total revenues	18.49%	12.98%
Physical revenues	-22.39%	-24.27%
Digital (Excl. Streaming)	-34.88%	-53.07%
Streaming	371.43%	286.62%
Perf. Rights	33.33%	24.49%
Synchronisation	0.00%	28.89%

N.B.: Figures are subject to rounding, which may affect overall totals and percentages.

Source: IFPI (2018), own calculations

In addition, the decrease of the revenues of the physical and digital (excl. streaming) revenues is higher in the EU28 recorded music market than the global one. European citizens downloaded 372.4 million single tracks and 64 million digital albums in 2017, respectively 50.97% and 53.96% less than in 2013.

However, it is noticeable that the synchronisation revenues are fast growing in Europe whereas they are stagnating at a global scale. Some interviewees, and the online consultation highlighted that this is especially an area of growth in Eastern Europe, as it is 1) starting from a lower level of revenues; and 2) cheaper for producers to pay for an Eastern-European rather than acquiring synchronisation right from more established markets.<sup>38</sup>

<sup>38</sup> Online consultation

### 2.1.3 A stagnating European recorded music market?

The growth of the European market recorded market seems to have slowed down in 2018 according to the 2019 IFPI report. It is reporting a modest 0.1% growth for continental Europe between 2017 and 2018, the EU28 recorded music market<sup>39</sup> growth is actually negative with a decrease of -0.55% on the same period, due to a decline in performance rights (-6%), and the continuous decline of physical revenues and digital downloads (respectively -19.5% and -24.5%).

This overall stagnation is hiding many disparities. Some markets show a strong growth rate (e.g. Austria with 20.20% or Bulgaria with 16.67% whereas some other indicate serious negative rates (e.g. Hungary with -17.17% or Germany with -9.92%, which means the UK is now the leading market in Europe).

From the “East” – “West” distinction that we previously analysed, it seems that the growth in streaming revenue was lower in the Western-market countries by 26% whereas it grew by 37% in the Eastern countries. Performance rights are decreasing by 7% in the Western market whereas they are growing by 5% in the Eastern one. Overall, performance rights are stable at the EU28 level.

The latest data shows that the continuous growth in streaming revenues does not totally offset the decrease of the physical and digital markets. For example, Germany’s recorded music market is decreasing by 10% despite a 30% growth in streaming revenues. Belgium is a similar case with -6% of growth in terms of recorded music market revenues despite a 41% increase in streaming revenues. This trend is also observable in some countries of the “Eastern market” such as Hungary or in the Baltic region.

All in all, the small decrease of the EU28 recorded music market is a result from a combination of factors: the slower growth in streaming, combined with an ongoing decline in physical sales and in performing rights revenues, as well as a stagnating synchronisation market. The stronger growth of the streaming, synchronisation and performing rights market in the Eastern countries is not sufficient to cover the strong decline of the digital downloads and physical revenues of the Western markets.

In a nutshell this stagnation indicates the following:

- 1) The digital shift is still affecting the music industry and additional revenues are needed to cushion the plummeting physical and downloads revenues.
- 2) All revenue streams are crucial for the overall recorded music market to grow.
- 3) The disparities in terms of the structure of the recorded music market in the EU are still persisting, but Eastern markets are catching up in terms of overall revenues.

One of the crucial questions is at what point will the physical market stabilise. Although vinyl sales are on the rise (6% worldwide), they still represent only 14% of the global physical music income. CD sales are still accounting for 15.6% of the global revenues of the recorded music market. An unknown factor is to what extent the industry will manage to generate sufficient income from streaming to totally cover up the losses in the of physical, digital and performing rights revenues.

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<sup>39</sup> Based on own calculations, as the European market as defined in the IFPI reports is wider than EU 28.

## 2.2 Streaming and piracy in the music sector

The consumption of music through streaming is, as already highlighted in previous sections of the report, exponentially rising. The major consequence of this is an increase of revenue for the recorded music industry through subscription, as well as a decrease of music piracy through peer-to-peer and downloads<sup>40</sup>. This tendency is expected to be confirmed over the long run if the paywalls to streaming platforms stay accessible. A rise in the price of monthly subscription to music platforms could however lead to a resurgence of piracy and to a new decrease of music revenues.

Piracy still exists and has taken new shapes, mainly through stream-ripping websites, which allow the user to separate the audio track from a video file and to download it as an mp3 file. These websites are based on a high level of traffic, from which they generate advertising revenues, without any royalty payment to the artists. Last year, the industry achieved a significant victory when legal action from record companies in the US and UK was successful in closing down YouTube-mp3.org, formerly the world's largest site dedicated to offering illegally stream ripped music. The Germany-based site, which had 60 million visitors per month from all around the world, shut down globally and its operator agreed not to infringe the rights of artists and record companies in the future.

## 2.3 Consumption & audiences

Music is more consumed today than ever before. The multiplication of audio devices increased to a large extent the demand for audio-visual (including music) content. Mobile phones and more recently connected devices are boosting the demand for audio content. Individuals today have opportunities to listen to music while doing different activities and to listen to it on the appropriate device, which is increasing the time available for consuming music<sup>41</sup>.

The role of these music platforms in shaping music consumption and the tastes of its audiences is high. A study conducted by the university of Minnesota and the European Commission Joint Research Centre<sup>42</sup> shows that the inclusion of a track in the "Today's Top-Hits" playlist increases the number of times a song is listened to by 20 million. Moreover, music recommendation on digital music services is now highly automatised and seems to lead to a concentration of listening time towards top hits. Indeed, scholars show that algorithm-based curation tended to lead to bubble-effects that tends to decrease the diversity of music listened by the audience<sup>43</sup>. Importantly, success in terms of streaming hits does not necessarily bring more listeners to the other artists of the catalogue of a label. Moreover, a success in streaming does not imply a success in terms of touring either.<sup>44</sup>

As music streaming platforms are extensively contributing to shaping musical tastes of younger generations, their role in terms of content curation and recommendation is expected to have more and more impact in the future.

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<sup>40</sup> IFPI Report (2018)

<sup>41</sup> Raphaël Nowak (2015), *Consuming Music in the Digital Age. Technologies, Roles and Everyday Life*

<sup>42</sup> Luis Aguiar Joel Waldfogel, *Platforms, Promotion, and Product Discovery: Evidence from Spotify Playlists*, JRC Technical Reports (2018)

<sup>43</sup> Mc Clung, M.G. (2017) *Filter Bubbles and Music Streaming: The Influence of Personalization and Recommendation Algorithms on Music Discovery Via Streaming Platforms*, Stanford University

<sup>44</sup> interviews

## 2.4 Concentration trends in the music industry

Increased concentration in the music industry is an important trend for the music sector. Whilst concentration has been a challenge for a long time – especially for record labels<sup>45</sup> – recent trends have emerged on different segments of the music industry.

The music industry is dominated by three major record labels since the Universal/EMI merger in 2011-2013, coexisting with a myriad of independent labels of various sizes (mostly MSMEs). These majors control around 80% of the market<sup>46</sup>:

Table 9: Overview of three world-leading record labels

The 'big three'	Headquarters	Owners
<b>Universal Music Group, which absorbed most of EMI's recorded music in 2013.</b>	United States	Vivendi, France (since 2006)
<b>Sony Music Entertainment including EMI Music Publishing since 2013</b>	United States/Japan	Sony Corporation of America, US (since 2008)
<b>Warner Music Group which integrated EMI's Parlophone and EMI/Virgin Classics labels in July 2013</b>	United States	Access Industries, US (since 2011)

Source: KEA 2017

The majors own numerous subsidiary labels and are highly vertically integrated, with subsidiaries operating across most activities of the music sector. They have affiliated music publishing companies (Warner Chappell Music for WMG, Universal Music Group also owns Universal Music Publishing Group, and Sony owns BMG Rights management).

This vertical concentration was strengthened by Sony's recent move from joint to sole control of EMI Music Publishing, which was approved by competition authorities in November 2018. This take-over allows Sony to double its catalogue of songs (from 2.16m to 4.21m compositions) and control a large share (around 70% of national charts) of the repertoire in many key EU markets: Spain, Italy, France, the UK, Ireland, Sweden and the Netherlands.<sup>47</sup>

The majors are also part of larger media conglomerates active in other cultural and creative sectors (notably video games, press and audio-visual content). There are strong relations between majors and independents, and many independent labels have distribution deals with one of the major music companies. The major record companies often take over contracts, buy labels or even whole record companies once artists with whom they have deals become successful<sup>48</sup>.

Often independent labels bought by the major record companies continue to work under their own label and are granted a degree of independence in finding, selecting and promoting talents in their markets, due to their specific expertise in the area where they operate.<sup>49</sup> As a result, it is sometimes difficult to distinguish between independent labels<sup>50</sup> and subsidiaries owned by majors.

<sup>45</sup> Mall, A (2018) Concentration, diversity, and consequences: Privileging independent over major record labels. *Journal of Popular Music*. Volume 37 - Issue 3 - October 2018. Cambridge University Press.

<sup>46</sup> Sourced from companies' corporate websites.

<sup>47</sup> <https://impalamusic.org/content/research-reveals-sony%E2%80%99s-post-merger-power-over-national-music-charts-europe#overlay-context=content/research-reveals-true-extent-sony%25E2%2580%2599s-post-merger-power-over-national-music-charts-europe>

<sup>48</sup> KEA (2006) the economy of culture in Europe. A report prepared for the European Commission, DG EAC.

<sup>49</sup> Andra Leurdijk and Ottilie Nieuwenhuis (2012), Statistical, Ecosystems and Competitiveness Analysis of the Media and Content Industries: the music industry. JRC Technical Reports, Brussels.

<sup>50</sup> Some (European) examples of independent labels include Domino Records, Postcard Records, Creation Records, Edel Group, PIAS Group, Wagram Music, Beggars Group.



The concentration of the recorded music industry tends to be intensified as well by the current dominating streaming model. Streaming has opened up distribution channels and opportunities for more music companies and artists to get their music out and reach consumers. However, the current remuneration model focused on a remuneration by plays rather than by users is reinforcing the concentration of the industry by allowing major labels, who are dominating the top 100/200 of streaming platforms, to grasp more revenues.

Importantly, concentration is expanding to other segments of the music sector. This includes especially the live industry, where some new forms of market concentration are emerging.

Live Nation managed more than 500 artists and promoted 30,000 concerts globally in 2017, with 86 million attendants and generating a total revenue of \$10.3 Billion.<sup>51</sup> LiveNation also owns Ticketmaster, the world's largest ticketing company. While no consolidated data on market share is available at EU level, a recent analysis by the Association of Independent Festivals shows that the company has a 46% share of the top 61 UK venue box offices.<sup>52</sup> However, the actual extent of the live music market concentration has not been examined yet by competition authorities in Europe.<sup>53</sup>

More importantly, this market concentration involves some price-setting capability, through the conditions set for artists managed by larger platforms: the exclusivity on headliners (leading artists) signed to major companies allow them to either 1) increase the price on those headliners and/or 2) include additional artists from the roster of the same company in the festival/venue programming.

As a result, the fees for larger bands (especially the headliners who attract a major part of the audience) are increasing. In a context of decreasing subsidies and budgets for many music festivals, this drives down the remaining budget for the overall artistic programming, which often entails a lower fee for emerging artists.<sup>54</sup> Moreover, this concentration trend is often preventing middle to large music venues to programme independently from the artists included in 'packages' by these large live promoters, resulting in a homogenisation of line-ups.<sup>55</sup>

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<sup>51</sup> <http://www.investors.livenationentertainment.com>

<sup>52</sup> <https://www.theguardian.com/business/2018/aug/27/live-nations-grip-on-music-festivals-stifling-competition>

<sup>53</sup> <https://www.nytimes.com/2018/04/01/arts/music/live-nation-ticketmaster.html>

<sup>54</sup> Interviews (festival and venue managers).

<sup>55</sup> Online consultation

## 2.5 Music is part of a broader entertainment industry

### 2.5.1 New strategies from key industry players

**Record labels** have evolved to become music-based entertainment companies, focused on engaging fans with a continuous stream of social music-based content, easy to share online<sup>56</sup> *"Alongside the technological revolution there is an ongoing evolution of record companies into more than music companies."* Universal Music's head of digital strategy Michael Nas, quoted in the IFPI report<sup>57</sup>, says that Universal is in the process of transforming from being a product-based music company to a music-based media company. This is resulting in the creation of jobs in major music labels which did not exist 10 or 5 years ago. Record labels are now proposing 360° deals and are adding artists' services including PR, communication and booking to the standard record deals.

**Traditional dissemination channels** are also incorporating these changes by enriching their services and moving away from being simply broadcasters of recorded content. We especially observe a trend in streaming of radio events and high-profile concerts.<sup>58</sup> Some radio stations are proposing tickets to attend the broadcasting of radio shows, or radio stations are taking part in festivals by broadcasting in-situ during the event. Traditional dissemination channels also adapted to the digital shift. The integration of music into several dissemination channels and especially on social media is resulting in some forms of convergence between traditional and new dissemination channels, but also new competition for content. The time spent by the consumer on different audio-visual services (including non-music ones) is now instrumental for the music industry.

The segment of the **live industry** is going through a similar development. The live industry is experiencing a growing trend of "eventisation"<sup>59</sup>. This tendency is particularly impactful considering the growing number of festivals at European level<sup>60</sup>. Music is not the sole reason which leads consumers to attend an event. Music becomes part of a global experience. Large music venues are also subjected to this change.

For example, the managing director of the Ancienne Belgique (AB) explained that there is a strong tendency of the venue to develop some forms of festival events outside in the summer, and inside in the winter in order to attract new audiences through augmented experiences. This goes hand-in-hand with the growing importance of continuous communication on social media (most interviewees explain they are dealing with updates on social media streams at least every 12 hours).

The **ticketing** companies are also participating in this trend through recent innovations. Some companies are offering advantages (and therefore developing new business partnerships) when a consumer buys a ticket for an event. Ticketing companies can accentuate the importance of the event by playing on the FOMO effect<sup>61</sup>, a marketing strategy aiming to generate sales by creating the fear that the consumer could possibly miss the event. This can be achieved by simply giving access to the exclusive playlist of an event or also by developing ticketing strategies using social media influencers. Conversely, streaming platforms can allow localisation of fans and improvement of targeted marketing for ticket sales of the artists' tours (and can even influence the touring strategy).

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<sup>56</sup> Miller, Larry S. (2018) Same Heart, New Beat. How Record Labels Amplify Talent in the Modern Music Place.

<sup>57</sup> IFPI Report (2018) p.21.

<sup>58</sup> Interviews with EBU/AER and participation to several conferences and panels about radio

<sup>59</sup> Eventisation relates to the increased focus on staging and on experiences surrounding the content played at an event (concerts but also sport competitions and other similar events), such the aspect of temporality, the special equipment and the atmosphere of the physical place. See for example Pallasmaa, J. (2014): Space, Place and Atmosphere. Emotion and Peripheral Perception in Architectural Experience. In: Lebenswelt 4, 230-245.

<sup>60</sup> Based on stakeholders inputs for online consultation

<sup>61</sup> The Fear Of Missing Out effect is a marketing trend way to boost the attendance to a festival by creating incentives for people to participate.

### 2.5.2 A phenomenon fed by the younger generations

Several studies<sup>62</sup> show that the young people born in the 2000's (sometimes also called the "z generation") have consumption habits which are slightly different than their elders. The evolution of the consumption habits of the younger generation goes hand-in-hand with the growing importance of mobile devices (the so-called ATAWAD<sup>63</sup> model, fully integrated in today's music consumption). Their way of consuming music is more mobile, cross-platforms and connected through social media.<sup>64</sup>

This change is resulting in an increasing consumption of music by the "z generation". The consumption of music through traditional dissemination channels such as TV, radio or physical formats is decreasing to the benefit of consuming music through streaming services, or through social media. A striking example of this new consumption habit is the growing importance of new social media channels such as the TikTok app.<sup>65</sup> This app, which is the evolution of the 2014 launched app Musical.ly is particularly widespread across young people. The idea is to link the app to the entertainment industry by easing the integration of musical content to online videos. The user can choose a track and film itself during maximum 60 seconds. The viral effect of particular videos, or of "challenges" result into a new promotion possibility for the recorded music industry, as well as a way for artists to attract the attention of labels. Spotify has also been integrating social media platforms like Instagram since May 2018, and the ticketing company Eventbrite integrated Instagram and Facebook, allowing artists to sell tickets directly from their fan page.

Another striking example of this tendency is the growing importance of electronic music festivals for youngsters. People who grew-up with the internet had the opportunity to access an ever-growing number of tracks of all kind of genres, and electronic music benefitted a lot from this. This growing interest for electronic music is resulting in a boom of electronic events for example for the Belgian festival "Tomorrowland", "Sonar Festival" in Barcelona or "Nuits Sonores" in Lyon. The fees for DJs to these festivals are going through a steady rise, especially for headliners, as well as on the overall income increase through merchandising.<sup>66</sup>

### 2.5.3 From live streaming to global media strategies

The electronic live music scene is also known for incorporating live streaming to events in order to reach additional audiences online. In only five years (2012-2017), the streaming platform Boiler Room<sup>67</sup> experienced a growth of 66% of streamed events (from 127 to 212 per year) an increase of 163,5 % of viewing time and an increase of 2930% of their audience (from 10 to 303 million viewers).

This live music event mediatisation trend is not only visible in the pop or the electronic music scene. The *Berliner Philharmoniker* innovated by being one of the first in Europe to create a Digital Concert hall already in 2008, i.e. a website accessible with subscription and where the concerts are live streamed. Several initiatives exist also for the opera, where shows from all over the world are broadcasted live to cinemas and augmented with interviews and insights into the backstage during the breaks. The French national public radios started to evolve in this direction in the beginning of the 2010's. They created in 2016 numerous apps in order to access their content on mobile devices, created 7 web radios and also a digital concert hall in 2017 in order to broadcast the live concerts of their 4 musical formations (a youth and a professional choir and two orchestras).

These online trends go hand-in-hand with the overall resilience of audiences for live concerts. People who were born in the 60's and 70's keep attending concerts and 'educate' their children

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<sup>62</sup> E.g. Glevarec, H, (February 2016) *Alternatives économiques*, (Magazine), p.25, and interviews conducted for this research.

<sup>63</sup> AnyTime, AnyWhere, on Any Device.

<sup>64</sup> Wikstrom PL, (2013) *The music industry: music in the cloud*, 2nd edition

<sup>65</sup> Used by 500 million people globally: <http://www.businessofapps.com/data/tik-tok-statistics/>

<sup>66</sup> International Music Summit 2018

<sup>67</sup> Online video platform filming DJ sets in clubs: <https://boilerroom.tv/about/>

to the attendance of this kind of event. The attendance of under 20 consumers to “traditional concert places” is stable. This means that the growing consumption in music is translating into a growing attendance to music experiences, including concerts, but also online live streaming and festivals.

## 2.6 Key takeaways and policy implications

- The European recorded music market has returned to growth thanks to streaming, but is less dynamic in comparison to the global market, which results in a smaller share of the European recorded market on the global scale.
- Streaming also made a large contribution to lowering piracy, which is nevertheless still persisting, mainly in the form of stream ripping.
- The concentration of the recorded music market has not disappeared with the digital shift. Even if streaming opened up new distribution channels for independent labels and made a huge amount of music accessible online, the remuneration model and the concentration effect of algorithm-based curation benefit more to the major record companies.
- The live music sector is also undergoing a concentration phenomenon due to the massive investment of multinational companies in the European live music sector, resulting in higher fees for headliners to the disadvantage of emerging artists and the diversity of festivals and major concert venues’ lines-up.
- The new strategies adopted by the key players of the music industry results in the development of proper media strategies. Major record companies slowly turn into music-based entertainment companies and labels are investing into the live sector in order to maximise their revenues.
- Audiences tend to engage more and more with music thanks to the widespread and infinite listening possibilities on very diverse devices.
- Live concerts are exponentially live-streamed on social medias trying to secure their place in the era of the attention economy.

The music sector is highly innovative and is in constant development trying to adapt to the new consumption habits of the young audiences, and interlinkages with social networks are increasingly used.

The key trends of the European music sector entail the following policy implications:

- Clear role for the EU as a transnational authority in combating piracy (stream ripping and secondary ticketing);
- Need to maximise competitiveness of the European music sector as a whole in the global marketplace;
- Potential for initiatives to address market failure around remuneration of emerging artists and diversity of the live offer on key platforms (festivals, major concert venues).

### 3 Prospective analysis: where is the music sector heading to?

This section aims to go beyond the key trends already identified on the market in previous sections, and to capture some more prospective trends, with a view to underpin the policy recommendations developed in this report that will address emerging challenges for the European music sector.

The music sector acts in an ever changing and a fast-paced environment. As such, it is highly challenging to develop a long-term vision and forward-looking analysis which accurately captures these different evolutions accurately. Analysing the future of the music sector requires a more focused approach rather than developing broader future scenarios. A series of key horizontal topics affecting the music sector were therefore singled out, discussed and analysed. In many instances, this forward-looking analysis is based on emerging trends in the sector, where some pointers are already observable in some aspects of the music sector.

Our approach to developing this more prospective component of the report has been largely based on desk research and stakeholder consultations via interviews, workshops, and an online discussion and validation process which has enabled us to test and review our preliminary findings several times, to ensure the most important topics were covered.<sup>68</sup> Unless specified otherwise, the content developed below is directly developed from stakeholders' consultations.

This analysis of future trends looks into different variables and seeks to cover a wide spectrum of the diverse European sector. The main trends that we analyse include topics linked to the uptake of digital technologies in music, policy and regulatory frameworks, gender equality, concentration in the music sector, as well as environmental issues.

The main foreseeable trends are then numbered and are directly linked to the different policy recommendations provided in chapter 6 of the study, where each recommendation is linked to some of the future trends identified.

#### 3.1 Analysing the impact of current and future digital developments

##### 3.1.1 An ongoing reorganisation and evolution of the music value chain

The digital environment is expected to generate important impacts across the music value chain:

On the **creation** side, there is a constant developing number of amateur musicians producing music on a semi-professional or even professional level thanks to the wide spreading and mainstreaming of home studios or music aesthetics relying on limited hardware needs (e.g. the production of electronic music). Artists can hence start building a career at home which gives the opportunity to record labels to have a large pool of potential talents and develop new forms of A&R<sup>69</sup> through online detection of artists.

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<sup>68</sup> We would like to thank warmly the organisations that provided inputs to the stakeholders' workshop organised in Brussels in June 2019: PEARLE, Live DMA, ICMP, FIM, Liveurope, EMEE, GESAC, EMC, EBU, JUMP, IMPALA.

As well as key experts interviewed specifically on these more prospective aspects:

Sophian Fanen (FR) – Journalist, author, « Boulevard du Stream », Castor Music, 2017

Olivier Toth (LU) – CEO, Rockhal, Board Member, European Arenas Association

Chris Carey (UK) – CEO, Media Insight Consulting, Founder, FastForward

Josh Greenberg (DK) – Founder, Green Mountain Lodge IVS

Sophie Goosens (BE) – Counsel, Reed Smith LLP

Olivier Tura (FR) – Director, Trempolino

Gonçalo Riscado (PT) – Co-founder and Managing Director, Cultural Trends Lisbon

<sup>69</sup> Artists and repertoires, which is the process in which labels invest in scouting talents and developing their careers (see also glossary in annex).

On the music **production** side, the labels are reviewing the way they deal with A&R proposing for example contact platforms to artists that are already active in the music ecosystem via self-releases and home studios. A study of the French Ministry for Culture is showing a significant rise of self-produced artists, artists having solely licensing or production deals with a label or even producing music outside of any legal agreement with a label.<sup>70</sup> Due to challenges of remuneration of the music online, labels tend to invest in artists already relying on a sufficient fan base, which allow them to grasp revenues beyond the licensing of music. In this context, labels are less incentivised (and able) to invest marketing or developing talent beyond their home market. Artists and managers lack the resources to take on board such investments and will only do this on an occasional basis (e.g. showcases and touring opportunities).

One could think that the future of music could exist without labels, with artists auto-producing their music finding their audience online and bypass the services of the labels. However, the recent announcement of Spotify to give up its “direct to artist” service<sup>71</sup> is a sign that intermediaries between the artists and the audiences, such as labels and distributors, will still have a major role to play in the following years.

Moreover, the self-produced artists are facing a series of difficulties, including 1) a problematic legal status as their activity is relevant to both the status of entrepreneur and artist; and 2) a lack of legal and fiscal skills to navigate the digital environment and ensuring the payments of the royalties. Although, self-production is becoming a more and more important way to start a career, an artist can relatively quickly shift into a precarious situation without support of a professional environment to build its career.

### **Streaming services took control of three important drivers of music consumption:**

Streaming platforms became the distributor, the retailer and the tastemaker at the same time. It also progressively reshaped the way music is presented to consumers: the “playlist model” emerges. Playlists had always existed at the fringe of the CD-model: ripped cassettes, mixtapes, jukeboxes. Streaming companies strategically placed this practice at the centre of their offer.

As a consequence of the rise of non-linear distribution to access music, linear distributors such as TV and Radio are facing many challenges to attract the audience attention. Even if radio is also benefiting from digitisation through the implementation of Digital Audio Broadcasting (dab+) and is still playing a major role in providing access to diverse music for a large audience,<sup>72</sup> it is facing increased competition to attract the audience’s attention and to keep it.<sup>73</sup> It is increasingly difficult for emerging artists to “cut through the noise” and catch the attention of the audience in this crowded dissemination environment, which is likely to hamper cultural diversity in the long run.

Finally, new technologies and their uses are emerging and seen as potentially important and impactful for the music sector, although their uptake in actual business practices remains to be seen. For example, AI and blockchain are seen as potentially impactful but little take-up is observed in the sector yet.

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<sup>70</sup> Agence Phare (2019), *Etude exploratoire sur l'autoproduction des artistes de la musique*, Direction Générale des Médias et des Industries Culturelles, Ministère de la culture, Paris.

<sup>71</sup> Spangler, Todd (July 2019) Spotify Shuts Down Ability for Independent Artists to Upload Music Directly. <https://variety.com/2019/digital/news/spotify-shuts-down-artist-direct-upload-1203256886/>

<sup>72</sup> IFPI (2019) *Panorama de la consommation de la musique dans le monde*. London

<sup>73</sup> The economy of attention is a relative new branch of the economical sciences analysing the attention of a customer as a scarce resource.

For the **live music sector**, the significant increase in the number of concerts, festivals and diverse events (cf. part 3.5) results in increasing fees of headliners who are crucial to attract the audience. Moreover, the current economic concentration of the live music market endangers the fabric of the live ecosystem, since it squeezes out more fragile, smaller actors.

The ongoing competition and concentration between festivals is creating a tense economic context and a festival should be almost fully booked to have a balanced budget or to be able to generate profit.

At the same time grassroots music venues and clubs with a small or medium capacity are endangered by a more widespread urbanisation and the ensuing local regulations to favour residents over the night-time economy. Since these places are where the artists are doing their first shows and organising their first concerts, a decrease of these venues could have severe repercussions on the music ecosystem for early-careers artists, hence damaging music diversity. Policy and regulatory options are developing at local level, such as the “night mayor” initiative to reconcile the vibrancy of live music scenes with their immediate neighbourhoods (see also section 4.6 for some examples/case studies on this). The enthusiasm from the audience and the boom of live shows has spurred some negative side effects, and notably the issue of secondary ticketing, where people or organisations buy a large amount of tickets and resell them for a quick and large profit. This issue is problematic and may require a regulatory response as the secondary ticketing market is estimated to be of comparable size to the streaming market and expected to grow in the coming years.<sup>74</sup> It drains investment away from the sector, as the value derived from secondary ticketing is not reinvested in the music sector. Furthermore, seats often remain unfilled at shows, as ticket buyers can afford some tickets to remain unsold if their exorbitantly high price (e.g. €28,000 for a single Adele ticket) artificially inflates the overall resale price. Moreover, if fans are ready to buy tickets amounting to several times the face value, then they have significantly less money to spend on other shows and merchandise, hence diminishing the potential external revenue of the artists, that tends to get a more important place in the artists business models.<sup>75</sup>

## Key trends forecast

**Forecast 1:** Self-releases will become more and more important but the majority of artists will still be signed by labels, which are able to navigate the complex monetisation environment and provide financial security in a precarious environment.

**Forecast 2:** New services will emerge for music discovery and diverse content curation, potentially powered by broadcasters.

**Forecast 3:** Live music regulation will be an essential pillar of future music policy to ensure cultural diversity and a more sustainable live music market (vibrancy of local venues, addressing secondary ticketing).

<sup>74</sup> Face-Value European Alliance for Ticketing: <http://www.feat-alliance.org>

<sup>75</sup> Online consultation



### 3.1.2 Future impacts of the streaming model

While streaming (subscription) services have become the main access point for music and have spurred a newfound growth for the sector, the sustainability of this model and its impact on the whole sector is still uncertain.

Although global revenues for recorded music (as opposed to live performance) grew by 8.1% to reach \$17.3bn in 2018,<sup>76</sup> labels, publishers and the like are earning 54% less than they would twenty years ago.

The repartition of the overall revenues According to the Citigroup report published in August 2018, 'Putting the Band Back Together', in 2017, artists captured just 12% of total music revenues, and a significant part of the revenues is retained by the costs of running a myriad of distribution platforms.<sup>77</sup>

The digital music environment brings also challenges in terms of **concentration and diversity** both for the recorded and the live music sector.

The digitisation of distribution of **recorded music** follows a process of concentration (e.g. Spotify, Youtube, Apple Music). This creates a change in the value chain: distribution and retail have been merged. Meanwhile, the sector is losing some of its traditional 'mediators' (journalists, radio, television), as curation is being automated (with algorithms, playlists, pre-curated and suggested content on platforms). As a result, music which is already well-established is more visible (as major labels invest to be better referenced), while the independent or fringe artists struggle to become part of the cohort of tracks suggested.

This playlist and automated curation model seems to result in a tendency to decrease the diversity of accessed music<sup>78</sup>. Listening time is also more passive, as listeners' chance upon new tracks through automated curation. This trend is also relevant for users generated content platforms such as YouTube where automated curation algorithms favour the consumption of music on top-hits. An illustration of this development is the recent issue of "dry streams" topic, whereby the number of streams listened to is not correlated to any actual engagement of the fans with the artist. This is due to the development of passive listening, where a song is placed in popular playlists (and is therefore gaining a lot of listening time), but without actually benefiting from further active promotion. This phenomenon is particularly obvious when artists or manager use streaming data to plan tours, and observe that live successes can be strongly decorrelated from streaming success.<sup>79</sup>

The lack of remuneration of artists on streaming platforms incentivises the artists to maximise the more direct revenue sources they have (live acts and merchandising). However, touring in Europe is not easy as the musicians have to face consequent administrative burdens (linked with problems of double taxation and instrument transports) and is also facing some sustainability issues (cf. point 5.3). This also potentially entails rethinking the relationship between artists and labels: whereas labels are currently incentivised to maximise streaming revenues, they may need to take up a more active role in terms of live and merchandising activities.<sup>80</sup> But this trend is still limited as producers and managers are still struggling to find ways to navigate this new environment.

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<sup>76</sup> IFPI (2019) *Panorama de la consommation de la musique dans le monde*. London

<sup>77</sup> CITI GPS (2018) Putting the band back together; Remastering the World of Music. Citi GPS: Global Perspectives & Solutions. August 2018

<https://ir.citi.com/NhxmhW7xb0tkWiqOOG0NuPDM3pVGJpVzXMw7n%2BZg4AaffFX%2BeFqDYnfND%2B0hUxxXA>

<sup>78</sup> Michael Hann (2019) How Spotify's algorithms are ruining music. Financial Times, 06.05.2019. <https://www.ft.com/content/dca07c32-6844-11e9-b809-6f0d2f5705f6>

<sup>79</sup> Interviews

<sup>80</sup> This is, to some extent, taking place via the so-called 360 deals, where a label offers a very broad range of services to artists in exchange for higher percentages of revenues.



Beyond these issues, the “music landscape” is very much limited on platforms, often due to problems related to metadata. Genres like jazz, folk or Opera (which could monetize appropriately in the CD era) are de facto limited in their expression on streaming platforms, whose remuneration models are more favourable to mass listening and shorter tracks.

Another alternative revenue source for labels or auto-produced artists can be found in synchronisation. However, the large increase in production, and the rise of quality is resulting in more competition on pricing. Well known songs and bands continue to generate decent sync revenue, but unknown songs from emerging artists are becoming less valued.<sup>81</sup>

The streaming model brought back growth in global revenue but remains fragile: it is generating comfortable revenue for “mainstream” music, for which visibility and marketing dynamic can be powered by investment from large labels, but it is still not profitable for underground, niche or emerging music.

Moreover, a streaming service customer involuntarily remunerates artists he or she will never listen to: the subscription system deforms the relationship that music listeners have with the artists they listen to online. If you listen to a niche artist on Spotify five hours a day for a month, part of the money you pay for your subscription still goes to mainstream artists (as the amount of money garnered through subscription is pooled together and then paid to artists depending on their total streams and terms negotiated). This creates an unbalanced relationship between the user and the artists they listen to on platforms.

However, the recent adoption of Deezer, one of the major streaming services in Europe, of a user-centric approach to paying streaming royalties to artists, is a promising step toward a better remuneration of more niche artists and genres.

The user generated content platforms stay the dominant way for consumers to access and listen to music. The level of remuneration is even more problematic than on streaming platforms, with the so-called value gap issue: some online services do not use licensing agreements for the music content available on their platforms, since they claim they are not legally responsible for the content posted – and as a result implemented less favourable revenue-sharing options compared to licensing deals. This issue has been extensively discussed during the discussions on the Copyright Directive, and different estimates were calculated to assess the loss of revenues for music creators.<sup>82</sup> There are still many challenges to address in the future to increase the artist’s remuneration on the digital era.

At the same time, streaming can also bring opportunities for the music sector in terms of circulation of diverse content. With the rise of streaming, music consumption no longer has the constraints of geographic boundaries and audiences can be identified, built and maintained anywhere (and the artist can directly see and make use of data on this audience). This is promising for the increased circulation of repertoire, provided that the issues of concentration in the music industry are well addressed.

## Key trends forecast

**Forecast 4:** New remuneration models will be developed by streaming platforms to increase engagement between consumers and artists. Similarly, some direct-to-fans business models will emerge online and allow for fairer remuneration to artists.

**Forecast 5:** New digital services will emerge to cater to the needs of genres which are underserved in the current digital distribution landscape.

**Forecast 6:** The market may tilt towards an increased availability and consumption of culturally-diverse music, provided that proper policies are designed to encourage more diverse curation models.

<sup>81</sup> Online consultation

<sup>82</sup> See for example the point of view of the larger labels with IFPI (2018) Global Music Report 2018 – State of the Industry: [https://www.ifpi.org/downloads/GMR2018\\_ValueGap.pdf](https://www.ifpi.org/downloads/GMR2018_ValueGap.pdf)

## 3.2 Regulatory and policy framework

One of the most important recent EU policy developments for the Cultural and Creative Sectors and for music in particular is the modernisation of the Copyright framework. Whilst the Directive on copyright in the Digital Single Market is now officially adopted, it is still shrouded by interrogations across the music (and tech) industry around its implementation of in the EU MS. Its potential impact is however seen as a potential game changer in terms of revenue generation for the music sector, thanks to the facilitation of cross-border access to content online and better functioning copyright marketplace. Concerning the latter aspect, it notably reinforces the position of right holders to negotiate better remuneration deals with online content sharing platforms for the online exploitation of their works via new licensing rules.

In this context, several factors may affect the healthy development of the music sector according to views expressed by different sector stakeholders:

- 1) From the perspective of digital platforms, there is a concern that the cost and effort associated with music licensing may create a barrier to entry as only a few companies can afford to license music on a pan-European basis. In addition, the Directive has not determined a clear method to solve the conflicts which may arise in case of unauthorised uses of protected content as a result of incorrect or overlapping data<sup>83</sup> (for the identification of right-holders). Solutions for correctly capturing rights ownership without impeding the platforms unnecessarily will need to be devised.

Various elements of the new rules for the use of copyrighted content on online sharing platforms are, however, clearly meant to address such concerns. Firstly the specific rules for small platforms and start-ups (to be identified in accordance with the Directive's criteria), which create a lighter regime for their first three years, allowing them to grow with legal certainty. Secondly, proportionality parameters set out in the Directive's regime aim to ensure a balance: the obligations of platforms to prevent the uploading of unauthorised content will be proportional to their size, means, business models and type of content their users are uploading. Moreover, the Directive recognise the importance of the cooperation between digital platforms and right-holders for the good functioning of the new rules. It mandates the Commission to organise in cooperation with the Member States stakeholder dialogues to discuss best practices for such cooperation and issue guidance taking into account the results of such dialogues. It is in the context of this process therefore that issues like conflicts emerging from incorrect or overlapping data should be addressed.

- 2) Artists have voiced the concern that the Copyright Directive does not distinguish between the early stage artists and the well-established ones. Yet, all are likely to be deemed "professionals". They see a risk that platforms will be more reluctant to engage with early stage artists, as they may not be sufficiently well-equipped to shoulder the costs of copyright infringement procedures (e.g. to take adequate actions upon receiving copyright infringement notifications from the platforms' content recognition systems). However, producers and the artists' collective management organisations are likely to handle the issue here. Equally, users will need to be educated about the content they can and cannot not upload and about the exact scope of copyright exceptions.

Down the line of the implementation of the Copyright Directive, and looking at future regulatory frameworks, it seems the music sector is looking towards a more harmonised

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<sup>83</sup> For example on streaming platform, the data associated to a song is filled in when uploading the song to the platform (which may be done by the artist, its manager or its label). Misspelling, incomplete information and incorrect references to songwriters or composers are frequent issues.

approach, reflecting the way music is monetised. The industry is living online, and so are its customers. There is no room for 27 different approaches in the music sector. Efficiency, simplicity and readability require that action takes place at EU level, especially when taking into account that most music releases are now global.

Another important future trend is about copyright education. As outlined in the previous paragraph and by the debates over the copyright directive, there is a need to develop more actions related to copyright literacy. A huge effort should be made to educate artists, musicians, managers, industry executives and the public about copyright. Education about copyright to the larger audience could increase the understanding of the economic and legal environment musicians are facing, hence promoting a more responsible consumption of cultural content (e.g. lowering piracy).

### Key trends forecast

**Forecast 7:** The new copyright framework will help the music sector to develop additional revenues.

## 3.3 Towards a more sustainable music sector

The two main revenue sources for music (live and streaming) both have an important carbon footprint.

The live music sector now “thinks green”: audiences are in high demand of a more environmental-conscious approach, even if industry professionals acknowledge that ecological consideration is getting predominant in the music sector<sup>84</sup>. This trend also comes from an impetus from public authorities. For example, the project LIFE GreenFEST<sup>85</sup> is focusing on training public authorities to choose more environmental-friendly, sustainable goods when tendering for cultural events like music festivals, shows or exhibitions.

Regulation is key for live music venues (on non-reusable plastics in venues for instance), and the live experience is turning towards more eco-friendly solutions. Many leading festivals are now setting up a clear strategy to decrease their environmental impacts.<sup>86</sup> However, the travel involved for a live act is generating an important carbon footprint (for both the bands and the audience). Organisations like “a greener festival” are developing calculations of the ecological impact of festivals (their 2019 data shows that festival attendants travel 232 kilometres on average) and support them in transitioning towards a carbon-neutral approach.<sup>87</sup>

This issue has recently been embraced by industry professionals, including prominent artists (Radiohead, Imogen Heap), leading music industry professionals (Universal, Warner, Sony, Warner/Chappell) and various organisations have joined forces to set up Music Declares Emergency.<sup>88</sup> They have declared a climate and ecological emergency and called for “an immediate governmental response to protect all life on Earth. We believe in the power of music to promote the cultural change needed to create a better future.” Most importantly, the website offers a wide range of tools and resources for all music actors to develop a more eco-friendly approach to all their activities, based on the work done by Julie’s Bicycle, a cultural

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<sup>84</sup> Online Consultation

<sup>85</sup> [www.greenfest.eu](http://www.greenfest.eu)

<sup>86</sup> See for example the green commitments of Live Nation here: <https://fr.livenation.be/SustainabilityCharter> or Rock Werchter here: <https://www.rockwerchter.be/fr/green>

<sup>87</sup> <https://www.agreenerfestival.com/>

<sup>88</sup> <https://musicdeclares.net/>

NGO focusing on ecological issues in the field, and supported once by the Creative Europe cooperation project scheme.

Alison Tickell, MD of Julie's Bicycle, and a member of the Music Declares Emergency working group, said the initiative was created "to enable the UK music industry to declare a Climate and Ecological Emergency, to accelerate collaboration and ambition in order to meet critical targets and to call on government to use their policy and investment tools to help us to reach those goals."

## Gender equality

Gender equality unfortunately remains an important issue in the music sector, be it in terms of representation in the music sector organisation or in terms of music creation:

- Representation of women in the music industry remains extremely low in all European countries. Across the participating countries' collecting societies, women represent 20% or less of registered composers and songwriters. Earnings for women are even lower and women are under-represented in leadership roles across the industry and on stages at festival programmes.<sup>89</sup>
- Women are also highly under-represented in music-making: between 2013-18, just 9.3% of Grammy nominees were women; in Rolling Stone's 500 greatest albums of all time, the highest-rated album by a female artist is at #30 (Joni Mitchell's 'Blue'); and in 2017's Billboard 100, 12% of songwriters and just 2% of producers were women.<sup>90</sup>

The awareness of the issue is certainly growing, and most importantly some important initiatives are directly tackling the issue. In Europe, Keychange is an international campaign which invests in emerging talent whilst encouraging music festivals, orchestras, conservatoires, broadcasters, concert halls, agents, record labels and all music organisations to sign up to a 50:50 gender balance pledge by 2022. More than 300 signatory organisations have already committed to this pledge. Other important initiatives include she.said.so, an international NGO which aims to connect and empower underrepresented communities in the music industry with a focus on women. The organisation already gathers 3,000 international members and an additional 10,000 members across its 15 local chapters, and develops actions to increase the representation of women in the music industry, as well as a mentoring programme she.grows to help women to develop their careers in the music sector.

The trend towards more awareness of the issue – and actions to address it – across the music sector is likely to increase and take a central role in the coming years.

At EU level, the new Gender Equality Strategy 2020-2025 includes key objectives which are strongly aligned with the objectives of the above-mentioned organisations, and notably closing gender gaps in the labour market; achieving equal participation across different sectors of the economy; addressing the gender pay and pension gaps; closing the gender care gap and achieving gender balance in decision-making and in politics.

While some individual projects address sustainable development needs in regard to gender equality as well as ecological issues, there are no dedicated support programmes targeting sustainability at national level. The supported projects at European level remain limited in scope and are not sufficiently focussed on concrete solutions for the European music sector, which testifies of the relatively new awareness about these issues within the European music sector.

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<sup>89</sup> According to KeyChange : <https://keychange.eu/about-us/>

<sup>90</sup> <https://www.shesaid.so/>

## Key trends forecast

**Forecast 8:** Environmental-friendly approaches will become the norm in the music industry, and especially in the live sector, but the costs entailed will be challenging for smaller music venues and festivals. Music artists will be vocal supporters to tackle the environmental challenges.

**Forecast 9:** awareness and actions to address the lack of gender equality will grow, and public authorities will explore funding options to tackle the issue of gender inequality in opportunity, representation and remuneration.

### 3.4 The impact of the covid-19 outbreak on the music sector

It is already clear that music is and will be hit very hard by the covid-19 outbreak. The first and biggest sub-sector to be impacted by the Covid-19 outbreak is the live music sector. Tours to China (especially for classical music ensembles) started to be cancelled at the beginning of 2020 due to the start of the pandemic there. After the virus arrived in Europe from the end of January and foremost in the course of February, concerts for more than 1000 persons were cancelled, and the closure of all concert places and all touring activities was gradually implemented throughout Europe by mid-march.

The impact on the live sector and its actor is huge as the whole industry is currently on hold for an indeterminate period. Musicians, especially independent ones, lost a significant part of their revenue streams and concert venues' staff are unemployed. A venue like the Ancienne Belgique in Brussels estimates losing between EUR 15,000 and 20,000 per day of closure.

It is at this stage still too early to assess the economic loss for the sector at European scale. Firstly, at the time of writing, no venue in Europe (even small ones) is authorised to reopen, without any certainty yet on future reopening dates. In many countries like Belgium, Germany or the Netherlands, festivals will not take place at least until the end of the summer. In some other countries like in France, the government is preparing a plan for the reopening of small concert places. Secondly the lack of data on the sector is also hampering this task. In a special website conceived and launched in April by Impala, only 11 countries have launched surveys and/or studies on the economic impact for the sector.<sup>91</sup>

A study undertaken at smaller scale can however help to grasp the scale of the situation. A study commissioned by France Festivals has estimated the impact of the cancellations of music festivals until mid-July. According to this study, the cancellation of 2640 music festivals would result in between EUR million 535.6 and EUR Billion 1.9 of economic loss for the sector. This situation will also impact have substantial impacts on the country's economy as this will result in between in EUR 1.75 Billion and 3.8 Billion of economic loss in spillovers (e.g. tourism, food and drinks).<sup>92</sup>

Even if the sector finds a way out of the crisis, and governments manage to reorganise events with enough security measures, many questions remain unanswered for the live music operators. Will the audience feel safe enough to attend small and large events? Will it be possible to organise concerts with sufficient prevention measures? The impact of the crisis on the transport sector and price of the flights' tickets might also be prohibitive for artists (and especially emerging ones) to cross borders. A lot of issues are still pending, and the full scale

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<sup>91</sup> <https://www.impalamusic-covid19.info/>

<sup>92</sup> [https://www.lesechos.fr/industrie-services/services-conseils/exclusif-les-milliards-deuros-perdus-de-lannulation-des-festivals-1200615#utm\\_source=le%3AlecOf&utm\\_medium=click&utm\\_campaign=share-links\\_twitter](https://www.lesechos.fr/industrie-services/services-conseils/exclusif-les-milliards-deuros-perdus-de-lannulation-des-festivals-1200615#utm_source=le%3AlecOf&utm_medium=click&utm_campaign=share-links_twitter)

of the blow to the live music sector needs to be reassessed frequently to react in a timely manner.

The impact of the Covid-19 outbreak on the recorded music industry is expected to be softer than the on the live sector. While the consumption of music streaming could be expected to peak during a confinement period, the publication of the first quarter results by Spotify show that there is no expectation for growth in the coming year.

The record labels and music publishers will still be impacted. Release schedules of labels will be most likely affected due to the closing of recording studios and also for the impossibility to run any promotion campaign. Moreover, the streaming platforms users seems to listen to more podcasts during the confinement which results in less plays, hence resulting in a smaller remuneration for artists and labels/publishers (which was already an issue before the outbreak).

The most impacted actors of the recorded music sub-sector will probably be the (already hit by the digital shift) independent record sellers forced to close their shops and which do not rely on a digital ecommerce platform.

We identified 15 collecting management organisations that are helping their members via temporary solidarity grants, direct allowances, using therefore unclaimed rights or anticipation of payments.<sup>93</sup> Some of them also take even the role of helpdesks for the artists to find out if and how they can benefit from horizontal governmental measures.

Many temporary measures were undertaken at national or sub-national level in forms of aid to small businesses to help economic actors to weather the storm. However, a preliminary analysis of existing measures show that 10 European countries did not implement dedicated support for the CCS and only a few set up sectorial plans for the music sector.

The trade association representing independent labels Impala produced a Crisis Plan and a sector recovery roadmap proposing recommendations for the recovery of the sector, calling for a joint action across Europe between national and EU policy level to be complemented by sectorial actions.<sup>94</sup>

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<sup>93</sup> <https://keanet.eu/collaborative-map-covid-19-policy-measures/>

<sup>94</sup> <https://www.impalamusic-covid19.info/>

### 3.5 Key takeaways and policy implications

The music sector is still subject to ongoing digital developments that continuously reshape the value chain of the music sector. We identified the following key foreseeable impacts:

- **Forecast 1:** Self-releases will become more and more important but the majority of artists will still be signed by labels, which are able to navigate the complex monetisation environment and provide financial security in a precarious environment.
- **Forecast 2:** New services will emerge for music discovery and diverse content curation, potentially powered by broadcasters.
- **Forecast 3:** Live music regulation will be an essential pillar of future music policy to ensure cultural diversity and a more sustainable live music market (vibrancy of local venues, addressing secondary ticketing).
- **Forecast 4:** New remuneration models will be developed by streaming platforms to increase engagement between consumers and artists. Similarly, some direct-to-fans business models will emerge online and allow for fairer remuneration to artists.
- **Forecast 5:** New digital services will emerge to cater to the needs of genres which are underserved in the current digital distribution landscape.
- **Forecast 6:** The market may tilt towards an increased availability and consumption of culturally-diverse music, provided that proper policies are designed to encourage more diverse curation models.
- **Forecast 7:** The new copyright framework will help the music sector to develop additional revenues.
- **Forecast 8:** Environmental-friendly approaches will become the norm in the music industry, and especially in the live sector, but the costs entailed will be challenging for smaller music venues and festivals. Music artists will be vocal supporters to tackle the environmental challenges.
- **Forecast 9:** awareness and actions to address the lack of gender equality will grow, and public authorities will explore funding options to tackle the issue of gender inequality in opportunity, representation and remuneration.

The following policy implications are resulting from the prospective analysis:

- The ongoing policy work, building on the copyright directive to ensure fair and effective distribution of remuneration, is strongly needed;
- Need to develop improved intelligence around digital developments and support mechanisms for innovative European business models;
- Support for better co-ordination and more ambitious development of the music sector's responses to the environmental crisis.



## 4 Mapping and analysis of support schemes

### 4.1 Overall Approach – music in European cultural policy

Europe's strength in the world is widely determined by the diversity and richness of its cultural heritage and its dynamic creative sectors. Culture fosters inclusion, common values and intercultural dialogue within Europe and beyond. This is why cultural and linguistic diversity have supported the foundation of the European project, as enshrined in the Treaty on the Functioning of the European Union. The EU's cultural competence, as officially laid down in the Treaty of Maastricht (1992), commits to bring Europe's common cultural heritage to the fore while preserving national and regional diversity by encouraging cooperation between Member States, supporting and supplementing their action in the cultural sector.

Since the Treaty of Maastricht, the cultural policy-making at EU level has been widely developed, by broadening the scope of the EU action to acknowledge and strengthen the role of cultural and creative industries as a factor of social and economic development. As such, policymakers have looked to streamline culture in a wider palette of policy areas (from research and innovation to social inclusion and sustainable jobs and growth). As a result, in the current multi-annual financial framework, several EU funding instruments are open to (or have earmarked budgets for) cultural initiatives that foster creativity, stimulate emerging talent or aim to create spill-overs in other economic sectors at EU level.

According to the principles of subsidiarity and proportionality, the intervention at EU level is desirable if an action cannot be sufficiently achieved by Member States, but can be better achieved at EU level by reasons of the scale and effects of the proposed action.<sup>95</sup> When it comes to the cultural and creative sectors, EU intervention in terms of funding and support is highly desirable to ensure that the EU cultural diversity is preserved and that the cultural and creative sectors benefit from the Single Market against the backdrop of globalisation and digitisation. The music sector is no exception, given its diversity and fragmentation within Europe in terms of both the industry's structure and the support received at national levels.

Therefore, the aim of the current section is two-fold:

1. Firstly, it looks into several EU support initiatives and funding instruments for the music sector in order to establish the currently available dedicated support for the industry, as well as additional EU funding opportunities.
2. Secondly, it maps the available national support in the EU 28 in order to precisely understand the degree of fragmentation of national market practices.

Based on these analyses, the section aims to provide an analysis of what is achieved in terms of support for the music sector within Europe the different national policy initiatives, as well as complementarities and synergies with the support available at EU level. The analysis identifies funding gaps and formulate potential ways for these to be tackled at EU level, and makes the case for further EU intervention for the music sector to contribute to the EU objectives of defending cultural diversity, strengthening the Single Market and fostering global competitiveness.

### 4.2 Analysis of EU-level funding schemes

#### 4.2.1 Creative Europe

Creative Europe is the EU framework programme in support for the cultural and creative sectors (CCS), and the most relevant EU funding instrument for the music sector. With an

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<sup>95</sup> Article 5(3) of the Treaty on European Union



earmarked budget of €1,46 billion for the 2014-2020 period, the programme aims to promote European cultural and linguistic diversity and to strengthen the CCS contribution to EU economy. Creative Europe is divided into two sub-programmes, Culture and MEDIA, which seek to reinforce the cultural and respectively audiovisual sectors' capacity to operate transnationally and to promote transnational circulation of works and mobility of artists and operators<sup>96</sup>.

The Culture sub-programme strands currently accessible to music organisations consist of European Platforms, European Networks and Co-operation Projects.

- Platforms are dedicated to cultural operators to promote emerging artists and stimulating a truly European programming of cultural and artistic work;
- Networks are meant to help the cultural and creative sectors to operate transnationally and to strengthen their competitiveness.
- Cooperation projects can work on two different scales, comprising three to six or more partners.

The Media sub-programme is organised in 12 focused actions, tailored to the needs of the value chain of the audio-visual industry. Music is not covered by this sub-programme.<sup>97</sup>

Even if they serve the same policy objectives under Creative Europe, the Culture and MEDIA sub-programmes are separate, having different support actions and indicative budgets. As such, during the current financial period, MEDIA benefits from €824 million, whereas Culture is allocated €455 million.<sup>98</sup> Creative Europe is popular among the sector and the low success rates of Creative Europe clearly show that there is a high demand for this kind of support.<sup>99</sup>

Finally, the programme features a third cross-sectorial strand which includes a stand-alone financial instrument aimed at facilitating access to finance for the CCS and the commissioning of research and data collection. The cross-sectorial strand also manages the Creative Europe Desks in each Member State and the 13 participating countries in the programme (see Table 1). The main function of these desks is to support local cultural operators in their application and to disseminate knowledge on the programme. Finally, the cross-sectorial strand can also finance projects with a specific policy focus. For example a call for Refugee Integration Projects was launched in 2016, under which several music projects were supported.<sup>100</sup>

The CCS Guarantee Facility was initiated by the European Commission in the framework of the Creative Europe Programme, and is led by the European Investment Fund. It aims to facilitate access to funding for CCS companies, in order to fill the financing gap currently preventing the CCS market from scaling up and enjoying its full economic and social potential. More concretely, it means that the European Union guarantees 70% of the loans granted to CCS organisations by financial institutions which have signed up for the programme. This programme is a way to bypass the reluctance of banks to take risks in investing in a market they do not know well, while enabling the CCS easier access to debt financing. The latest figures available indicate that around €6 million loans have been unlocked for the music sector thanks to financial intermediaries benefitting from the facility between Q1 2017-Q1 2019.<sup>101</sup>

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<sup>96</sup> Regulation (EU) 1295/2013 of the European Parliament and of the Council establishing the Creative Europe Programme (2014 to 2020);

<sup>97</sup> Audience development; Capacity building / Training Support; Coproduction Funds; Development Single Project Cinema / Television / Digital Platform; Distribution selective support; Festivals support; Film Education; Market access support; On-line distribution ("promotion of European works online"); On-line distribution support ("On-line Distribution"); TV programming support and Video Games Development support

<sup>98</sup> Aspect highlighted by the stakeholders' consultation for KEA's *Research for CULT Committee – Creative Europe: Towards the Next Programme Generation*, Brussels, June 2018;

<sup>99</sup> KEA (2018) *Research for CULT Committee – Creative Europe: Towards the Next Programme Generation*. Brussels.

<sup>100</sup> Such projects include : ORPHEUS XXI - Music for Life and Dignity; COMMUNITY: Interactive and Creative Approaches to Discover Different Cultures; The sound routes. Notes for getting closer; BEYOND THEATER – creative platform for professional skills; and Re-build Refuge Europe. All project descriptions are available at: <https://ec.europa.eu/programmes/creative-europe/projects/>

<sup>101</sup> EIF (2019) CCS Guarantee Facility Implementation Status.

[https://www.eif.org/what\\_we\\_do/guarantees/cultural\\_creative\\_sectors\\_guarantee\\_facility/ccs\\_implementation\\_status.pdf](https://www.eif.org/what_we_do/guarantees/cultural_creative_sectors_guarantee_facility/ccs_implementation_status.pdf)

The Culture sub-programme has grown in scope over the years, without an equivalent increase in its earmarked budget, in contrast with the increased awareness and evidence of the contribution of CCS to wider economy and society.

In the European Commission's statistics on beneficiaries of Creative Europe, the music sector figures as a sub-sector of the Performing Arts which is generally treated under the budget of the Culture sub-programme.<sup>102</sup> Imbalances in terms of funding between different cultural and creative sub-sectors, lead to disproportionate access to the programme. For instance, between 2014-2017, the support action for Film Festivals alone (which is budgeted under the MEDIA programme) has financed 192 projects, while the total number of projects on music financed under support actions for Cooperation, Platforms and Networks (under the Culture programme) was 52 in the same period.<sup>103</sup> Evaluations of the Culture sub-programme indicates that the limited funding available does not wholly cover the needs of some essential creative sectors, such as the music sector,<sup>104</sup> which does not benefit from a dedicated action.

Nevertheless, some important initiatives in the music sector have been financed via Creative Europe. Some examples which have brought an important contribution to the EU circulation of artists and works are detailed below (see Table 11).

**Table 10: Funding scheme fiche – Creative Europe**

<b>Line DG</b>	<b>DG EAC; implementation by EACEA</b>
<b>Geographical scope</b>	Full participation: European Union + Norway, Iceland, Albania, Bosnia & Herzegovina, Montenegro partial participation: North Macedonia, Republic of Serbia, Tunisia
<b>Overall budget</b>	€1,46 billion (2014-2020); €2,8 billion for 2021-2027
<b>Funding per project / application (if applicable)</b>	<ul style="list-style-type: none"> <li>▪ <b>Networks</b> Max €250,000 per year or 80% of the total eligible costs</li> <li>▪ <b>Cooperation projects</b> Up to €200.000 (for small scale Co-operation projects) Up to €2 million (for large scale Co-operation projects)</li> <li>▪ <b>Platforms</b> Max €500.000 or 80% of the total eligible costs</li> </ul>
<b>Co-financing rate</b>	Between 50% and 80% of the total eligible costs
<b>Solely restricted to music</b>	No
<b>Objectives</b>	Promote EU cultural and linguistic diversity Strengthen the CCS contribution to EU economy
<b>Type of non-financial support provided (e.g. networking, business support advice, marketing, legal support)</b>	<b>Creative Europe Desks</b> disseminate knowledge on the programme and support local cultural operators in their application process <b>EU prizes</b> for literature, architecture, cultural heritage and emerging artists (music) aim to promote artists and their work, to highlight excellence in the fields
<b>Type of actions supported</b>	Support to circulation of EU works, support to internationalisation of artists and cultural operators, support to audience development, support to skills development, support access to finance, support access to foreign markets

<sup>102</sup> EACEA statistical data on the Culture sub-programme, 2014-2017;

<sup>103</sup> Idem.

<sup>104</sup> European Commission stakeholders' consultation for the Commission Staff Working Document 'Impact Assessment accompanying the document Proposal for a Regulation establishing the Creative Europe programme', Brussels, 30.05.2018;

<p><b>Eligible actors</b></p>	<p><b>Culture sub-programme:</b> public and private cultural organisations and institutions such as theatres, museums, arts or music venues, heritage sites, professional networks + EU Prizes</p> <p><b>MEDIA sub-programme:</b> audiovisual professionals and SMEs consisting of independent European producers and distributors, cinemas, online platforms and festivals focusing on European films, audiovisual markets and promotion networks.</p>
<p><b>Examples of projects already implemented and ongoing in relation to music</b></p>	<p><b>Networks</b></p> <ul style="list-style-type: none"> <li>▪ <b>European Jazz Network:</b> <ul style="list-style-type: none"> <li>- <b>Short description:</b> The EJM is a non-profit Europe-wide association of producers, presenters and supporting organisations who specialise in creative music, contemporary jazz and improvised music created from a distinctly European perspective. The membership in June 2019 includes 151 organisations (Festivals, clubs and concert venues, independent promoters, national organisations) in 35 countries.</li> <li>- <b>Results:</b> The network which exists since 1985 developed into both an active player of the jazz scene as well as a resource centre for concerts, festivals and club/ venues as well as for management booking as the EJM is running a comprehensive database about European jazz organisations, booking agencies, media and artistic proposals</li> <li>- <b>EU funding:</b> €248,500 for 2018-2019</li> <li>- <b>Website:</b> <a href="https://www.europejazz.net">https://www.europejazz.net</a></li> </ul> </li> </ul> <p><b>Platforms</b></p> <ul style="list-style-type: none"> <li>• <b>Liveurope:</b> <ul style="list-style-type: none"> <li>- <b>Coordinator:</b> Ancienne Belgique</li> <li>- <b>Short description:</b> an initiative supporting concert venues in their efforts to promote up-and-coming European artists. The platform works as a quality label awarded to live music venues committed to European diversity. Its objective is thus to boost the showcasing of young European acts across the countries and to help them reach new audiences. Liveurope platform is the first initiative of its kind in Europe and among the first platforms to be supported by Creative Europe. Currently the platform has 14 members from 14 countries.</li> <li>- <b>Results:</b> During the first two years of activity, 2014-2015, Liveurope has contributed to the organisation of 837 concerts. The figures for the years 2015-2016 demonstrate the rapid growth of the platform, which registered a 20% increase in the number of member venues from 2014. The newest Liveurope report should be available in late 2019.</li> <li>- <b>EU funding:</b> €1 million – from the Support to European Platforms action (under Culture sub-programme) 2014-2020.</li> <li>- <b>Website:</b> <a href="http://liveurope.eu/">http://liveurope.eu/</a></li> </ul> </li> </ul> <p><b>Small scale cooperation projects</b></p> <ul style="list-style-type: none"> <li>▪ <b>European Music Incubator (EMI)</b> <ul style="list-style-type: none"> <li>- <b>Short description:</b> EMI is an innovative learning programme for emerging musicians who want to expand their activities and</li> </ul> </li> </ul>

experiment with other creative sectors on the backdrop of digitisation (i.e. virtual reality, video games etc). It offers key entrepreneurial knowledge for artists to reach beyond the traditional framework of popular music

- **Funding:** €200.000 - Support to European Cooperation Projects – smaller scale (Culture sub-programme) 2016-2018;

- **Website:** <https://music-incubator.eu/>

### Large scale cooperation projects

#### ▪ Europavox

- **Short description:** 7 Partners from 7 different countries were gathered in order to design and manage the cooperation project EUROPAVOX: a project composed of three main activities geared to promoting European musical diversity, professionalisation and innovation of cultural operators towards professional practices and new uses for the audiences.

- **Results:** Running of several projects including best of U, a playlist of emergent European music, booking of 400 European bands on the stages of the 7 partners, export coaching to 7 European bands and transverse, a programme for collaboration between the music world and digital start-ups.

- **Duration:** April 2016 - April 2020

- **EU Funding:** € 2.000.000

Creative Europe is the main European source of funding for the music sector. Besides the financing available, the Culture sub-programme also provides non-financial support to certain sectors, including music, via four European Union Prizes, which aim to highlight excellence in the respective fields, to promote artists and their works beyond national borders. Regarding music, The European Border Breakers Awards for emerging artists (in 2004), and its successor the Music Moves Europe Talent Awards (since 2018) are interesting actions for European talents to gain recognition, but they are quite recently established and do not yet enjoy the same media recognition as other more-established Prizes (e.g. the EU Prize for Contemporary Architecture – Mies van der Rohe Award).

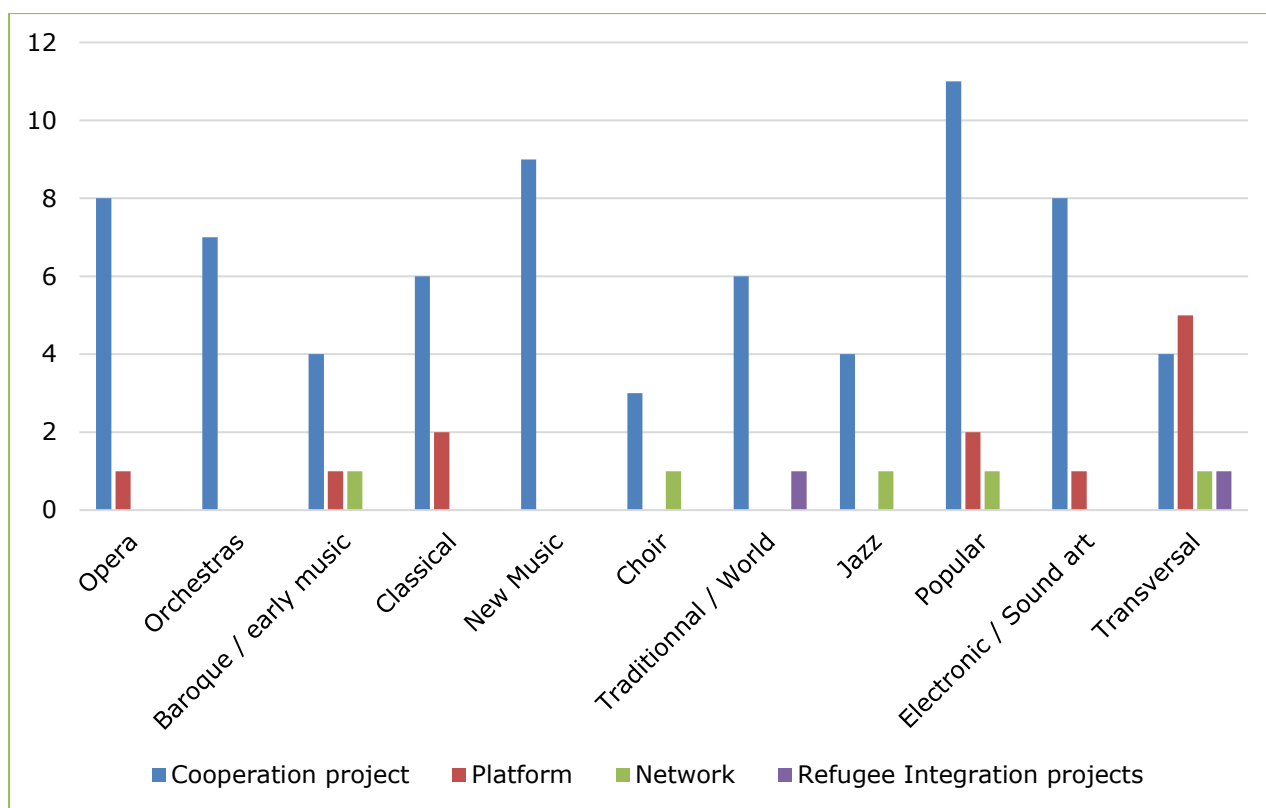
### Focus: The music genres supported by Creative Europe.

We provide below a short analysis of the music genres involved under the Creative Europe supported cooperation projects, networks and platforms. We only considered projects that explicitly mentioned a genre or gave a specific type of formation (e.g. band, orchestras) which formed the basis to develop clear categories. Although classical genres are more represented, the genres supported under Creative Europe are quite diverse, with the exception of the urban genre. The analyses performed on the programme data indeed leads us to the following 11 categories:

- 1. Opera (8 cooperation projects and 1 platform):** Projects engaging directly with opera houses or the opera as broad genre. This category contains projects that are dealing with thematic of opera and digitisation (opera vision / opera digital project), opera and audience development, the Fedora Platform who is dedicated to fundraising for opera houses, or diverse opera co-productions.

2. **Orchestras (7 cooperation projects):** Projects that concern orchestras generally on audience development or on capacity building for emerging or professional musicians, notably youth orchestra projects.
3. **Baroque/early music (4 cooperation projects, 1 network):** Projects focusing on the performance, and development of the early music / baroque music sector, via the capacity building for young musicians, cooperation of early music ensemble, and audience development projects. This sector is well represented via the REMA network.
4. **Classical (6 cooperation projects and 2 platforms):** Projects referring generally to the capacity of young musicians after their higher music education (Give Music a Future, L'Europe du piano, classical future Europe) or focussing on classical music composers (understood here as the composers after 1800 and before the second world war).
5. **New Music (9 cooperation projects):** Refers to projects either managed by prominent new music institutions (such as the IRCAM in France), projects directed towards to the contemporary musical composition or its promotion (for example via youth projects, like the Big Bang project or MusicaFemina, a project dedicated to the promotion of new music composers).
6. **Choir (3 cooperation projects and 1 network):** Projects dedicated to the promotion of the vocal music, generally by amateurs. They are well represented via European Choral Association – Europa Cantat, the largest network in the sector of collective singing in Europe.
7. **Traditional / World (6 cooperation projects, 1 refugee integration project):** projects listed within this category are projects that aim at the promotion or conservation of musical heritages of traditional music (generally not written) or which involve cooperation projects with musical traditions coming from the Mediterranean region, usually seeking a fusion style between European and extra-European music genre.
8. **Jazz (4 cooperation projects and 1 network):** projects explicitly referring to the jazz genre. The main project activities identified are dedicated to young people or amateurs. This sector is well represented via the European Jazz network.
9. **Popular (11 cooperation projects, 2 platforms and 1 network):** projects listed under this category are projects that have a clear link with the music industry of amplified music (generally via showcase festivals), or projects that aim to boost the career of musicians (European music incubator), or its circulation (Liveurope, Live Style Europe, Europavox).
10. **Electronic / Sound art (8 cooperation projects and 1 platform):** This category entails a large range of projects who could be classified either in the popular music category considering their link with the industry, or more in the new music category considering their link with research and electroacoustic musical research. However, they never clearly fall in these and hence form a stand-alone category. These projects are generally cutting-edge projects, who seek to develop new performance concepts and which generally cooperate closely with other arts fields (i.e. design, visual arts...).
11. **Transversal (4 cooperation projects, 5 networks and 1 refugee integration project):** The transversal category is made out of network who are doing a work beneficial for the entire music ecosystem e.g. music education (AEC), defending the value of creation (ECSA), trying to connect and make the music sector speak with one voice (European Music Council). It also includes one digital project (Blockchain my Heart).

Figure 8: Creative Europe projects focusing on music 2014-2019



Source: KEA

#### 4.2.2 Cultural and Creative Sector Guarantee Facility

Set up under the cross-sectoral strand of the Creative Europe programme, the Cultural and Creative Sectors Guarantee Facility (CCS GF), is the first EU financial instrument with a specific focus on culture and creative sectors. In addition to addressing the chronic issue of access to finance for the cultural and creative sectors, the CCS GF seemingly pursues the same objective as the SME window of the European Fund for Strategic Investments (EFSI), under the Investment Plan for Europe: increasing lending to SMEs to enable them to scale up their activities.

With an initial budgetary appropriation of EUR 121m from Creative Europe budget, the initiative is expected to create more than EUR 2 billion of new loans and other financial products for the CCS through the guarantee's catalytic effect. The CCS GF is implemented and managed by the European Investment Fund (EIF).<sup>105</sup> on behalf of the European Commission.

Financial intermediaries are incentivised to invest in the cultural and creative sectors through:

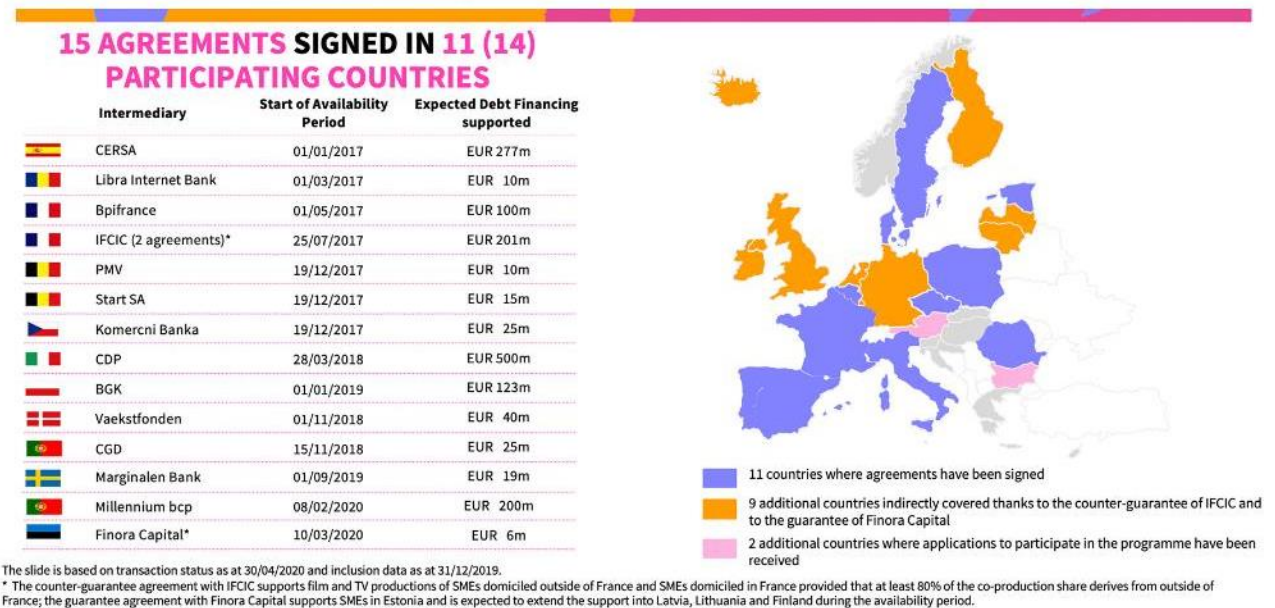
- 1) A risk-sharing mechanism, where the CCS GF covers the losses on a portfolio of loans for the CCS. The guarantee rate on a loan-by-loan basis is usually 70%, and is capped to up to 25% of the total losses over the portfolio of loans.
- 2) Financial intermediaries are eligible to benefit from capacity building activities, which aim to improve the ability of financial intermediaries to understand the CCS, and assess the risks associated with SMEs and micro, small and medium-sized organisations in the cultural and creative sectors. These companies will benefit from technical assistance, knowledge-building and networking opportunities, provided by Deloitte and KEA<sup>106</sup>.

<sup>105</sup> [https://www.eif.org/what\\_we\\_do/guarantees/cultural\\_creative\\_sectors\\_guarantee\\_facility/index.htm](https://www.eif.org/what_we_do/guarantees/cultural_creative_sectors_guarantee_facility/index.htm)

<sup>106</sup> [https://www.eif.org/what\\_we\\_do/guarantees/news/2018/kea-deloitte-ccs.htm](https://www.eif.org/what_we_do/guarantees/news/2018/kea-deloitte-ccs.htm)



**Table 11: Overview of the availability of the Guarantee Facility, name of the financial intermediaries and amount of available support**



Source: European Investment Fund (EIF)

In its fourth year of activity, the CCS GF is performing well. In 2019, a total of 15 transactions in 11 countries have been signed and those 15 transactions are expected to generate EUR 1.3 billion of debt financing for companies from the cultural and creative sectors. Several new transactions are currently in the assessment process within the European Investment Fund. Debt financing of EUR 424.4 million was made available to 1547 CCS SMEs to finance projects worth EUR 1.08 billion.

Given the strong market demand, the European Fund for Strategic Investment has been mobilised to top-up the CCS GF by €60 million in 2019 and a second top-up of additional €70 million in 2020 and this brings total amount of finance available for the CCS GF to EUR 252m, over two times more than the original budget.

The Creative Europe's Cultural and Creative Sectors Guarantee Facility received an honourable mention as "Product Innovation of the Year" at the Global SME Finance Awards 2019.

The capacity building assignments held with financial intermediaries show that music is in the top priorities of financial intermediaries, next to film, videogames, and fashion.

### 4.2.3 ERASMUS+

Erasmus+ offers opportunities to the cultural and creative sectors in the fields of education, training and youth in line with the Agenda for new skills and jobs.<sup>107</sup> The programme has an overall indicative financial envelope of €14.7 billion under Heading 1 (harnessing European economic integration) and of €1.6 billion under Heading 4 (establishing a coherent role for Europe on the global stage) of the EU Budget for 2014-2020.<sup>108</sup> Importantly, the CCS is one of the priority sectors identified in some key actions of the programme. Concerning the music sector, ERASMUS+ can potentially offer support to:

- establishing international partnerships to foster cross-borders cooperation amongst education institutions, industry or other organisations to better address possible skills gaps (see Table 13);
- fostering entrepreneurship and employability (including in the music sector) across Europe (see Table 13) also in developing countries.

The programme has also financed the use of music to improve teaching techniques or learning experience (reference to funded projects in Table 13).

The programme targets particularly students and young professionals, but it can also support adult education, vocational training and lifelong learning projects. These actions are notably supported by the Programme's Key Action 2 "Cooperation for Innovation and the Exchange of Good Practices".

Table 12: Funding scheme fiche – ERASMUS+

<b>Line DG</b>	DG EAC; Implementation by EACEA
<b>Geographical scope</b>	Member States of the European Union + Non-EU Programme Countries (North Macedonia, Iceland, Liechtenstein, Norway, Serbia, Turkey) + Partner countries <sup>109</sup>
<b>Overall budget</b>	of €14.7 billion under Heading 1 and of €1.6 billion under Heading 4 of the EU Budget for 2014-2020
<b>Funding per project / application (if applicable)</b>	n/a
<b>Co-financing rate</b>	80%
<b>Solely restricted to music</b>	No
<b>Objectives</b>	<p>The general objective of the Erasmus+ programme is to contribute to:</p> <ul style="list-style-type: none"> <li>▪ the objectives of the Europe 2020 Strategy, including the headline education target<sup>110</sup>;</li> <li>▪ the objectives of the strategic framework for European cooperation in education and training (ET 2020), including the corresponding benchmarks;</li> </ul>

<sup>107</sup> Available at: <https://ec.europa.eu/social/main.jsp?catId=1223>

<sup>108</sup> [https://ec.europa.eu/programmes/erasmus-plus/programme-guide/part-a/what-is-the-budget\\_en](https://ec.europa.eu/programmes/erasmus-plus/programme-guide/part-a/what-is-the-budget_en)

<sup>109</sup> [https://ec.europa.eu/programmes/erasmus-plus/programme-guide/part-a/who-can-participate/eligible-countries\\_en](https://ec.europa.eu/programmes/erasmus-plus/programme-guide/part-a/who-can-participate/eligible-countries_en)

<sup>110</sup> The headline education target is to reduce early school leaving to less than 10% and increase attainment in tertiary education to at least 40% by 2020



	<ul style="list-style-type: none"> <li>▪ the sustainable development of Partner Countries in the field of higher education;</li> <li>▪ the overall objectives of the renewed framework for European cooperation in the youth field;</li> <li>▪ the objective of developing the European dimension in sport, in particular grassroots sport, in line with the EU work plan for sport;</li> <li>▪ the promotion of European values in accordance with Article 2 of the Treaty on the European Union.</li> </ul>
Type of actions supported	<p><b>Key action 1 - Mobility of individuals</b></p> <p><b>Key action 2 - Cooperation for innovation and the exchange of good practices.</b> This action is the most relevant for the CCS / music sector and includes:</p> <ul style="list-style-type: none"> <li>▪ <b>Transnational Strategic Partnerships</b> aimed to develop initiatives addressing one or more fields of education training and youth and promote innovation, exchange of experience and know-how between different types of organisations involved in education, training and youth or in other relevant fields. Certain mobility activities are supported in so far as they contribute to the objectives of the project;</li> <li>▪ <b>Knowledge Alliances</b> between higher education institutions and enterprises which aim to foster innovation, entrepreneurship, creativity, employability, knowledge exchange and/or multidisciplinary teaching and learning;</li> <li>▪ <b>Sector Skills Alliances</b> supporting the design and delivery of joint vocational training curricula, programmes and teaching and training methodologies, drawing on evidence of trends in a specific economic sector and skills needed in order to perform in one or more professional fields;</li> <li>▪ <b>Capacity-building projects supporting cooperation with Partner Countries in the fields of higher education and youth.</b> Capacity-building projects aim to support organisations/institutions and systems in their modernisation and internationalisation process. Certain types of capacity-building projects support mobility activities in so far as they contribute to the objectives of the project;</li> <li>▪ <b>IT support platforms</b>, such as eTwinning, the School Education Gateway, the European Platform for Adult Learning (EPALE) and the European Youth Portal</li> </ul> <p><b>Key action 3 - Support for policy reform</b></p> <p><b>Jean Monnet activities</b></p> <p><b>Sport</b></p>
Eligible actors	<p>Eligibility criteria may vary according to the Action, but in principle the participation is open to:</p> <ul style="list-style-type: none"> <li>▪ a school/institute/educational centre (at any level, from pre-school to upper secondary education, and including adult education);</li> <li>▪ a vocational education school/institute/centre;</li> <li>▪ a public or private, a small, medium or large enterprise (including social enterprises);</li> </ul>

	<ul style="list-style-type: none"> <li>▪ a social partner or other representative of working life, including chambers of commerce, craft/professional associations and trade unions;</li> <li>▪ a public body at local, regional or national level;</li> <li>▪ a research institute;</li> <li>▪ a foundation;</li> <li>▪ a non-profit organisation, association, NGO;</li> <li>▪ a body providing career guidance, professional counselling and information services;</li> <li>▪ a body responsible for policies in the field of vocational education and training.</li> </ul>
<p>Examples of projects already implemented and ongoing in relation to music</p>	<p><b>Title: MUSICXCHAIN</b></p> <ul style="list-style-type: none"> <li>▪ <b>Action:</b> Cooperation for innovation and the exchange of good practices - Strategic Partnerships for vocational education and training (VET)</li> <li>▪ <b>EU Grant:</b> € 241.949</li> <li>▪ <b>Short description:</b> The MusicXchain is a project and a network of six (6) education providers from five (5) member states (Finland, Latvia, Germany, Netherlands and Slovenia) all offering upper secondary VET education in music. This project focuses on enhancing key competences of learners in the music sector by creating new and innovative ways for cooperating and learning.</li> <li>▪ <b>Website:</b> n/a</li> </ul> <p><b>Title: MUSICREATES</b></p> <ul style="list-style-type: none"> <li>▪ <b>Action:</b> Cooperation for innovation and the exchange of good practices - Strategic Partnerships for vocational education and training (VET)</li> <li>▪ <b>EU Grant:</b> € 181.851</li> <li>▪ <b>Short description:</b> The scope of the project is to better prepare students in the partner countries to work in the international music labour market. The target group is secondary level students and staff in vocational education in the fields of music performance; classical, pop, jazz and folk and music technology. The working life in the music industry makes demands of entrepreneurship and reaching out beyond national boundaries.</li> <li>▪ <b>Website:</b> <a href="http://www.musiccreates.eu/">http://www.musiccreates.eu/</a></li> </ul> <p><b>Title: ECMA – NEXT STEPS</b></p> <ul style="list-style-type: none"> <li>▪ <b>Action:</b> Cooperation for innovation and the exchange of good practices - Strategic Partnerships for higher education</li> <li>▪ <b>EU Grant:</b> € 398.789</li> <li>▪ <b>Short description:</b> The consortium sees chamber music as a tool to modernise higher education in classical music and intends to initiate this process to improved curricula in the partner institutions that are informed by the latest teaching and learning approaches and the expertise from professional partners, and are therefore better tailored to the current reality of the music profession.</li> </ul>

Teaching staff will be updated or re-trained with information on innovative teaching and learning methods, leading to higher quality teaching. Institutions will also be able to develop a strong international profile in the field of chamber music, which will increase attractiveness of European higher music education worldwide.

- **Website:** <http://www.ecma-music.com>

#### **Title: STAMP- Shared Training Activities for Music Professionals**

- **Action:** Cooperation for innovation and the exchange of good practices - Strategic Partnerships for vocational education and training (VET)
- **EU Grant:** € 301.407
- **Short description:** The project aims to i) develop excellent tools for vocational training (workshop models, guidelines for mentors and trainers, guidelines for staff mobility), made available in an online platform and ii) improve employability and entrepreneurship within the music sector in Central, Eastern and South-Eastern Europe.
- **Website:** <https://stamp-music.org/>

#### **Title: SHIFT**

- **Action:** SHIFT provides training initiatives for cultural leaders, working together and creating paths for them to face global challenges, Leaders and staff members of cultural networks and the broader cultural sector are key targets of the project.
- **EU Grant:** n.a.
- **Short description:** provide training initiatives for cultural leaders, working together and developing new approaches based on the UN Sustainable Development Goals (SDGs) to tackle societal challenges such as Climate change, gender & power-relations, inclusion and cultural leadership.

#### **Title: Capacity Building for Young Music Businesses**

- **Action:** Cooperation for innovation and the exchange of good practices and capacity Building for youth in ACP countries, Latin America and Asia
- **EU Grant:** € 150.000
- **Short description:** Taking up the current challenges in the music industry in Ghana, the project will build up young artists', creative workers' and managers' capacity in order to strengthen their market position and standing vis-à-vis the established operators of the value chain. Partners will conduct three Youth Mobilities involving more than 50 young artists and cultural managers from four countries directly linked to the music business offering practical and vocational training. The consortium comprises competent partners from Europe (DE, FR, UK, ES) and Ghana being local, national, EU and international cultural players.

**Title: EDUCOPERA- STRUGGLING AGAINST EARLY SCHOOL LEAVING WITH AN EDUCATION TO OPERA**

- **Action:** Strategic Partnerships for school education
- **EU Grant:** € 279 250
- **Short description:** The EducOpera means to struggle against Early School Leaving (ESL) through the acquisition of skills & competences by the means of Education to Opera. To achieve this aim, it aims to design 3 main intellectual outputs:
  - A tool & method (IO1) to identify and assess the competences acquired by teenagers thanks to an education to music in general and Opera in particular which might be relevant skills & competences required at school
  - A training for professionals (IO2) - educators being trained to this pedagogical & innovative approach to enrich their professional practice and being able to use the IO1 in their assessment
  - A guidance for professionals in order for them to be able to explain the EducOpera approach to other teachers/educators (at school and outside school) teaching musical education (IO3) making the link with the struggle against Early School Leaving (ESL); learning to learn making the link between formal, non-formal and informal learning
- **Website:** <http://infodef.es/project/educopera>

#### 4.2.4 Horizon 2020

Horizon 2020 is the largest EU programme dedicated to Research and Innovation (R&I) from concept to market uptake, benefiting from a dedicated budget of nearly €80 billion.

The Programme Regulation makes specific reference to the cultural and creative sectors under Pillar II Industrial Leadership and Pillar III Societal Challenges.<sup>111</sup> Funding that is not earmarked but available for the CCS and the music industry is included in actions dedicated to SMEs as well as in some other sections of the Programme as described below.

**Pillar I – Excellent Science:** This pillar can highly contribute to research for the CCS and the music sector, since it supports breakthrough research in all scientific fields (including music). While the main direct beneficiaries of this type of funding are researchers and associated institutions, research outcomes and potential applications could be valuable for the music industry and society at large (see examples of projects funded under the Marie Skłodowska-Curie actions and the ERC).

**Pillar II – Industrial Leadership:** The majority of funding to support R&I projects in the CCS is available under the ICT Work Programme for the development and management of digital content, in line with the Programme Regulation. This pillar could be relevant to fund research projects e.g. on the question of metadata or royalties collection.

**Pillar III – Societal Challenges:** Within Societal Challenge 6 "Europe in a changing world: Inclusive, Innovative and Reflective Societies", a number of call topics can be suitable to investigate the use of music for a wider societal use such as learning, promoting social inclusion and cohesion, enhancing users' experience. The current annual Work Programme 2018-2020 also offers opportunities for research in relation to intellectual property rights and copyright.<sup>112</sup>

**Funding for SMEs:** Funding is available through the SME instrument, now part of the European Innovation Council pilot (EIC pilot).<sup>113</sup> This instrument is useful either to fund concept and feasibility studies (Phase 1) or demonstration, testing, piloting and scaling up activities (Phase 2).

SMEs and other business can also benefit from financial instruments supported by H2020. Examples are the InnovFin products managed by the EIB Group and funded by H2020 available for start-ups and SMEs but also for mid-caps, larger private companies, research institutes/organisations, universities or an R&I-driven entities.<sup>114</sup> However, data on financed companies or projects is not publicly available.

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<sup>111</sup> Regulation (EU) No 1291/2013 establishing Horizon 2020 - the Framework Programme for Research and Innovation (2014-2020)

<sup>112</sup> DT-GOVERNANCE-13-2019: Digitisation, Digital Single Market and European culture: new challenges for creativity, intellectual property rights and copyright

<sup>113</sup> Source : <https://ec.europa.eu/programmes/horizon2020/en/h2020-section/sme-instrument>

<sup>114</sup> More information is available here: <http://www.eib.org/en/products/blending/innovfin/products/index.htm>

Table 13: Funding scheme fiche – Horizon 2020

Line DG	DG RTD; Implementation by EASME
Geographical scope	<b>European Union &amp; Associated countries:</b> Iceland, Norway, Albania, Bosnia & Herzegovina, North Macedonia, Montenegro, Serbia, Turkey, Israel, Moldova, Switzerland, Faroe Islands, Ukraine, Tunisia, Georgia, Armenia
Overall budget	nearly €80 billion for the period 2014-2020
Funding per project /application (if applicable)	n/a
Co-financing rate	EU funding can cover up to 100% of the eligible costs of the action for research and innovation actions and for coordination and support actions. The general applicable rate for innovation actions is 70%, but it can go up to 100% in the case of non-profit organisations
Solely restricted to music	No
Objectives and scope of the programme	<p>To achieve Research and Innovation (R&amp;I) from concept to market uptake.</p> <ul style="list-style-type: none"> <li>• to ensure Europe produces world-class science</li> <li>• to remove barriers to innovation</li> <li>• to make it easier for the public and private sectors to work together in delivering innovation.</li> </ul>
Type of actions supported and co-financing rate	<p>The following types of actions can be funded under each pillar</p> <ul style="list-style-type: none"> <li>▪ <b>Research and innovation actions (RIA):</b> Funding for research projects tackling clearly defined challenges, which can lead to the development of new knowledge or a new technology. <ul style="list-style-type: none"> <li>- <u>co-financing rate:</u> 100% of eligible costs</li> </ul> </li> <li>▪ <b>Innovation actions (IA):</b> Funding is more focused on closer-to-the-market activities. For example, prototyping, testing, demonstrating, piloting, scaling-up etc. if they aim at producing new or improved products or services. <ul style="list-style-type: none"> <li>- <u>co-financing rate:</u> 70% of eligible costs (except for non-profit legal entities, where a rate of 100% applies)</li> </ul> </li> <li>▪ <b>Coordination and support actions (CSA):</b> Funding covers the coordination and networking of research and innovation projects, programmes and policies. Funding for research and innovation per se is covered elsewhere. <ul style="list-style-type: none"> <li>- <u>co-financing rate:</u> 100% of eligible costs</li> </ul> </li> <li>▪ <b>Marie Skłodowska-Curie actions:</b> Funding for international research fellowships in the public or private sector, research training, staff exchanges. <ul style="list-style-type: none"> <li>- <u>co-financing rate:</u> reimbursement according to unit costs</li> </ul> </li> <li>▪ <b>European Research Council (ERC) grants:</b> ERC supports frontier research, cross disciplinary proposals and pioneering ideas in new and emerging fields which introduce unconventional and innovative approaches.</li> </ul>

	<ul style="list-style-type: none"> <li>- <u>co-financing rate</u>: reimbursement according to unit costs</li> <li>▪ <b>SME Instrument</b>: This instrument is aimed at highly innovative SMEs with the ambition to develop their growth potential. It offers lump sums for feasibility studies, grants for an innovation project's main phase (demonstration, prototyping, testing, application development...); lastly, the commercialisation phase is supported indirectly through facilitated access to debt and equity financial instruments. As from 2018, it is part of the European Innovation Council (EIC) Pilot. <ul style="list-style-type: none"> <li>- <u>co-financing rate Phase 1</u>: 100%; up to 50.000 euro;</li> <li>- <u>co-financing rate Phase 2</u>: 70%. Up to €2.5 million per project.</li> </ul> </li> <li>▪ <b>Fast track to innovation</b>: Funding started in 2015 as a pilot action. Continuously open, innovator-driven calls will target innovation projects addressing any technology or societal challenge field. As from 2018, it is part of the European Innovation Council (EIC) Pilot. <ul style="list-style-type: none"> <li>- <u>co-financing rate</u>: 70% of eligible costs (except for non-profit legal entities, where a rate of 100% applies). A maximum EU contribution of €3 million per project applies</li> </ul> </li> <li>▪ <b>Future and Emerging Technologies (FET) Open</b>: FET Open offers grants of typically €3 million to promote collaborative, inter-disciplinary research and innovation on future and emerging technologies. <ul style="list-style-type: none"> <li>- <u>co-financing rate</u>: 100% of eligible costs. Grants of typically €3 million.</li> </ul> </li> <li>▪ <b>Horizon Prizes</b>: Horizon Prizes are challenge prizes (also known as 'inducement' prizes) which offer a cash reward to whoever can most effectively meet a defined challenge.</li> </ul>
Eligible actors	<ul style="list-style-type: none"> <li>• H2020 is open to all organisations</li> </ul>
Examples of projects already implemented and ongoing in relation to music	<p style="text-align: center;"><b>Pillar I – Excellent Science</b></p> <p><u>European Research Council (ERC) grants</u></p> <ul style="list-style-type: none"> <li>▪ <b>Title: BioMusical Instrument</b></li> <li>- <b>Topic</b>: ERC-2017-PoC - ERC-Proof of Concept</li> <li>- <b>EU contribution</b>: € 149,901</li> <li>- <b>Coordinator</b>: GOLDSMITHS' COLLEGE</li> <li>- <b>Short description</b>: The BioMusical Instrument project aims to create a product prototype of a wearable digital musical instrument based on biosignals from the performer's muscles, and to allow musicians to perform electronic sounds from bodily gestures. The BioMusical Instrument will be the first product to combine EMG sensing, machine learning, and advanced audio signal processing. The Coordinator has identified partners in the biomedical hardware field, the music technology industry, and rehabilitation research to benchmark and evaluate the product prototype.</li> <li>- <b>Website</b>: n/a</li> </ul> <p><u>Marie Skłodowska-Curie actions</u></p>

- **Title: New Frontiers in Music Information processing**
- **Topic:** MSCA-ITN-2017 - Innovative Training Networks
- **EU contribution:** € 819,863.64
- **Coordinator:** Queen Mary University of London
- **Short description:** Music Information Processing (also known as Music Information Research; MIR) involves the use of information processing methodologies to understand and model music, and to develop products and services for creation, distribution and interaction with music and music-related information.
- **Website:** n/a

- **Title: EURJAZZ – The Europeanisation of Jazz during the Interwar Period: Beyond National Narratives**
- **Topic:** MSCA-IF-2017 - Individual Fellowships
- **EU contribution:** € 195,454.80
- **Coordinator:** ROYAL NORTHERN COLLEGE OF MUSIC
- **Short description:** EURJAZZ looks at the role played by music in the process of cultural Europeanisation. It examines how a cultural product coming from outside Europe can become fully part of European culture and identity. Taking jazz as an example of such cultural expression, the project explores how its diffusion outside the United States (USA) led to the development of a unified European jazz world, which was distinctive and independent from the American one.
- **Website:** n/a

## Pillar II – Industrial Leadership

- **Title: Binaural Tools for the Creative Industries (BINCI)**
  - **Topic:** ICT-21-2016 - Support technology transfer to the creative industries
  - **Overall Budget:** € 1.2 million euro
  - **Partners:** Fundacio Eurecat (Coordinator), 3d Sound Labs, Head Acoustics Gmbh, Antenna Audio Limited, Mylius Lars
  - **Short description:** BINCI's main objective is to develop an integrated software and hardware solution to ease the production, post-production and distribution of 3D audio content meant to be experienced by consumers through headphones. BINCI tools for binaural 3D audio production aim to be fully suitable to develop professional applications in the creative industries (e.g. music, video games, virtual and augmented reality, etc).
  - **Website:** <https://binci.eu/binci/>
- 
- **Title: VISUALmusic - Real Time 3D Motion Graphics Studio for Creative Music Industry SMEs**



- **Topic:** ICT-21-2016 - Support technology transfer to the creative industries
- **Overall Budget:** € 1.26 million
- **Partners:** Brainstorm Multimedia S.L. (Coordinator), Universitat Politècnica de Valencia, Università degli Studi di Padova, Square Rivoli, Publishing Huntemann, Oliver Club Entertainment, Link Associated
- **Short description:** The aim of project VISUALmusic is to extend the use of real-time 3D Motion Graphics technology for music SMEs by developing a more affordable, Real Time 3D Motion Graphics Studio. These technologies are used to create engaging visual experiences during live acts. In order to reduce costs and improve capability, the project VISUALmusic proposes to transfer the power of partner Brainstorm's real time graphics technology, normally used in the broadcasting industry, to the "live event" sector of the entertainment business.
- **Website:** <http://www.visualmusicproject.com/>

### Pillar III – Societal Challenges

#### ▪ **Title: Towards Richer Online Music Public-domain Archives (TROMPA)**

- **Topic:** CULT-COOP-09-2017 - European cultural heritage, access and analysis for a richer interpretation of the past
- **EU contribution:** € 3 million
- **Partners:** Universidad Pompeu Fabra, Technische Universiteit Delft, Goldsmiths' College, Universität Für Musik Und Darstellende Kunst Wien, Video Dock Bv, Peachnote Gmbh, Voctro Labs Sl, Stichting Koninklijk Concertgebouworkest, Stichting Centrale Discotheek
- **Short description:** TROMPA seeks to enrich and democratise the publicly available musical heritage through a user-centred co-creation setup. For analysing and linking music data at scale, the project will employ and improve state-of-the-art technology. Music-loving citizens (including the large scene of amateur performers) will cooperate with the technology, giving feedback on algorithmic results, and annotating the data according to their personal expertise.
- **Website:** <https://trompamusic.eu/>

### SME Instrument

#### ▪ **Title: The Next Billion Musicians: Leading the Digital Disruption of Music Education**

- **Topic:** EIC-SMEInst-2018-2020 - SME instrument
- **EU contribution:** € 1.95 million
- **Coordinator:** Yousician OY
- **Short description:** Yousician is a mobile service that uses advanced audio technology combined with music exercises to motivate users to learn and play an instrument. The goal of this project is to make music education available to a billion new people. To do this the project aims to: (1) increase the product range by adding more instruments, syllabus

for advanced users and localisation to several languages and (2) build readiness to scale up in global markets.

- **Website:** n/a

▪ **Title: Beatik- Collaborative Digital Scores Platform for Classical Music**

- **Topic:** EIC-SMEInst-2018-2020 - SME instrument

- **EU contribution:** € 746,492.25

- **Coordinator:** REVINCLASSIC SOCIEDAD LIMITADA

- **Short description:** BEATIK seeks to provide an integrated platform and eco-system to help all musicians and the institutions they belong to, such as orchestras, conservatoires and music schools, from performance preparation to sharing annotations and score distribution. This will greatly reduce the quantity of paper used in distributing sheet music, its storage and transportation, the cost of which currently average up to €150k annually / music institution. This solution is expected to generate considerable savings for organisations with many musicians, providing a tool to supersede paper scores and the limited digital scores solutions currently on the market.

- **Website:** n/a

▪ **Title: New system for Automatic Music identification of live events and cover versions (MILC)**

- **Topic:** INNOSUP-02-2016 - European SME innovation Associate – pilot

- **EU contribution:** € 79,376.25

- **Coordinator:** ROYAL NORTHERN COLLEGE OF MUSIC

- **Short description:** The objective of the MILC project is to set the basis for a new innovative world-leading- and cutting-edge music monitoring service for live acts in public venues and on-line platforms, investigating and developing various technologies that would allow existing radio/streaming monitoring services to become capable of monitoring and identifying music on TV, radio, venues, live concerts and internet.

- **Website:** n/a

▪ **Title: EVEARA: Testing a New Business Model for Digital Music Distribution**

- **Topic:** SMEInst-01-2016-2017 - Open Disruptive Innovation Scheme

- **EU contribution:** € 50,000

- **Coordinator:** EVEARA LIMITED

- **Short description:** EVEARA is a digital aggregator providing automated solutions for record labels to access all relevant digital distribution channels and reach markets and listeners exponentially, increasing their revenues throughout Europe. By providing aggregation services and “white label” digital services across multiple channels (artists, SME producers/labels and other copyright holders, and large enterprises), EVEARA is not only simplifying digital distribution , but it

is also creating a new business model that is expected to take 1.6% of the market share. This project is now benefitting from a grant from the call of the first phase of the preparatory action of Music Moves Europe on Online and Offline Music distribution.

- **Website:** n/a

#### 4.2.5 COSME

COSME, the dedicated EU programme to strengthening the competitiveness and sustainability of SMEs, with an earmarked budget of €2.3 billion (2014-2020)<sup>115</sup> displays a number of support actions to improve access to finance, to markets and framework conditions for European SMEs and to promote entrepreneurship and entrepreneurial culture. There is no specific mention of the music sector in COSME Regulation, nor in the annual work programmes. However, the wider CCS sector is clearly eligible to the broad objective of supporting SMEs and entrepreneurship.

**Table 14: Funding scheme fiche – COSME**

<b>Line DG</b>	DG GROW; Implementation by EASME
<b>Geographical scope</b>	<p><b>Full members:</b> European Union + Iceland, Montenegro, North Macedonia, Turkey, Albania, Serbia, Bosnia &amp; Herzegovina, Kosovo</p> <p><b>Member without participating in COSME financial instruments:</b> Moldova, Armenia, Ukraine</p>
<b>Overall budget</b>	€2.29 billion (2014-2020); proposed €4 billion (2021-2027)
<b>Funding per project / application (if applicable)</b>	n.a.
<b>Co-financing rate</b>	Between 60% and 90% of total eligible costs (refer to the Call for Proposals)
<b>Solely restricted to music</b>	No
<b>Objectives and scope of the programme</b>	Strengthen the competitiveness and sustainability of EU enterprises, particularly SMEs, and encourage entrepreneurial culture and promote the creation and growth of SMEs.
<b>Type of non-financial support provided (e.g. networking, business support advice, marketing, legal support)</b>	<b>Enterprise Europe Network:</b> offer support to SMEs to become active in the Single Market and beyond (provide info on EU legislation and programmes, EU funding, IP rights), supports SMEs to apply for the SME Instrument (in partnership with Horizon 2020)

<sup>115</sup> Regulation No 1287/2013 of the European Parliament and of the Council establishing a Programme for Competitiveness of Enterprises and small and medium-sized enterprises (COSME) (2014-2020)

<b>Type of actions supported</b>	Actions to support access to finance, access to markets, actions to shape better EU policies for SMEs activities, actions to develop entrepreneurship and entrepreneurial culture.
<b>Eligible actors</b>	EU SMEs, intermediary organisations that support SMEs, public or private bodies, all legal entities forming a consortium, natural persons.
<b>Examples of projects already implemented and ongoing in relation to music</b>	<ul style="list-style-type: none"> <li>▪ <b>Title: Participatory Baroque Festival in the European Region of Danube-Vltava:</b></li> <li>- <b>Project description:</b> the aim was to establish a participatory baroque festival in the region Danube-Vltava (Austria and Germany) in order to increase senior tourism in low season times and eventually to transfer this touristic offer to other European baroque regions. The overall aim is the internationalisation of tourism in the Danube Vltava region through the use of local and regional cultural activities in the music sector.</li> <li>- <b>Funding:</b> € 289.766 – Action: Framework conditions for enterprises (2015-2016)</li> </ul>

#### 4.2.6 Preparatory action “Music Moves Europe: Boosting European diversity and talent”

The first year of this Preparatory Action (PA) implemented by the European Commission (DG EAC) is already showing interesting results in terms of targeted funding opportunities for the European music sector.

The two calls for projects for a total of € 850,000 focused on *On-line and Off-line distribution* and on *Training Schemes for young professionals*. This first phase has been very much welcomed by the sector and helped to pursue the development of music projects with an EU added-value, and allowed continuing the support of a few projects which had already benefited from EU support programmes and would not have been able to continue their activities without this PA. For example, the *Eveara project “Testing a New Business Model for Digital Music Distribution”* which already benefited from a € 50,000 support from the European Commission under the Pillar III - societal challenges of the H2020 programme between 2016 and 2017, is now benefitting from a grant from the open call on On-line and Off-line music distribution with a total budget of €48,100 for 2018-2019.

In 2019, the second year of this PA, the European Parliament foresaw an envelope of 3 million Euros. For the implementation, the Commission decided to build on the initiatives under the 2018 Preparatory Action in the field of “training” and “export” and to explore actions in new areas, i.e. “music venues”, “co-creation”, “health effects” and “music education”. For the third year of this PA, the Parliament voted a budget of 2.5m EUR for 2020.

**Table 15: Funding scheme fiche – Preparatory Action “Music Moves Europe: Boosting European diversity and talent”**

<b>Line DG</b>	DG EAC; implementation by DG EAC
<b>Geographical scope</b>	European Union + Norway, Iceland, Albania, Bosnia & Herzegovina, Kosovo, Montenegro, North Macedonia, Republic of Serbia, Tunisia
<b>Overall budget</b>	€1.5 million (2018); €3 million for (2019); €2.5 million for (2020)
<b>Funding per project / application (if applicable)</b>	From €30,000 to €90,000
<b>Co-financing rate</b>	80-90% of the eligible costs
<b>Solely restricted to music</b>	Yes
<b>Objectives</b>	<ul style="list-style-type: none"> <li>▪ promote the competitiveness of the sector as well as increased access of citizens to music in all its diversity</li> <li>▪ test suitable actions for more targeted EU funding for music post-2020</li> </ul>
<b>Type of non-financial support provided (e.g. networking, business support advice, marketing, legal support)</b>	n.a.
<b>Type of actions supported</b>	Grants to support pilot projects, and studies
<b>Eligible actors</b>	non-profit organisation (private or public); public authorities (national, regional, local); universities; educational institutions; associations; natural persons are not eligible except self-employed persons or equivalent (i.e. sole traders) where the company does not possess legal personality separate from that of the natural person
<b>Examples of projects already implemented and ongoing in relation to music</b>	<p><b>Preparatory action - Phase 1 – Call for projects “Online and offline distribution”</b></p> <ul style="list-style-type: none"> <li>▪ <b>Title: Eveara Limited</b></li> <li>- <b>Short description:</b> Eveara aims at developing a white label online distribution software, which can help small actors of the market to create their own distribution channel. It follows up on a successful SME instrument phase-1 feasibility study funded by the Horizon 2020 programme.</li> <li>- <b>Total budget (including self-financing):</b> €48,100 for 2018-2019</li> <li>- <b>Website:</b> <a href="http://www.eveara.com/english.html">http://www.eveara.com/english.html</a></li> </ul>

▪ **Title: Digital Music Solutions**

- **Short description:** The proposal is about developing a new innovative, immersive and interactive streaming platform to promote European classical music repertoire. It will provide a new encoded multitrack format, separating the different sources of sounds which is nowadays heavily hampering the distribution of European classical music online. It is expected that this new interactive way to make classical music accessible increases the demand and provide opportunities to the classical music to grow its audience and outreach.

- **Total budget (including self-financing):** €667,150 for 2018-2019

- **Website:** <https://nomadmusic.fr/fr>

**Preparatory action - Phase 2 – Call for projects “Training Scheme for young music professionals”<sup>116</sup>**

▪ **Title: Europe in Synch**

- **Short description:** Promoted by AMAEI, the Portuguese publishing association, Europe in Synch aims at fostering the European professionalisation of young music professionals actively involved in synch licensing, promoting the use of culturally-diverse European music in new audio-visual productions (film, advertising and other content). It brings together young professionals from the music sector with film and advertising producers, so as to provide a real-life, hands-on learning experience for these professionals while promoting European music in synch.

- **European Funding:** up to €55,000 per project for 2019-2020

- **Website:** <https://europeinsynch.net/>

▪ **Sustainable Career in the Music Sector - SuCarMus**

- **Short description:** Consisting of a series of training sessions for young music professionals SuCarMus aims to help young music professionals to understand the music sector ecosystem, while encouraging them to network on an international level. Participants will engage in a year-long programme of training activities including two intensive residencies, online mentoring/training sessions provided by experienced international music professionals and an international networking meeting. SuCarMus is coordinated by Cyprus Music Information Centre (CY) and implemented in partnership with the Institute for Research on Music and Acoustics (GR) and Piranha Arts – World Music Expo (WOMEX).

- **European Funding:** up to €55,000 per project for 2019-2020 - **Website:** <https://www.sucarmus.ne>

<sup>116</sup> For more information on the other awarded projects, please consult: [https://ec.europa.eu/programmes/creative-europe/calls/eac-s18-2018\\_fr](https://ec.europa.eu/programmes/creative-europe/calls/eac-s18-2018_fr)

#### 4.2.7 Other EU programmes

Several other EU programmes provide indirectly funding to cultural projects and from which the music sector can theoretically benefit, although no specific reference to the sector is made. These programmes include EuropeAid, Europe for citizens, Cohesion policy and structural funds, European Regional Development Fund, Interreg and the Employment and Social Innovation programme (EASI)<sup>117</sup>

It is unfortunately not possible to retrace the number of beneficiaries of each programme, that are often run by regional organisations following some specific objectives and encompass many sub-programmes and sub-projects. However, the objectives of several programmes are well aligned with the identified key actions to support the European music sector.

This sub-chapter provides a quick overview of these programmes and underlines their potential to enhance the European music sector.

Quick presentation of the programmes relevant for the music sector organisations and professionals.

Under Europeaid, the main programme under which the music sector may benefit from some form of support is the ACP Cultures+, a development programme focussed on the regions of Africa, Caribbean and Pacific to foster sustainable development in the creative industries, bolster social and economic development and preserve cultural diversity.

#### The European Structural and Investment Funds (ESIF)

With an earmarked budget of €352 billion (almost a third of the total EU budget), The European Structural and Investment Funds (ESIF) under the EU Cohesion Policy aim to reduce differences between regions and to ensure growth across Europe.

The EU has 5 structural funds that underlies several objectives. They do not directly target the cultural sector, and hence even less music, but CCS stakeholders can benefit from funding if they comply with the thematic objectives of cohesion policy.

#### The European Regional Development Fund (ERDF)

The aim of the ERDF is to reduce disparities amongst regions. It encompasses the following 11 thematic objectives (TO), with a focus on the first four:

- TO1: Strengthening research, technological development and innovation
- TO2: Enhancing access to, and use and quality of, information and communication technologies
- TO3: Enhancing the competitiveness of SMEs
- TO4: Supporting the shift towards a low-carbon economy
- TO5: Promoting climate change adaptation, risk prevention and management
- TO6: Preserving and protecting the environment and promoting resource efficiency
- TO7: Promoting sustainable transport and improving network infrastructures
- TO8: Promoting sustainable and quality employment and supporting labour mobility
- TO9: Promoting social inclusion, combating poverty and any discrimination
- TO10: Investing in education, training and lifelong learning
- TO11: Improving the efficiency of public administration

However, as each regional programme is developed on the basis of a dedicated strategy with its own priorities, understanding the whole extent of support to music under this programme is challenging and would require a separate study.<sup>118</sup> Some examples were however identified through desk research:

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<sup>117</sup> Fund-Finder (2019) Le Sourd, Sert – On the Move, Brussels

<sup>118</sup> See for example KEA (2013) the use of structural funds for cultural projects. A study for the European Parliament, 2013.

**Name of the Programme:** ERDF

<b>Example of projects already implemented and ongoing in relation to music</b>	<ul style="list-style-type: none"><li>▪ <b>Title:</b> <b>Ecovvenue - Making London theatres more environmentally friendly</b><sup>119</sup>:</li><li>- <b>Short description:</b> support project for 48 SMEs, theatres and performing arts venues across London.</li><li>- <b>Contribution of the European Regional Development Fund:</b> € 404,041 through the “London” Operational Programme for the 2007-2013 programming period.</li></ul> <ul style="list-style-type: none"><li>▪ <b>Title:</b> <b>La Rodia – Reconversion of a brownfield site into a music venue (Besançon – France)</b></li><li>- <b>Short description:</b> Located in what has become a cultural district, La Rodia hosts nowadays more than 500 music groups each year, and gathering around 36,000 spectators per season.<sup>120</sup></li><li>- <b>Contribution of the ERDF:</b> € Million 2.013.</li></ul>
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### The European Social Fund (ESF)

ESF supports training, life-long learning, vocational trainings, social inclusion measures and employment programmes. The CCS and the music sector may benefit from some specific projects. The main objectives of the ESF include:

- Employment & supporting labour mobility
- Social inclusion & combating poverty
- Education, skills & lifelong learning
- Institutional capacity building & efficient public administrations

And to a lesser extent, objectives 1-4 of the cohesion policy:

- Strengthening research, technological development and innovation
- Enhancing access to, and use and quality of, information and communication technologies
- Enhancing the competitiveness of SMEs
- Supporting the shift towards a low-carbon economy

There is no searchable database of projects which would allow for an analysis of ESF-funded projects related to music. Examples could be identified via desk research:

**Name of the Programme:** ESF

<b>Example of projects already implemented and ongoing in relation to music</b>	<ul style="list-style-type: none"><li>▪ <b>Title:</b> Project Madeleine H/F</li><li>- <b>Short description:</b> coordinated by Réseau en Scène Languedoc Roussillon on equality between men and women in the cultural sector.</li></ul>
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Many of the objectives of the structural funds are however in line with key priorities for the European music sector, e.g. the shift toward a lower carbon economy or the competitiveness of SMEs. It could serve for the development of product and services in the creative industries or financing social innovation projects.

<sup>119</sup> [https://ec.europa.eu/regional\\_policy/en/projects/united-kingdom/ecovvenue-making-london-theatres-more-environmentally-friendly](https://ec.europa.eu/regional_policy/en/projects/united-kingdom/ecovvenue-making-london-theatres-more-environmentally-friendly)

<sup>120</sup> <https://www.europe-en-france.gouv.fr/fr/projets/une-ancienne-friche-convertie-en-salle-de-concerts-la-rodia-besancon>



**Table 16: Overview of culture and creative sectors-related activities that could be eligible under each specific Thematic Objective of the ESIF<sup>121</sup>**

Thematic Objectives	Structural Fund	Example of culture and creative-related activities
1- Strengthening research, technological development and innovation	ERDF, ESF	Product and service development in the creative industries (e.g. innovative online dissemination tools for the music industry);
		Social innovation projects with the involvement of the creative sector (e.g. development of innovative citizens platforms for establishing urban cultural development plans), etc
2- Enhancing access to and use and quality of ICT	ERDF, ESF	Development of ICT products with cultural and creative content
		Development and improvement of ICT services for specific target groups (e.g. rural population
3- Enhancing competitiveness of SMEs	ERDF, ESF	Development of education schemes to promote entrepreneurship at universities targeted to creative, artistic and cultural professions (e.g. seminars on entrepreneurship, management classes, etc.);
		Building-up of networks and communities for new creative entrepreneurs.
4- Supporting the shift towards the low-carbon economy	ERDF, ESF	Investment programmes for cultural infrastructures (e.g. Music venues or festivals) to improve their energy efficiency their initiatives to reduce their carbon footprint.
5- Climate change adaptation & risk prevention and management	ERDF	Reduction of greenhouse gas emissions is part of this objective. Some music companies (and wider CCS) whose work often involve creation, transmission and storing of large amounts of data could benefit from investment in order to reduce the emissions related to such activities.
6- Protecting the environment and promoting resource efficiency, eligible activities might include the following	ERDF	Creative renovation of cultural buildings and infrastructure
		Cultural tourism projects (e. g. promotion of regional cultural events like festivals)
7- Sustainable transport & removing bottlenecks in key network infrastructures	ERDF	n.a.
8- Employment & supporting labour mobility	ERDF, ESF	Creative industries business incubators (e. g. transforming unused urban spaces in co-working spaces with related training programmes for young creative entrepreneurs)

<sup>121</sup> Le Sourd, Sert (2019) Fund-Finder 2019 edition. On the Move, Brussels.

		Support programmes for business creations in the field of cultural and creative industries (e.g. start-up support programmes for the creative industry), etc
9- Social inclusion & combating poverty	ERDF, ESF	Measures and innovative projects to allow the cultural participation of people living in urban and rural communities (e.g. innovative architectural adaption of public spaces for the creative practice of young people);
		Cross-border networking and support programmes for women in cultural professions (e.g. education programmes regarding cultural management and cultural participation of women), etc
10- Education, skills and lifelong learning	ERDF, ESF	Investments in artistic, culture or creative industries related education and training infrastructures (e.g. renovation and/or upgrading of buildings)
		Cross-border trainings related to creative competences, cultural exchange, and languages (e.g. cross-border platform of regional cultural centres), etc
11- Institutional capacity building & efficient public administrations	ERDF, ESF	Technical assistance measures for cultural administration involved in ERDF programmes (e.g. training, studies related to culture, arts and creative industries);
		Cross-border networks of cultural administration, cultural organisations, and associations as well as related citizens projects and cooperation (e.g. cross border network of umbrella organization of visual artists), etc.

## B- Interreg – European Territorial Cooperation

Funded by the ERDF with € 359 million for 2014-2020, Interreg aims to enhance regional and cross-border collaboration. It is structured across 3 different types of programmes:

**Interreg Va:** Cross-border Cooperation supports projects that address common problems across borders and enhances cross-border cooperation for development and growth;

**Interreg Vb:** Transnational Cooperation aims to improve the way several countries work together to solve common problems. It promotes cooperation between national, regional and local partners and coordinated strategic responses to agreed priorities;

**Interreg Vc, URBACT and ESPON:** Interregional Cooperation programmes aims to strengthen and improve the effectiveness of regional policies through exchange of experiences between local and regional authorities and related stakeholders.

The Interreg projects support the 11 thematic objectives mentioned above. Based on extensive desk research, several projects support the CCS (e.g. CREADIS3 under Interreg Europe, or the Interreg Baltic Sea Region Creative Ports), but no music-specific project was identified.

### 4.3 Concluding remarks of the European-level mapping

The mapping shows that funding opportunities for the music sector (and the wider cultural and creative sectors) are available in several programmes beyond Creative Europe. However, the support does not specifically target the music sector overall, except for the ongoing MME Preparatory actions, and few calls explicitly target the wider creative industries. Moreover, the Creative Europe budgetary envelope and the popularity of the programme makes it highly competitive, and therefore access to Creative Europe can be challenging.

The majority of opportunities for the music (and the wider CCS sectors) reflect larger policy objectives, to which the music sector could contribute (e.g. the calls within COSME, SME Instruments, InnoFin, or Erasmus+, as shown in the tables above). The analysis shows the number of music projects funded under the programmes mapped is small (and so is the number of beneficiaries from the music industry). In relation to Erasmus+, the research revealed that most of the beneficiaries are education institutions with little participation from the industry. However, there are quite a few Horizon 2020 and SME instrument projects related to music.

This situation translates into a lack of awareness on funding opportunities outside Creative Europe for the music sector on the one hand, and little or no relation to the music sector's strategic needs or key trends from the programme side (except for Creative Europe), on the other hand. Music is primarily featured in calls aimed at cross-collaboration and spill-overs in different sectors: either the music sector is used to increase the competitiveness or boost innovation in other sectors, such as tourism, or innovative technologies are deployed in different creative fields, including the music sector, with a view to align business models to the realities of the current digitised market. This shows however the potential of the music sector to contribute to the wider economy and the opportunity to make use of technological innovations in music.

More synergies between Creative Europe and the other programmes mapped would help to streamline support for the music sector in order to finance creation and to cater for a fairer remuneration. Creative Europe itself offers still a limited support to the sector, given its small budget and the lack of a dedicated action to music, to match the dimensions of the sector and its contribution to European economic growth.

The following sub-section focuses on the support available at national level in order to provide insights on how the EU support to music could be best tailored, in synergy with existing support across member states.

## 4.4 Analysis of national-level support schemes

### 4.4.1 Methodological note

The mapping has been done via a survey directed towards the cultural ministries of the EU 28 members and through additional desk research. The full results of this mapping is available in annex III.

The analysis provided in this part of the report does not go into the details of each Member State support, but rather identifies key tendencies on how the music sector is funded by national authorities and the type of support provided. The section examines the similarities and differences across the different models of public support, and assess possible complementarities with the support available at European level.

### 4.4.2 A diverse range of funding architectures for the music sector

#### *- Diverse State structures resulting in different degrees of decentralisation*

Every country has different ways of supporting the arts and the music sector, depending on their history and their level of decentralisation. Federal states like Germany, Austria, and Belgium have a strong music support ecosystem at regional level (or Bundesländer). In the more centralised States (e.g. France, Poland, Czech Republic), support to music is directly provided by the cultural ministry or by an arts council. Beyond this general principle, some mixed models appear. For example, Germany and the Austrian federal State also provide support at State level via grants dedicated to international actions or initiatives of national significance. Even though the United Kingdom is not per se a Federation, the strong level of independence of its members results in a mixed model between a devolved administrations (arts councils) and some national arms' length bodies supporting culture (and music).

#### *- Diverse degrees of support*

This classification has been undertaken in order to show 1) the different ways to support the music sector across Europe and the main types of support provided by Member States, and 2) the main gaps in terms of overall support provided to music across Member States. This classification is an attempt to bring a high-level overview regarding the very wide range of funding architectures in the 28 Member States and is not meant to be a performance classification. This remark is particularly relevant considering the lack of publicly available information on amateur music and investment in music education, which are crucial for a healthy music ecosystem. This is mainly due to the overlaps in budget categories, where these types of activities often fall under general education or arts education budgets.

Table 17 below provides a pan-European overview of the key types of funding schemes identified at national level. A full description of the funding schemes for each country is available in annex III.

Table 17: Music support architecture in Europe

	Support to national institutions	Grants or indirect support from ministry of culture	Support by an arts council similar body	Support by music centre similar body	Support by other ministries / international cooperation	Support at regional level	Support at sub-regional level	Tax incentives	Music export office (MEO)
<b>Low support</b>									
Bulgaria						n.a.			
Cyprus								n.a.	
Croatia						n.a.			
Greece									
Romania						n.a.	n.a.		
<b>Low-Middle support</b>									
Czech Republic							n.a.	n.a.	2017
Finland						n.a.	n.a.		2011
Hungary						n.a.	n.a.		2017
Italy							n.a.		2016-17* / 2010
Poland						n.a.			2000 / emerging
Portugal									2015
Slovenia									
<b>Middle - strong support</b>									
Estonia							n.a.		2014
Lithuania							n.a.		2015
Luxembourg						n.a.			2009
Netherlands						n.a.		n.a.	2008
Slovakia							n.a.		2016
Spain									2009
Sweden						n.a.	n.a.	n.a.	
<b>Strong support</b>									
Austria									2011
Belgium									
Denmark						n.a.	n.a.	n.a.	2013
France									
Germany									2007
Ireland						n.a.	n.a.		
Latvia								n.a.	2012
The UK								n.a.	

Legend					
		no support available			no MEO
	n.a.	small scale / generally not earmarked to music / hard to assess			emerging MEO / older MEO but mainly dedicated to classical music
		small scale / mainly restricted to classical music	n.a.	decreasing support	MEO in creation
		support available			MEO established between 2005 and 2015
	n.a.	particularly strong support			MEO established before 2005

Based on this overview, we have developed the following typology of the level of support available for music across Europe.

- **Low support:** Every country analysed has at least some kind of support to music. The most common form of support to music is the financing of prestigious national classical institutions, or music-related museums. In some countries (Greece and Romania), support to music seems to be limited to such measures. In other countries (Cyprus and Croatia) there are some support initiatives at the national level, but they are not complemented by support to a music centre or an arts council like body, and there is no support provided by other ministries. These countries have not set up any (or very few) tax incentives or special regulations benefitting the music sector and have either a small-scale emerging Export office or none at all. They represent the category of countries where the support to the music sector is low. The remaining countries can be classified into three other categories.

- **Low to middle support:** The middle support group of countries shows, in addition to supporting national music institutions, also support to the music sector via grants managed by the cultural ministry or arts councils (or similar bodies). The amount of support within this category can vary greatly. Some countries like Slovenia and Czech Republic have set aside a relatively small amount of funding. The support is then provided via general calls for proposals and the grants are not specifically earmarked to a specific objective or actor in the music sector (e.g. production support for festival and venues, touring, music education...). However, Slovenia implements a diverse range of measures which indirectly benefit the music sector (special social security measures for musicians, scholarships, and residencies in major cultural capitals). In the case of Hungary, the country works with a wide range of institutions for the provision of grants (Hangfoglaló, Hungarian National Cultural Fund - NKA and Magyar Zenei Tanács – Hungarian Music Council), but this support is mainly reserved for classical music genres and have no particular tax incentives or specific regulations for the music sector beyond these grants. In Portugal, the situation is quite similar. Although the music sector can benefit from the support of DG Artes (Ministry of Culture), Portugal does not have any tax incentives or regulations for the music sector. DG Artes allocates EUR 16 Million every year to cultural projects, from which around EUR 3 Million is earmarked to the music sector via a diverse range of grants.

- **Middle to strong support:** This category covers countries that show substantial support to the music sector. These countries support their music sector mainly via arts councils (on top of the other measures identified for the above-mentioned categories), with the exception of Lithuania and Luxembourg. These two countries have however implemented a wide range of support schemes considering the size of the country and the development of their industries. The other countries show either a wide range of institutions where rather targeted support is available. For example, the Slovakian cultural ministry supports four institutions which provide grants to the music sector (Slovak Arts Council, Slovakian Music Centre, the Music Fund, and Kult Minor). Similarly, Sweden provides support via three national institutions operating like Arts Councils but with different priorities (support to organisations, support to individuals, and support to cooperation and internationalisation projects). In the Netherlands, direct support is provided by the Ministry of Culture as well as via the Fonds Podiumkunsten, complemented by well-developed funding mechanisms at municipal level. These countries also have well-established Music export offices compared to countries from the previous categories.

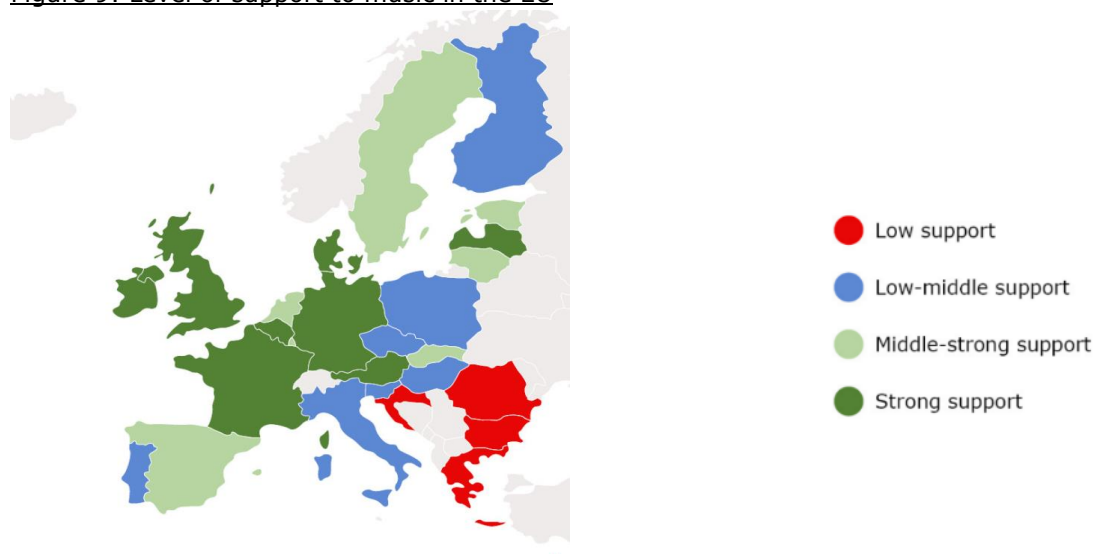
▪ **Strong support:** This last category encompasses countries who show strong support for the music sector via a widespread cultural policy and developed strategy not only for the music sector itself but for many subparts of the music sector. For example, the Danish ministry of culture, besides providing grants dedicated to music, directly supports institutions covering in total 4 music subsectors (rock, jazz, new music, traditional and folklore) which then implement a wide range of actions, festivals and also provide information that benefits the music sector in its entirety. In France, the government manages itself some venues or funds indirectly music actors via the CNV tax (tax on concert tickets), and organises at national level strategies supporting different music genres through “labels”, which cover not only the classical music branch but also the more popular contemporary music (musiques actuelles). The funding is organised in different programmes and mainly provides grants. The support for festivals is then financed at regional and local levels. The UK provides funding to the music sector via four arts councils for England, Scotland, Wales, and Northern Ireland, covering a wide range of well-funded programmes.

In France, the website [www.monprojetmusique.fr](http://www.monprojetmusique.fr) (My music project) is compelling as it lists 13 major funding bodies that are awarding grants for music projects. It acts as a reference site dedicated to the financing of professional music projects. It lists the support programmes in the music sector, for all projects, all structures, all music genres, throughout the territory. This initiative is supported by the main collective rights management organisations and professional organisations in the music industry. Any other body offering funding opportunities for professional music is invited to participate and enrich the website.

In this category, federal states are also well-represented, with Belgium, Germany and Austria to name a few. These countries have indeed set up a wide range of publicly financed institutions and grants that implement projects supporting the music sector at different levels. For example, Initiative Musik, the German music export bureau, is the most substantially publicly funded export office in Europe and the regional Länder provide EUR 3 billion for music and theatre.<sup>122</sup> These countries also have older music export offices than the other countries, sometimes established in the 1990’s.

The map below (as well as table 17 above) provides the full picture of the classification proposed across Europe.

**Figure 9: Level of support to music in the EU**



Source: KEA

<sup>122</sup> Forecast made by the General Office of statistic in 2011.

## 4.5 Support at regional level

In general, little aggregated information is available on funding schemes at regional level, even from the ministries themselves, as almost no ministry was able to provide the study team with an overview of music funding schemes at regional level.

However, it can be assumed that the regional (or sub-national) level plays an important role in supporting the music sector. This is particularly the case of federal systems with a strong level of support, where *linguistic communities* in Belgium or *Länder* in Austria and Germany are key actors in terms of music funding. Also, in more centralised countries, regional entities can still play a substantial role. For instance, in France the *Regions* are the only place to provide public funding for festivals. Studies on festivals also indicate that a larger share of public funding comes from the local level in the festival's budgets.<sup>123</sup>

For countries with a middle to strong level of support, such as Estonia, there is no specific organisation who has knowledge about the funding schemes for music implemented at regional level. Each region and city is funding music related activities but no systematic data collection has been undertaken until now. The organisation *Cultural endowment of Estonia* has regional offices, but they mainly give awards and do not implement any specific funding schemes.

Support at local level tends to get more important in countries with lower levels of State support. For instance, interviews made with Slovenian professionals tend to show a stronger level of support at the municipality than at the regional and national level.

As no comprehensive resources were available to discuss music funding at local/regional level, additional interviews with support scheme managers were undertaken to develop a more fine-grained analysis and identify good practices. The selection was made through internal consultations, especially with Sound Diplomacy, which manages the *Music Cities* network<sup>124</sup> and has extensive experience in working on local music policies. The selection was then developed to cover different forms of supports (music creation, talent development, and local partnerships). The selected good practices are presented below.

**Table 18: Case study - Musikstadtfonds Hamburg**

<b>Geographical scope</b>	Hamburg residents
<b>Overall budget</b>	€600,000 <sup>125</sup>
<b>Funding per project / application (if applicable)</b>	Up to €50,000 - with some exceptional circumstances allowing higher amount
<b>Solely restricted to music</b>	Yes
<b>Objectives and scope of the programme</b>	<ul style="list-style-type: none"> <li>- Strengthen genres and instigate collaborations within Hamburg</li> <li>- Internationalisation of Hamburg as a music city</li> <li>- Accessibility to music shows</li> </ul>

<sup>123</sup> Négrier, E.; Bonnet L.; Guérin, M. (2013) *Music Festivals, a Changing World, An International Comparison*, p.67.

<sup>124</sup> A network of cities particularly active in music policies, based mostly in Europe: <https://www.musiccitiesnetwork.com/>

<sup>125</sup> Hamburg.de (2016), *Music City Fund* (accessed 5.04.19)



	<ul style="list-style-type: none"> <li>- Music tailored to youth and children</li> <li>- To provide free music in the city</li> </ul>
<b>Type of actions supported</b>	<ul style="list-style-type: none"> <li>- Support for developing new work to the public in the form of concerts, concert series or small festivals</li> <li>- Support for educational programmes.<sup>126</sup></li> </ul>
<b>Eligible actors</b>	Music creators, groups, companies
<b>Examples of projects already implemented and ongoing in relation to music</b>	<ul style="list-style-type: none"> <li>• <b>Title: Barockwerk Hamburg</b> <ul style="list-style-type: none"> <li>- <b>Project description:</b> Vocal and instrumental chamber ensemble staging music from the Baroque era. Funding was given to cover the costs of 2 concerts.<sup>127</sup></li> <li>- <b>Funding:</b> €6,000</li> </ul> </li> <li>• <b>Title: Decoder Ensemble</b> <ul style="list-style-type: none"> <li>- <b>Project description:</b> Funding for a Big Data Weekend, which included concerts and lectures collaborating with 8 young composers. Decoder Ensemble is a contemporary music band, using a range of electric and acoustic instruments and voice to set them apart from conventional chamber music ensembles.<sup>128</sup></li> <li>- <b>Funding:</b> €30,000</li> </ul> </li> </ul>

Table 19: Music Pool, Cultural Development Fund, Aarhus<sup>129</sup>

<b>Geographical scope</b>	Aarhus Municipality
<b>Overall budget</b>	2 million DKK
<b>Funding per project / application (if applicable)</b>	Over €100,000 is possible
<b>Solely restricted to music</b>	Yes. Music Pool is strictly for music
<b>Objectives and scope of the programme</b>	<ul style="list-style-type: none"> <li>- Promote the production of local music</li> <li>- Encourage cultural growth in the city</li> </ul>
<b>Type of actions supported</b>	Support for touring/travel ; support for guest musicians for individual concerts/events ; support for workshops ; support for small concerts and festivals ; support for local music initiatives
<b>Eligible actors</b>	Cultural institutions, individuals, groups and associations

<sup>126</sup> Hamburg News (2017), [Music city funds enters second round](#), (accessed 5.04.19)

<sup>127</sup> Barockwerk Hamburg, [About us](#), (accessed 5.04.19)

<sup>128</sup> Decoder Ensemble (2017), [Big Data Weekend](#) (accessed 5.04.19)

<sup>129</sup> Aarhus Kommune (2019), [Musikpuljen](#) (accessed 8.04.19)

Aarhus Kommune (2019), [Round 1 2018](#) (accessed 8.04.19)

Grobund Bandakademi (2019), [Who Are We?](#) (accessed 8.04.19)

Concert Clemens (2019), [About Us](#) (accessed 8.04.19)

**Examples of projects  
already implemented  
and ongoing in relation  
to music**

▪ **Grobund Bandakademi**

- **Project description:** Funding granted for work with young people. Aimed at 14-20 years old musicians, Grobund focuses on creating networks, offering professional support, help organising concerts, and providing access to a recording studio.

- **Funding:** €30,000

▪ **Concert Clemens**

- **Project description:** Funding has been provided to Concert Clemens to help increase the international work they do. A classical vocal group, they perform around Denmark as well as at international music festivals, competitions and concerts. A key focus of the group is also to work within music education, developing collaborative projects with modern composers and music students.

- **Funding:** €125,000

## 4.6 Support at sub-regional level / Case studies

Beyond the above fact sheets, the section below provides more qualitative insights in how music support is managed at local level, as well as the types of partnerships set up to promote a healthy local music ecosystem. This section is thus more process-oriented and touches upon the way music support is run in practice.

### 4.6.1 Berlin

Music, musicians and music industry professionals have access to a high level of support from the Senate and associations within the city. Benefiting from a range of funds on offer, as well as membership schemes developed to support the local music scene.

Berlin is both a municipality and a German state (Bundesland), with three levels of funding: borough, Senate (federal state level) and national. The Senate is the main body in charge of setting the objectives for cultural policy, providing funding to artists, groups, and cultural organisations within the city<sup>130</sup>. In 2013 the Berlin Senate set up Musicboard Berlin. Dedicated to the local pop and contemporary music scene, the board offers support to projects that cover both national and international scope. It aims to

- Provide funding for new and creative pop music
- Increase the visibility of Berlin as a centre for artistic productivity
- Enhance the collaboration with local networks, businesses, and commissions
- Increase inclusion and accessibility within the local music infrastructure
- Strengthening local LGBT and POC scene

Musicboard Berlin integrates fully with the local music scene, working within music networks and commissions, and strives to fund projects that involve cross-organisation working. It generally funds scholarships/residencies, projects and platforms, workshops, concerts, and interdisciplinary work. It can also fund venues and festivals. Musicboard puts itself in the middle between the administrative and public authorities of the city, and local

<sup>130</sup> <https://chmcc.hypotheses.org/2474> (accessed 9.04.2019)

businesses. Doing so means that it acts as a moderator for any concerns around noise or neighbourhoods, and can provide support around mediation through the provision of contacts<sup>131</sup>. It can also provide 'orientation consultation' with the option of paid-for consultation sessions). The yearly budget of the Musicboard Berlin is €1.7million (€250,000 goes towards financing the Berlin Music Commission). There are 5 funding programmes for artists and groups to apply for. In 2017, 48 projects were funded across 2 of the programmes, 19 musicians received support funding, 31 musicians received help from the Scholarship and Residency fund, and 12 festivals received funding. Funding in 2017 helped support 183 events<sup>132</sup>. The support can go up to €10,000 and is open to any individuals or company living or working in Berlin within the local pop music industry.

**Table 20: Case Study - Musicboard Berlin**

<p><b>Example of projects already implemented and ongoing in relation to music</b></p>	<ul style="list-style-type: none"> <li>▪ <b>VER.MI.SCH.T</b> <ul style="list-style-type: none"> <li>- Project description: Project designed to encourage networking and cooperation between neighbourhood venues and musicians. It has a strong focus on musical diversity. 20-25 Berlin musicians are involved in the project, with the main focus on female and LGBT artists, as well as inclusion for people with disabilities.</li> <li>- Funding: Up to €10,000 - Pop in the Hood programme</li> </ul> </li> <li>▪ <b>GURR</b> <ul style="list-style-type: none"> <li>- <b>Project description:</b> GURR is a 2-woman band. They've created their own genre, 'First Wave Gurr!core'. They performed at SXSW, Eurosonic Norderslaag and The Great Escape in 2017.</li> <li>- <b>Funding:</b> Up to €1,500 Support Funding</li> </ul> </li> </ul>
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The Berlin Music Commission is another organisation that helps bring together the local music scene. Through membership it creates a diverse network through which collaborations and relationships are formed. The Commission works with local companies to provide extra services such as think tanks, coaching and consulting<sup>133</sup>.

In 2001 the public body, ClubCommission Berlin was set up. The association of Berlin club, party and cultural event organisers, members have access to industry-specific training, consulting, networks and public relations. ClubCommission Berlin works closely with Musicboard Berlin to strengthen the city's music industry<sup>134</sup>. In 2018 a new scheme funded by local government and facilitated by ClubCommission was launched to provide grants of between €50,000 - €100,000 to nightclubs in Berlin for soundproofing in order to improve relations between neighbours and venues, and reduce the number of complaints and venue closures<sup>135</sup>.

<sup>131</sup> Musicboard Berlin, [About Us](#) (accessed 9.04.2019)

<sup>132</sup> Musicboard Berlin, [website](#)

<sup>133</sup> Berlin Music Commission [About Us](#) (accessed 9.04.2019)

<sup>134</sup> <https://www.europavox.com/news/music-stands-berlins-threat-live-venue-berlin-started-fight-back/> (accessed 9.04.2019)

<sup>135</sup> The Guardian (Dec. 2018), [Berlin pledges €1million to soundproof city's nightclubs](#) (accessed 9.04.2019)

#### 4.6.2 Nomex

Nomex was set up in 2008 as a collaborative organisation between the music export offices in Finland, Denmark, Sweden, Norway and Iceland. Created to share information and best practices amongst the Nordic regions, Nomex is a pan-Nordic network that has worked on a number of joint strategies<sup>136</sup>. Each music office has its own director and board that contributes to the overall programme board. What started as an informal set up between music export offices, turned into the creation of a 5-year programme, 'Strength in Unity' running from 2012 until 2017. It now aims to strengthening the intra-Nordic market, expanding Nomex projects to outside of the Nordic region, providing support services such as networking opportunities, playlist participation, publicity and travel discounts. Annual board meetings (5 times a year) helped keep the dialogue running and key decisions on budgets, strategies and action plans would be made during these sessions. Recommendations and project reviews are sent to the board ahead of meeting by project managers from each office<sup>137</sup>. The annual funding of the programme fluctuated between 1.5 million DKK to 2 million DKK across the 5-year period.

Nomex is a strong model for cross-country collaboration because it directly addresses increasing circulation of non-national repertoire. The Nordic Playlist has been present at festivals and events across each participating country, showcasing the talent that is available. This cultural exchange saw the creation of Ja Ja Ja. Celebrating the best talent from the Nordic countries, Ja Ja Ja was born as the international arm of Nomex, exporting music to London and, in 2014, Berlin as a showcase club night<sup>138</sup>. The club night has grown to include festivals and showcases in Tokyo and Vienna<sup>139</sup>. All showcase costs are covered by the Nomex.

This network grew due to the strong collaborative effort from each office. Ways in which each office participated, aside from board meetings, were through the use of contacts, sharing information on social media, and individual event/panel organisation<sup>140</sup>.

#### 4.6.3 Brak

Independently run, but government funded, Brak is based in West Norway and is a non-profit artist and music business development centre. The company focuses on the support of many areas of the music industry, including musicians, bands, venues, promoters and music businesses. The city of Bergen funds the organisation, allowing it to provide free membership, workshops, seminars and guidance. Through the monetary support of the Bergen local government, Brak has a support centre that is readily available to the local music industry, providing advice and help for musicians, event promoters, organisers, producers, suppliers, and those who are interested in music and require advice on how to become involved. Help is available to all residents in Bergen via free membership. Whilst the organisation is run independently from the government, it also promotes the local music industry as an important place to experience music in Norway<sup>141</sup>.

Aside from support in the form of advice and guidance, Brak also set up a funding programme, SOMU, in 2012. Six recipients were selected in 2018, receiving a total of NOK 100,000 between them<sup>142</sup>. This funding programme is run by Brak but funded by the bank, Sparebankstiftinga. The government funding for Brak goes towards the administration and maintenance of this programme. Successful applicants can use the grant for recording, tours and collaborative projects<sup>143</sup>.

<sup>136</sup> Nomex, *About Us* (accessed 12.04.2019)

<sup>137</sup> Nomex (2016), *Nomex Annual Final Report 2016*, (accessed 12.04.2019)

<sup>138</sup> Ja Ja Ja Music (2019), *About Us* (accessed 16.04.2019)

<sup>139</sup> Ibid.

<sup>140</sup> Nomex (2016), *Nomex Annual Final Report 2016*, (accessed 12.04.2019)

<sup>141</sup> Brak (2019), *About Us*, accessed 7.05.2019

<sup>142</sup> SOMU (2019), *About Us*, accessed 7.05.2019

<sup>143</sup> Brak (2019), <http://www.brak.no/om-brak/prosjekter/>, accessed 7.05.2019

#### 4.6.4 Mannheim

Mannheim provides a large amount of government funding to music. In 2016 the city funded music with a total of €1,465.315. Institutional funding makes up 82%, of which the majority goes to the Popakademie and the Chamber Orchestra Ludwigshafen-Mannheim. €34,000 goes to infrastructural funding, which includes the management of rehearsal spaces and funding for local choirs. €68,200 was spent on music projects, across all genres, which includes touring grants, concerts and recordings. The Cultural Office also has two vehicles available to borrow by applicants (Bandmobil). Bands can apply for and use these for touring purposes.

The Mannheim Music Commission runs the Band Support Mannheim programme offering free, professional coaching to new bands. The programme is for 14 to 27-year old people who have written at least two of their own songs and can commit to an hour and a half per week for 1 year<sup>144</sup>. Coaches are graduates of the Pop Akademie, and aside from music business coaching, will also help to create a press kit - music video, photos, demos and interviews.

Mannheim's Cultural Office started a rehearsal room grant in 2016 following research that found that 76% of their survey respondents rated the rehearsal room situation in the city as difficult to bad. 6 bands are funded for a 2-year period in a bid to help the new generation of young talent in Mannheim. The grant subsidises the cost of rehearsal space by 50% (up to 200 Euros). New bands from the ages of 16 - 27 years old, with their own repertoire, can apply for this grant. There are some conditions to the grant: at least a third of the band must be residing in Mannheim; the band must be able to prove they have been active in the arts for the past year through songwriting, concerts and shows; and the use of the rehearsal room must already be in motion before receiving the grant. A jury of established musicians and music organisers from Mannheim will make the decision<sup>145</sup>. In 2016 the city gave out grants of €3,768 for this programme.<sup>146</sup>

#### 4.6.5 Tun€r 29

Tun€r 29 was created by Musiques et Danses en Finistère in Brittany (FR), an on-line tool presenting a state of the art of funding opportunities available locally. The tool helps to find or generate resources (sponsorship, financial aid, patronage, bank credit, other resources such as merchandising...), control spending and rethink the relationship of music actors with its partners to develop a broad understanding of partnerships: Public and private resources and also how to work with civil society organisations. This tool is intended for the whole music sector and covers creation, production, diffusion, cultural action, operating and international.<sup>147</sup>

#### 4.6.6 Katowice – UNESCO City of Music

Katowice is a dynamic city (over 300 thousand inhabitants), which underwent a large-scale urban regeneration, shifting from a heavy industrial centre to a cultural hotspot. It became on 11 December 2015 a UNESCO creative city in the field of Music. Thus, it conducts a wide variety of music projects: Every year Katowice hosts 27 music festivals. It organised in 2017 the edition of WOMEX, one of the biggest music fairs.

<sup>144</sup> Regioactive (2017), <https://www.regioactive.de/news/2017/11/29/workshops-gigs-kontakte-bandsupport-mannheim-erwartet-eure-bewerbung-65GRQz5YbB.html>

<sup>145</sup> <https://www.mannheim.de/de/kultur-erleben/musik/proberaumfoerderung>

<sup>146</sup> Stadt Mannheim (2017), *Förderbericht 2016 des Kulturamtes der Stadt Mannheim*

<sup>147</sup> Nimpe (2018) workbook

The music ecosystem in Katowice is very dense: there are 30 music clubs, 7 music labels, 12 recording studios, 11 music stores, 24 concert halls. Katowice delivered vast investments projects which now enable its cultural institutions to offer excellent artistic and visual experiences to music audiences. Opened in October 2014, the new seat of Polish National Radio Symphony Orchestra is popular for its acoustic of the highest quality as well as the architectural quality of both the concert hall and the whole building. Erected in the area of the former Katowice coal mine, NPRSO forms part of the Culture Zone, which provides a perfect example of revitalization of post-industrial areas through culture.

“The Symphony”, a concert hall of Karol Szymanowski Academy of Music opened in 2006 and develops a wide range of music activities, with concerts presenting both eminent artists and orchestras as well as young talented musicians at the beginning of their professional career. The Youth Palace is a place designed for the young people in Katowice, which offers diverse educational and training in music, theatre, dance and sport. The theatre concert hall, an integral part of the Palace, having been renovated recently, quickly became an important venue for jazz and classical music festivals in Silesia.

## **4.7 Support at city level**

More and more cities and regions in Europe (and around the world) are starting to put more emphasis on protecting and developing their music ecosystems, putting in place dedicated music policies, managing and developing music for economic, social and cultural gain. The Music Cities Network, an initiative by the Hamburg Music Business Association (IHM) and Sound Diplomacy, is a public/private network dedicated to improving communication and cooperation, sharing research and knowledge, exploring policy and advocacy and networking for policy makers, city leaders and all other music city stakeholders around the world. Current members are Aarhus, Bergen, Berlin, Groningen, Hamburg, Manchester, Nantes, Reykjavik and Sydney.

The following section gives examples of how cities and regions in Europe have been supporting the development of their music scenes through music policy.

### **4.7.1 Agent of Change**

In response to increasing music venue closures in cities due to new developments and noise complaints, the agent of change policy aims at protecting existing venues. Agent of Change places the responsibility for noise attenuation in the hands of the new developer. This means if a residential unit is being built near an existing venue, it is the responsibility of the residential unit to make sure noise from the venue will not affect residents, either by soundproofing the units or by paying for the venue to upgrade its soundproofing. Likewise, new or expanding venues must ensure their noise will not disturb existing residences and business. First introduced by the state of Victoria (Australia), in January 2018, the UK government announced that it would add Agent of Change to the National Planning Policy Framework.

### **4.7.2 Night mayors and Music Offices / Boards**

More and more cities have been creating new and improved governance structures to develop and support their music ecosystems and night time economies. Night Time Mayor, Night Czar or Night Ambassador, are policy positions devoted to the night. European cities

that have a night mayor, or similar initiatives include Amsterdam, Berlin, London, Paris and Mannheim. In Amsterdam, an initiative by the previous Night Mayor reduced crime in the Rembrandtplein district. A public safety and awareness campaign helped cut alcohol-related violence by 25%, with nuisance reports down 30%. In London, the Night Czar launched a comprehensive report detailing London's policy focuses as a 24-hour city and convened a Night Time Commission, which has seen many local authorities augment their local plans to include the night time economy.

Music Offices or music commissions, which come in different forms, unite music & non-music people, to conduct research, suggest policy and benchmark ideas to provide the justification to politicians and voters that change is required.

#### **4.7.3 Infrastructure Mapping**

Access to spaces and places – venues, creative spaces, rehearsal spaces, studios, offices, public squares and privately-owned public squares – is integral to the viability of the music- and cultural scenes. Infrastructure mapping helps cities to assess value, identify deficiencies and plan for the future. One of the most culturally-mapped cities in the world is Amsterdam. The city council knows where its music-related infrastructure is across the city. In London, a vast cultural infrastructure plan has been created, mapping over 2,000 lines of data for music-related uses alone. In Berlin, the Clubkataster, a directory of entertainment, cultural and amusement sites, which was launched by Music Board Berlin (the city's Music Office), is used to inform decisions on construction projects where noise complaints could threaten venues.



## 4.8 Concluding remarks – A substantial support but a scattered offer

The mapping of funding schemes shows that support for the music sector across Europe is far from homogeneous, with the picture at national and regional levels largely corresponding to the existing, highly uneven industry structure and extent of development. The diverse structures of government lead to diverse architectures of funding sources and shows that a more comprehensive study is necessary to understand the amount (and effectiveness) of money which flows to each dedicated action. Two thirds of public cultural expenditure in Europe takes place in regions and cities. Our analysis confirms that there are many interesting and forward-looking initiatives at local and regional level.

However, we observe that there is no clear East / West divide in terms of public support levels to correspond with that observed in the recorded music market. This can be explained through the rise of public expenditure towards culture in Eastern Europe between 2004 and 2017.<sup>148</sup> At the same time, cultural expenditures from Western member states decreased during the same period overall, and are still struggling to recover from the 2008 financial crisis.

Most of the current music funding schemes were developed during the 1980's and the 1990's, in order to support specific music genres and approaches to audiences (especially music institutions which require large budgets for running costs, or large music festivals).

The diverse strategies to support the music sector in Europe can show variable results. A genre-based institution (like Tempi, SNYK, Jazzdenmark or ROSA rock in Denmark) which implement funding schemes towards the music sector also play an important role by providing valuable tailored information to a particular subset of the music sector. When these institutions organise festivals, it allows them not only to augment their own resources but also provide a promotional stage for emerging artists where they can network with other professionals. Arms' length bodies such as arts councils also allow for greater transparency and equal access to funding for any kind of genres as well as increases efficiency and equitable to funding for all genres.

Another finding of the mapping of funding schemes is that there are in many countries several bodies responsible for supporting the music sector and a substantial number of grant schemes, which however results in a complicated environment to navigate for the music organisations and musicians. It is hard to follow the different funding lines and to understand at the end how much money is actually earmarked to a specific action, and hence to understand the degree or effectiveness of support.

There are very few more sustainable funding mechanisms in order to support the music sector as a whole, such as incubation programmes to support emerging projects (profit and non-profit), at the very beginning of their development, and help them to find the most appropriate business models to thrive. This point is addressed more widely in the next chapter.

<sup>148</sup> Budapest Observatory (2019) Public Funding of Culture in Europe, 2004-2017. The Budapest Observatory, March 2019



## 5 Gap analysis: where is support missing?

The results of our research, as well as the contributions of music stakeholders through the workshop, interviews, and the online consultation, helped to identify key trends which are affecting the development of a competitive, diverse, and sustainable music sector.

- **Digitisation**
- **Concentration**
- **Mobility**
- **Sustainability**

This part of the report explains how these trends affect the European music sector's competitiveness and diversity and what funding needs derive from them. It proposes an analysis of how far these funding needs are already covered at European as well as national level, based on the mapping presented in section 4. We then provide a short analysis to discuss what kind of support is still missing for each funding need.

### 5.1 Funding needs resulting from digitisation

The digital shift has brought up many challenges and opportunities to the music sector in its entirety. A multiplication of possible ways to consume and distribute music online has emerged, which results in stronger globalisation of the industry and a sometimes complex professional environment.

Geographical boundaries are less relevant and have almost disappeared for the artists and the labels, and now "every release is a global release". This has created a new environment for music professionals across the whole value chain. While opportunities around revenue streams are expanding, the return on investment is weaker than before and the new digital environment is complex to navigate (e.g. the complex royalty payment schemes<sup>149</sup>, not only for the creators but also for the music companies which have to develop international partnerships to make the most of global digital opportunities.

The increasing difficulty of music companies to gather revenues in turn results in precarity for young musicians who have often to deal with several jobs or occupations to make ends meet, turning the profession of musician into an exhausting job requiring substantial entrepreneurial skills.

#### 5.1.1 A complex digital environment to navigate for music sector professionals across the whole value chain

The digital environment is complex to understand and to navigate for all professionals in each part of the value chain (artists, promoters, PR agents, broadcasters...). New skills and new business models are required to understand how to navigate this fast-evolving digital environment. Furthermore, the rapid development and volatility of artists' careers create a need for capacity and knowledge building for artists to sustain their careers.

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<sup>149</sup> IDEA Consult, KEA & imec-SMIT-VUB (2017) Mapping the creative value chains: a study on the economy of culture in the digital age. Study for the European Commission, DG EAC, May 2017.

### Funding need 1: Funding for training and capacity building of the professionals of the entire music sector to better navigate the digital environment.

#### European level

**Support via Creative Europe:** The initiative *European Music Incubator* is designed to support musicians. Based on 5 themes (Music and brands, music and tourism, digital teaching, playlist and curator, music for movies and video games), it aims to support musicians by better distributing their music on streaming platforms and helping them to understand how to grasp other income: first in getting acquainted with alternative revenue sources such as synchronisation in video games, and then through capacity building to develop PR skills in the digital environment. The project *Towards 2020* was a large-scale cooperation project for helping musicians to adapt to the digital era. This project aims at developing skills for Europe's young musicians to successfully engage with 21st-century audiences and society through capacity building courses provided by digital specialists. The question of digitisation is directly tackled by *ECSA*, the European Composers and Songwriter's Association. This Creative Europe funded network aims to foster the adaption of composers and songwriters to the digital age both professionally (by improving their professional IT skills) and commercially (via collective thinking on new business models). Finally, the *INES network* website makes available showcase conferences and panel discussions, providing valuable tools that help understanding of the rapid development of online music work.

It appears that professionalisation training at the European level focuses mainly on emerging musicians, often at the end of their higher education degree. Training directed toward other parts of the value chain and to older professionals are fewer in numbers (some examples include *EXCITE* - Exchange of International Talent in Europe - that is directed not only towards musicians but also music businesses; Live DMA's *Live Style Europe project*; *Jump*, the European Music Market Accelerator).

**Support by Erasmus +:** STAMP is a Training and Lifelong Learning programme for Music Professionals. The project is completed but the tools developed and online courses are still online. The project aims to i) develop tools for vocational training (workshop models, guidelines for mentors and trainers, guidelines for staff mobility), available in an online platform, and ii) improve employability and entrepreneurship within the music sector in Central, Eastern and South-Eastern Europe. It provides webinars<sup>150</sup> and toolkits on diverse topics such as *artist and entrepreneurship* or *social inclusion of disadvantaged youth*, and has also set up a database<sup>151</sup> for online and offline training opportunities for music professionals throughout Europe. Most of the training sessions were filmed and are still available online.

Considering the importance of training and professionalization and the high demand from the sector, two **specific calls for proposals** have been launched by DG EAC to implement the **Preparatory Action on music in 2018 and 2019** respectively. Under the 2018 call on "*Training Scheme for young music professionals*", 10 projects received co-funding (also see section 5.2.5). The scope of action of these projects is quite large covering workshops and mentoring programmes either dedicated to a particular part of the value chain (musicians, publishing and synch professionals, music managers) or for young music

<sup>150</sup> See: [https://www.youtube.com/watch?v=cp2CqHr5v2o&list=PLdC\\_gBS536bmrKYnD5Uxlp9BKdYIH262\\_](https://www.youtube.com/watch?v=cp2CqHr5v2o&list=PLdC_gBS536bmrKYnD5Uxlp9BKdYIH262_)

<sup>151</sup> [www.stamp-music-training.org/](http://www.stamp-music-training.org/)

	professionals indiscriminately, often with an emphasis on gaining entrepreneurial skills. These actions are very welcomed as they allow young music professionals to gain both a better understanding of the evolving digital environment as well as concrete skill buildings through mentorship programmes, workshops or conferences. Under the 2019 call, the selection of projects is being finalised in the early spring 2020.
<b>National level</b>	The issue of digitisation is less often tackled at the national level than at the European level. Some initiatives exist in <b>Denmark</b> via <i>Tempi</i> , one of the four music associations of Denmark. It provides a database of Danish artists/ bands with an individual presentation containing a picture of the band, a short biography, and links to the social media and digital music platforms which help the musicians to promote themselves online. <b>Estonia</b> provides support for composers with a sub-programme “support to publishing”, but its scope in terms of funding and beneficiaries is limited as its total budget is only EUR 50,000. Other countries like <b>Belgium</b> ( <i>Podiumskunten</i> and Cultuur Loket) provide grants to attend capacity-building conferences which may tackle this issue. The CNV in <b>France</b> also provides capacity-building workshops. It, however, remains unclear how well this issue is tackled within such capacity-building workshops (no detailed evaluation is available).
<b>Short Analysis</b>	<p>Although some interesting initiatives striving to solve the issue of capacity building in the digital environment exist at the European level, their scope remains limited as the projects remain limited in time. A project like the <b>European Music Incubator</b> is a project tackling very well the issue but is limited in terms of scope as only 7 musicians were able to participate due to the limited funding available. Furthermore, the few capacity building training initiatives seem to focus mainly on creators which leaves aside a considerable proportion of professionals across the music value chain. It is harder to assess how far this issue is tackled by the member states.</p> <p>It is also worth noting that there are no identifiable funding schemes focusing on helping the artists to develop new skills at the end of or after their creative careers.</p>

### 5.1.2 European music diversity and online music platforms

One of the key challenges identified deals with the mechanisms of online music promotion and the potential threat to music diversity, with an increased appearance of “top hits” and “top artists”, and difficulties to gain visibility and promote non-mainstream music.

The issue of concentration of plays has also a strong consequence on the revenue of smaller music companies. Although digitisation opens up many remuneration opportunities for music companies (via branding, VIP experiences, synchronisation, fashion...), the multiplication of thinner revenue streams creates a fragile financial environment for the production of new musical works.

Furthermore, the resources and capacities for music companies to access, understand and process data (if available) to develop a PR strategy and targeted marketing for their artists are lacking. All in all, this leads to increased risks when music companies want to produce and release new music, which could result in a vicious circle of underinvestment in new emerging artists. Smaller music companies are the backbone of the sector<sup>152</sup>, the real

<sup>152</sup> Guibert, G. (2006); *La production de la culture – Le cas des musiques amplifiées en France*, Mélanie Séteun et Irma éditions, St Amand Tallende,

innovators and risk-takers, providing the necessary elements to develop a sustainable economy of diversity: cultural diversity, diversity of choice and diversity in entrepreneurship.

This trend results consequently in two funding needs:

Funding need 2: Funding for support mechanisms to promote music diversity online	
European level	<p>Promoting European music diversity is at the heart of <b>Music Moves Europe</b> initiative (MME), the EU-level framework in support of Europe's music sector, which translates in targeted funding including for promoting diversity online. For example: Some <b>Creative Europe</b> projects, networks, and platforms such as <b>ECSA</b>, <b>Rema</b>, <b>ETEP</b>, and <b>Europavox</b> are addressing the problem of the visibility and the promotion of European music diversity online. In the framework of its digital activities entitled <b>REMAMEDIA</b>, the European Early Music Network runs a web radio dedicated to its members and young ensembles: <a href="http://www.remaradio.eu">www.remaradio.eu</a>. In addition to that, many video interviews and conferences can be found on <a href="http://rema-eemn.net/videos">http://rema-eemn.net/videos</a>. The <b>ETEP</b>, the European Talent Exchange Programme, is also aiming to achieve more media-coverage and visibility for artists. However, it is unclear how far this aim encompasses a digital strategy. Finally, <b>Europavox</b> is compiling 649 contemporary emerging European bands or artists on its website, classified in 23 genres, many sub-genres and by geographical provenance. Each of the bands has a profile that features an article written by a European journalist, link to social media, YouTube channel and digital music platforms.</p> <p>If these projects are very important to the promotion of diversity online, their scope remain however limited as they promote targeted genres and are based on a top-down principle. The European audiences can only access the music curated on these platforms and the content reaches only those music enthusiasts aware of the existence of these specialised websites and projects. The call for Online and Offline Distribution projects of the first phase of the Preparatory Action on music has co-funded promising start-ups and technologies who could enable a more <i>organic approach to European audience development</i>: either via the creation of a low-cost music distribution software (<b>Eveara</b>), or via tailor-made radio monitoring services allowing the bands to discover where they have fans all over Europe and to connect with them (<b>WARM</b>).</p> <p>The better promotion of the European music diversity online can also occur via capacity building programmes aiming to equip musicians with better digital skills, and with capacity building workshops about copyright and authors' rights in the digital age. These kinds of projects are however very rare and limited in scope. Only two projects from the popular music genres (<b>European Music Incubator</b> and <b>Jump!</b>) are providing capacity building around the topic of the online dissemination of music.</p>
National level	<p>If many funding schemes supported by Member States strive to enrich and support a diverse musical production in terms of genre, very few funding schemes are tackling directly the issue of diversity online. Music organisations (e.g. the IRMA in <b>France</b> or the music centres in <b>Denmark</b> and <b>Belgium</b>) which provide capacity building workshops to help musicians to understand in a better way the digital music world. Some export offices also have playlist projects (e.g. the playlist <i>What</i></p>

	<i>The France of the Bureau-Export</i> ), which aim to improve the visibility of artists produced in France on streaming platforms.
<b>Short Analysis</b>	There are only very few funding schemes tackling the issue of European music diversity online, at European as well as national level, which represents a crucial gap in funding considering the potential benefit of music streaming for the promotion of the very large European musical diversity within and beyond the European borders. The actions in the context of MME launched in 2018 are therefore very timely and relevant. The supported 8 innovative online and offline music distribution models have the potential to increase the visibility of European repertoires beyond mainstream hits.

### Funding need 3: Funding for a diverse musical production

<b>European level</b>	<p>No funding schemes were found at the European level to support the productions from smaller music companies or music initiatives. Some support is however available to nurture the careers of emerging artists, notably in terms of market access and audience development.</p> <p>Music Moves Europe Talent Europe: the award promotes emerging artists who represent the European sound of today and tomorrow. The awarded artists receive a Music Moves Europe Talent Award in recognition of their international success, as well as being rewarded with a performance at the Eurosonic Noorderslag showcase, a training programme and financial support for touring and promotion. The Music Moves Europe Talent Awards are designed to accelerate the international careers of upcoming European artists.</p>
<b>National level</b>	<p>Some funding schemes supporting music production (labels, recording studios, publishing companies, producers...) could be found at national level in countries showing a strong level of support. For example, the existing tax credit for phonographic producers in <b>France</b> (since 2006) shows that the beneficiaries of this tax credit are spread all over the territory, and that the tax credit generated €2.46 of fiscal revenues per €1 invested in the scheme.<sup>153</sup></p> <p>Whilst some effective mechanisms were identified in countries showing a strong level of support, almost no support could be found in the three other categories of countries (from strong/medium, medium, and small) that cover a large part of the EU. When available, support to recorded music is very often limited to covering the composers' fee (for example for the creation of the music for a movie, as in <b>Estonia</b>), recordings of heritage music in <b>Portugal</b> or to the promotion of a record abroad in the framework of music export support schemes.</p>
<b>Short Analysis</b>	Supporting smaller music companies and composers is a way to ensure a diverse culture of music production. When support exists, it is generally restricted in terms of genre, or directed piecemeal to the musicians and not to the infrastructure. Overall, the support available does not seem sufficient to fight the potential vicious circle of underinvestment in new music talents.

<sup>153</sup> Impact evaluation of the tax credit for phonographic producers – French cultural ministry July 2018. <http://www.culture.gouv.fr/Presse/Communiqués-de-presse/Le-ministère-de-la-Culture-publie-une-évaluation-de-l-impact-du-credit-d-impot-en-faveur-de-la-production-phonographique>

### 5.1.3 Digitisation and music consumption

Studies show a rise in music consumption, especially digitally. Music is consumed in an increasing way on playlists, which are either curated by the platforms themselves, or by algorithms that apparently show a tendency to decrease the diversity of accessed music.<sup>154</sup> As noted in the previous chapter, this results in a lack of visibility for artists who are not put at the forefront of this form of curation, where very often the audience does not know the performing artist, the songwriter, and the substantial amount of work invested in it. Related to this, there is a need to educate the younger generation about the value of music and copyright and what music really means (work and dedication invested in music creation) and to continue to educate against piracy issues.

Funding need 4: Funding for music education and awareness-raising of the reality of music production for young audiences	
<b>European level</b>	<p>At the European level, the Creative Europe programme finances a large number of projects pursuing an audience development objective, especially towards children. These projects are mainly considering the Opera, classical music, and new music genres (e.g. Music Up Close Network, European Music trails, Nig Bang, C3CIC). However, no project is aiming at raising awareness of the public about the music work “behind the scenes” in a music literacy perspective.</p> <p>Some projects are focused on defending the value of the copyright at the European level (ECSA), but this activity is not directed toward a larger audience beyond the European policy-making sphere. The European Music Council, through the promotion of its five music rights, is doing valuable work for the promotion of the value of music but has no funded actions directed toward young audiences.</p> <p>Support to music education is the subject of a call for projects to implement the 2019 Preparatory action on music. The call is expected to be launched in the early spring 2020.</p>
<b>National level</b>	<p>At the national level, the publicly funded German Music Council is the only identified organisation at national level which seeks to raise awareness on the value of creativity.</p>
<b>Short Analysis</b>	<p>There are almost no funding schemes existing to promote the value of music, neither at the European level nor at the national level, even in countries showing a strong level of support to the music sector. While this education and awareness-raising may be done by music schools or associations of amateur music practices, this remains limited in terms of outreach as music players represent only a small part of the wide number of music consumers. The relatively small coverage of this funding need highlights the lack of comprehensive data on music education in Europe. This funding need may therefore be best addressed through a first targeted research on the topic before developing specific funding lines.</p>

## 5.2 Funding needs on concentration and diversity in the live music sector

The relationship between concentration and diversity in the live music sector (venues and festivals) is also an issue that has been recurring throughout our research and flagged as a crucial one by the stakeholders consulted.

<sup>154</sup> Michael Hann (2019) How Spotify's algorithms are ruining music. Financial Times, 06.05.2019. <https://www.ft.com/content/dca07c32-6844-11e9-b809-6f0d2f5705f6>

### 5.2.1 A decreasing diversity on European live events

The concentration in the live music festival sector affects music diversity by 1) a less diverse line-up; and 2) a lower fee for emerging artists as a result of the augmentation of the headliners' fees.

Music venues, especially the smaller ones, also face market and societal challenges. Europe boasts a well-developed and diverse club scene, which is a strength of the sector, as small clubs can be seen as incubators where emerging artists can grow and develop their audience. However, music clubs increasingly face pressure and restrictions from local authorities due to urban regeneration and gentrification, and extensive noise regulations. Music venues also need to face the radical changes in way of music consumption, which makes it hard to attract younger audience.

Funding need 5: Funding to promote diversity in the live music sector.	
European level	<p>Several initiatives under Music Moves Europe tackle the issue of concentration and diversity in the European live music sector. The <b>Creative Europe</b> project Live Style Europe (LSE) aims to empower regional and national live music associations, as well as music venues, clubs and festivals by providing them with skills and tools for an easier adaptation to the evolution of the live music sector. Considering the crucial role of grassroots live music venues for the promotion and the emergence of new talents, this initiative seems to be important in order to promote diversity in live music events. Another Creative Europe project that supports the circulation of emerging artists is the Liveurope platform. Liveurope consists in a bonus mechanism for live venues to book emerging artists from other European countries and which shown substantial results. In four years Liveurope contributed financially to the organisation of 1831 concerts of 14 music venues spread all around Europe. It boosted the booking of European emerging artists by 63% in four years of existence. The platform SHAPE is similar to Liveurope, however focusing on festivals and electronic music. It gathers 16 organisations spread over 12 European countries. Europavox and NIMPE also tackle these issues.</p> <p>The 2019 Preparatory Action on music also aims to tackle this issue, through its 2019 call for proposals on "Small venues". It focuses on the cooperation of grassroots venues with a capacity of up to 400. The objective is to strengthen cooperation between clubs, as well as to reinforce the dialogue between clubs and urban authorities in order to enhance the functioning of the club scene and hence to promote diversity.</p> <p>Finally, the Music Moves Europe Talent Awards support emerging artists who represent the European sound of today and tomorrow. Every year, eight outstanding artists receive a Music Moves Europe Talent Award in recognition of their international success, and are rewarded with a performance at ESNS (Eurosonic Noorderslag), a training programme and financial support for touring and promotion. The Music Moves Europe Talent Awards are specifically designed to accelerate the international careers of upcoming European artists.<sup>155</sup></p>

<sup>155</sup> For more information, see: <https://musicmoveseuropetalentawards.eu/>



<p><b>National level</b></p>	<p>At the national level, several funding schemes are geared toward supporting the costs of artists' fees for concerts as well as promotion support for young or emerging artists or bands.</p> <p>Countries with strong levels of support have set up direct funding schemes towards music venues, beyond national institutions. They also provide funding to help music venues to adapt to new regulations in terms of security (emergency fund of the CNV in France) or to help purchasing upgrades of their equipment (infrastructure fund of the <i>Initiative Musik</i> in Germany).</p> <p>In the other countries, the support provided is mostly geared toward the promotion of excellence rather than the promotion of emerging acts.</p> <p>Also due to their importance for local and regional development, the support to festivals is chiefly provided at the regional or local level, and thus harder to assess. On average, public funding accounts for 30% to 55% of a festival budget with local funding covering around 20% of the whole festival budget.<sup>156</sup></p>
<p><b>Short Analysis</b></p>	<p>Several initiatives at European level are effective in tackling the concentration issue and to promote diversity in European live musical events (e.g. Liveurope). While there is no funding gap per se, increasing funding volumes could be considered in order to amplify their positive results for diverse programming.</p> <p>Support to the live music sector at national level seems adequate in countries which show a strong general level of support to the music sector. However, few funding opportunities supporting the infrastructure of live music venues could be found, especially at the grassroots level. In the majority of the European countries, support to live music venues outside of classical music is non-existent.</p> <p>The section on music policy from a governance perspective as well as the Berlin case studies underlines that a good structuration of the dialogue between the live music sector stakeholders with their local authority is crucial for this subsector (see also section 5.7). Initiatives aiming at creating collaborations, policy discussion space and exchange of good practices of live music networks could be envisioned.</p>

### 5.2.2 A lack of information preventing the circulation of European live acts

Challenges concerning the mobility of artists have also been identified by our research as well as in the workshop held on 13 June with some leading European music organisations. These include mainly visa and double taxation issues, as well as the lack of market information which are preventing the circulation of the European musical diversity.

<sup>156</sup> Négrier, E.; Bonnet L.; Guérin, M. (2013) *Music Festivals, a Changing World, An International Comparison. The study is based on the sample of 390 festivals based in Finland (20 festivals) Flanders (18), France (92), Ireland (21), Norway (10), Quebec (43), Spain (97), Switzerland (7), Sweden (23), WBF (Wallonia-Brussels Federation) (52), Others - Bulgaria, Denmark, Iceland, Lithuania, Luxembourg, Poland, Portugal - (7)*



### Funding need 6: Information on touring and mobility

<p><b>European level</b></p>	<p>At the European level, the organisation <b>On The Move</b>, a cultural mobility information network, provides very useful guides and information about funding opportunities for the mobility of cultural professionals, that also encompasses the music sector. The sectorial organisation <b>Pearle*</b> also provides useful “cookbooks” for issues around mobility (e.g. on VAT, taxation for artists, and social security in an international context).</p> <p>Besides that, many <b>Creative Europe projects</b> are supported to foster the mobility of musicians and professionals of the music sector but none of them strive to increase the information around mobility issues.</p> <p>We should in particular mention here the <b>pilot project I-portunus</b> which is dedicated to the mobility of short-term mobility of artists and culture professionals. The results of the third call for application show that out of 832 applications, 43.69% come from the performing arts sector (including live performances and the opera sector).<sup>157</sup></p> <p>The Music Moves Europe Talent Awards also includes Touring &amp; Promotional Support: € 7.500 to help the winners cover expenses related to international touring and promotion. The prize can be spent on any kind of touring or promotional expenses like: nightliner rentals, hotels, ad campaigns, promotional materials, etc.</p> <p>The programme <b>Erasmus+</b> is actively supporting the mobility of music students.</p> <p>On the policy side, EU level cooperation with Member States in the context of the Work Plan for Culture 2019-2022, also focuses on “working conditions of artists”. A respective study (results in the spring 2020), launched by the Commission, is expected to feed those discussion and will inter alia provide further insights also in relation to mobility issues.</p>
<p><b>National level</b></p>	<p>Many grants are available at national level to help musicians or bands go on tour within the country or outside the country (i.e. export schemes). As for the other funding needs (e.g. Funding need 3), these schemes are mainly concentrated in the categories of countries who show a stronger level of support. Funding for mobility exists also in countries who show a low level of support. It is supported by private cultural institutions or foundations as is the case in Romania. Support for mobility is often provided as a reimbursement of touring costs (travel or transportation of instruments) or as a guarantee in case of an unprofitable project.</p> <p>There is no funding scheme at national level to foster co-productions among European countries beyond the bi or tri national funds of cultural institutions. These funds are aiming to foster the artistic mobility only between neighbouring countries. An example is the German-Franco-Swiss Fund Impuls Neue Musik, that promotes projects which result from collaborations between musicians and / or composers of the three countries.<sup>158</sup></p> <p>A good practice example is the French organisation <b>Zone Franche</b>, a world music network based in France, which has created an ‘Artists’ Visa Committee’ in 2009 to respond to the growing difficulties for music organisations to deal with visa applications for international activities. It can be accessed by touring managers, festival organisers, self-produced artists, record labels, programmers, music professionals in general, as well as local authorities who encounter issues to invite a foreign artist to France. The Committee supports the visa application process and</p>

<sup>157</sup> <https://www.i-portunus.eu/about-the-programme/i-portunus-statistics/third-call-2019/>

<sup>158</sup> For more information consult [fr.impulsneuemusik.com](http://fr.impulsneuemusik.com)

	helps to find solutions to sticking points, working with the responsible ministries, it carries out legislative monitoring, indexes and analyses blocking situations and advocates for easier circulation of musicians.
<b>Short Analysis</b>	<p>If the issue of encouraging and funding mobility seems quite well-tackled at European and national levels (through export offices), there is little information and resources on the issues related to mobility such as visa requirements for inviting a music professional originating from a non-EU country, instrument transportation or double taxation besides On The Move and Pearle, which have compiled dedicated information on Visa and taxation issues. The ongoing EU level study on working conditions for artists can be expected to provide additional insights.</p> <p>However, funding related to some more practical aspects of music touring are not taken into account in the European funding ecosystem (visa, instrument transportations, and advice on double taxation). Such funding would benefit both to the music creators (artists, composers, songwriters) as well as agents, promoters and concert venues.</p>

### 5.3 A growing awareness and concern about the sustainability of the music sector

The music sector in its global nature is increasingly concerned by sustainable development issues, and the role of music in tackling wider societal issues. The consultations and research carried out for this study point to five main funding needs in terms of societal challenges and sustainable development:

- gender equality;
- well-being of music professionals;
- ecological issues;
- employment and decent work for all;
- more inclusive, safe, resilient and sustainable cities.

These topics largely overlap with the societal challenges identified by Horizon Europe, and the strategic objectives of the European Gender Equality Strategy 2020-2024.

Finally, there is a need to rethink the funding infrastructure, which is mainly based on one-off grants, by mixing it with more long-term funding via institutions and incentive-based models to strengthen the resilience of non-profit music organisations.

#### 5.3.1 A lack of funding for projects tackling societal challenges

There is a growing awareness in the music sector of the role it has to play in cross-cutting societal changes, such as gender equality, ecological issues and well-being, but also fair work, and the resilience of cities. These topics are of utmost importance for the long-term sustainability of the sector, as well as being questions of responsibility. The gender balance is an equality issue but also one of talent identification and opportunities (i.e. ensuring non-discriminatory access to music careers). Ecological issues challenge existing business practices, their impact, efficiency and costs, and more broadly question the role that arts and music play in raising awareness and in setting an ambitious environmental-friendly agenda. The awareness of this issue is however fairly recent across the sector and responses are not well developed. Finally, concern around the well-being of musicians is rising within the music sector but it is still too often considered as a taboo issue within the industry. We picked up these issues since they were raised very frequently during the different consultation rounds, although they are recent on the music policy agenda.

Funding for projects relating to other societal challenges, like social inclusion, racism or European citizenship and feelings of belonging, could also be possible funding targets.

### Funding need 7: Funding to help the music sector to address societal challenges

#### European level

Concerning the topic of gender equality at European level, the initiative **Keychange** that is supported by the **Creative Europe** programme is stimulating talent development, exchange and innovation by creating new international opportunities for performance, creative collaboration and capacity building amongst female musicians and innovative industry professionals who are pushing the boundaries of their practice. They released a manifesto proposing ways to tackle gender issues at European level. The initiative's strategy seems appropriate for generating more efficiency within the European music sector as it both raises awareness about gender inequality within the music industry as promoting the place of women through dedicated actions. The **SHAPE** platform is also paying attention to gender equality through promoting an almost gender equal artists' selection. The project **Wom@rts** also seeks to increase gender equality in several branches of the cultural and creative sectors.

Finally, the first phase of the **Preparatory Action on music** focusing on *training needs for young music professionals* supported a *Mentoring Programme for **Women Entrepreneurs in Music industry***. This project aims to equip young women entrepreneurs with business skills and to empower them and to strengthen their place in the industry by giving them advice on how to manage their careers. The results of this programme are expected by mid-2020. The third year of the Preparatory Action on music (2020) is expected to focus, inter alia, on sustainability, including gender equality. Respective calls can be expected during the course of the year.

Concerning the topic of environmental sustainability, the support of Creative Europe is quite low, possibly because of the relatively recent awareness of this issue within the sector. Only two Creative Europe projects touch directly upon the issue of environmental sustainability of the sector. It funded the project **Imagine 2020 (2.0)**, that aims to "raise awareness in the cultural field and in a broader civil society context around climate change and the socio-ecological crisis." It also supports the London-based Creative Climate Leadership programme (CCL), led by **Julie's Bicycle**. It is a programme that attempts to use the transformative power of culture as a driver of lifestyle change in order to address ecological issues. This project was not dedicated to the music sector itself but encompassed e.g. musicians and music projects in its activities.

Concerning the topic of mental health and well-being of music professionals, there currently aren't many actions undertaken at national nor at European level. The Creative Europe project **NEFELE** (Network of European Art Festivals for mEntal HealTh Enhancement) is the only creative Europe funded project European which address directly these issues by inviting artists to reflect about this topic during festivals in order to raise awareness on the issue. It does not specifically target the music sector, however. To implement the 2019 Preparatory Action on music a call for tender for a **study on health issues of musicians** was launched end of 2019. It will certainly help to better understand the health and working conditions for musicians and music creators around the EU and the national differences for the treatments of mental disorders for musicians within the EU 28.

	<p>In terms of resilient cities, programmes such as URBACT and the Urban Innovative Actions are focusing on resilience of European cities, although very few music-related projects are supported. As part of Music Moves Europe, a call for proposals on Co-operation of Small Music Venues was launched in 2019. It aims at promoting a sustainable live music distribution through cooperation between small- and medium sized music venues in order to stimulate innovative collaboration models and to enhance venues' role and identity in the local community.</p> <p>Creative Europe launched in 2016 a call for projects aiming at <u>refugee integration</u>. The call financed 8 projects to focussing on the inclusion of migrants into the European society. Two projects were projects that used music as a means for integration, i.e. <b>ORPHEUS XXI</b> - Music for Life and Dignity, <b>The sound routes</b> – notes for getting closer. This shows that music is a good lever to pursue social innovation objectives, and namely to foster inclusion and social integration.</p>
<b>National level</b>	<p>Only two initiatives could be identified at national level in Belgium, via the organisation Podiumskunsten that provides a programme providing information, research and formation about security issues and well-being at the workplace. Some countries like France, Lithuania, Croatia provide governmental social insurances systems, but their degree of coverage and their impact on the music professionals still has to be studied.</p>
<b>Short Analysis</b>	<ul style="list-style-type: none"> <li>▪ <u>Gender issue</u>: Keychange is a relatively new initiative which quickly achieved a very high visibility within the European music sector. The Mentoring programme for women entrepreneurs in music industry, supported by Music Moves Europe (PA 2018) also tackles this challenge via capacity building.</li> <li>▪ <u>Environmental sustainability</u> is a relatively new topic in the industry (cf. section 3.3). Projects have so far focused more on raising awareness about the topic rather than on developing solutions for music sector professionals and on exchanges of good practices.</li> <li>▪ <u>Mental health and well-being</u>: support is almost non-existent, except for the new study (launched in the context of the Preparatory Action on music). That study would be best placed to inform about the need for possible EU action in this field.</li> <li>▪ <u>Employment and decent work for all</u>: specific support is not available as such. However, this is often included as a cross-cutting priority of many funding schemes (e.g. this is one of Creative Europe's objectives).</li> <li>▪ <u>Resilient cities</u>: as analysed in section 4.7. more and more cities are developing a holistic approach to their music ecosystem and developing innovative policies for a sustainable music sector locally (which in turns contribute to the resilience of the city by creating jobs and social impacts). Some of these initiatives would benefit from peer-learning projects to support the roll-out of such approaches in other cities.</li> </ul> <p>Overall, the European level seems to be a better scale to enhance dialogue and exchanges of good practices concerning these three central topics of sustainable development (gender equality, mental health and environmental issues). The new calls to implement the Preparatory Action 2020 will be of relevance to promote sustainable development, including gender equality. The new Creative Europe programme could include gender balance requirements as one of the horizontal principles.</p>

### 5.3.2 A lack of long-term perspective on support for the European music sector

This aspect has been underlined in the different consultations carried out, and is missing in many funding programmes which tend to focus on grants and support to specific projects. Cuts in funding to music institutions which provided non-financial support to the whole sector are amplifying this trend (i.e. the reported cuts in funding of public radio stations which generally also host orchestras/ensembles, develop capacity building training schemes, and host music education workshops).

The mapping and analysis of the funding schemes display a very scattered offer in terms of available support and funding mechanisms across Europe, with a predominance of one-off grants, which prevent the development of long-term structures. It also results in a complex landscape to navigate for music industry professionals. Additionally, institutions providing skills development and capacity building are in high-demand by professionals of the music sector.<sup>159</sup>

Funding need 8: Need for more long-term and sustainable perspectives in the music support ecosystem	
European level	<p>The EU funding dedicated to <b>networks and platforms</b> such as the EJN, AEC, Opera Europe, Live DMA, ECSA or REMA, are sustained in the long-term and essential in terms of visibility and benefits for their members.</p> <p>However, the diversity of the sector in terms of structuration is not wholly represented by existing networks. Diversity of genres and geographical coverage remains a challenge for the European music sector and the promotion of its diversity.</p> <p>With the <b>Music Moves Europe</b> initiative, the European Commission seeks to develop a comprehensive and sustainable approach to EU level support to music.</p>
National level	<p>We observe that there are very few institutions at the national level that are working on 360° support to music, i.e. providing consulting, an information platform, hosting capacity building trainings, etc. Denmark is in that sense an outstanding example with dedicated institutions to four genres which are not only proposing diverse financial support schemes via grants, but also provide important non-financial forms of support via capacity-building encompassing e.g. information on PR, touring and internalisation. For the countries showing a low or a low to middle support to the music sector, this type of support is only provided by classical music institutions. This points to needs in terms of funding to continue and deepen the structuration of the sector as well as a need to broaden its spectrum in terms of genre and sub-sectors.</p>
Short Analysis	<p>At the European level the networks seem to be a structural element for the European music sector, but does not cover the specificities of each sub-sector. Europe should continue to help the sector to strengthen and deepen its structuration at the European level. The focus on the development of transversal funding schemes that are well-integrated in the value chain of the different music subsector (e.g. Liveurope and SHAPE) rather than multiplying the grant possibilities, would help to address the lack of readability of music support.</p>

<sup>159</sup> This was voiced in all consultation rounds carried out by a very different range of stakeholders.

## 5.4 Key takeaways of the gap analysis

This chapter identified 8 funding needs

- Funding need 1: Funding for training and capacity building of the professionals of the entire music sector to better navigate the digital environment.
- Funding need 2: Funding for support mechanisms to promote music diversity online
- Funding need 3: Funding for a diverse musical production
- Funding need 4: Funding for music education and awareness-raising of the reality of music production for young audiences
- Funding need 5: Funding to promote diversity in the live music sector.
- Funding need 6: Information on touring and mobility
- Funding need 7: Funding to help the music sector to address societal challenges
- Funding need 8: Need for more long-term and sustainable perspectives in the music support ecosystem

The gap analysis showed that the identified funding needs are generally not sufficiently covered at the **European level**. Creative Europe is the only European programme that covers most of the funding needs but the support remains limited as the projects are either on hold or punctual.

Hence, at this stage, the scope of the support is not fully aligned with the development of the European music sector and cannot support adequately the European music ecosystem, especially when considering its limited budget. However, there are already some projects that are aligned with the needs of the sector. They have been identified as good practice examples and can serve as a basis for the recommendations formulated in the next chapter.

**Table 21: Overview of the Gap analysis in funding needs at the European level**

Funding needs	1	2	3	4	5	6	7	8
Creative Europe - <b>Networks</b>								
Creative Europe - <b>Platforms</b>								
Creative Europe - <b>Projects</b>								
Creative Europe - <b>GF*</b>								
Preparatory Action on music (2018-2020)								
Erasmus +								
H2020								
Cosme								

Legend:

	Not sufficiently covered but good practices identified
	Some funding schemes available but topic not sufficiently covered or hard to assess
	No projects / funding schemes

We saw at the **national level** that there is a wide range of funding architecture in Europe that can be classified in four broad categories. All the funding needs tend to be partially answered but often only by a few countries with more advanced support ecosystems. The gap analysis at the national level shows that:

- 1- The European music ecosystem, and especially the European music market is strongly globalised and cannot rely only on national policies in order to fill the funding gaps identified.
- 2- The degree of support can vary greatly within the European member states, and the 8 identified funding needs are relatively well-addressed only in a limited number of countries (e.g. Denmark, Belgium, France, Germany, the UK).
- 3- For countries with a lower level of support, all funding needs identified are not well-addressed.



## 6 Conclusions and recommendations

### 6.1 Main conclusions

The music sector is a vibrant economic sector, but also an essential part of the daily lives of European citizens. Although a lesser breadth of evidence is available on this, music education, amateur practice and concert-going are constitutive elements of today's European societies.

Firstly, the attendance to concerts in small or big venues but foremost on festivals is on rise everywhere in Europe. Beyond the economic importance of such events their social role should be underlined. Venues are a vector of social engagement and social cohesion, through the engagement of many volunteers, the hosting of not only concerts but also of rehearsal studios, bars, restaurants, etc. Music festivals account for the majority of festivals, a type of event showing an exponential increase since the last 20 years or so. Festivals also play a key role in the strategy of territorial development of regions and create cohesion between sometimes several tens of thousands of visitors. However, for this part of the sector the available data is still limited and of questionable quality. Moreover, the professional structure of music festivals is very uneven throughout Europe.

The consumption of recorded music is on the rise thanks to the multiplied distribution possibilities offered by the digital era and the growing popularity of music among the young generation. The recorded music sector has to a large extent embraced and overcome the digital disruption and is now growing, economically speaking. This is reflected by the continuous growth of royalty collections, and overall revenues are increasing, thanks to the growth of digital revenues offsetting the decline of physical formats. While the recorded European Music sector is now stagnating, this study shows that this stagnation hides actually many disparities; these are highlighted in the first chapter of the report. The European recorded music market is a mix of countries that range from being in the top 5 of the world's markets to underdeveloped and emerging music markets. The structuring of the markets, i.e. the share of each revenue source in the total revenue of the market (physical sales, digital, performing rights, synch) varies also greatly within the EU28.

The digital environment is still hard and risky to navigate for industry professionals who have a huge job in order to cope with these fast-paced evolutions, especially on how to adapt promotion and marketing strategies to the new ways the audience tastes are built.

If the digital shift is bringing new challenges to which the music value chain must adapt, it has still not particularly shaken some key characteristics of the European music market, namely:

- The concentration of the recorded music industry, which is also more and more evidenced in the live sector;
- The limited online and offline cross-border circulation of European repertoires, as Anglo-American repertoires also dominate the online market (followed by local repertoires).

In terms of funding, little dedicated support is currently available for the music industry at EU level. The mapping shows that funding opportunities for the music sector (and wider cultural and creative sectors) are available in several programmes within and beyond Creative Europe. However, overall the support does not specifically target the music sector, albeit a few calls explicitly target the wider creative industries. Whilst support is technically open to music SMEs, very few of them actually use or from benefit EU support from such programmes not specifically targeting the CCS (e.g. Horizon 2020 or COSME).



For instance, COSME's beneficiaries are most often regional and national economic and business associations or SMEs active in manufacturing and overall light industries. In relation to Erasmus+, the research revealed that most of the beneficiaries are education institutions with little participation from the music industry.

The diversity and fragmentation of the sector poses several issues and challenges in terms of policy-making. First and foremost, a European music policy needs to address the diversity of actors (large and small, for-profit or not, and sometimes publicly-funded). Second, the myriad of music actors is active at very different levels, and is often not well-connected to European funding (and policies). Third, both the commercial industry and more socially-oriented music practices require differentiated approaches and have different funding needs compared to grassroots music SMEs.

From a policy perspective, it is worth noting that music is taking a more prominent role on the policy agendas at different levels of governance: 1) at EU level, in the framework of the Music Moves Europe initiative; 2) in a few European countries, though the mapping exercise has demonstrated that only a handful of Member States have designed a comprehensive music strategy; and at local level, where some initiatives like the Music Cities convention are placing music in a central position for local development.

The analysis developed in the previous sections also points to the need for music education in a very broad sense: music literacy skills are more needed than ever, since the mediation and curation role is becoming much blurrier and is taken up by artists themselves, playlists on streaming platforms, and still some specialised media outlets.

Educational needs also relate to important areas including copyright education for the music sector (which could be addressed as part of the relevant Creative Europe funded 'networks', but also awareness-raising campaigns towards the general public, as well as promotion and marketing, where social media have drastically changed the way promotion and marketing is done. Training and professionalization are of essential importance everywhere in the EU: there's an increasing demand from musicians for resource centres, access to showcase festivals, and conferences (this is why targeted training calls were launched to implement the 2018 and 2019 Preparatory action "Music Moves Europe: Boosting European diversity and talent"). The sector needs more infrastructure, tools and resources to attend to this demand.

## 6.2 Key policy recommendations

The gap analysis allows us to point out several funding gaps resulting from insufficiently covered funding needs in order for the European music sector to reach its objectives of a more diverse, competitive and sustainable music sector. These gaps originate either from lack of support at the national level or the lack of structural support at EU level. This concluding and recommendation part presents ways to address these funding needs. These recommendations are formulated on the basis of:

- the analysis developed in the study
- recent legislative / regulatory developments at the EU level
- several rounds of consultations and interviews held by the experts and the research team
- recommended tools formulated by the Brussels-based representative organisations that participated in the workshop held last June
- input from the experts of the study
- the structured dialogue in the framework of Music Moves Europe
- the input of diverse organisations, notably the European Music Council and its European Agenda for Music published in March 2018, which provides a holistic approach to the development of the music sector in Europe.

We cross-analysed the main findings of the study and the funding needs identified with concrete proposals for action. A visual overview of the process is available in the annex II of the report. These proposals are also based on the identified strengths and weaknesses identified in the current support for music from the European and national levels. We then assess how the proposed actions comply with the EU policy objectives of the music sector (creativity, sustainability, competitiveness and diversity). Particular attention was paid to ensure that the recommendations follow a holistic approach and consider the three aspects of what the European music ecosystem is: a cultural sector (not confined to entertainment), a driver of economic value, and an engine for social and human cohesion.<sup>160</sup>

The recommendations take into account several core principles to ensure they fit in the current EU policy framework:

- **Subsidiarity:** most of these recommendations are looking at EU-level solutions. This implies that the objectives of the actions/recommendations proposed cannot be sufficiently achieved by the Member States, but can be better achieved at Union level.
- **Relevance and EU added value:** the music sector is fast evolving, and also already supported at several levels, so only actions with a clear EU added value are put forward. Only the more pressing needs are addressed in this section.
- **Feasibility:** all recommendations identified are largely actionable in the framework of Music Moves Europe, including the future sectorial action of the new Creative Europe programme. Recommendations also point to possible further regulations at EU level that would play a crucial role for the entire music ecosystem.

The recommendations are grouped under three building blocks:

- 1) Recommendations on music-specific actions under the future Creative Europe programme;
- 2) Recommendations for music support under other EU programmes;
- 3) Recommendations related to the policy and regulatory framework for music.

### 6.2.1 Ensure tailor-made actions for music under the CE funding programme.

The mapping of funding schemes at European level has underlined that Creative Europe is the main EU funding source for the music sector, but that several issues still need to be addressed, as noted in sections 4 and 6. The programme is currently difficult to access for the music industry, and does not take wholly into account the latest trends and developments across the sector.

It is hence necessary to design the new sectorial action of Creative Europe for music (also taking into account its limited budget) in a more tailored way, following up on the targeted approach of Music Moves Europe. This will help improve the legibility of the support available at European level for all the actors of the European music ecosystem.

A more tailored structuring of the sectorial action will allow for better access of the European music sector to EU funding (and more visibility for the available support), and at the same time allow policy makers to develop differentiated actions or selection criteria for different types of stakeholders of the European music sector (i.e. the needs and actions

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<sup>160</sup> Cf. European Agenda for Music

undertaken for the commercially oriented part of the industry and the amateur and inclusive part of the ecosystem are different).

**Table 22: Proposals for the future sectorial action for music of Creative Europe**

N°	Policy recommendations
1	<p>Develop calls for training and capacity building schemes adapted to the needs of the whole value chain. This could focus on:</p> <ul style="list-style-type: none"> <li>▪ special grants for incubation programmes dealing with artistic entrepreneurship (e.g. based on the model of the European Music incubator),</li> <li>▪ licensing (like the currently funded project Europe in Synch of Music Moves Europe),</li> <li>▪ legal requirements for touring and cross border activity (tackling challenges of double taxation, instrument transportation...),</li> <li>▪ revenue modelling, risks and failure management to increase access to finance</li> <li>▪ career management for musicians (how to deal with an emerging and a finishing music career...)</li> </ul>
2	<p>Increase the volume of financing available in order to expand the budget for platform calls under Creative Europe. Such types of funding (based on re-granting) work particularly well in the fragmented landscape of the European music sector. Currently existing platforms have also demonstrated a strong positive impact on the diversity of the programming of the European live music sector (e.g. Liveurope and SHAPE).</p>
3	<p>Grants dedicated to foster the collaboration of music sector stakeholders with other sectors to facilitate cross-disciplinary activity and bolster the music sector spill over effects on the wider society.</p> <p>Such innovation grants could focus for example on:</p> <ul style="list-style-type: none"> <li>▪ digital solutions for concert venues to develop proprietary audience management and ticketing tools;</li> <li>▪ green solutions for the production of live music events;</li> <li>▪ "Green label" where the EU co-financing rate would increase if the project can demonstrate a positive environmental impact.</li> </ul>
4	<p>Overall, financial support should have a clear focus on cultural diversity, and notably:</p> <ul style="list-style-type: none"> <li>▪ projects and platforms that boost the visibility of European repertoires;</li> <li>▪ scheme for the European promotion of a recording that could cover digital marketing, promotion, touring, showcasing...</li> </ul>
5	<p>Gender equality is a cross-cutting priority of the European Commission and should be wholly integrated across EU programmes, including the future sectorial action on music. More specifically, this could entail:</p> <ol style="list-style-type: none"> <li>1) Including gender equality as part of the selection criteria for future calls.</li> <li>2) Setting gender balance requirements as an eligibility criteria, based on the principles of the Keychange pledge mechanism.</li> <li>3) Issuing specific calls to support networks and organisations promoting advocacy and capacity-building activities focused on gender equality.</li> </ol>
6	<p>Create a dedicated scheme to enable the professional structuring of traditionally unstructured sub-sets of the industry (e.g. festivals) or to foster the development of the music ecosystem in territories where it is still non-existent (e.g. in less developed music markets). For example, this grant could be used to set-up music export offices where they</p>

	do not exist (such as a mentoring or peer-learning scheme where experienced export managers could coach local teams).
7	<p>Support the implementation of the Guarantee Facility for the cultural and creative sectors, by:</p> <ul style="list-style-type: none"> <li>▪ Increasing the uptake of the guarantee facility by small music business companies, with dedicated workshops to improve the quality of applications by music SMEs, or communication events about the guarantee.</li> <li>▪ Dedicated training and toolkits on the valuation of intangible assets would help music SMEs in effectively exploiting their catalogue of rights as collaterals for loan applications.</li> <li>▪ Ensuring that the future Invest EU programme adequately takes into account the needs of CCS SMEs (including music), via the different financial products and tools it will set up (debt, equity, technical assistance, and investment readiness programmes).</li> </ul>

### 6.2.2 Promote the awareness of music sector organisations of funding opportunities by other EU programmes.

The study has shown a lack of awareness of music sector organisations in relation to EU funding opportunities beyond Creative Europe, even though the objectives of these programmes are sometimes in line with music sector priorities. The study has shown the crucial importance of complementarity in terms of governance level (from the local to the European scale). Erasmus + and other EU programmes have a key role to play in the exchange of good practices of music policies and music training schemes.

**Table 23: Policy recommendations for other EU programmes**

N°	Policy recommendations
8	<p>Raise awareness of availability of support in EU programmes not used by music sectors organisations. Clear information on relevant calls beyond Creative Europe could be made available on Creative Europe's website;</p> <p>Alternatively, in case a European Music Observatory is launched in the future, one of its missions could be to serve as a funding information platform (in cooperation with the Creative Europe Desks) to take advantage of these funding opportunities (especially the regional and structural funds) to strengthen local music ecosystems.</p>
9	<p>Encourage the exchange of good practices of local governance for local music ecosystems, notably through Interreg and URBACT programmes, through peer-learning activities and delegates of local authorities wishing to make on-visit-sites or create cooperation between two or several municipalities/regions.</p> <p>This could be done by including the cultural and creative sectors as one of the priority sectors in these programme guidelines.</p>
10	<p>Investigate the idea of developing a European certified lifelong-learning scheme for musicians. As a matter of fact, transnational strategies for musicians already involve operating in different European markets, and a European diploma is needed. This would require further consultation with the music education sector, and could potentially be developed as part of a Sector Skill Alliance project.</p>
11	<p>Make use of the EU's external policy and funding instruments in order to find possible synergies to support export of European music, and particularly the ACPCulture+ programme or support under the European neighbourhood policy such as MedCulture and Eastern Partnership Culture Programme.</p>

### 6.2.3 Regulatory and policy perspective

Transparency requirements are relevant to better monitor the cross-border circulation of repertoire but also allow music professional gain a finer and more granular understanding on how the digital music environment affects their business practice. This will allow them to adapt their practice and have significant gain in terms of competitiveness, and also level the playing field and create a fairer European music sector.

N°	Policy recommendations
12	Enhanced transparency for streaming platforms in order to be able to gather and analyse data relevant for the EU objectives of cultural diversity. This could be the result of a broader regulatory endeavour for example concerning the use of algorithms and artificial intelligence or the use and sharing of data. This could in fact help to identify more precisely how music circulates, where promotion is most relevant, and where EU or national actions are required. Alternatively, an analysis of the results of the 2018 calls for proposals of Music Moves Europe (especially on online and offline distribution) could help to identify the most relevant vehicles for action in this field.
13	Monitor the concentration trends in the industry, including: <ul style="list-style-type: none"> <li>▪ The market footprint of the Universal/Sony duopoly.</li> <li>▪ Merger rules should be reviewed to ensure that taking over a major music company should not be more easily approved when done in several stages (move from joint to sole control) than in one transaction.</li> <li>▪ The EC and national competition authorities should also oppose the sale of one of the music majors to a major digital retailer (Google, Alibaba, Amazon, etc.).</li> <li>▪ Open a sectorial consultation (e.g. under the hat of DG Competition) that could organise a state of play of the concentration in the different music sub-sectors, along the value chain.</li> </ul>
14	Work on the possibilities of harmonisation or facilitation of administration on diverse mobility-related concerns such as the VAT, visas, social insurance, transportation of music instruments.
15	Advocate for policies that protect local music- and cultural spaces, including music venues and rehearsal spaces. Such spaces are important incubators for music artists, meeting points for the sector and the general public and a strong cultural asset. Support could range from developing policy toolkits, including the “Agent of Change” and targeted funding in collaboration with local governments.
16	In a longer term perspective and as part of possible further regulatory developments in the EU internal market, assess the need for and feasibility of a regulatory approach to promote cultural diversity in the music sector, bearing for example in mind the precedent of the EU audiovisual regulatory framework (in particular, the provisions supporting cultural diversity in the revised Audiovisual Media Services Directive: requirements on the share and prominence of European works in the catalogues of on demand services, framework for Member States’ ability to impose European content investment obligations).

### 6.3 Concluding remarks

The study of the trends of the European ecosystems and of the funding architecture for the music sector at European and national level show that there is a clear advantage to boost policy and support action at EU level in order to reach the goals of diversity, competitiveness and sustainability of the European music sector. At the moment, the funding architecture at the European as well as the national level is falling short in terms of answering the crucial funding needs of the sector. The European music sector, albeit fragmented, seems ready to continue its journey of structural development across the entirety of European Union territory and to work together towards a more holistic approach that can strengthen the European music sector.

Europe is a music continent. It is the place where many iconic musical forms of expression have emerged, from opera to the Beatles, and where many great technological developments, including new digital innovations, have been produced. Spotify and the mp3 are evidence of the highly innovative European music sector. It is now the responsibility of European policy makers to nurture this tradition and further strengthen the role of music in modern European society through targeted support that could, if ambitious enough, produce a strong multiplier effect benefiting the entirety of the European music ecosystem, with spill-overs to other sectors and industries. This will allow the EU to maximise not only the revenues of the European music industry, which has the potential to remain one of the frontrunners at global level, but also to benefit from the many positive external effects that music has on our broader society, in terms of social inclusion and cohesion as well as in terms of innovation.

## Annexes

### Annex I: Glossary

#### Actors

##### **Authors (composers and songwriters)**

Composers write the music to a song or for an instrumental track. Songwriters write the words and melody that make up a song. Song structure and the arrangement are also part of the process (so a songwriter can also be the composer).

##### **Agent**

A music agent is the representative of the artist (person or company) who deals with the contracts and manages everything related to the event. He is responsible for determining tour itineraries, scheduling appearances for the artist and obtaining contracts with talent buyers. The structures of music agents are generally called booking agencies.

##### **Digital Music Service**

A legal business whereby music in digital format is offered to the public for sale as permanent downloads or other form of consumption such as streaming, mobile ringtones, etc

##### **Distributors**

For digital music, this is the actor managing the process of selling recorded material to the public through physical and digital mediums, typically through record stores or online retailers such as iTunes, cdbaby.com, and Bandcamp.

Traditional distribution is about moving CDs (or other physical recordings) from record labels to retailers. Distributors not only ship boxes of CDs, they also promote their catalogue to retailers.

Particular types of distributors have emerged with the rise of auto production. Some distributors gather music in digital format, which it then licenses or sells through to digital music retailers and music services.

##### **Festivals**

A music festival is a series of concert that mainly happen in the summer but tends nowadays to be widespread all around the year. They happen both in rural as in urban areas, either as yearly or biennial event but also accompanying the season of a cultural institution, creating an appendix to their usual programming.

**Live venue:** Site where an event or concert is held. Examples include clubs, theatres, auditoriums, arenas, amphitheatres, casino showrooms, and festivals.

##### **Managers**

This is the person responsible for developing the artists' profile and career. The manager advises the artist on all business-related decisions and promotes the artist through direct personal networking, media coverage, distribution of demos. For independent bands, the manager is often a member of the group and also acts as the 'booking agent' of the ensemble. In professional circumstances, or when a record contract is signed, a professional manager is hired under a contract that pays the manager a percentage of the group's profits. If the act generates significant income and are becoming quite high-profile, they may also hire a business manager.



**Metadata**

A metadata is a layer of digital information about a sound recording such as artist name, album title, record label, release date, copyright owners, and so on. With a CD the metadata is not normally displayed by the player, but can be accessed by specialized music playback and/or editing applications

**Performers**

Music performers includes singers and musicians. They may be:

- Part of an orchestra, band or group
- A solo artist
- A group of singers, including backing singers and vocalists.

**Publishers**

Music Publishers used to mainly deal with the copyrights associated with printing and distributing sheet music. These days, in addition to print rights, publishers help musicians with mechanical and synchronisation rights and also collect money on their behalf for publishing-related copyrights. They can also deal with marketing.

**Performance Right Organisations**

A PRO is an organisation, usually non-profit, that acts as an intermediary between music rights holders and parties wishing to license those rights for public performance, reproduction or other commercial use

**Producer**

A producer is a person hired by the Artist or Record Label to produce the sound recording, including managing the production budget and/or making creative, financial and scheduling decisions. In the live music sector, a promoter is the person or the company that finances and/or organises a concert – also called concert organiser.

**Record labels**

Record labels are the companies that market recorded music and music videos. Record labels engage in a wide range of functions in the music industry including new artist recruitment and development (known as A&R), music publishing (most often via a separate company), and copyright enforcement. They also take up a manager role via 360 deals, where they offer additional services to artists.

*Marketing* is one of a record label's most important functions, as public awareness of the brand is the way they make money.

Major record labels offer deals to music artists. These record labels own distribution networks that put the music of the artists they sign to exclusive contracts in the hands of consumers via streaming/records and digital tracks.

Labels sign a range of agreements with their artists, including licensing and distribution agreements, which give them significant cuts of the artist's earnings worldwide. Larger record labels may also own sub-companies that specialize in publishing, recording, and promoting various music genres such as country, Latin, jazz, and hip-hop.

**Streaming**

Streaming is a technology that has a twofold usage in the music sector. Streaming can be used by digital platform to allow direct broadcast of music. It reads files as they are uploaded, rather than having to wait for the download to complete. Streaming can also be used for the direct broadcasting (or slightly delayed) of a music event on the internet – also called live streaming.

**Showcase**

A showcase is a performance for a target audience of music industry professionals more so than the general public; the goal of a showcase is to attract interest of potential industry partners, such as booking agents, managers and record labels.

**Talent Agent**

A talent agent is a representative who arranges for the public performance and other creative-related opportunities for a musician. They're also known as a 'booking agent' or 'bookers'. They may be independent or hired by concert or festivals organisers.

**Ticket scalpers**

Person who resells concert or festival tickets bought in large quantities for a quick and large profit.

**Type of rights****Copyright**

Copyright is defined as the set of exclusive rights granted to the creator of an original work, including the right to copy, publicly perform, distribute and adapt the work. These rights can be licensed, transferred and/or assigned. In addition to authors' rights (for composers and songwriters), different types of rights exist in the music sector.

**Mechanical rights**

Mechanical royalties are a kind of publishing royalty (money owed to publishers and songwriters for the usage of a composition, as opposed to a particular recording). Songwriter and composer who create original music, are entitled to a mechanical royalty for the "reproduction" of their composition. In the physical world, this meant mechanical reproduction in the form of CDs or vinyl. In the digital world, both downloads and streams are considered virtual mechanical reproductions.

**Performance rights**

Performance rights are another form of publishing royalty, owed to publishers and songwriters when their compositions are played on the radio, performed in public, and more.

**Neighbouring rights**

Neighbouring rights are a subset of copyright intended to cover performance, communication and dissemination rather the original works themselves. The owners of neighbouring rights would generally be performers, and record labels.

**Synchronisation**

A music synchronization licence, or "sync" for short, is a music licence granted by the holder of the copyright of a particular composition, allowing the licensee to synchronize ("sync") music with some kind of visual media output (film, television shows, advertisements, video games, accompanying website music, movie trailers, etc.). When an audiovisual project producer wants to use a recording in their work, they must contact both the owner of the sound recording (record label), and the owner of the composition (songwriter via publishing company). In many cases, producers with tight budgets will elect to use a cover version of a particular song in order to save money on the master side.

## Some key activities

### 360 deals by labels

Under 360 deals, which are also called "multiple rights deals," record labels may get a percentage of revenue that may have been previously off limits to them, such as:

- Digital sales
- Tours, concerts, and live performance revenue
- Merchandise sales
- Endorsement deals
- Appearances in movies and television shows
- Songwriting, lyric display and publishing revenue
- Ringtone sales

### A&R

"Artist and Repertoire." The talent department/person at a record label responsible for developing artists and locating songs for them to record.

### Catalogue

All the songs owned by a record label or music publisher considered as one collection. A collection of musical compositions or recordings form a music catalogue. The owner owns the copyrights of the catalogued compositions and recordings. A record label's *back catalogue* is the music which they recorded and released in the past rather than their latest recordings.

### Licensing

In the music industry context, it means to grant permission for one person or company to use or perform another person's song or instrumental track. A record label may license another label to sell recordings it owns. A publisher may license a film maker to use works by one of its composers. A licence allows limited rights to another party. The terms of the licence will specify duration, exclusivity, territory, etc.

## Annex II: From trends and funding needs to policy recommendations

This table shows visually the link between the formulated recommendations in the last chapter of the report corresponds to the findings of the prospective analysis (chapter 3) and the funding needs of the gap analysis (chapter 5).

Recommendations	Forecasts									Funding needs							
	1	2	3	4	5	6	7	8	9	1	2	3	4	5	6	7	8
1 - Develop calls for training and capacity building schemes adapted to the needs of the whole value chain	✓	✓		✓	✓	✓	✓		✓	✓					✓		
2- Increase the volume of financing available in order to expand the budget for platform calls under Creative Europe			✓											✓			
3- Grants dedicated to foster the collaboration of music sector stakeholders with other sectors to facilitate cross-disciplinary activity and bolster the music sector spill over effects on the wider society								✓								✓	✓
4- Strengthen financial support schemes with a clear focus on cultural diversity online	✓	✓	✓		✓	✓						✓		✓	✓		
5- include gender equality as a cross-cutting priority in the future sectorial action on music.			✓			✓			✓			✓		✓		✓	
5- Create a dedicated scheme to enable the professional structuration of less structured sub-part of the sector						✓						✓					✓
6- Support the continued implementation of the Guarantee Facility under Creative Europe	✓							✓			✓	✓					
7- Raise awareness of availability of support in EU programmes not used by music sectors organisations								✓								✓	✓

8- Encourage the exchange of good practices of local governance for local music ecosystems	✓							✓			✓	✓	✓		✓	✓
9- Investigate the idea of building a European certified lifelong-learning scheme for musicians	✓			✓	✓			✓								
10- Make use of Europe Aid in order to find possible synergies to support European Music Export and international music cooperation					✓	✓					✓	✓				
11- Establish transparency regulation for streaming platforms in order to be able to gather and analyse data relevant for the EU objectives of cultural diversity	✓			✓							✓	✓				
12- Monitor the concentration trends in the live and recorded industry		✓	✓									✓		✓		
13- Work about possibilities of harmonisation or facilitation of administration on diverse mobility-related concerns such as the VAT, visas, social insurance, transportation of music instruments			✓			✓								✓		
14- Advocate for policies that protect local music- and cultural spaces, from music venues to rehearsal spaces	✓		✓			✓									✓	✓
15- Assess the feasibility of an adaptation of the Audiovisual Media Services Directive for the music sector, and notably the provisions supporting cultural diversity	✓	✓			✓	✓					✓	✓		✓		

<i><b>TRENDS FORECAST</b></i>	<i><b>FUNDING NEEDS</b></i>
<b>Forecast 1:</b> Self-releases will become more and more important but the majority of artists will still be signed by labels, which are able to navigate the complex monetisation environment and provide financial security in a precarious environment.	<b>Funding need 1:</b> Funding for training and capacity building of the professionals of the entire music sector to better navigate the digital environment.
<b>Forecast 2:</b> New services will emerge for music discovery and diverse content curation, potentially powered by broadcasters.	<b>Funding need 2:</b> Funding for support mechanisms to promote music diversity online
<b>Forecast 3:</b> live music regulation will be an essential pillar of future music policy to ensure cultural diversity and a more sustainable live music market (vibrancy of local venues, addressing secondary ticketing).	<b>Funding need 3:</b> Funding for a diverse musical production
<b>Forecast 4:</b> new remuneration models will be developed by streaming platforms to increase engagement between consumers and artists. Similarly, some direct-to-fans business models will emerge online and allow for fairer remuneration to artists.	<b>Funding need 4:</b> Funding for music education and awareness-raising of the reality of music production for young audiences
<b>Forecast 5:</b> new digital services will emerge to cater to the needs of genres which are underserved in the current digital distribution landscape.	<b>Funding need 5:</b> Funding to promote diversity in the live music sector.
<b>Forecast 6:</b> the market may tilt towards an increased availability and consumption of culturally-diverse music, provided that proper policies are designed to encourage more diverse curation models.	<b>Funding need 6:</b> Information on touring and mobility
<b>Forecast 7:</b> the new copyright framework will help the music sector to develop additional revenues.	<b>Funding need 7:</b> Funding to help the music sector address societal challenges
<b>Forecast 8:</b> environmental-friendly approaches will become the norm in the music industry, and especially in the live sector, but the costs entailed will be challenging for smaller music venues and festivals. Music artists will be vocal supporters to tackle the environmental challenges.	<b>Funding need 8:</b> Need for more long-term and sustainable perspectives in the music support ecosystem

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21.11.2018: **Brussels Creatis Talks - Focus on music with PIAS & guests.**  
Panelists: Damien Waselle (Pias), Benjamin Schoos (Freaksville Records), Arthur Le Gall (KEA) et Didier Gosset (IMPALA)

23.11.2018: **Linecheck Festival, Milan- Creative Industries In Europe: The Future Sounds Good!**  
Panelists: Arthur Le Gall (KEA), Sylvia Costa (MEP), Assomusica

20.02.2019: **Brussels Creatis Talks - Focus on radio.**  
Panelists: (Mickaël Bursztejn, Founder of Kiosk Radio), Gabrielle Boeri-Charles (Co-founder and director at Binge Audio), Adeline Beving (Project leader Open Innovation at Radio France), Alexandre Héraud (podcast producer).

07.05.2019- **Liveurope Europe Day, Venues as hubs for new European talent**  
Panelists: Blu Samu (Artist), Olivier De Schutter (MEP Candidate for the green party), Geert Van Itallie (Melkweg Amsterdam), Julien Fournier (Wallonie-Bruxelles Musiques)

13.05.2019: **Brussels Creatis Talks - Focus on Festivals.**  
Panelists: Jochem Daelman (Co-founder of Horst Arts & Music Festival & co-founder Onkruid Magazine), Marta Pallarès (Music journalist & International communication manager at Primavera Sound), Alex Stevens (Co-founder of FiftyFifty Lab)

- **ESNS Panels and conferences (16-19.01.2019)**

#### **Event Analytics 2.0.**

Panelists: HUNG DANG Mitra-Intelligence (DE), ALEXANDER MISERA VLEK Technology (DE), CHRISTIAN LOHSE PurpleX GmbH (DE), FRED TÜRLING Eventim Germany (DE)

#### **Festivals As A Catalyst For Integration; how to empower newcomers**

Panelists: Anna Van Nunen - Innofest (NL) Frans Somers - Vluchtelingenwerk (NL) Hayan Mezher - New Faces Participant (SY) Nienke Bodewes - Into The Great Wide Open (NL) Romy Jochems - Vsb Foundation (NL)

#### **Ticketing Technology And Innovation**

Panelists: James Barnett - Open Stage (GB), Nikolas Schriefer - Stagelink (DE), Tom Roetgering - Guts Tickets (NL), Phillipp Jungk - Dgbrt (DE)

#### **Cutting Out The Middle Men**

Panelists: Cliff Fuet - Eleven Advisory (GB), Ric Salmon - Atc Management (GB), Stephen O'reilly - Ie:Music (IE), Rachael Patterson - K7 (GB)

## Annex IV: Mapping of funding at national, regional and sub-regional levels

### Clarification of the typology used

This mapping entails most of the actions undertaken by EU MS in order to support their music ecosystem. This help takes the form of subsidy are either direct or indirect

- Direct subsidies take the form of
  - o Operating grants, dedicated to support the day to day roll out of an organisation. These functioning grants are in general reconducted automatically over several years, framed by a law or a multiannual convention between the organisation and the state.
  - o Project grants, dedicated to support a particular project that achieve concrete aims and goals (mainly of general interest for the society or for the wealth of the sector) These grants are either awarded after application of the
- Indirect subsidies take the form of tax breaks, insurances, low interest loans etc.

## Austria

### Support at national level

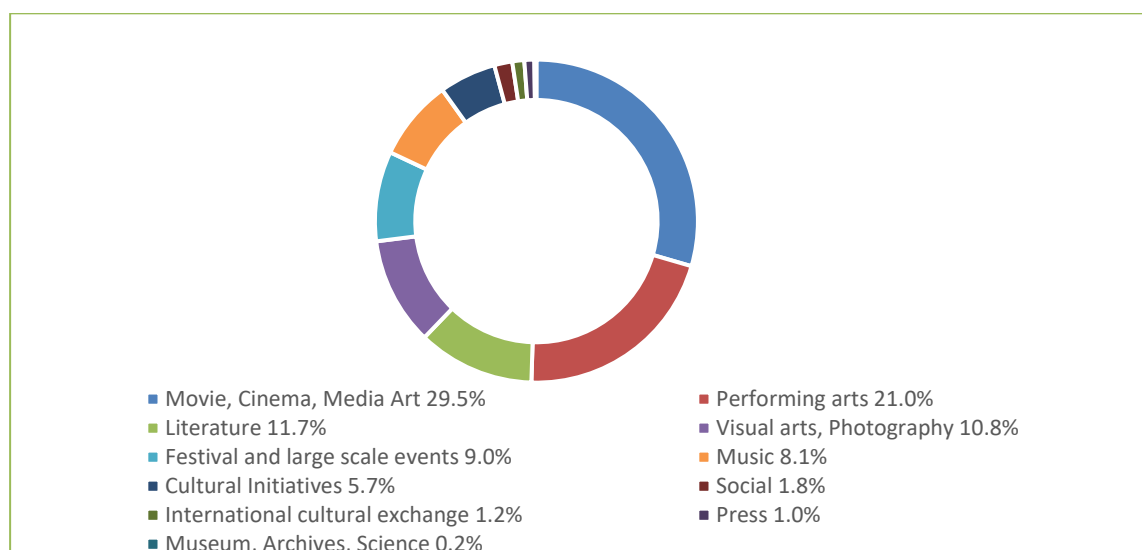
#### ▪ *Support from the Ministry of Culture*

As Austria is a federal state, the federal government's support for the cultural sector was solely reserved for the member states until 1988. Since then the federal government is able to support the cultural sector at the federal level for "The promotion of artistic creation and its mediation, the improvement of the framework conditions for sponsoring as well as the social situation of the artists". Following the subsidiary principle of federal states, the federal government is allowed to support only services and projects who promote supra-national interests, have a strong innovative character, and who help to strengthen the image of the country on the international stage.

- Budget of the Ministry of Culture (The Arts and Culture Division of the Federal Chancellery of Austria) 2017: EUR 435,121,271.36
- Budget of the Ministry of Culture earmarked for music dedicated actions 2017: 1.99% of the total budget (EUR 8,669,969.28)

In Austria music is the 6<sup>th</sup> most subsidised cultural sector with EUR 7,307,537.00 earmarked for the sector after Movie, cinema and art (EUR 26,659,896.55), Performing arts (EUR 18,975,810.00), Literature (EUR 10,590,923.00), visual arts and photography (EUR 9,771,630.65), Festivals and large-scale events (EUR 8,138,770.00).

## 2017 funding expenditures of The Arts and Culture Division of the Federal Chancellery of Austria



Source: Kunst und Kulturbericht 2017

The funding earmarked directly for the music sector is subject to the application of four laws, the Kunstförderungsgesetz, the Bundesmuseumsgesetz, the Bundestheaterorganisationsgesetz and the law on the Salzburger Spielfonds,

### 1- Kunstförderungsgesetz

#### Federal Music Funding in Austria (Kunstförderungsgesetz)

	2016	2017
Music Funding	6 875 202.00	7 307 537.00
Yearly programmes	5 222 001.00	5 691 201.00
Projects	1 079 025.00	926 786.00
Single persons scholarships	518 326.00	625 600.00
Government premiums	30 850.00	28 950.00
Prize	25 000.00	35 000.00
Hofmusikkapelle (Venue and ensembles)	1 370 431.75	1 362 432.28
<b>Total</b>	<b>8,245,633.75</b>	<b>8,669,969.28</b>

Source: Kunst und Kulturbericht 2017

The promotion of music by the federal government is mainly aimed at the music sector through yearly programmes (78% of all music funding). The other 22% are distributed to the sector mainly through grants or prizes that are awarded by an advisory board or a jury.<sup>161</sup>

<sup>161</sup> Department 2 of the second section of the federal government.  
<https://www.kunstkultur.bka.gv.at/abteilung-ii-2-aufgaben>

- Yearly programmes:

- Annual programme support for orchestras and music ensembles: Promotion of Austrian orchestras and music ensembles, which can apply to a multi-year continuous activity;
- Annual programme support for concert promoters and music theatre: promotion of Austrian concert promoters, which can apply to a multi-year continuous activity;
- Promotion of festivals and similar seasonal events in Austria of national importance.

- Grants:

- Project cost subsidies for concert promoters, orchestras, music ensembles and music theatre (Promotion of Austrian concert promoters, orchestras and music ensembles);
- Training grants for artists: Promotion of further education of professional musicians and theater professionals abroad, if there is no comparable further education offer in Austria;
- Tour and travel support for Austrian music ensembles and musicians in Austria and abroad;
- Travel grants for Austrian composers whose works are to be performed abroad;
- Material cost subsidy for composers and music publishers: Promotion of the material production of works by Austrian contemporary composers whose performances are secured;
- Dissemination support for phonograms and publications: Promotion of the dissemination of works whose authors or interpreters have Austrian citizenship or reside in Austria.

- Scholarships:

- State scholarship for composition: Promotion of the compositional activity of composers;
- State scholarship for music and performing arts: recognition and promotion for the creation of young artists; serves artistic development and entry into the Austrian and international art scene.

- Awards:

- Great Austrian State Prize: Award for outstanding achievements in the field of music;
- Austrian Art Award for Music: Award of a Life's Work;
- Outstanding artist award in the category Music: Award by artists of the younger and middle generation.

- Shareholding participation:

- The state also owns 100% of the Vienna State Opera as well and the Volksoper through its shareholding participation in the management of the federal theatre<sup>162</sup>. It is also a management shareholder of the Wiener Hofmusikkappelle an historical venue housing many classical music ensembles.

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<sup>162</sup> Department 8 of the second section of the federal government

## *2- Laws on Federal museums and theaters (Bundesmuseums- and Bundestheatergesetz)*

Besides the Kunstförderungsgesetz the music sector is also partly subsidised through the Bundesmuseumsgesetz and the Bundestheaterorganisationsgesetz with a fund of EUR 1,362,432.28. Its main focus is the Opera stages (Volkstheater and Staatsoper).

## *3- Salzburg Festival Fund (Salzburgerfestspielfonds)*

The federal government of Austria is also participating in the "Salzburger Festpielfonds". The 100 years old internationally recognised festival for opera, theatre dance and classical music has 40% of its yearly budget covered by the fund. This is therefore the largest operating grant given by the federal government. The 2018 budget of the Salzburger Festspiele was EUR Million 60.8 which represented a total expenditure of EUR 24.32 million.

## *4- Tax incentives and specific tax regulation applicable to the music sector*

- The Federal government provides subsidies for contributions to the statutory social Insurance (Health, pension and accident insurance) of self-employed artists. The subsidy is awarded to artists who earn at least EUR 5,527.92 and maximum EUR 29,942.2 per year. The maximum grant is € 1,896 per year and represents around 6% of a self-employed artists' yearly income). In 2018, the total contribution to social insurance of self-employed artists amounted to EUR 6.6 million of State expenditure.

- The Austrian government supports the artistic and cultural sector through an incentive created to increase the investment of the private sector (cf. Gemeinnützigkeitsgesetz). However, there is no distinction by sector of the recipients, therefore the portion of funding allocated to the music sector via this law is impossible to estimate.

- There is also a reduced turnover tax for music performances of 10% (or 0% for not-for-profit organisations and local authorities) and music sheets (10%). Any workers can be relieved from Austrian withholding taxes if they are originating from a country that signed a double tax convention. As a result, the foreign taxpayer is entitled to claim full relief from the Austrian tax.

### **▪ *Austrian Music Fund (Österreichischer Musikfonds):***

The Österreichischer Musikfonds exists since 2005 and is organized and registered as a not for profit association under the name "Austrian music promotion". The fund is financed yearly with EUR 950,000 by the Federal Ministry of Education, Art and Culture as well as collecting societies (AKM / GFÖM, Austria Mechana / SKE-Fonds), and professional organisations (Fachverband Film & Musik, IFPI, ÖSTIG).

- Production funding: Refunds max. 50% of the production costs incurred in Austria for the production of albums. Critical criteria for the promotion of production is their suitability as a cultural asset with an Austrian character, the professionalism in production and the



possibility of exploitation in Austria and abroad. 56 productions could be supported with total funding of EUR 727,450 (including EUR 159.150 video promotion).

- Tour support: for concerts in Austria: Concert series occurring under the same name within maximum 3 months touring. Support of maximum EUR 1 000 per concert and EUR 10 000 per tour. In 2018 tour support was awarded for a total of 25 tours with EUR 127 500.00.

- **MICA – Music Austria:** created in 2011 as part of the Österreichischer Musikfonds, MICA is dedicated to promoting the export of Austrian bands abroad. The total support for 2018 was EUR 96 130.00

- FOCUS ACTS: grants to up-and-coming Austrian artists consisting of a travel allowance of EUR 5 000.00 for their international tours. It aims to promote international development of young local artists. Eligible applicants are Austrian musicians from Pop / Rock / Electronic, new music, jazz & world music genres that have been selected as part of the activities of Austrian Music Export by international juries and festivals. Criteria for funding include the presence of international structures and business partners (booking, label, distribution, promotion, management) and a coherent export concept. Applicants must, at the time of submission, have at least ten international concerts arranged for the subsidized tour period.

- Showcase Funding / International Tour Support: Showcase Funding / Funding of travel expenses, advertising costs, etc. up to a maximum of EUR 1,000 (non-repayable) in cooperation with the Austrian Federal Economic Chamber. Applications can be submitted by Austrian labels, publishing companies, producers and recording studios.

- International Tour Support in the Framework of MICA's activities at Festivals or Showcase Events: Travel funding for musicians selected to perform at events like Eurosonic Noorderslag, The Great Escape, Reeperbahn Festival etc. and the festivals and events in MICA's annual focus countries. In some cases, MICA can also provide support for professionals travelling to these events

- Participation in international showcase festivals: MICA is representing Austrian bands at showcase festivals for pop/rock/electro, Jazz and world music, festivals and trade fairs for classical and for contemporary classical music.

- Professional's Directory: List of all the professionals in the music sector in Austria. Compiles useful information for international professionals who want to work in Austria (Conditions for entry, residence and employment for foreign artists)

- International market analyses: MICA publishes reports on specific countries (Belgium, Croatia, Germany, France, Poland, Slovenia, Switzerland, The Netherlands), on specific cities (New-York) and also provides consulting for Austrian professionals.

▪ ***Support from other ministries / international cooperation***

- The New Austrian Sound of Music (NASOM): NASOM is the Ministry for Foreign Affairs' music support programme: they aim to present Austrian music as lively, modern and culturally diverse. 25 ensembles or young musicians have been nominated for the years 2018/2019, for the sixth edition of NASOM Ministry programme.
- Austrian Cultural Fora: The network of Austrian Cultural Fora abroad organizes cultural and scientific projects and acts as a service point for Austrian creative artists as well as scientists. They are oriented towards the specific needs of the fora's local users and partners and have sole responsibility as to the content of their programmes.
- GO INTERNATIONAL: The Go International initiative of the Internationalisation agency of the Austrian economy (WKO) and the Federal Ministry of Science, Research and Economy (BMWFW) aims to support export activities of Austrian small and medium-sized enterprises for positioning abroad. Their programme "Going Special" offers funding opportunities for creative industries and includes music).

**Support at Regional level**

The Austrian Federal states play an important role in the funding ecosystem. The level of support differs from state to state. They almost all provide grants or organise musical events. No compilation of the support activity of the Austrian Federal states could be found.

**Support at sub-regional levels**

- City of Vienna, cultural department: The Cultural Department of the City of Vienna supports individual projects and the implementation of long-term work processes and project series. Music institutions, ensembles, orchestras and choirs and projects such as concerts and festivals at a high artistic level are funded either through yearly programmes or through projects. Purely commercial projects (eg musical, cabaret, revue, etc.) student projects and sociocultural projects (eg charity events) are excluded.

## Belgium

### Support at national level

As a federal state and following the principle of subsidiarity, Belgium's support to the cultural sector, and hence to the music sector is mainly dependent on the linguistic communities (one of the two types of federal entities with the regions). The federal state is responsible for historical and prestigious institutions such as fine arts museums and the Royal Theater of La Monnaie (Opera), the National Orchestra, the Palais des Beaux-Arts "Bozar" as well as for issues related to cultural policies (labour law, social security, taxation and intellectual property rights).

Each industry sector gather in joint committees (JC) who are composed of an equal number of employer and employee organisation representatives, under the direction of an independent chairperson. in order to conclude collective labour agreements, preventing or solving social disputes and advising on policy. JC304 is regulating all performing arts related activities and was concluded in 1973.

#### ▪ ***Tax incentives and specific tax regulations applicable to the music sector***

- Tax shelter for performing arts: From January 2003 onwards, investors can enjoy a tax exemption for the amount they invest in the production of an audiovisual work in Belgium. From 2017 a tax shelter to support investment in the production of performances is in place. It however still cannot be used by music industries companies (except for classical music, opera and musicals).

- Reduced tax rate: 6% VAT (instead of 21%) is applicable to live performances and related activities.

In 2013 the Federal government made changes in terms of employment and social security, in order to take into consideration, the increasing insecurity of the artistic professions.

## Support at Regional level – Flemish community

### ▪ **Support from the Ministry of Culture**

The *Flemish Parliament Act on the Arts* itself does not discern any artistic disciplines, but in the current procedures, the following 'main disciplines' are presented as options: music, performing arts, visual and audiovisual arts, architecture and design, and trans-disciplinary arts. The five areas targeted by cultural funding are: development, production, presentation, participation and reflection. Since 2009, the budget of the Ministry of Culture has been shrinking. Since 2016, the budget of the Flemish community for cultural purposes goes directly to the municipalities without earmarking. The investment in the music sector is dependent on local political priorities.

The government expenditures of the Flemish community are under pressure since the financial crisis. The 2017 cultural budget of the **Flemish community in 2017 was EUR 157,193,000.00.**

Breakdown of the subsidies distributed by the Flemish government each year  
(in EUR Million)

Structural subsidies	84.8
Subsidies to 'Official Flemish Institutions of Culture'	54
subsidies to the support organisations for culture	3.1
project subsidies (in 2016)	5.9

Source: [www.public.tableau.com](http://www.public.tableau.com) & [www.kunstenerfgoed.be](http://www.kunstenerfgoed.be)

The subsidies intended for the music sector are awarded by **strategic advisory councils** since 2003. The Strategic Advisory Council for the policy domain Culture, Youth, Sports and Media (SARC) was established in 2008. Since 2015, the SARC is an integrated part of the Flemish Administration. Apart from a 'general' Council, there are sub councils for four different sectors: Arts and Heritage, Sports, Media and Socio-Cultural Work.

- Grants for artists: short term grants and long-term grants (max: 3 years, only for established artists). These allow for the research and development of new ideas, residencies abroad or career orientation.

- Project subsidies for artists or organisations: for projects limited in time (max: 3 years) or scope (in terms of functions and disciplines).

- Multi-annual funding for arts organisations (five years) which opt for one or a combination of more functions and/or disciplines  
Art Institutions: Art institutions are large-scale initiatives with national and international appeal and an important symbolic value. These are the permanent structures of the art field with a structural link with the Flemish community. The Flemish Government determines, with the advises of a commission, which organisations may submit an application for recognition, opening the right to apply for a five-year grant. The Flemish Community concludes a management agreement with these institutions. In the period 2014-2019, the recognised Art Institutions of the Flemish Community are: Concertgebouw Brugge, deSingel, two symphonic orchestras 'Antwerp

Symphony Orchestra' and 'Brussels Philharmonic', Kunstencentrum Vooruit, Kunsthuis Vlaanderen (Opera Flanders and Ballet Flanders) and Ancienne Belgique.

- Awards: Since 2003, the Flemish government awards the Ultimas (former Culture Prizes) on a yearly basis in all cultural disciplines. Laureates earn a prize of EUR 10,000. Every year, one career prize is awarded: the Prize for General Cultural Merit (for EUR 20,000).
- Forum voor Amateurkunsten (Amateur Arts Forum): Founded in 2006 the Forum voor Amateurkunsten offers support, training and visibility. Furthermore, there is the possibility of subsidising international projects and new disciplines. They reach out to over 6 000 local initiatives.

### Recent developments:

In 2017, 207 arts organisations are receiving in total EUR 84,763,400, which is EUR Million 3.2 more than in 2016. 11 organisations got access to the structural fund for the first time and 49 organisations lost their structural support.

Recently however, there was a fundamental shift: as of 2016, the scope of the Flemish Parliament Act of 2012 has been vastly limited, as the result of a policy decision to decentralise local cultural policy and grant more autonomy to cities and municipalities

At the end of 2019, the Flemish government cut subsidies by 60% in total. The cut results in:

- 3% decrease in structural subsidies
- 60% decrease in project subsidies. The project subsidies will be focused to projects with high potential to reach international audience.

#### ▪ ***Cultuurlooket***

Public information platform which "strives to make legal, business and business economy affairs more comprehensible". They provide information on social status of the artists, income tax, VAT, copyright, forms of organisation, marketing and promotion, financial management, insurance, international work, etc.

#### ▪ ***Flanders Arts Institute (FAI)***

The FAI is responsible for research/monitoring/field analysis, professional development and international relations development. They implement different **support programmes**

- Visitors' programme: Every year, Flanders Arts Institute welcomes around 150 international guests from within Europe and other continents during three to five-day programmes. For more ambitious visitors' programmes, Flanders Arts Institute collaborates with similar organisations in Belgium, Europe and overseas. Visitors' programmes are tailored to the needs of individuals, with unique custom-made programmes based on the interests of the guest and on what Flanders has to offer; bands, based on an art discipline or a theme and with a programme that is proposed by Flanders Arts Institute.

- Exchange & discovery programmes: In the spirit of follow-the-actor Flanders Arts Institute creates exchange and network opportunities abroad for artists, art organisations and art professionals from Flanders and Brussels during international festivals, showcases, meetings, workshops and research visits. Flanders Arts Institute collaborates with other intermediary organisations in Belgium, Europe and overseas for the most ambitious activities around exchange and discovery.

Flanders Arts Institute also provide online databases, researches and websites:

- Online arts database: Provide international cultural professionals with a handy tool to easily search for professionals active in music, performing arts and visual arts.
- Residencies searching tool: Flanders Arts Institute aims to inform artists and art professionals from home and abroad by providing easy access to information about residencies and workspaces in the fields of visual arts, performing arts and music in Flanders and Brussels as well as internationally.
- Studies: Flanders arts institute/Kunstenpunts research department also provides the music sector with different studies. The Havelovewilltravel study, for example, monitors where Belgian artists played between 2013 and 2017. This was done in cooperation with Wallonie Bruxelles Music.
- Websites: FAI also has dedicated websites to promote Belgian music ([www.belgiumbooms.be](http://www.belgiumbooms.be), [www.belgianjazz.de](http://www.belgianjazz.de) and [www.havelovewilltravel.be](http://www.havelovewilltravel.be).)

Since September 2019 Flanders Arts Institute also acts as the Export office of Flanders resulting of the merger of *Poppunt* (export office for non-classical music) and Flanders Arts Institute for Classical Music.

- Poppunt / Flanders Arts Institute's export expenses are divided between 98.46% direct export expenses via own initiated or run operations and activities and 1.57% of redistribution of funds to artists and professionals through own driven grants and programmes. Poppunt / Flanders Arts Institute's activities' costs are mainly shared between communication and PR actions, networking (inclusive staff travel) and showcasing. Poppunt / Flanders Arts Institute doesn't implement education programmes related to export.

#### ▪ **Sociaal Fonds Podiumkunsten / [www.podiumkunsten.be](http://www.podiumkunsten.be)**

The Performing Arts Social Fund (Sociaal Fonds Podiumkunsten) is the skills and development organisation of the professional performing arts and music sector in the Flemish Community. It is run by employers' and workers' organisations.

- Inter.Mezzo: training for professionals of the performing arts sector (inclusive music): Training dedicated to professionals who want to build their career. Eligible actors are performing artists: dancers, actors, musicians, singers, circus artists... or everyone else with a function in the performing arts sector: technicians, front office, dramatists,

producers, logistics staff, business managers... a personal contribution of 40 euros is required for four hours' coaching, which can be extended once by a further four hours.

- Financial support to attend capacity building courses: This financial help can be provided for capacity building courses of Podiumkunsten or of any other capacity building organisation.
- MyPension.be: It offers the possibility for artists to access information about their rights concerning their pensions. This sectoral pension, financed partly by the employers, takes the form of an Ethias group insurance scheme. To qualify for the supplementary pension, the person must have worked in the sector for at least 130 days during his professional life. At the time the pension falls due, Ethias automatically contacts the pensioner.
- Information about social rights: Podiumskunsten is also an information Centre which helps the professionals to get information about their social rights.
- Information about free available positions: Podiumskunsten give information about the available position about the Flemish speaking part of Belgium and Brussels.
- Information, research and formation about security issues and well-being at the workplace: The programmeme entails: basic training for safety and health advisers / ARIANE, an administrative risk management system / A work perception survey / transgressive behaviour: a website to denounce harassments at the work place / skills and talent management
- Projects on cultural diversity: Through these projects, Podiumskunsten is working to improve cultural diversity in the arts sector: SPRKR stands for SPReeKuuR, the Dutch word for "consultation time". At SPRKR, they receive artists with various different frames of reference and/or artists involved in contemporary art forms that are not often found in the field of regular, subsidised art. In principle, as well as artists, organisations, groups or collectives can take part in SPRKR. They hold discussions so as to gain a thorough understanding of the participants' situation and needs in order to provide advices. It can range from referrals or knowledge-sharing to joint drafting or support for a particular project.

▪ ***www.poppunt.be***

Poppunt is an information Centre for musicians, DJs, and producers in Flanders. It issues monthly magazines, thematic guides on specific topics (from how to build up and manage a rehearsal room to how to auto produce an album) or with general information on how to build an artist's career (Poppuntgids). It also organises infosessions and workshops on specific themes and provides a thorough database on the actors of the sector.

## Support at Regional level - French speaking community

### ▪ **Support from the Ministry of Culture**

The French-speaking Community of Belgium is the French-language body within the Federal State with responsibility for cultural affairs. However, a number of cultural dimensions are handled by other public authorities. Subsidies via programme contracts are becoming the norm (support planned for 4 or 5 years). There are also calls for projects.

The minister is advised by 30 consultative bodies regarding sectoral policies. (appointed by the FWB government after an application process). There is a music directorate within the general artistic creation service of the general culture administration.

2017 total expenditure by cultural function according to the organisational chart of the Culture AG in EUR Million

	Creation	Production/ Publishing	Dissemination	Conservation	Education	Management/ Reglementation	Total
Music	21.8	3.4	7.5	0.05	0.05	0.028	32.7

Source: Focus culture 2017

### ▪ **Wallonie-Bruxelles International (WBI)**

WBI is the central administration responsible for external relations. This means it works closely with the French-speaking Community of Belgium, Cocof and the Wallonia Public Service. Wallonie-Bruxelles International has an agency for music (Wallonie-Bruxelles Musique - WBM) They offer different kinds of support for musicians and bands focussing on export.

- Belgian Booms: set-up in collaboration with Kunstenpunt and Sabam For Culture, WBM is promoting Belgian artists to foreign professionals during showcase festivals (ESNS, The Great Escape, Reeperbahn ...).

It offers diverse financial support (grants) for:

- Touring: at least 4 or 5 dates. Support of max. EUR 4000 in case of an unprofitable tour.
- Promotion of a recording abroad: Max. 75% of the budget and limited from EUR 1000-3000 depending on the territory. The support can cover the salary of the press agent or community manager, publication in specialised press, promotion of a single and shipping fees.
- Fact-finding missions: Help covering 50% of the mission's cost (transport cost + EUR 38.1 per diem, limited to 5 days).
- Participation in showcase festivals (covers, in case of an unprofitable action, not only travel costs but also accommodation, possible rental of a place and backline, participation in the promotion costs of the evening...)
- Attendance at professional events abroad (reimbursement of the teams' travel costs & costs of instrument transport)

Belgium Booms provides also non-financial support to the music sector such as:

- Scivias: action to promote the equal treatment of men and women in the music industry



- Expert Network: team of consultants and experts from Belgium and abroad (touring, booking, management, press relations, distribution, streaming...) able to advise music professionals on questions of international development.

- ***Conseil de la Musique***

Founded in 1981, the Conseil de la Musique is a non-profit organisation that aims to inform, advise and promote the music sector in the Wallonia-Brussels Federation

- Musiscope: Musiscope is an information tool for professionals in the music sector, offering information and conferences focused on the practice and issues of different music related professions.
- Du F. dans le texte: DFDT is a musical contest for artists and groups, amateur or semi-professional, living in Wallonia-Brussels Federation and practicing a French repertoire in current music (rock, pop, hip hop, song, electro, ...) . The contest is open to all styles.
- GRiAM: Created in 2009, the GRiAM (International Reflection Group on Music Apprenticeships) aims to stimulate research and reflection in the field of music pedagogy.
- Publications: The conseil de la musique delivers the magazine Larsen, a yearly publication specialised in musical pedagogy (Orphée Apprenti), and the Intégrale de la musique a yearly publication on the music sector in Wallonia.
- La Maison des Musiques: Managed by the Conseil de la Musique, this music venue located in the Centre of Brussels organises classical and contemporary music as well as concerts for younger audiences, workshops, showcases, ... La Maison des Musiques also hosts many artists for residencies.
- IdIm: is a web portal put online in March 2017. It lists all the actors and stakeholders of the music sector in the Wallonia-Brussels Federation. The data collected on these actors and stakeholders are classified under various categories (artists, stage, training, equipment, ...) divided into more specific subcategories. The Complete Music is a scalable database, which is accessible for free. The data collected is exclusively public data.

- ***St'art***

St'art is designed for SMEs in the cultural and creative sector. The fund contributes towards the creation of enterprises or the development of existing structures, for example, to carry out a new project, create a product or conquer new markets.

- ***Tax incentives and specific tax regulation applicable to the music sector***

- Decree of 24 October 2008 determining the conditions of subsidising employment in the socio-cultural sectors of the French Community
- Framework Decree of 10 April 2003 in Respect of the Recognition of and Subsidising of the Professional Sectors of the Performing Arts

### **Collaboration of the two main linguistic communities**

The two main linguistic communities produce several festivals together: Festival de Wallonie/Festivaal van Vlaanderen, NEXT festival, Couleur Café, Passaporta, Muziekpublique and the Zinnekeparade.

### **Support at Regional level - German speaking community**

#### **▪ *Cultural Affairs Department of the Ministry for the German-speaking Community***

The German speaking community is less active in supporting the music sector than the French and the Flemish community. Since the 90's concrete policy goals have been developed such as, supporting organisations active in the field of youth, adult education and libraries. Future priorities continue to focus on youth, culture, media and adult education. The German community have agreed to pay closer attention to creativity and artistic quality and increasing cultural professionalism (management) as well as cultural participation by young people. Other goals include the development of a legal framework for scientific surveying and administrative structures to maintain cultural heritage sites and monuments.

- Eastern Belgian Art Prize (every three years)
- 28.06.1988 Decree Governing the Recognition of and Grants for Amateur Art;
- 18.04.1995 – Decree setting down the Grant Provisions for the Procurement of Items of Equipment by Associations and Clubs for Practising Amateur Art Activities;
- 25.05.1999 – Decree Governing the Recognition of and Grants for Chamber Music Ensembles.

### **Support at sub-Regional level**

All the Provinces and many towns and municipalities are developing cultural policies. In some sectors, such as cultural centres and libraries, these policies are agreed between the French-speaking Community of Belgium, the Provinces and the municipalities.

The policies implemented are very close to the ones implemented by the linguistic communities, i.e. grow strong local roots and increase artistic quality. This support is organised by decrees which define the conditions for access to subsidies, as well as their award and justification.

- supporting artistic creation and dissemination: performing arts (music, theatre, dance, fairground arts), literature, plastic arts, cinema, audio-visual, radio;
- protecting and promoting cultural heritage (apart from real estate heritage, which falls under the Regions): museums, folklore, ethnology, indigenous languages, cultural archives;
- territorial cultural development: cultural centres, public libraries;

- developing cultural democracy and participation in social and cultural life: youth and continuing education, cultural and associative life, intercultural affairs, amateur artistic practices;
- supporting training for cultural leaders: professionals and volunteers;
- supporting broadcasting: public radio and TV, community TV;
- supporting the press;
- supporting international activities.

## Bulgaria

### Support at national level

#### ▪ ***Support from the Ministry of Culture - National Cultural Fund***

Funded by the Ministry of Culture in 2000, the cultural fund provides funding for a variety of projects, including:

- Mobility
- Professional development
- Audience development
- Critique
- Social engagement in the arts

In 2018 the fund was doted of approx. EUR 256,000.

#### ▪ ***Support from the Ministry of Foreign Affairs***

The Ministry of Foreign Affairs can support the travel costs of artists to far away destinations. This is usually done via the ambassador and cultural attaché of the respective country that the artist would be visiting.

#### ▪ ***Support from the Bulgarian National Radio (BNR)***

The BNR, as part of the "Spring" competition awards artists a position at the showcase festival Eurosonic Noorderslag (ESNS). The BNR allocates money for travel for the artists and their crew (up to a limit) and lends assistance to any artists who are looking for information on the opportunities available at the event.

#### ▪ ***Tax incentives and specific tax regulation applicable to the music sector***

There are no tax incentives or specific tax regulation applicable to the music sector in Bulgaria.

### Support Regional level

n.a.

### Support sub-regional level

- Sofia Municipality cultural fund
  - Around EUR 85,000 per year earmarked for music
  - Mobility (internal / external) EUR 32,500 per year

Some artists reach the international scene thanks to their relationship with the ambassadors abroad but there is no established programme aimed at music exportation.

## Croatia

### Support at national level

#### ▪ **Support from the Ministry of Culture**

As a centralised state the Croatian Ministry of Culture is the main body that provides support to the music sector. It is taken into consideration within the “Strategic Plan of the Ministry of Culture 2019-2021”, most prominently under the Goal 1. “Development of cultural and artistic creativity and industry”, Objective 1.3. “Encouraging the development of performing arts”, under the following articles:

- 1.3.2. “Supporting publishing, international promotion of Croatian music, activities of the Croatian Music Information Centre, as well as new musical and dramatic works by contemporary Croatian authors” incorporates financial support of publishing activities in the music sector.
- 1.3.3. “Supporting manifestations and guest performances in the Republic of Croatia in order to disseminate cultural programmes of different performing arts, as well as transferring expertise and developing artistic skills” comprises supporting musical performances during festivals and cultural manifestations, guest performances by visiting musicians and support of young musicians in developing artistic skills through competitions and learning.
- 1.3.4. “Supporting musical and theatrical amateurism and preservation of traditional culture” includes funding of initiatives that promote cultural diversity and traditional arts and crafts, including in the music sector.

It is also addressed under Objective 1.1. “Supporting artistic creativity, entrepreneurship and cultural participation”. It encompasses support of individual artists and artists’ associations through public funding.

- 1.1.2. “Entrepreneurship in cultural and creative industries” grants access to funding through a public tender for entrepreneurs in the cultural sector.
- 1.1.3. “Development of cultural infrastructure and cultural participation” supports the renovation and maintenance of cultural institutions, including those dedicated to music, such as concert halls.
- 1.1.4. “Increasing the presence of Croatian art and culture worldwide” includes cooperation with other countries and organisations on various cultural issues, including music.

The funding of the music sectors through public funds is primarily accomplished through the yearly Call for Proposals for Programmes Addressing Public Cultural Needs. The Call itself caters for each sector separately (for example, there are subsections such as “Visual Arts” and “Protection and Maintenance of Archaeological Heritage”).

The music sector is directly addressed through following sub-calls:

- Music and Musical-Theatrical Arts: Budget of EUR 1,355,463.10 in 2018.
- Cultural and Artistic Amateurism (Music and Folklore): Budget of EUR 823,076.23 in 2018.

- Innovative Artistic and Cultural Practices – Rock Music, Festival and Club Programmes: Budget of EUR 133,137.85 in 2018.
- Promoting Croatian Musical Creativity: Budget of EUR 39,939.00 in 2018. It allows for funding composers and groups of composers of contemporary music that have not received royalties for their works.

Other sources of funding which include the music sector are:

- Call for Proposals for Promoting Entrepreneurship in Cultural and Creative Industries: started as a collaboration between the Ministry of Culture and the Ministry of Economy, Entrepreneurship and Crafts, but was taken over completely by the Ministry of Culture. In 2018, its budget was EUR 1 065 040.00 and its goal is to promote activities for developing new business models based on recognising creative competences as strategic values of society and boosting employment in the culture sector. The music sector is partially funded via this scheme.
- Backpack (Full) of Culture – Budget of EUR 119,817.00 in 2018
- Development of Audiences – Budget of EUR 133,130.00 in 2018
- International Cultural Cooperation Programmes – Budget of EUR 1,362,103.49 in 2018.

▪ ***Tax incentives and specific regulations applicable to the music sector***

Croatian Community of Independent Artists – Budget of EUR 4,766,054.00 in 2018. The Croatian Community of Independent Artists is an association of individual artists who consider art to be their main profession – state funds are used for pensions and health insurance, as well as for the everyday operations of the association.

**Support at regional level**

n.a.

**Support at sub-regional level**

n.a.

## Republic of Cyprus

### Support at national level

#### ▪ **Support from the Ministry of Culture**

The Ministry of Culture has some music dedicated grants included in its culture programme 2015-2020. The yearly budget of the music dedicated support is not known.

The purpose of the Music Support Activities Development Plan is to provide the basis for targeted public support that will be offered to operators and natural persons active in the field of music, whose activities (works, actions, actions) contribute to the projection and the promotion of creators and their works, in creativity, mobility as well as in public participation. Activities that can be funded by the Plan should focus on visibility / creativity, mobility and participation. In relation to the actors, appropriate incentives are provided for systematically enhancing their modes of activity on an annual basis, thus contributing to the development of institutions. With regard to natural persons and groups of natural persons activities targeted will seek to open up prospects and offer opportunities for creative integration and recognition.

#### **I- For actors: Activities contributing to**

1. View / showcase the creators and their works:
  - a. Organising music festivals.
  - b. Organisation of conferences / symposiums.
  - c. Organising concert themes.
2. Encouraging creativity and developing professional skills:
  - a. Organising music educational programmes / music workshops.
3. Support for mobility:
  - a. Meetings / Meetings with foreign musicians in Cyprus.
  - b. Developing partnerships with foreign players / participating in music networks.

#### **II- For groups of individuals: Activities contributing to**

1. View / showcase the creators and their works:
  - a. Organizing musical / creative activities.
  - b. Organisation of artist meetings with the public (discussions, project presentations).
2. Encouraging creativity and developing professional skills:
  - a. Organising music educational programmes / music workshops.
3. Support for mobility:
  - a. Developing partnerships with foreign players / participating in music networks.
  - b. Meetings / Meetings of foreign artists with artists in Cyprus.

#### **III- For natural persons (researchers, composers, interpreters): Activities that contribute to**

1. Encouraging creativity:
  - a. Participation in artist in residence programmes abroad.
  - b. Participation in music education programmes / music workshops abroad, not forming part of the formal field of study. The applicant should participate as trainee and not as a trainer.
2. Support for mobility:
  - a. Active participation in music conferences / symposia abroad.
  - b. Participation in project presentation events abroad (concerts or other events).
  - c. Participation in activities with foreign artists abroad.
  - d. Participation in international music competitions / festivals / events.

- ***Tax incentives and specific tax regulation applicable to the music sector***

n.a.

**Support at regional level**

n.a.

**Support at sub-regional level**

n.a.



## Czech Republic

### Support at national level

#### ▪ ***Support from the Ministry of Culture***

The Ministry of Culture in Czech Republic implements the following funding schemes and support programmes:

- Non-profit professional activities (music festivals, concert events, continuous activity of professional ensembles, creative workshops, courses, competitions for young artists and professionals in the field of interpretation, composition etc., educational projects designed especially for children and youth, preparation of music editions, publishing of music editions, musical magazines, recordings, musical information and documentation activities, music conferences)
- presentation of Czech music and performers abroad (concerts and tours)
- Functioning costs of professional regional symphony orchestras and choirs
- individual art- or scientific projects
- Support to non-professional activities (competitions, festivals, free time activities for children)
- interdisciplinary projects (annual festivities)
- contribution of the Ministry of Culture to music organisations (Czech Philharmonic, Prague Philharmonic Choir, Arts and Theatre Institute (including music department and Czech Music Council), National Museum (including Czech Music Museum), NIPOS (including statistics and care about the non-professional activities), National Theatre (with opera scenes), NULK Strážnice (folklore research org.).

The total grants awarded in 2019 amounted to CZK 44 million (EUR 1.71 million).

#### ▪ ***Arts and Theatre Institutes***

The ATI is a resource organisation running the Czech Music Export Office as well as the creative Europe Desk. It implements one funding scheme for which the music sector is eligible:

- short term mobility to help professionals attend international events

#### ▪ ***Tax incentives and specific tax regulation applicable to the music sector***

n.a.

### Support at Regional level

Regional Offices and City Offices have their own grant programmes and strategic documents. The cultural policy in regions works under the principle of territorial autonomy. Towns and regions have their own budgets and evaluation commissions. They support mostly musical events, regular activities of regional ensembles, conferences, workshops and competitions. Regional and City Offices do not grant publication (periodicals) or recording activities.

### Support at sub-Regional level

n.a.

## Denmark

### Support at national level

#### ▪ *Support from the Ministry of Culture*

The Danish national budget (Finance Act) for 2019 contains the following subaccounts under the music account 21.22

- 21.22.01 Landsdelsorkestre (County orchestras)

Orchestras funding in EUR millions (2019)

	State	Commune	Own Funding	Total
Aalborg Symfoniorkester	2.80	84.79	432.42	520.01
Aarhus Symfoniorkester	2.87	63.89	568.67	635.43
Odense Symfoniorkester	2.88	97.30	1274.60	1,374.78
Sønderjyllands Symfoniorkester	5.45	15.80	47.41	68.66
Copenhagen Phil - Hele Sjællands Symfoniorkester	4.79	11.98	161.77	178.55
Total	18.78	273.77	2,484.87	2,777.42

Source: Danish Finance Act 2019.

- 21.22.10 Diverse tilskud til musikformål (Various grants for music purposes)
  - Operating grant to the House of Music, Nordjylland: Annual grant of EUR 602 505.00. Located in Aalborg the House of Music, Nordjylland opened in March 2014. It contains a concert hall and practice rooms for the Aalborg Symphony Orchestra and The Royal Academy of Music. Additional tenants include Orchestra Norden, as well as two of Aalborg University's fine arts divisions, Institute of Music and Danish Jazz Centre.
  - Operating grant to the Danish National Chamber Orchestra (Danmarks Underholdningsorkester): Annual grant of EUR 200 835.00 dedicated to the operating costs.
- 21.22.17 Musikskoler (Music schools)
  - Subsidy to salaries of music teachers: The state reimburses up to 25 per cent within the limits of the appropriations provided for by the Finance Act. Music schools run as municipal institutions or as self-governing institutions with municipal grants. For the reimbursement to be granted, it is a prerequisite that the children and young people who attend the music school do not pay fees amounting to more than 1/3 of the gross expenses of the music school's operation.

### ▪ **The Danish Arts Foundation**

The Danish Arts Foundation is an institution under the Ministry for Culture, the national arts council of Denmark. It runs a number of music support schemes .

#### **Schemes from the Danish Arts Foundation in which the music sector is included**

- Career programme "The young artistic elite" Grants for 15 to 20 recipients among the most talented young artists (not applicable to students) who have either completed an artistic education or have made themselves a name in the art world. Applicants must have at least one year's relevant experience and must have demonstrated a high artistic level and national as well as international potential, for example: recruitment or collaboration with professional art and cultural institutions, festivals, galleries, with official publications and the like in Denmark / abroad; exposures abroad; good position in international competition; signed an agreement or cooperation with the art and cultural institution / producer / agent nationally and internationally. Budget for 2019: EUR 803 340.00

- Journal Support Grants for the production of Danish general cultural journals: This grant is dedicated to already existing public cultural journals. Both printed magazines and web magazines can apply. The purpose of the scheme is to support the production of existing Danish printed journals and online journals, which have a clear general cultural purpose and which are generally available. General cultural purpose means journals that deal with general subject matter for a broad circle of readers or journals that have considerable significance for artistic environments such as literature, visual art, architecture, music, performing arts and design and handicrafts. There is therefore no support for start-ups, professionalisation and development of existing journals or marketing projects. Subsidised journals must show a high-quality, aesthetic design and graphic expression; make a narrow topic accessible to outsiders; should be professionally convincing; have a particular significance in a given artistic domain, sub discipline.

Not subsidised are: Magazines that are distributed free of charge, even for marketing purposes, except for Internet magazines; associations' newsletters or magazines; One-time releases that are not included in the planned release series (theme numbers, stand-alone projects); Journals published by political parties or predominantly political; Journals covering hobby and amateur activities; Web magazines, which are merely web editions (typically PDF files) of the printed journal; Web portals that merely serve as a gateway to a number of other resources;

- Huskunstnerordningen: This grant is aimed at subsidising artist fees where professional artists work with children and young people in schools, day care etc. It is dedicated to schools / youth education and various day care facilities for children and young people; municipalities and regional networks; all kinds of cultural institutions; professional artists; associations and other institutions with activities organised for children and young people.

A house artist's course can be: a workshop, based on a single art form (architecture, visual arts, crafts and design, literature, music, performing arts) or based on a cross-artistic field. The House Art Committee prioritises long-term courses for the individual child, where there is time for a process, and where the artist and the children / young people have the opportunity to jointly delve into and investigate the creative, artistic process. Long-term projects, (for a school or calendar year), may be applicable for the same group of children. The committee attaches great importance to the meeting between the artist and the child. The individual child / young person must as a minimum meet the artist (either individually or as part of a group) for a total of 10-15

hours. The hours can be divided into several days, depending on the age of the target group and the nature of the project.

### **Multiyear agreements**

- Regionale spillesteder (Venues): (approx. EUR 4.433 Million in 2018) The Danish Arts Foundation may give grants for venues (for expenses associated with music).
- Support to music institutions: approx. EUR 2.7 Million in 2018
- Support to music ensembles: approx. EUR 4 Million in 2018
- Support to festivals: approx. EUR 728,000 in 2018
- Support to music basic course institutions: approx. DKK 40.8 million or EUR 5.48 million in 2018. There are 8 basic music course institutions throughout Denmark that are supported via multiyear agreements by the Danish Arts Foundation.
- Support to genre organisations:
  - o SNYK: approx. EUR 410,870 in 2018.
  - o JazzDanmark: approx. EUR 748,800 in 2018.
  - o Tempi: approx. EUR 567,700 in 2018.
  - o Rosa: approx. EUR 547,300 in 2018.

### **Grants dedicated to music:**

- Children and young people (approx. EUR Million 2.3 in 2018): The grant aims to promote learning environments and talent development. It supports music teaching of an experimental character and development of new educational material. Eligible actors are all actors in the field of music education and similar activities, as well as leisure clubs, rehearsal clubs, youth schools, after-school clubs and other actors within the association and leisure life (except associations who have a multi-year agreement with the Danish arts foundation).
- Information, Documentation and Publication - Music Grants for publications of journals, publications, information and documentation services on music (approx. EUR 160,700 in 2018): A grant can be applied for publishing of journals and other publications on music, including web publishing and other electronic communication information, dissemination and documentation. This may include documentation of musical genres, periods and artists. No subsidies are given for production of promotional material for compositions, recording and production of music development and publishing of music educational material\* working grants associations and organisations' member-related websites, newsletters, etc. The amount of the subsidy depends on the project.

This grant can't be given to institutions that have a multi-year agreement with the Danish Arts Foundation's Project Support Committee for Music.

Publishing of music educational material can receive support under the section on "Children and young people - learning environments"

- Orchestras, bands, choirs and ensembles (approx. EUR Million 1,1 in 2018): The grant is designed for Professional Danish orchestras, bands, choirs and ensembles. Soloists with international concert activities can also apply for the grant. The grant can be used for all expenses related to the orchestra / ensemble's activities, except for the remuneration of musicians. Orchestras, bands, choirs and ensembles of 6 persons and

above may, however, use the grant for all expenses, including the remuneration of musicians. It is a prerequisite for obtaining funding that activities can be documented in 2019 (the year before the grant year). If the same person conducts several professional orchestras, bands, choirs or ensembles, the total concert activity must be documented in 2019 (the year before the grant year) of at least 10 concerts in Denmark and abroad for the orchestras, bands, choirs or ensembles concerned (School concerts do not count in the number of concerts). The grant requirement must be at least EUR 3,347.00.

- Concert (approx. EUR 552,000 in 2018) and music festivals (approx. EUR 680,000 in 2018): Grants given to organisers of at least 5 concerts, who have public access / entrance, and only if organisers provide professional tariff remuneration to the participating musicians. In special cases, the committee may grant exemption from admission requirements.
- Amateur Music (approx. EUR 624,000 in 2018): This grant is dedicated to nationwide Amateur music organisations and associations as well as organisers of amateur music activities of nationwide interest. In the committee's prioritisation of applications, the committee first of all assesses the importance of the activity for strengthening quality and diversity in the amateur music scene. In its assessment, the current music committee places particular emphasis on: - Music professionalism and development - vision and ambition - needs and effects. The committee welcomes: - that the project contributes to renewal within the music scene - the projects and activities are of national interest.
- Composer Agreements (approx. EUR 573,000 in 2018): Composer agreements for shorter or longer duration. It can be: Ordering of works, house composer agreements, residencies and other binding collaborations between music actors and Danish composers in all kinds of music. The Danish Arts Foundation provides subsidies for the composers' fees.
- Grant to support Musician Fees (approx. EUR 2.4 million in 2018) : This grant is dedicated to music venues and music associations to help them pay fees to musicians. This grant cannot be given to institutions that have a multi-year agreement with the Danish Arts Foundation's Project Support Committee for Music. The prerequisites for the grant are as follows: at least 10 concerts (with entrance fee) are held annually within at least 6 months; Concert are accessible to the public; professional tariff remuneration should be granted to all participating musicians at the concerts (around EUR 270.00); There should be a minimum of 50% local co-financing, and this co-financing must be at least around EUR 4 000.00).
- Work development - music workers, and creative artists in music (approx. EUR Million 1.7 in 2018): The grant is dedicated to composers, songwriters and sound artists in all genres to further develop their artistic work. Excluded are students at the music conservatories at bachelor / undergraduate level or undergraduate / superstructure level or equivalent programmes abroad
- Grant for music and performing arts (approx. EUR Million 1.7 in 2018) : This grant, jointly funded by The National Arts Foundation's project support committee for music and for performing arts, is dedicated to professional actors (individuals, groups, ensembles, associations, institutions, etc.) in the field of music drama and related forms of expression. It aims to promote cross-arts projects in the intersection between music and performing arts. Grants are primarily granted for newly written, newly composed and experimental projects, including projects aimed at children and young people.

The grant can support projects' tour activity (primarily for projects produced with the support of Music and Performing Arts' aesthetic committee under the Danish Arts

Foundation), project development / project maturation (artistic development work - typically workshops, laboratories, concept and format development, without requirement for public performance and entrance fee).

- Publishing music and realising sound art (approx. EUR 267,000 in 2018): This grant is dedicated to individuals, orchestras / ensembles / bands, project groups, organisations etc., to support the publication of music at a high artistic level. The projects can be, for example, music publishing of high artistic quality with artistic ideas in publishing format and marketing, cross-art music projects / installations, music apps, music films, etc.

### **Grants for music with focus on internationalisation**

- International concert activities: The committee calls on applicants at the beginning of the year to get an overview of the current year's international concert tours and trips and to prioritize what is sought, since the committee can only accommodate a limited number of applications per year. The committee expects no more than one application per ensemble for each application deadline. Grants are awarded for transport and international projects.
- International concert activities - CLASSICAL MUSIC (approx. EUR 54,677 in 2018): the following institutions are excluded from applying for this grant. The county orchestras, choirs and ensembles, The Royal Copenhagen. Theatres, choirs and ensembles, The Choir of the Danish Opera and the Norwegian Music Corps.
- International concert activities - NEW COMPOSITION MUSIC (n.a.): The grant is operated by the association SNYK
- International concert activities - ROCK / POP (n.a.): The grant is operated by the association Danish Rock Council (ROSA)
- International concert activities - JAZZ (approx. EUR 66,973 in 2018):: The grant is operated by the association Jazz Denmark
- International concert activities - WORLD MUSIC (n.a.): The grant is operated by the association Tempi
- International concert activities FOLK MUSIC: The grant is operated by the association Tempi
- International Visitor Programmes- Music (approx. EUR 65,158 in 2018): This grant is dedicated to support the travel costs for research and stay in Denmark of Foreign festival leaders, concert organisers, music journalists and others.
- International development and networking activities (approx. EUR 112,490 in 2018): Grants for musicians and composers' development and networking activities. Grant dedicated to Danish musicians and composers or for Danish hosts who apply for the visit of foreign musicians and composers.
- Activities abroad: Danish professional musicians and composers have the opportunity to apply for grants for development and network activities or residency stays abroad at least 2 weeks. A stay must include activities such as creative composition work, workshops, master classes, clinics, artist talk, co-writing sessions and production collaborations.
- Activities in Denmark: Danish institutions and professional actors within Danish music life have the opportunity to apply for grants as host for foreign musicians or composers for a period of 2 weeks to 3 months duration. The invited artist can, for example, participate in activities such as: creative composition work, teaching courses, guest lectures, workshops, master classes, artist talk, co-writing sessions and production collaborations, etc. Individuals excluded from these grants are:

Musicians and composers who are still students at the music conservatories at the undergraduate / undergraduate level or the graduate / postgraduate level or equivalent degree programmes abroad cannot apply for the grant. Excluded activities are: Training and courses for individuals; Activities that are mainly concert tours; Stay already fully financed by a host institution or residence at residencies, cultural institutions and institutions abroad that are operated from Denmark.

In addition to the grants awarded for activities in Denmark and Abroad, in 2018, the Danish arts foundation awarded approx. EUR 194,200 to specialised genre organisation for delegations to international showcase festivals.

▪ **SNYK**

Created in 2000 SNYK promotes and helps actors of the contemporary classical music scene. They provide a wide range of financial and non-financial support.

- Databases: SNYK provides databases about the work of Danish composers (from 1930 until 2010) and about up and coming concerts in the field. The agenda can be updated by the ensembles/musicians themselves.
- G (( )) ng Tomorrow Festival: SNYK organises a festival dedicated the contemporary music scene in Denmark.
- Consulting: SNYK provides strategic consulting for composers, sound artists, concert organisers or musicians active in the field of new, experimental music and sound art.
- Communication and press work: The support is here to help musicians and ensembles to write a press release, contact the press, describe a project to an audience, press and communication strategy.
- Consulting for fundraising: SNKYK helps and informs music professionals about upcoming deadline for grants managed by third bodies (private foundations or by public bodies)
- Consulting for financial and administrative guidance: Free consulting (to a certain extent) for financial and administrative guidance and support of projects of new music professionals. Against the payment of a fee, SNYK can even manage the application to grants of the Danish Arts Foundation's Project Support Committee for Music (PSU). Free consulting is also delivered for music professionals who received a grant from the Danish Arts Foundation in order to help to prepare budgets, organise bookkeeping and financial statements. They can answer questions concerning the ongoing budget follow-up. Snyk can assist as much or as little as is necessary so that a musician can focus on his core business and immerse him/her self in their artistic work.
- Project development, collaborations, curating and knowledge: financial support for projects and events that benefit the environment within new, experimental music and sound art in both Denmark and abroad. Grants (max. EUR 1 348.00 per project) are given for activities or concerts that fall within the three areas below:
- Project work: grants are awarded to projects that show professionalism, potential and lack a small boost in order to be realized, develop and grow strong enough to be sustainable in the long term - ie. with potential for transfer in the same or new formats.
- Kick Starter: Grants are awarded to projects or a production that can be kick-starting for a career or area.
- Exports: Grants are awarded to projects that can pave the way for artists or organisers, open international doors and create important international networks. Budget for 2019 is EUR 13 389.00.



#### ▪ **JazzDanmark (jazz)**

JazzDanmark is financed mainly through a four-year framework agreement with the Danish Arts Foundation. In addition, JazzDanmark receives project support and grants from associations, foundations and other contributors.

- JazzDanmark Pool: The pool is a support scheme primarily for Danish musicians, as an aid to the implementation of international tours and projects and Danish musicians' tours in Denmark with foreign soloists. Danish musicians being those musicians who are resident in Denmark and who can be said to have a significant part of their work in Denmark. The grant is given by an advisory board.

Emphasis is placed on the project that obtains a maximum benefit from the funds allocated. For example, in connection with international soloists' visits to Denmark, workshops are arranged at relevant institutions (eg conservatories), or during tour activities abroad, other collaborators are involved in the project (eg a record company that can help with the establishment of distribution agreements o. etc.) It entails:

- a transport support to cover travel expenses in connection with tours abroad
- a transport support to cover foreign soloists' travel to Denmark in connection with activities with Danish musicians. Non-eligible expenses are: fees, recordings, fact finding missions and promotion activities, administrative costs and operating support for orchestras, composition fees, accommodation costs, participation in workshops, seminars, showcases or competitions, loss cover for projects that have taken place. The Average support by projects is between EUR 267.00 – 2 670.00.
- Strategic consulting: JazzDanmark provides consulting for bands who are planning on their development phase and are looking for funding possibilities.
- News channel: JazzDanmark provide the opportunity to circulate news or articles about jazz bands on the organisations' website, social media)
- Lending of PA facilities.
- Borrow a meeting room: offers access, during opening hours, to the meeting rooms of the organisation.

#### ▪ **Tempi**

Tempi is an association focussed on promoting the Denmark's roots genre. Tempi defines roots as "the unifying term for a wide and diverse genre area that contains all the music and all the genres that somehow convey, carry on or be inspired by musical traditions and roots. Near as well as distant." The Tempi genre connects to musical traditions and roots such as Danish, Nordic and Northern European traditions as well as traditions from all over the globe.

- News portal: Tempi provides regular information on the world / Folk music scene of Denmark.
- Databases: Listing of relevant venues and festivals for the folk/world music scene
- Export: Tempi helps to export and promote Danish music from the Tempi genre area abroad. It is mainly active through networking and strategic consulting. They focus on 4 geographical areas. (The Nordic countries - with a special focus on Norway and Sweden; GAS territories and Hungary; Great Britain; Canada and the northernmost states of the United States



- Artists page: Tempi provides the artists/ bands it is working with an individual presentation containing a picture of the band, a short biography, and links to the social media and digital music platforms.

- **ROSA (rock)**

ROSA-Danish Rock Consultation has since 1981 supported and disseminated newer Danish rock music and related genres at home and abroad. ROSA is a private entity that is however mainly funded by operating grants from the Danish Arts Foundation's Project Support Committee for Music via a framework agreement renewed every three years. It provides a wide range of support.

### **Projects**

- SPOT: Spot is a showcase festival / networking platform exists since 1994 and organised by ROSA, The Danish rock council and Music Export Denmark. It aims to create a space for international professionals to meet local professionals of the rock sector of Denmark. Spot also organises free concerts during the summer in Immervald (Aarhus)
- Efterskolekoncerter: ROSA - Danish Rock Consultation has since 2007 arranged concerts at Danish after school centres in collaboration with the after school centres and "AFTRYK Festivalen". The aim of the project is to offer young musicians the possibility of concert experience playing to a young and modern audience. The concerts act as marketing platforms for the music and help to ensure that a young audience segment has access to new quality music. ROSA's E-Tur also aims to ensure an appropriate geographical repartition and to spread new Danish music. Every new school year, five upcoming music names are ready to go out and play live at the Danish after school centres.
- Music at home: Music at home is a project started in 2018. The aim is to create an intimate concert framework for people to discover new music. So far, the project has been settled in Aarhus and Aalborg. The purpose is - in addition to creating new scenes and audience environments for the music - to give citizens, who in everyday life only have occasional contact with Danish produced art, the opportunity to experience music in a safe local environment
- Rockcruise: ROSA curates and organises a number of concerts and artistic events in collaboration with DFDS (a cruise company), which finances all fees and associated costs. Since the start in 2004, the collaboration with DFDS has included concerts, free trips for artists and special music events. DFDS is a main sponsor for ROSA / SPOT.
- Pop Pilot: music camp for young girls aged 13-16 who focus on community, originality, empowerment and music. The camps aims to empower girls who are not musicians and get them acquainted with music. The purpose of Pop-Pilot is to strengthen teenage girls' beliefs in their own creative and musical abilities at a time in life, where decisive personal competencies arise and mature.

### **Festivals/showcases**

- Nordklang: Rosa is participating in Nordklang, a Nordic music festival located in St. Gallen in Switzerland, where only Danish music is being played. The aim of the festival is to attract the press as well as a new audience.
- Diás Nórdicos: Diás Nórdicos is a festival focusing on Nordic culture, which has existed since 2010. ROSA has been a co-initiator and musical partner since its inception, and has presented Nordic soloists and groups in (mainly) Madrid since 2010, and since 2014 also on tours in Latin America. The initiative's success, both in the media and

with the audience, lies in the Latin country's interest in Nordic culture as well as the Nordic social model. ROSA's role in Días Nórdicos is to create and strengthen the interest in Danish / Nordic music and culture in the Spanish-speaking areas. Besides concrete concerts, workshops, sessions, exhibitions, etc., Días Nórdicos functions as an overall branding of Danish and Nordic values. Target groups range from ordinary audiences to media, institutions and businesses.

- Udenfor Saesonen (UFS): With the songwriter and musician Steffen Brandt as curator, 4 concerts are held every year, promoting new repertoire and new soloists across musical genres and artistic expressions.
- STRØM Festival: festival for new electronic music in the Copenhagen area. Today, Strøm has developed into a nationwide, independent institution for electronic music, with a particular focus on concert development, teaching and counselling. ROSA holds the chairmanship of Strøm's board of directors and acts as administrative secretariat for the institution. Strøm was established to create cultural policy equality for the electronic music, to contribute to the continued development of the electronic scene, to spread knowledge of electronic music and to stimulate Danish citizens' access to the genre's expression, professionalism and productions.

### Support schemes

- Live support: for Danish bands for international tours, concerts, showcases etc. Maximum of up to 50% of the documented and approved expenses. The application must be submitted BEFORE the tour start, and that the support is only paid AFTER the end of the foreign performance and by the submission of final accounts with a copy of the original documents. In principle, no grants are awarded for tours that earn a financial profit.
- Truck n'roll: attractive discount scheme for musicians who can hire vans, passenger cars and minibuses at favourable prices, fully insured through Europcar and ROSA. Truck'N'Roll makes it easier for Danish bands to go on a tour - by lowering the risks. When registering, a Truck'N Roll card is sent, which ensures special orchestra prices per day incl. 700 km per day on selected vans, passenger cars and minibuses. Truck'N Roll prices apply only when driving in Denmark To be qualified for a Truck'N Roll card, the orchestra must play their own material and be over 21 years old. Membership of Truck'n'Roll costs a modest amount around EUR 25 / year, and can be ordered by contacting ROSA.

#### ▪ **Slots- og Kulturstyrelsen (The Danish Agency for culture and palaces)**

The Danish Agency for culture and palaces is an agency of the Danish Ministry of Culture. It awards one grant for which music professionals can apply for.

- International Cultural Exchange Projects: The collaborative agreement which exists between the Danish Ministry of Foreign Affairs and the Danish Ministry of Culture is designed to promote Danish international cultural exchange. The funding scheme administered under this agreement is open only to institutions covered by the agreement. International partners interested in initiating a collaboration on international cultural exchange can, however, contact their local Danish mission. It is up to the Danish mission to apply for funding. Funding goes towards cross-sectoral international cultural exchange projects within the branches of the arts covered by the Ministry of Culture: Film, Architecture, Crafts and Design, Literature, Music, Visual Arts and Performing.

Grants available under the Collaborative Agreement can be sought by partners of the Collaborative Agreement for international cultural exchange projects designed to strengthen: Development and renewal of Danish arts and culture Promotion of Denmark as a country; furthering of cultural export; furthering of intercultural dialogue. The grant focusses mainly on European neighbours, USA, Asia - China, Japan and South Korea.

Eligible actors are: Danish Foreign Missions, The Danish Institutes in Rome, Athens and Damascus, The Danish Cultural Institute, The Danish Film Institute, The Danish Architecture Centre, The Danish Design Centre, The Danish Centre for Culture and Development.

- ***Music Export Denmark***

Based in Frederiksberg, Music Export Denmark, MXD is working to increase the export of professional Danish popular music and to strengthen the business base for Danish artists and music companies in connection with exports abroad.

MXD provides export support, creates international projects, communicates internationally on the promotion of Danish music abroad and informs about international market conditions.

- ***Tax incentives and specific regulations applicable to the music sector***

n.a.

### **Support at regional level**

n.a.

### **Support at sub-regional level**

n.a.

## Estonia

### Support at national level

#### ▪ **Support from the Ministry of Culture**

The yearly expenditure of the Ministry of Culture on music is EUR 12 million and includes support for a list of organisations and 4 support schemes. This does not include infrastructure investments.

**The Ministry of Culture is in charge of the development of professional music field and the Ministry of Education is responsible for music education.**

#### Operating grants

- Operating grants to musical state institutions: The Estonian National Opera is a public body. The Estonian National Opera is the main promoter of Estonian musical theatre, with compositions, operas and ballets from Estonia and abroad in its repertoire. The funding to musical state institutions **slightly decreased these last years due to the multiplication of umbrella organisations supported by the state. For example, the state funded Arvo Pärt Centre that was opened in 2018. These new cultural institutions are either co-founded through the Astra-programme (Research and development Programme of the Estonian government) such as the new concert venue at Estonian Music and Theatre Academy that opened in fall 2019, or they are co-founded with private partners such as the Estonian Instrument Foundation established in 2015.**
- Support to annual activities of music organisations: the Estonian Philharmonic Chamber Choir / ERSO - Eesti Riiklik Sümfooniaorkester (National symphonic orchestra)
- Support to SA Eesti Kontsert: The musical scope of Eesti Kontsert encompasses symphonic and chamber music, jazz, choral music, electronic acoustic music and music for children. It organizes concerts, festivals as well as school concerts. It also organises the competition 'Stars of Classical Music', in cooperation with Eesti Televisioon and Klassikaraadio. Its aim is to bring young talented musicians in front of a wide audience, encourage creativity, find new enthusiasts of classical music, and provide high-quality educational entertainment to viewers. Young classical musicians aged 15–25 who speak Estonian can compete.
- Support to umbrella organisations: The Ministry of Culture supports directly the operating costs of 17 umbrella organisations, state foundations and organisations whose activities are crucial for the Estonian music ecosystem (among others: Estonian Music Information Centre, Arvo Pärt Centre, Estonian Instrument Foundation, Estonian National Symphony Orchestra, Music Estonia ...)

#### Grants from the Ministry of Culture dedicated to music

- Music festivals and major events (EUR 800,000.00 per year): The purpose of the grant is to ensure the continuity and development of music festivals to increase the possibilities of Estonian musicians and composers to introduce their creations; to improve the possibilities of the population to access professional music events; to increase the involvement of Estonian musicians in the concert organisers' own

productions and to promote the development of professional concert management throughout Estonia.

Support can be requested by private and public legal entities, local government agencies, self-employed persons on the commercial register. It is awarded by a commission composed of directors of Estonian musical institutions.

- Music Publishing support programme (EUR 215,000.00 per year): Includes support to composition: EUR 165,000.00 and support to publishing EUR 50,000.00). The co-financing rate should represent at least 10% of the budget and the minimum grant is EUR 2,000.00.

The programme aims to promote the value of Estonian composers and sound works by enriching Estonian music life through new music, by storing and securing access to nationally important musical works and musical texts; as well as ensuring that important reference books, cultural studies, monographs, etc., are published in the music field.

Support can be requested by: State and local government agencies entered on the Estonian register; private legal persons and self-employed persons.

Type of supported actions:

- Composer's fee for the creation of work dedicated to public performance, recording or broadcasting in Estonia
  - Composer's fee for the creation of original music of Estonian theatrical performances or film
  - Fee of Estonian composers for the creation of works ordered by a foreign institution, or for a foreign composer living in Estonia.
  - Publishing, including digitally, Estonian music (notes) and musical publications.
  - Composer's residency in a music organisation or an ensemble.
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- Support to music competitions for young musicians (EUR 74,000.00 per year): The purpose of the grant is to ensure that national and international music competitions and events that raise the professional level of young musicians are held in Estonia for the development of Estonian national culture and interpretation and sound creation.
- Support can be requested by: Private legal entities, local government units, self-employed persons entered on the commercial register, organising a musical competition of national importance with a budget of at least EUR 15 000 and held in Estonia. The grant is awarded by a commission.
- Music collectives and concert organisers support programme (EUR 390,000.00 per year): The purpose of the grant is to ensure the continuity and development of music collectives and concert organisers important for Estonian national culture and professional art, to increase the possibilities of Estonian musicians and composers to introduce their creations and to improve the possibilities of the population to access professional music events, increase the involvement of Estonian musicians in the own productions of concert organisers and promote the development of professional concert management throughout Estonia.

Support can be requested by: Private legal entities, self-employed persons entered on the commercial register. The grant is awarded by a commission.

### **Grants from the Ministry of Culture in which the music sector is included**

- Support Programme for Estonian Culture in the world. (EUR 650 000.00 per year): This programme supports projects that promote the internationalisation of Estonian culture and cultural exports, the promotion of Estonia throughout the world through culture and the creation of opportunities for Estonian creative people. It aims to foster the access to the international arena for cultural collectives and creative companies, as well as to contribute to the promotion of Estonia, the promotion of cultural diplomacy and the internationalization of Estonian culture outside Estonia through music, literature, performing arts, cinematography, visual arts, museums, folk culture, architecture, design and high-level cultural events related to Estonian communities abroad.

The minimum grant per project is EUR 4,000.00 and maximum EUR 60 000.00. The total amount of grants awarded from the call for proposals is for two rounds. The grant is delivered by a commission.

Support can be requested by legal entities registered in Estonia, State or local government agencies, self-employed persons entered on the commercial register who want to set-up a project in the following fields:

- participation in high-level cultural events important for Estonia and Estonia's focus on major international events
  - organisation of high-quality cultural projects, including concerts, performances, exhibitions, etc.
  - organisation and attendance of Estonian culture days and Estonian festivals
  - participation in international network events, residencies abroad, presentation festivals, and other events promoting the internationalisation of Estonian culture.
  - The following projects are not eligible: projects that have already been supported by the "Estonian Culture in the World" application round; projects in which activities have been carried out / event occurred prior to the submission of the application; participation in workshops or other self-improvement activities; creation of works; projects that are not sufficiently prepared or are still in the process of development.
  - The maximum rate of support for the eligible costs of the project is 80%. The total contribution of the State is taken into account when calculating the contribution rate. At least 20% of the project's eligible costs must be covered by funds that are not repayable or non-refundable by the State, local authorities or other European Union institutions or funds.
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- Co-financing of Estonian projects participating in the European Union Creative Europe Culture Programme (EUR 46,400.00 per year): The aim of the application round is the internationalisation of Estonian culture and the creation of sustainable external contacts through the participation of Estonian cultural institutions in the EU's Culture programme "Creative Europe".  
Support can be requested by: Private and public legal entities; state or local government agencies. The grant is awarded by a commission. The minimum grant per applicant is EUR 1,000 and the maximum amount is EUR 15,000.

- Implementation of transnational cultural cooperation agreements (unknown amount): Grants are awarded on the basis of a ministerial directive on a proposal from the Commission. All grant allocation directives are available through the Ministry of Culture's register of documents. On the basis of a ministerial decree, a grant agreement with the beneficiary is signed by the Secretary General on behalf of the Ministry of Culture and the signatory representing the beneficiary. On the basis of a contract signed by both parties, the grant amount will be transferred to the beneficiary's account.

- ***Grants implemented by Cultural Endowment of Estonia (Eesti Kultuurkapital)***

Cultural Endowment of Estonia (Eesti Kultuurkapital). The endowments are given either on the basis of applications or on the initiative of Eesti Kultuurkapital. The music endowment aims to support physical and legal persons that are active in Estonia and represent Estonia.

It intends to support activities that contribute to the development and renewal of Estonian music. The activity benefit is intended to support artistic associations and artistic collectives that promote musical culture. The applicant's cost-sharing and/or co-financing must be at least 10% of the total amount of the project's costs in order to qualify for the project or activity grant.

- The creative work benefit: The creative work benefit is awarded by the Music Endowment for the creation of musical works, writing librettos, making notations and arrangements of musical works and creating and translating texts on musical topics.
- Grants: The Music Endowment supports professional activity, development of skills and self-improvement of creative people (including performers, composers, arrangers, music researchers, music journalists etc.) by awarding different kind of grants.
  - Creative grants:
    - The quarterly grant EUR 1,000 which can be applied for four times a year.
    - The six-month creative grant EUR 3,000; applications can be submitted twice a year
    - The one-year creative grant EUR 8,000; applications can be submitted once a year
    - The two-year creative grant EUR 16,000; applications can be submitted once a year
  - Study grants: For students studying in Estonia, the grant amount is EUR 500. Only students that have Estonian citizenship can apply for this grant from their 2nd academic year.
    - The *one-year study grant* to study in a high school abroad EUR 3,000.
    - The *study grant* to study in Finland is supported with up to EUR 800.
    - The *study grant* to study in a high school abroad. EUR 1,000 for students who study in European countries (except Finland)
    - In England, Switzerland, Norway and outside of Europe the amount of the grant is up to EUR 1,200. Applications can be submitted four times a year.
  - Special grants:



- The performer's grant: Up to EUR 2,000, the performer's grant ensures an active performer opportunity for lifelong learning, concert activity and learning repertoire. Applications can be submitted four times a year.
- The specialty grant: The speciality grant is a one-time creative grant to support active creative people, music researchers, music producers/creative directors, music journalists, teachers and other promoters of the area and international cooperation. Applications can be submitted four times a year.
- Awards:
  - The Music Endowment's annual award EUR 4,000.00) are given to physical or legal persons that have excelled during the year, achieved a high level in their activity or developed the area that merits acknowledgement.
  - The Music Endowment's life's work award: EUR 10,000.00 are given to acknowledge long-term activity and contribution to the development of the discipline.
  - Acknowledgement awards:
    - The *teacher's acknowledgement award* (EUR 800.00 euros) is given to pedagogical activity which promotes musical education in Estonia.
    - The *Music Endowment's acknowledgement award* (EUR 1,500.00) intends to recognise Estonian musicians or music institutions for their activity so far.
    - The *Estonian Music Council music award* (EUR 4 000.00) intends to recognise Estonian musicians or music institutions for their activity so far.
    - The *competition award* is intended to acknowledge individuals that have achieved success at professional competitions (music writing, interpretation etc. competitions). (Amount of the award is unknown)

#### ▪ **Grants implemented by Baltic Culture Fund**

Baltic Culture Fund promotes cultural cooperation between Baltic States, in order to strengthen the internationalisation of Estonian, Latvian and Lithuanian culture through joint cultural events. Grants are distributed once a year since 2019. The budget of the fund was EUR 300,000 of which each Baltic state contributed EUR 100,000.00. Six projects were supported from this amount. In addition, the Baltic Culture Fund received a donation of EUR 100,000.00 from the Nordic Council of Ministers for organising cultural events in the Nordic countries. This amount was shared between three projects. Some musical projects were funded.

- The Jāzeps Vītols Latvian Academy of Music, with the Estonian Academy of Music and Theatre and the Lithuanian Academy of Music and Theatre, offers 12 music students from the Baltic countries an opportunity to complete their studies at the Karajan Academy and perform a concert at the world-famous Berliner Philharmoniker in May 2021. The grant in this case is EUR 30,000.00
- With a grant of EUR 50,000.00, the Music Information Centre Lithuania with Music Estonia and the Latvian Music Information Centre will set up a joint stand for the Baltic countries at the World Music Expo WOMEX 2019 in Tampere.
- The Lithuanian Composers' Union, Latvian Composers' Union and Estonian Composers' Union were jointly granted EUR 25,000.00 euros to introduce contemporary music from the Baltic countries in Sweden and Iceland.



- ***Tax incentives and specific tax regulation applicable to the music sector***

Salary guarantee for professional musicians (in state owned foundations and institutions)/ The Estonian Ministry of Culture has guaranteed the level of salaries for professional musicians (in state owned foundations and institutions) so that they are equal to the official average salary in Estonia (EUR 1 300 monthly in 2019).

- ***Music Estonia***

Music Estonia is a privately-owned non-profit membership association. Its budget for export activities in 2018 was EUR 313 900.00. Music Estonia's export expenses consist only of direct export expenses via own initiated or run operations and activities. It doesn't redistribute funds to artists and professionals through own driven grants and programmes. Music Estonia's export activities costs are mainly dedicated to networking (inclusive staff travel), and showcasing. A smaller part of its expenses is dedicated to education.

### **Support at regional level**

The Estonian Ministry of Culture is planning to start monitoring the support to the culture (including music) sector at regional level in 2020.

- Expert groups of Eesti Kultuurkapital: The cultural endowment of Estonia (Eesti Kultuurkapital) has 15 experts' groups. An expert group is a structural unit of the Cultural Endowment the function of which is to distribute the money appropriated to a specific area of Estonia on the basis of submitted applications and on its own initiative (the Cultural Endowment of Estonia Act). The expert group panel consists of five persons active in the area and who are nominated by organisations of this area. The membership of an expert group panel shall be approved by the grand board of Cultural Endowment. The term of authority of a panel is two years, the members of a panel shall perform their functions until a new membership of the panel is approved. The same person may belong to two panels. The amount of money granted via the regional expert group is unknown.

From the survey, it is evident that there is no specific organisation that has knowledge about the funding schemes for music implemented at regional level. Each region and city are funding music related activities but data has not been collected until now. The Cultural endowment of Estonia has regional offices but they mainly give awards and don't implement specific funding schemes.

### **Support at sub-regional level**

n.a.

## Finland

### Support at national level

#### ▪ **Support from the Ministry of Culture**

The whole budget of the Ministry of Culture and Education is EUR 6.4 billion and the proportion of culture is EUR 447 million. Funds originate from the National Lottery (about 50%) and the rest is covered by collected taxes.

The Ministry of Education and Culture distributes state subsidies to orchestras on the basis of the number of musicians each year. The network of orchestras covers the entire country and reaches almost a million listeners. The Ministry of Education and Culture also funds the Finnish National Opera.

In addition to that EUR 2.9 million is dedicated to support equality and easy access for children to participate in music activities.

- National Council for Music: The Arts Promotion Centre Finland (see after) appoints national arts councils for a two-year term. The expertise of members of other national and regional arts councils, as well as that of external experts, may also be utilised in the peer reviews of applications.

- The National Council for Music awards discretionary subsidies to freelance artists and groups amounting to EUR 1.4 million. Each year artist grants are awarded to approximately 75 artists, over half of whom are on five-year or three-year grants and the remainder on one-year or half-year grants.

- In addition, the National Council for Music awards approximately EUR 2.4 million a year in other grants and subsidies for music. Approximately EUR 1 million of this amount is used to support the concert activities of orchestras, bands and choruses. Artists typically receive project grants for purchasing instruments, composing and giving concerts.

- The National Council for Music also selects the recipient of the state prize for music. In addition, the council assists the Ministry of Education and Culture, for example by evaluating applications for national cultural events.

#### ▪ **Support from the Arts Promotion Centre Finland - TAIKE**

### Grants

- Grants for artists: TAIKE and its 20 arts councils and two separate boards award around EUR 21.6 million a year in grants to professional artists. Artist grants account for approximately EUR 11 million of the total amount. Grants are awarded to individuals and working groups formed by them. Professionals from the music sector can apply to the following grants:

- Grants for promoting cultural diversity: The purpose of grants to promote cultural diversity is 1) to enhance the opportunities of artists with immigrant backgrounds or who belong to other cultural minorities to carry out artistic activities and to participate in Finnish art life on an equal basis; 2) to support art and cultural projects in Finland that promote cultural diversity and intercultural dialogue and combat racism. TAIKE does not award grants amounting to less than EUR 2,500 .

- Project Grants: Project grants are intended for individual projects made by professional artists to be realised in 2020-2021. Projects must begin in the year that the grant is awarded. Project grants may be used to cover, for example: material costs; production costs and working costs. Arts councils do not award grants amounting to less than EUR 2,500.

- Grants for mobility: The objective of grants for mobility is to promote the international mobility and networking of artists and art experts living in Finland. Grants for mobility are intended to cover the costs of trips abroad. These trips must be connected to projects that are significant artistically or in terms of a specific artform, and in connection with which the applicant shall 1) appear or present his/her art outside of Finland, 2) work at an artist residence, 3) develop his or her own work, 4) promote the working environment within the artform.

Grants for mobility may be used to cover the costs of trips abroad insofar as other funding is not available. Acceptable costs include: travel tickets (using the least expensive form of public transport); reasonable accommodation costs; artist residence costs; other direct travel costs; reasonable living costs (working costs).

Costs should be budgeted for at least the amount being applied for. Working costs may be included in the budget. Grants for mobility may not be used to cover material costs; production costs; freight charges; daily allowances; trips within or to Finland; familiarisation trips; competition trips; studies abroad leading to a degree.

- Artist Grants: Artist grants are intended to support the work of professional artists. Artist grants are not awarded to support studies or thesis work related to vocational qualifications or higher or lower university degrees. Grants are not available to 1) applicants who have received other or state working grants during the same year; 2) who have received a supplementary State artist pension.

Amount: Artist grants may be awarded for a period of five years, three years, one year or half a year as of the start of the next calendar year. In addition, in the field of photographic art, two ten-year artist grants are available to artists of exceptionally high merit. These may also be awarded as five-year grants. Half-year artist grants may begin in January or July. Unless otherwise notified by the grant recipient, the grant period shall begin in January. The amount of each artist grant is EUR 1,733 per month. The grant includes statutory pension and accident insurance issued by the Farmers' Social Insurance Institution Mela. The grant is paid monthly.

- Project Grants for children's culture: Project grants are intended for individual projects in children's and youth culture to be realised in 2019-2020. Projects must begin, however, in the year that the grant is awarded. Project grants may be used to cover, for example: material costs; production costs; working costs. Arts councils do not award grants amounting to less than EUR 1,500.

- Regional Grants: You can apply for the grant either as a project grant or as a working grant. Project grants are intended for individual projects in different fields of the arts to be realised in 2019-2020. Projects must begin, however, in the year that the grant is awarded. Working grants are intended for continuous professional artistic work lasting from 4 to 6 months during the period 1 June to 31 December 2019.

- Regional project grants: Project grants may be used to cover, for example: material costs production costs working costs Arts councils do not award project grants amounting to less than 1,500 euros.

- Regional working grant: Working grants are intended for the personal use of their recipients in order to safeguard their working conditions. Working grants are not available to applicants who have received full-year state artist grants or other working grants during the same year who have received a supplementary State artist pension. The computational amount of each working grant is EUR 1 700 per month. The grant includes statutory pension and accident insurance issued by the Farmers' Social Insurance Institution Mela. Other paid employment during the grant period is permitted.

### **Direct Subsidies**

Taite awards more than EUR 8 million a year in operational grants and special subsidies to more than 150 registered and legal communities, such as associations, foundations, cooperatives, companies and municipalities. Special subsidies account for approximately EUR 2.7 million of the total amount. Professionals from the music sector can apply for the following subsidies.

- Erityisavustukset kulttuurilehdille (Special grants for cultural magazines): The grants are intended for cultural magazines and online publications in Finland that maintain a diverse social debate on culture, science, art or different worldviews. Taite does not award grants of less than EUR 5 000. The subsidy will not be granted for basic operating costs of the Community (operating grant).

A grant may be awarded to a cultural newspaper which: is of high quality; appears in paper, online or in Finland; is published at least three times a year (paper and visual magazines); is constantly updated (web magazine); is available for everyone; has been published for at least one year.

This grant is intended to cover the cost of publishing a cultural magazine or promoting circulation. The publisher must have evidence of the publication of a cultural magazine in print or electronic form.

This grant cannot be awarded: to a cultural magazine that serves as a tool for communicating within the community (eg. member magazines); to a science journal; special editions to celebrate a certain numbers or years.

- Artist-in-residence subsidies: The objective of artist-in-residence subsidies is to promote the international scope of the Finnish art scene. Artist-in-residence subsidies are intended to support the operations of international artist-in-residence programmes in Finland in 2020. A precondition for receiving the subsidy is that at least some of the artists in residence must be foreigners.

These subsidies may be granted as operational subsidies to cover a community's basic operating costs or a specific area of operations. In exceptional cases, these subsidies may be awarded as special subsidies for projects to be implemented in 2020. These subsidies are discretionary and are applied for and awarded for one year at a time each year individually.

These subsidies may be awarded if considered necessary taking into consideration the applicant's other state support, as well as the quality and scope of the applicant's operations. State subsidies may cover only a portion of the total funding of operations and not all expenses.

TAIKE does not award operational subsidies amounting to less than EUR 10 000, so if necessary smaller amounts are awarded as special subsidies. Operational subsidies awarded by TAIKE may cover a maximum of 80% of the total amount of approved costs. In addition, the amount of the subsidy combined with other state support may not exceed the total amount of approved costs (100%).

- Cultural wellbeing subsidies for communities: special subsidies are intended for individual projects in different fields of the arts to be realised in 2019. The subsidised project should promote the availability and accessibility of art, as well as increase the use of art for promoting wellbeing. The activities should aim to become established as a permanent and structured operating model. TAIKE does not award subsidies amounting to less than EUR 2,000. Special subsidies are not awarded to cover the costs of a community's regular operations (see Operational Subsidies).

The applicant should have a plan for realising the positive effects of art in the project, for example by supporting a salutary environment or occupational wellbeing, maintaining the functional capacity of long-term patients, or promoting wellbeing by means of art-based methods. The subsidy should be used to employ professional artists.

The recipient of the subsidy must appoint a project manager from within his or her organisation to serve as the contact person for artists. Activities for maintaining the working ability of artists, for example by means of supervision, mentoring or professional guidance, may be considered part of the self-financing portion.

The subsidy may be awarded to cover the following, for example: Artist salaries and material costs in art projects; organising artist mentoring in connection with art projects; artist-based occupational wellbeing projects; planning and implementing a salutary environment through the work of artists; organising events, seminars, courses, camps and workshops related to the positive effects of art on wellbeing; for projects and cooperation that promote national and international health through art.

- Festival subsidies: The objective of festival subsidies is to improve the conditions for performing creative work, as well as the diversity of production and distribution forms the inclusion and participation of citizens culture regional accessibility to art and culture. These subsidies may be awarded to festivals that: are organised regularly in Finland; are well established (organised at least 3 times in the past); are professionally organised have a programme based on culture and the arts have a high-quality programme; have a programme that is open to the general public are significant within their own field of the arts and promote the development of their own field of the arts are significant nationally or regionally. TAIKE does not award festival subsidies amounting to less than EUR 10,000, so smaller amounts are awarded as special subsidies.

- Subsidies for large-scale annual art and cultural festivals that have national and international significance, that have broad relevance in terms of cultural policy, that are important for the development of the festival sector and that have year-round operational resources.

- Subsidies for art and cultural festivals that are organised on a regular basis, that have national or regional significance, and that are significant in terms of promoting different artforms, inclusion and participation, and cultural diversity.

- Operational subsidies: The objective of operational subsidies is to support the livelihoods and employment of artists, as well as to diversify the conditions for performing artistic and other creative work. Operational subsidies also promote the availability and accessibility of art and culture nationwide.

Operational subsidies are intended to support the operations or a certain part of the operations of communities. These subsidies are discretionary, and they are applied for and awarded on an annual basis.

Operational subsidies may be awarded if considered necessary taking into consideration the applicant's other state support, as well as the quality and scope of the applicant's operations. Operational subsidies may cover only a portion of the total funding of operations and not all expenses. TAIKE's operational subsidies may cover a maximum of 80% of the total amount of approved costs. In addition, the amount of the subsidy combined with other state support may not exceed the total amount of approved costs (100%)

TAIKE does not award operational subsidies of less than EUR 15,000, so smaller amounts should be applied for under special subsidies for a project or projects. See the call for applications for special subsidies.

- Operational subsidies for performing arts: The objective of operational subsidies is to support the livelihoods and employment of artists, as well as to diversify the conditions for performing artistic and other creative work. Operational subsidies also promote the availability and accessibility of art and culture nationwide. Operational subsidies help develop the contents and structures of operations within the performing arts and keep them up to date. Operational subsidies for performing arts are intended to support the operations or a certain part of the operations of communities. Operations may be national or international, and the subsidy may be used also to support visits and tours by communities. Operational subsidies for performing arts may be awarded for a period of one year or three years.

- In 2020, operational subsidies may be awarded as either a one-year operational subsidy or a five-year development subsidy.

- One-year subsidies may be awarded to professional performing arts communities that carry out regular year-round performance activities with high artistic quality. Recipients may also be new communities that are just developing their operations. TAIKE does not award operational subsidies of less than EUR 20 000, so smaller amounts should be applied for under special subsidies for a project or projects.
- Three-year subsidies may be awarded to professional performing arts communities, but the next application period for three-year subsidies will be in 2021 for 2022-2024. Subsidies may be awarded to professional performing arts communities that have been registered and operated for at least three years and that have demonstrated their ability to offer a high level of artistic quality. Applicants should carry out regular year-round performance activities. Communities applying for these subsidies should include with their application an operational plan and budget covering the next three years. The minimum amount of three-year subsidies is EUR 80,000 /year.
- A one-time five-year development subsidy may be awarded to a prior recipient of a one-year subsidy for developing operations, to a new community for a broad five-year project or in general for the applicant's artistically ambitious and challenging five-year operations/project. The amount of the subsidy is at least EUR 50 000 /year. A five-year development subsidy may be awarded to the same applicant only once.

- Special subsidies for children's culture: State subsidies are awarded to cover the costs of implementing projects related to children's and youth culture in 2020. Projects should promote the working opportunities of artists involved with children's culture. TAIKE awards some special subsidies for children's culture for special development projects that promote children's and youth culture. In addition, one of the priorities of these subsidies is to promote the local accessibility of children's and youth culture. It shall be considered an



advantage if the project is carried out together with a children's cultural centre and if it promotes the working opportunities of artists involved with children's culture.

TAIKE does not award subsidies amounting to less than EUR 5 000. If the project generates a profit, the recipient may be asked to return the subsidy in full or in part.

Special subsidies are not awarded to cover the costs of a community's regular operations (see Operational Subsidies).

- **Special subsidies:** Special subsidies are intended for individual projects in different fields of the arts to be realised in Finland or abroad in 2020. Special subsidies may be awarded if considered necessary taking into consideration the applicant's other state support, as well as the quality and scope of the applicant's operations. Special subsidies may cover only a portion of the total funding of the project and not all expenses. If the project generates a profit, the recipient may be asked to return the subsidy in full or in part.

The TAIKE does not award subsidies amounting to less than EUR 5 000. Special subsidies are not awarded to cover the costs of a community's regular operations (see Operational Subsidies).

- **Subsidies for promoting cultural diversity and combating racism:** The objective of these subsidies is to promote inclusion and participation in culture, as well as intercultural dialogue.

These subsidies are intended: 1) to support activities and projects that promote cultural diversity and intercultural dialogue; 2) to support the artistic activities and cultural projects of immigrants and cultural minorities; 3) to support activities and projects that combat racism; 4) to promote the integration of immigrants by means of art and culture; 5) to foster the unique identities of cultural minorities; 6) to promote interaction between cultural minorities and the general population.

These subsidies are not intended for general activities or projects that promote the integration of immigrants (such as Finnish language courses or employment schemes) or for practicing religion.

These subsidies may be granted either as operational subsidies or as special subsidies.

- *Operational subsidies* may be granted to cover a community's basic operating costs or a specific area of operations. TAIKE does not award operational subsidies amounting to less than EUR 10 000, so smaller amounts are awarded as special subsidies for projects. Operational subsidies awarded by TAIKE may cover a maximum of 80% of the total amount of approved costs. In addition, the amount of the subsidy combined with other state support may not exceed the total amount of approved costs (100%).
- *Special subsidies* may be granted to support individual projects to be implemented during 2020. TAIKE does not award special subsidies amounting to less than EUR 5,000. If the project generates a profit, the recipient may be asked to return the subsidy in full or in part.

- **Subsidies for promoting the cultural activities of disability communities and the accessibility of culture:** These subsidies are intended for promoting inclusion and participation in culture.

- Support to associations: These subsidies are intended to support the artistic and cultural activities of national disability associations and communities. Priority shall be given to projects that create new kinds of operating models and/or are based on cooperation between disability communities. Subsidies may also be awarded for cooperation projects between disability communities and actors in the fields of art and culture

- Support to projects: These subsidies are intended to support the artistic and cultural activities of national disability associations and communities. Priority shall be given to projects that create new kinds of operating models and/or are based on cooperation between disability communities. Subsidies may also be awarded for cooperation projects between disability communities and actors in the fields of art and culture

The support to associations and the support to projects are not intended for investment purposes; equipment procurements; improvements to the accessibility of buildings; recreational activities (e.g. excursions, parties); writing, translating or publishing simplified language literature. For these purposes, funding can be applied for from the Finnish Centre for Easy to Read of the Finnish Association on Intellectual and Developmental Disabilities (FAIDD).

These subsidies may be granted either as operational subsidies or as special subsidies.

- *Operational subsidies* may be granted to cover a community's basic operating costs or a specific area of operations. TAIKE does not award operational subsidies amounting to less than EUR 15 000 , so smaller amounts are awarded as special subsidies for projects. Operational subsidies awarded by TAIKE may cover a maximum of 80% of the total amount of approved costs. In addition, the amount of the subsidy combined with other state support may not exceed the total amount of approved costs (100%).
- *Special subsidies* may be granted to support individual projects to be implemented during 2020. These subsidies are discretionary and are applied for and awarded for one year at a time each year individually. The TAIKE does not award special subsidies amounting to less than 5000 euros. If the project generates a profit, the recipient may be asked to return the subsidy in full or in part.

#### ▪ **Music Finland**

Music Finland's Export expenses consist of 36.64% of direct export expenses via own initiated or run operations and activities and of 63.36% of fund redistribution to artists and professionals through own driven grants and programmes. Music Finland's export activities costs are mainly dedicated to networking (inclusive staff travel), and communication and PR. A smaller part of its expenses are dedicated to showcasing and education.

#### ▪ **Tax incentives and specific tax regulation applicable to the music sector**

As from the beginning of October 2018, music authors can credit Teosto copyright royalties to their company so that Teosto royalties are taxed as the company's business income. Thanks to the reform, music authors can work as entrepreneurs in the same way as operators in other fields.

### **Support at regional level**

n.a.

### **Support at sub-regional level**

n.a.



## France

### Support at national level

#### ▪ *Support from the Ministry of Culture*

The main public funding source for culture at national level originates from the Cultural Ministry. Its funding represents 29% of the total public expenditure for culture (the remaining 71% is carried out by sub-national actors). Between 2013 and 2016 it funded on average EUR 300.5 Million to support music per year. The funding is organised in different programmes and the funding sources are only based on grants. The state manages some venues itself or funds music actors indirectly via the CNV (Centre National de la chanson, de la variété et du Jazz) tax.

#### Support to creation

Support to Creation - Programme 131 (in EUR million)

Grants to operators	2013	2014	2015	2016
CNV (excluding emergency funds)	1	1	1	1
Cité de la musique - Philharmonie de Paris	25	24	36	36
Ensemble Intercontemporain	4	4	4	4
Opéra national de Paris	100	100	99	98
Orchestre de Paris	9	9	8	8
Théâtre national de l'Opéra Comique	11	11	11	7
<b>Subtotal</b>	<b>150</b>	<b>149</b>	<b>159</b>	<b>154</b>

Operators directly managed by the state				
Salle Pleyel	4	4		
Remboursement Pleyel			4	2
<b>Subtotal</b>	<b>4</b>	<b>4</b>	<b>4</b>	<b>2</b>

Labels and networks				
CNCM	3	2	3	2
Opéra en région	29	29	29	28
Orchestre permanent	23	22	22	22
SMAC	10	10	10	12
<b>Subtotal</b>	<b>64</b>	<b>63</b>	<b>64</b>	<b>64</b>

Other kind of support				
Other venues	5	5	5	5
support to artists and artistic teams	13	14	15	17
Festivals	9	9	9	8
Residencies	1	1	1	1
Emergency fund	0	0	1	6
CNV Tax revenue	27	29	29	31
<b>Subtotal</b>	<b>55</b>	<b>58</b>	<b>60</b>	<b>68</b>

<b>Total P131 "Creation"</b>	<b>298</b>	<b>298</b>	<b>322</b>	<b>324</b>
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Source : Maistre, O. Rassembler la musique, pour un Centre National de la Musique, parliamentary report, 2018.

## Legend of the table

### Grants to operators

- Centre national de la chanson, de la variété et du Jazz (CNV): Its main missions are to support the entertainment companies using the funds raised by the tax on variety shows, to develop commercial activities in the collective interest of the profession, and to set up a resource Centre on artistic, economic, social, technical and heritage environment of performing arts in the field of song, variety and jazz.

Since 1 January 2005, the CNV has been responsible for direct collection and collection of the tax on variety shows, which amounts to 3.5% of the amount of the ticket sales (excluding the VAT).

- Other entries: The other entries under this section of the table refer to prestigious music ensembles or institutions of the new music and/or classical music scene.

### Labels and Networks

- Centres nationaux de création musicale CNCM (National Centres of musical creation): The national centres of musical creation (CNCM) work on the renewal of forms and of musical languages. They support the elaboration and the conception of new musical works. They also pursue research works, with the aim of experimenting and of developing (clarification) new tools and steps (initiatives) of musical creation.

Every year, 8 CNCM host over a hundred composers, interpreters and artists of diverse disciplines in residence to develop a creative project. They put at their disposal recording studios, equipment and a technico-musical assistance of high-quality level.

They participate in the distribution of works by the organisation of festivals or in co-production with the places of distribution to enhance national and international influence.

The label is given according to a multi-year objectives agreement between the CNCM and the public partners and lasts three years, with some exceptions. The objectives are as follows:

- Support for creation
- Production of shows and dissemination
- Awareness and pedagogy
- Research

- Opéra en region: Label given to Operas located outside of the Ile-de France Regions who get the status of a national opera. The label is given for a 5 year period.

- Network of permanent Orchestras: The Ministry of Culture currently supports 20 permanent symphonic ensembles as part of the "national network of orchestras in the regions", 3 of which are integrated with opera houses in the regions. Their missions are divided along five main lines: creation and production, dissemination, relations with the public, partnerships and professional issues related to the recruitment and integration of young people. These orchestras play mainly repertoires of the nineteenth and twentieth centuries, performing nearly 3000 different works per season, for about two million spectators, at about 2,500 concerts.

- Label SMAC: The "scenes de musiques actuelles" (SMAC) - currently 85 venues- have for mission to diffuse current music in their widest acceptance and all their diversity. They ensure therefore the regular and professional distribution of "current music" concerts (electro-amplified music, jazz, chanson, traditional music ...) especially of groups / artists in development. Through their missions of support to creation, they ensure the reception

of pre-production and / or residencies to create shows, accompanied by cultural actions with the public. They also ensure the support of various artistic practices and the follow-up of amateur and professional artists (from rehearsal to training). The SMACs organise around 6 000 public performances and gather nearly two million spectators each year.

- Other Kinds of Support: This table gathers diverse kinds of support provided by the cultural Ministry. It shows that the cultural Ministry is providing additional support for venues others than operas and SMAC venues.

- Emergency fund: The Live Performance Emergency Fund intervenes on operating losses and extra security costs, due to the rise of security costs following the Bataclan attack in Paris in November 2015.

- CNV Tax revenue: Created in 1986, the CNV is a public institution which aims to support live shows of current music and varieties. It relies on the funds collected by the entertainment tax and redistributes them in the form of financial aid to the various project promoters.

- Support toward the economic development of enterprises
- Festivals: support for festivals of genres covered by the CNV
- Support to capacity building (Structuration and professional development)
- Live: support for the production of shows, supporting act, venues, residencies and international projects.
- Support for the equipment of concert venues
- Support to venues for creation, production and dissemination activities.
- Support to Export (managed by the Bureau Export de la Musique)
- Treasury advance for the production of festival or tours as well as for music venues
- Support for concerts held in small and medium size venues in Paris (run in collaboration with the Paris municipality)

#### ▪ Support to education

Support to education - Programme 224 (in EUR million)

	2013	2014	2015	2016
Subsidies to conservatories	22	15	6	15
<b>Total P224 "Transmission des savoirs ..."</b>	<b>22</b>	<b>15</b>	<b>6</b>	<b>15</b>

Source : Maistre, O. Rassembler la musique, pour un Centre National de la Musique, parliamentary report, 2018.

#### ▪ Support to books and creative industries

Support to books and creative industries – Programme 334 (in EUR million)

	2013	2014	2015	2016
Support to recorded music	2	2	2	3
<b>Total P334 "Livre et industries culturelles"</b>	<b>2</b>	<b>2</b>	<b>2</b>	<b>3</b>

Source : Maistre, O. Rassembler la musique, pour un Centre National de la Musique, parliamentary report, 2018.

**Some remarks about the support originating from the cultural Ministry:** The cultural Ministry manages a relatively small part of the budgetary credits earmarked to support the cultural sector. In 2018, only 22% of them were managed by the central administration, 41% were spend directly by state cultural operators and the remaining 37% were managed by the DRACs (Directions régionales des affaires culturelles).<sup>163</sup>

<sup>163</sup> Sénat (2018), Statutory Report, Projet de loi de finances pour 2018 : Culture. Available online under: <https://www.senat.fr/rap/l17-108-38/l17-108-382.html>

The DRACs have been reorganised following the ambitious territorial reform of France of 2015. These regional governmental units are the representation of the state in the regions and are different from the administrative layer of the regions, who have also a cultural policy. The budgetary credits managed by the DRAC originate from the cultural Ministry. They amounted in 2018 to EUR 813.24 million budgetary credits and represents 37% of the total mission's budgetary credits, excluding staff costs. The support they provide is given by commissions composed of representatives of the cultural Ministry as well as representatives of the regional cultural institutions or professional organisations.

#### ▪ **Support from other bodies beyond the Ministry of Culture**

- public broadcasters: The public broadcaster Radio France also provides support to music by hosting and financing two orchestras and 3 radio dedicates exclusively to music, covering a broad range of genres France Musique (classical music, classical contemporary music and jazz); Le Mouv' (Rap, Hip-Hop, Urban culture) and FIP (Eclectic)

Main funding dedicated to music by Radio France (French public broadcaster) in 2016 - estimation in EUR Million

Radio France - total budget EUR 652.8 M	Budget share (%)	Amount In eur Million
Radio Orchestras (2)	10.8%	71
France Musique (Radio)	7.1%	46
Mouv' (Radio)	2.5%	16
FIP (Radio)	1.7%	11
<b>Total</b>	<b>22%</b>	<b>144</b>

Source : Maistre, O. Rassembler la musique, pour un Centre National de la Musique, parliamentary report, 2018.

#### ▪ **Tax incentives and specific regulations applicable to the music sector**

- Tax credits for the live and the recorded music industry

Tax credits for the live and the recorded music industry in EUR Million

Fiscal expenses in EUR Million	2014	2015	2016	2017
Tax credit for phonographic production	10	8	8	8
Tax credit for musical live performances	0	0	0	20
<b>Total</b>	<b>10.00</b>	<b>8.00</b>	<b>8.00</b>	<b>28.00</b>

Source : Maistre, O. Rassembler la musique, pour un Centre National de la Musique, parliamentary report, 2018.

The objective of the tax credit for phonographic production is to support music creation and diversity by supporting companies in the sector, foremost among which are SMEs that are most vulnerable to the digital transition. In addition, it is a question of supporting the diversity of the repertoires and the renewal of the talents.

The tax credit for musical live performance is dedicated to venues who support emerging artists. This provision is intended to strengthen their investment capacity in new productions. The tax credit is calculated for each fiscal year, and equals 15% of the total amount of expenses incurred for shows involving emerging artists. The rate can be raised to 30% for SMEs. The amount of eligible expenses is limited to EUR 500,000 per concert and the maximum of the tax credit is EUR 750,000.00.

## ▪ Social Security System

France has a special social security status for professional artists or technicians who work for live performances, film, and audio-visual companies, called "intermittent du spectacle". Employees can benefit from an unemployment assurance scheme, according to the number of hours worked, and after an additional contribution applied only this socio-professional group. This unemployment scheme allows the artists or technicians to be paid for all the personal work, preparation and other actions inherent to their profession.

## ▪ **Support to music by other ministries**

The Ministry of Culture is not the only funding source at national level to support the cultural and creative sector. According to the French Ministry for Public Policy and Public Accounts, EUR 4 283.2 Million were dedicated in 2018 to cultural and communication actions. It is however unknown which part of this sum was dedicated to support for the music sector.

Budgetary credits from other Ministries earmarked  
to support culture (in EUR million)

	2017
Education	2 574.6
Higher Education, Research and Innovation	564.7
Europe and Foreign Affairs	747.6
Interior	9.4
Territorial Cohesion	96.1
Overseas	12.7
Economy and Finances	122.1
Public action and public accounts	9.2
Army	75.5
Agriculture and food	31.4
Ecological transition and solidarity	7.5
Justice	4.2
Services of the prime minister	2.6
Sports	2.8
<b>Total</b>	<b>4.260,3</b>

Source : *Chiffres clés 2018 – Financement de la culture* –  
Ministère de l'action et des comptes publics (2018)

## • **Other Funding bodies**

There is a high number of bodies active in music funding in France. The website Monprojetmusique.fr (My music project) lists funding bodies of all kind (collecting societies, professional organisations, cultural ministry related bodies such as the ADAMI, CALIF, CNC, CNV, FCM, JM France, LE BUREAU EXPORT, MFA, SACD, SACEM, SCPP, SPEDIDAM, SPPF, which allows the music professionals to navigate the rich funding offer of around 130 funding programmes.

## **Support at regional level**

71% of the public expenditure for culture is made by at the sub-national level (from regions to municipalities). Each of the regions and the other sub-regionals actors have different priorities.

The 13 French regions have a lot of freedom concerning their support action for the cultural sector. The level of funding is different from region to region and the priorities in terms of

support are also different. However, the regions' actions often fit in the framework of a complement to funding from the State, the departments and the communes.

As a general rule, regional support for live performances concerns professional structures (operas, orchestras, national stages, festivals). They can be attributed to non-labelled venues or ensembles. In general, the regions support several of the following aspects: support for residencies for contemporary music, pedagogical orders and support for artistic and cultural education, support to export and, more generally, support for dissemination and creation. The call for projects formula is becoming widespread in most regions. A thorough analysis couldn't be found.

Generally, they are providing the funding to the cultural actors via General Directorates incorporated in the Regional Council's structure or via "Etablissements Publics de Coopération Culturelle" (EPCC - Public Institutes of Cultural Cooperation).

Finally, the regions play a crucial role for the funding of the cultural life by providing regular funding to associations.

### **Support at sub-regional level**

The music sector can benefit from funding and support actions from 3 other governmental levels. The departments, intermunicipal associations, as well as municipalities.

## Germany

### Support at national level

Germany has a rich musical heritage - and a strong contemporary music scene. In order to promote music from the Baroque to the Modern and to support the current scene from New Music to Pop, the German Federal Government engages financially in selected institutions, organisations and projects that have gained importance at home and abroad. However, this support remains very little compared to the support at state level and municipal level.

#### ▪ ***Support from the Beauftragte des Bundes für Kultur und Medien (BKM)***

The BKM is the equivalent of the Ministry of Culture at the Federal level. As culture is an exclusive competence of the regions (Länder) the support from the federal state is limited to direct funding and calls for projects with national significance.

Direct Funding for diverse music institution such as:

- Museums / Research Centres: the Beethoven Haus (A museum that also organises a festival and concert series), The Bach Archive Leipzig (a documentation and research Centre about the composer Johann Sebastian Bach), the Museum Mendelssohn-Bartholdy-Haus Leipzig. The federal government funds the Museum of Musical Instruments which harbours the music research Centre.

- Festivals: It is also funding the Bayreuth Festival, a world-class music theatre event – that exists since 1955. It also supports several specific actions undertaken by the festival such as purchase of the Richard Wagner National Archive and the redesign of the Richard Wagner museum in Bayreuth that were made possible with the support of the Federal Government.

- Ensembles or projects: Berliner Philharmoniker / Barenboim-Said Academy in Berlin: Since 2017, the Minister of State has been supporting the Barenboim-Said Academy in Berlin. At the state-recognized conservatory, students from all over the world, predominantly from the Middle East, receive classical music education here. The Barenboim-Said Academy draws on the successful work of the West-Eastern Divan Orchestra, founded by Daniel Barenboim and literary scholar Edward Said in 1999. The leitmotif of the orchestra is that its members listen to each other across cultural and political differences. The young musicians of the Divan learn to play, to work together and to communicate among top-level peers. In this atmosphere different views are possible while the connecting is in the foreground. In addition to musical education, the students also take part in lectures and seminars in philosophy, music, art and literature history and modern history.

- Foundations/ associations: Stiftung Oper in Berlin. "State Cultural Foundation", a foundation for the promotion of contemporary art and culture. They also promote facilities and projects through the Stiftung Preußischer Kulturbesitz" (Prussian Cultural Heritage Foundation). Mitteldeutsche Barockmusik e.V., a support institution for the promotion of baroque music of central Germany

- Hauptstadt Kultur Fonds: By supporting contemporary cultural and artistic projects, the Fund aims to initiate and strengthen interregional and international cultural dialogue with Berlin as its starting point. Funding is available for projects in all areas of artistic activity

(except filmmaking) which are significant for Berlin as the country's capital, which have a national and international impact or an especially innovative character. The projects should be designed for Berlin and presented in Berlin. They should be relevant for an audience and/or expert in Berlin and beyond and/or fill existing gaps in Berlin's cultural offerings. The following are not eligible for funding: commercially oriented projects, those carried out as part of the regular operations of Berlin's cultural institutions and funded from their budgets, and those already receiving federal funding through other institutions (e.g. the German Federal Cultural Foundation, the Fonds Darstellende Künste e.V.). The decisive criterion for selection is substantive and artistic excellence. No one may claim legal entitlement to funding.

▪ ***German Council***

The German Music Council, an umbrella organisation of more than 100 member associations. It is an institution representing the interests of the music sector overall (from amateur to confirmed artists) and promotes awareness of the value of creativity. It provides a wide range of support.

- Funding Programme Orchestra: In order to promote the artistic diversity of German orchestras, the federal government has launched the new funding programme "Excellent Orchestra Landscape Germany". Despite restricted municipal budgets, it should offer musicians opportunities for innovative projects that address important questions of the future of society and the development of musical culture. From the 2017/18 season, 31 projects from 29 publicly financed concert orchestras will be supported nationwide through this programme.

- Management of particular events:

- Beethoven anniversary 2020 - a national event: The 250th birthday of Ludwig van Beethoven in December 2020 will attract the attention of music lovers around the world. The Federal Republic of Germany commemorates the anniversary of the Bonn-born musician and composer as an event of particular national importance. Together with the state of North Rhine-Westphalia, the Rhein-Sieg district and the city of Bonn, it finances a Beethoven anniversary society that realizes and promotes innovative project ideas in the federal state, the region and in the state. The birthplace of the composer is undergoing an expansion and museum redesign. In addition, the federal government is coordinating and promoting exhibitions, events and artistic projects throughout Germany that deal with the composer's life and work or place his work in the context of contemporary art.

▪ ***Association Initiative Musik (promotion of Rock/Pop and Jazz)***

In order to improve the situation of German rock, pop and jazz music, the Federal Government is involved in the "Initiative Musik" and funds the majority of its budget. The non-profit project company promotes young musical talent, music export and cultural integration.

- APPLAUS Award: With the venue awards APPLAUS for the areas of jazz, rock pop, the federal government also promotes outstanding programmes of selected music clubs from the fields of rock, pop and jazz throughout Germany - and thus also the work of young musicians.



- Infrastructure fund: Special programme to enable clubs to bring their lighting and sound technology up to modern digital standards, there are corresponding special programmes. By means of special programmes made possible by the German Bundestag - for example the programme for the digitization of performance technology - the Federal Government supports live music venues to respond to the challenges of digital transformation and thus to better meet the needs of contemporary artistic productions.
- Artists support: The programme serves to promote popular music in Germany. It pursues the goal of promoting young talent, disseminating German music abroad and promoting the integration of persons with a migration background. The programme contributes to the promotion of the location, the promotion of culture and the music industry in Germany. It is aimed at artist management, artists agencies, music producers, music publishers, manufacturers Audio or audiovisual recordings, tour and concert organisers.
- Short tours: The Short Tour Funding serves to support short tours of performing artists (soloists or ensembles) of the musical genres of rock, pop and jazz abroad, thereby compensating for funding gaps. It wants to support artists to take advantage of international appearance offers, which offer a reasonable opportunity for market entry and further establishment with sufficient professional perspective. Max. 5 appearances or support shows, appearances at music festivals, showcases or in TV and radio broadcasts abroad. If individual performances take place within short tours in Germany, the short tour is only eligible if max. 2 appearances take place domestically. Support for longer tours can be requested through the Artist Support Programme.

## Promotion of important festivals and conferences

- Support to showcase festivals: A new focus has been given by Federal Government with the promotion of important festivals and conferences on the scene, including the Reeperbahn Festival in Hamburg, the jazzahead! in Bremen, the c / o pop in Cologne and the Pop-Kultur Festival in Berlin. Funding is provided here for formats that support the industry exchange, the popularization of German groups or artists at home and abroad as well as innovative artistic developments.
- Support to music competitions: The State Secretary for Culture, in particular through the German Music Council, also supports a whole series of music competitions: from amateur music to competitions for top musical talents. *The Junge Deutsche Philharmonie*, in which young musicians are prepared for a career in the orchestra, is also being promoted as ambassador of a contemporary orchestral culture.
- German Musical Instrument Fund: In order to be able to provide high-quality musical instruments to young musical talent, the Federal Government has set up the German Musical Instrument Fund together with the Deutsche Stiftung Musikleben. Through a competition, talented young musicians can be awarded valuable instruments on loan and advance their artistic development to a top level.
- Musikfonds: Since 2016, the Federal Government has also been supporting contemporary music with a music fund for its creation, communication and dissemination in a variety of genres. (from pop to contemporary classical music) The Musikfonds is intended to support outstanding projects in all fields of current music with an application amount of up to 50,000 euros. In total there are 2 million euros annually

### ▪ **State cultural foundation (*Kulturstiftung des Bundes*)**

The Federal Cultural Foundation supports projects in the field of arts and culture within the scope of federal competence.

- general project funding: cultural creators can apply for funding for projects from all artistic disciplines twice a year, for visual and performing arts, literature, music, dance, film, photography, architecture or new media. The general project funding of the Federal Cultural Foundation is characterized by the fact that it is not determined to promote a particular sector or topic. These are large, innovative projects in an international context, which can be taken into account here.
- The programme "Culture Digital": This programme aims to motivate cultural institutions and to help them to shape the digital opportunities and challenges of the present in a self-determined and well-oriented manner and to approach them creatively and critically. The fund is dedicated to publicly funded cultural institutions of all artistic disciplines, which have already developed their first digital strategies and implemented and tested digital services such as online collections, social media or apps. The purpose of the Digital Fund is to enable associations of at least two cultural institutions to expand their processes of change, to experiment with new digital aesthetics and forms of expression, and to further advance digital profiling

### ▪ **Tax incentives and specific tax regulation applicable to the music sector**

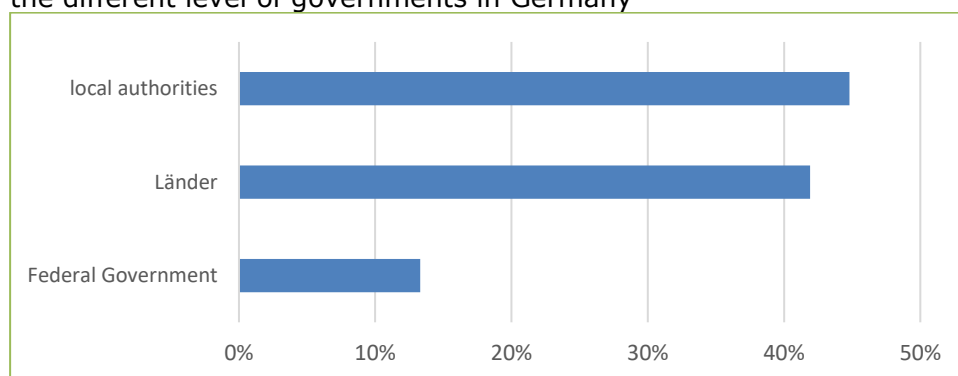
Germany has a special social insurance for artists, which is partly subsidized with public money. This way free-lance artists still have a way to be social insured comparable to

employed workers. The artists pay half of the insurance fee. The rest is split between the instructing party, for example the promoter (30%) and the government (20%).

### Support at regional level

The Musik Rat (German music information Centre) evaluates the support to music by the 16 Länder at around EUR 3 Billion<sup>164</sup>. In Germany, the total public expenditure between the different levels of government towards culture is estimated at EUR 9.4 billion

Repartition of the EUR 9.4 billion public expenditures to culture between the different level of governments in Germany



Source: Culture Finance report (2014), based on 2011 data

The support to the music sector at regional level often takes the shape of operating grants for orchestras, ensembles, choirs and festivals. It often aims to promote and maintain the broad spectrum of interpretation of classical and contemporary music in the country and region, but are open in some regions also to support of festivals of many genres.

**Music institutes :** Some regions have genre organisations (Musik institute) similar to the danish ones undertaking projects and acting as information and consultation organisation for musicians.

**Music funds :** some regions put in place music funds that support deliver project grants for a wide range of genres, musicians, ensembles or festivals.

### Support at sub-regional level

In Germany the local authorities are the biggest culture funder (cf. previous figure) Some municipalities like Berlin and Mannheim have developed comprehensive policies to support their local music ecosystems. (cf. case studies p. 74 & 77)

<sup>164</sup> Deutscher Musikrat – Kulturfinanzbericht 2018

## Greece

### Support at national level

In Greece there is no Music Export Office nor a special fund for artists circulation either internally or internationally. While there used to be a state funded organisation for the promotion of Greek culture in general (music was part of it), there are currently only some private efforts to create a Hellenic Music Office, as there is no state policy for the support of local talents.

Today, at governmental or regional and even municipal level, the funding system for any kind of music event is structured in 2 main axes:

#### ▪ **Support from the Ministry of Culture**

The Greek Ministry of Culture does not implement a specific policy and strategy for the music industry.

The budget of the Ministry earmarked for culture and creative industries was EUR 305,000,000 for 2019. This amount is split between:

- Funded organisations: A few symphonic orchestras, some choirs and ensembles recognized of public interest, that receive an annual fund. The Ministry also subsidises music institutions such as the Athens Opera and the Athens Concert Hall. In 2019 the support amounted to EUR 21,180,000

- Music Grants: The grants dedicated to music are not implemented in the frame of a specific strategy. The Ministry either sets up special funds for one year or evaluates each funding proposal separately. For 2019, the Ministry granted emergency subsidies of EUR 250 000 to all forms of music except the traditional music. The Ministry of culture earmarked EUR 150 000 in the field of traditional culture, which included music projects.

The Ministry also supported export actions such as a *Greek booth* in some European showcase festivals (Midem and Womex)

- Pronia: Pronia is a grant of the Ministry for cultural actors who target young, minority or vulnerable groups.

#### ▪ **Tax incentives and specific tax regulation applicable to the music sector**

The services provided by writers, composers, artists and performers of works of art, as well as their rights, are subject to the reduced VAT rate. 13%. According to press reports, the Ministry of Culture is expecting legislation to reduce VAT on Music concerts from 24% VAT to 6% VAT.

### Support at regional level

The situation is equivalent at regional level: each region is autonomous in defining strategies for funds to support music and culture and this new administrative role has just started 3 years ago. So, not only there is a lack of understanding of the problem, but as for the municipalities, regional budgets has had to face the financial and political turmoils of Greece.

### **Support at sub-regional level**

Each municipality is autonomous in defining strategies for funds to support music and culture but this budget has had to face the financial difficulties of Greece. Some municipalities are funding organisations like symphonic orchestras, choirs or ensemble recognized of public interest. Some of them also provide grants for rest of live music key holders (artists, bands, orchestras...). These grants are in general given when music professionals apply to public funded events and festivals through specific calls that are issued from various municipality.

## Hungary

### Support at national level

#### ▪ ***Support from the Ministry of Culture***

The Hungarian culture Ministry is granting music via the semi-independent National Culture Fund. Apart from that, state-owned and municipality owned infrastructure (mainly concert halls) and mainly classical ensembles receive direct funding. There is no central registry about this type of funding.

#### ▪ ***Nemzeti Előadó-művészeti Érdekegyeztető Tanács (NEÉT)***

The NEÉT is a council that deals almost exclusively with national funding of classical ensembles, symphonic orchestras, concert halls, and music school system. National Concert Council for the Performing Arts Concerning the Promotion of the Performing Arts Organisations and Special Rules of Employment is a forum for the reconciliation of professional, professional policy and support issues concerning legal relationships governed by Law.

#### ▪ ***Hungarian National Cultural Fund – NKA***

The NKA is also one of the main founders of HOTS the Hungarian music export office and is also administrating 25% of the private copy levying. The NKA is also issuing call for proposals that cover the music sector:

- Support for composition: Support for the composition of new Hungarian classical music (larger symphonic, oratorical, choral, competition and musical stage, solo and chamber music). Maximum support is around € 12,000 and the 2019 budget is around € 570,000.

- Distribution and dissemination support: Support for the distribution and dissemination of contemporary Hungarian classical music in Hungary or abroad, the organisation of contemporary concerts or series of concerts, organizing contemporary concert events. Maximum support is around € 12,000.00 per application and the 2019 budget is around € 142,770.

- Promotion of production and distribution of classical music audio and video materials: Maximum support is around € 6,000 per application and the 2019 budget is around € 72,670.

- Publication of classical music scores, musicology, music criticism and music pedagogy: Maximum support is around € 6,000 per application and the 2019 budget is around € 60,560.

- Promoting presence in international performing arts organisations, contributing to the 2020 membership fee: There is no maximum support and the yearly budget for 2019 is € 18,170.

- Implementation of Hungarian classical music masterclasses: Maximum support is around € 3,000 per application and the 2019 budget is around € 45,420.

- Contribution to art prizes established by domestic performing arts NGOs for outstanding performers in the performing arts: There is no maximum support per application and the 2019 budget is around €18,170

- *Club Sponsor Subprogramme*: Support to concert venues in Hungary and abroad, including clubs, community centres or even entertainment venues. Through the Club

Sponsor Subprogramme, around € 3,000 over the last five years to support live, concert venues. Eligible actors are concert venues that operate most of the year, with organisers pledging to organize at least one live music, admission ticket per month - without restrictions on the genre. The grant can only be used to pay for the performers and to promote the concerts. The Subcontracting Support Programme of the Voice Reception Programme has three sub-themes

- support for concert venues in the capital
- support for concert venues in rural areas
- support for concert venues in cross-border Hungarian-populated areas.

#### ▪ **Hangfoglaló**

Hangfoglalo programme is a funding scheme based on open applications for emerging talents who attends to develop inside and outside Hungary. It provides several types of grants

- Media grant: At the start of the Voice Capture (Tamás Cseh) Programme, a request from the profession was to assist the specialized music press, which led to the establishment of the Media Support Subprogramme. The purpose of the Sub-Programme is primarily to provide regular, predictable support to music print newspapers, submissions and blogs on the subject can also be submitted. In the year of the launch of the Programme, it was even possible to apply for msuci newspapers on local and small community TVs and for two seasons to receive support for such radio programmes as well. For the past two years, the Voice Recruitment College has been only competing for print and online media.

- Support for emerging bands: The Pre-Orchestra Subprogramme was started with the aim of bringing emerging artists to their tours with popular formations that can fill concert halls. The bands can indicate one or more bands of their choice. This also seen as a way to support emerging to tour without equipment rental, travel expenses or event promotion expenses. It is important for the Voice Recording Programme College to include bands that were a few years backed by the Initial Performer Subprogramme and most of the applicants have opted for a pre-programme from the recent sub-programme formations. Interestingly, thanks to this, more and more well-established musicians also undertake mentoring.

- The Voice Recruitment Programme: This programme pays great attention to talent development and youth education, as live music culture can only develop in a constantly renewing environment. In this way, it has created a dedicated sub-programme to support start-up performers, through which applications emerging bands can apply. It supports the production of video and audio recordings (video and audio), as well as communication for career entry. The maximum amount of support is €6,055.

In addition to the Programme Office staff, the sponsors are supported by experienced mentors, and the Voice Recruitment Programme provides them with opportunities to perform at smaller and larger summer festivals.

- Hungarian Oncoming Tunes (HOTS): HOTS is an international sub-programme of the Voice Recording Programme, which has become the strategic office of Hungarian pop music export for the past three years. In addition to ensuring the international visibility of domestic pop music, the programme aims to provide a consistent presence in markets where there is already significant international royalty revenue. The international marketplace for royalties generates, for example, professional, showcase and other audience-centric events. HOTS organise workshops, meetings and events in order to help bands, domestic market players and authors to gain international knowledge.

- DobMania camp: DobMania is a music summer camp taking place since 2009. Its yearly implementation is supported by with around € 1,500. The camp is a one-week series of courses, in the evenings with more personal discussions between teachers, lecturers and campers. The drum lessons are organized by style with the help of professional teachers, orchestral practice and group work.

- Hangfoglaló provides also a diversity of professional trainings without additional charge. It is also holding seminars to help artists on administrative organisation.

▪ ***Magyar Zenei Tanács – Hungarian Music Council***

The Hungarian Music Council was established on 5th December 1990 by 20 musical associations. Its current membership includes 38 civil organisations, 14 associated institutions and 10 individual members.

Its activity encompasses:

- the representation of the Hungarian music sector towards the cultural Ministry
- the recommendation of musicians for state decorations and the World Music Day
- the coordination of the recommendations of artists for musical artistic awards to be conferred by the Minister of Culture;

▪ ***Tax incentives and specific tax regulation applicable to the music sector***

There is no special tax incentives or tax regulation applicable to the music sector in Hungary. The taxation on music activities is even relatively higher than in western Europe. Hungary used to apply a tax incentive where corporations could support performing acts instead of paying (a part of) their corporate tax. The incentive was widely misused and abolished effective from 1 January 2019. It should be replaced with a new scheme by the end of 2019.

There is no tax exemption for concerts whose VAT rate correspond to the standard rate of 27%.

Considering the indirect help for musicians, Hungary as special rules for the employment of professionals of the Performing Arts Organisations since 2008 which provides a clear legal basis and some legal minimums for the employment of musicians.

**Support at regional level**

n.a.

**Support at sub-regional level**

n.a.



## Ireland

### Support at national level

Non- commercial support for music in Ireland has different ministerial sources: Department of Culture, Heritage & the Gaeltacht (DC and its agencies Arts Council, Culture Ireland) as well as the Department of Education and Skills and its agencies HEA, ETB, Solas. These range in support from bursaries to support for professional artists, orchestras and ensembles, composers, and festivals, opera provision etc. In the case of DCHG & AC and DES (Music Generation. Curricular primary Post Primary, Third Level Solas (skills).

#### ▪ *Support from the Arts Council*

Music investment in 2019 by the Irish government was EUR 10.4 million, from which 5.2 were earmarked for support to Opera and 5.2 earmarked to support other kind of music. It encompasses support for the the work of professional artists in all music genres, including performers, composers, conductors and choral practitioners as well as support for a number of resource organisations that play an important role in the development of music in Ireland. It aims to ensure that high-quality musical experiences are available to all irrespective of means, disability, geography, education, age or experience. It strives also to understand and respond to each individual musical genre in its own terms.

The arts council runs support schemes which are directly dedicated to music

- Music project award Arts Grant Funding (Max EUR 30.000,00): The music project award supports individual artist's or organisation's specific projects in the field of music commencing on an open call basis. The purpose of the award is to support projects that enrich the musical landscape by facilitating professional artists in bringing innovative, ambitious and high-quality projects to audiences, both in live performance settings and through other audience channels. Potential proposals could be those that:

- 1- Are high-quality artistic projects that demonstrate a strong and imaginative curatorial approach
- 2- Involve the creation and/or presentation of new work
- 3- Focus on repertoire new to audiences across all music genres and/or offer experiences unique in the context for which they are intended – e.g. repertoire by major international figures rarely performed in Ireland; second-performance projects featuring existing Irish compositions; repertoire by neglected historical figures (Irish and international)
- 4-Add significantly to the canon of new or historic Irish repertoire in a way that will enhance future performance possibilities
- 5- Deliver significant development opportunities to professional practitioners
- 6- Bring music of all genres to new contexts or new audiences or expand the avenues through which music reaches people.

The Arts Council has identified the following as a strategic priority for support through this award: Projects that show a clear, planned and thought-through focus on maximising public reach and engagement, and in engaging and developing new audiences. Professional artists of high quality who engage in devised or collaborative creative processes. The maximum amount to request is the difference between the proposed expenditure and the proposed income indicated in the budget.

- Music recording scheme (Unlimited award): This scheme funded by the Arts Council but administered by Music Network provides support for professional performers and composers in Ireland through funding for music recording. The aim of this scheme is to ensure that the work of Irish composers and performers is available other than in live performance, and to ensure that important or neglected materials of Irish music are preserved and disseminated to the highest professional standard. The scheme assists in the production and dissemination of audio or video recordings. It supports work by performers and composers of recognised ability working primarily in non-commercial genres. The scheme does not cover demo recordings or private recording projects as it is designed to support production of recordings that will be available to the public.

- Music bursary award (Max EUR 10.000,00): The purpose of the award is to support professional artists to develop their art practice. It provides artists with the time and resources to think, research, reflect and critically engage with their art.

#### *Funding schemes in which music is included*

- Travel and Training award (Max EUR 3.000): Individual artist may apply to the open call on an ongoing basis, at least 4 weeks before the proposed travel dates. The travel grant is also eligible for partner meetings of the Creative Europe programme supported collaborations. The Travel and Training Award has three main strands with different objectives and priorities. These are described in turn.

- Travel and training outbound: The objective of the travel and training outbound award is to support individuals who wish to avail of training and other professional development opportunities abroad (outside the Island of Ireland). This strand accounts for the greater part of the funding available. The priority here is the development of the individual's own arts practice, including: participation in one-off training opportunities, specialist courses or masterclasses. Other professional development opportunities such as short-term research projects, residencies, participation in workshops, internships (not including visual arts), mentoring programmes, attendance at conferences/seminars, and so on. The award will support formal postgraduate training only where the selected course is of a type and/or at a level not available in Ireland (artform variations may apply). Applicants must provide evidence that this is the case.

- Travel and training inbound: The objective of travel and training inbound is to support individuals or organisations who wish to invite specialists from abroad (outside the Island of Ireland) to deliver high-level training or mentoring for the professional development of artists and others working professionally in the arts in Ireland. Where an individual or organisation wishes to bring in such specialists from abroad, the host individual or organisation may apply for the cost of travel and accommodation for the international guest(s). Payment will be made after the visit and only upon submission of receipts. Applicants must state whom they wish to invite and provide details of the training or mentoring to be provided.

- Creative Europe (Culture Sub-programme) Travel Award: The Creative Europe (Culture Sub-programme) Travel Award only supports applications from arts organisations in the Republic of Ireland planning to submit proposals for EU funding under the Creative Europe (Culture Sub-programme) 2014–2020. The award is intended to cover some of the costs associated with face-to-face meetings with partner organisations in Europe, and will not support training costs or courses. Organisations may make only one application under this

award per project application to the Creative Europe (Culture Sub-programme). Applicants must be able to demonstrate that they have identified the required number of transnational partners and are at an advanced stage in developing an application to the Creative Europe (Culture Sub-programme). They must provide details of their proposed project and their key partners. They will also need to demonstrate their current level of engagement with the proposed partners. It is likely that funding offered under the Creative Europe (Culture Sub-programme) will not exceed EUR 2 000, and in most cases will be less than that. Applications that can demonstrate organisational commitment will be prioritised. Film projects are not eligible for support under the Creative Europe (Culture Sub-programme) Travel Award.

- Music commissions award (Max EUR 12.000): The Music commissions award supports fees paid to artists for commissions in the field of music. The primary purpose of this award is to facilitate creative partnerships between a range of commissioners and artists. The process must lead to some form of outcome or conclusion. This might be a public performance, a process of engagement with a community of place or interest or some other form of dissemination or presentation of the commissioned work in Ireland or abroad. In the context of this award the definition of a 'commission' is where one person or entity (the commissioner) supports and pays another (an artist or group of artists) to create or deliver an artistic work or project that takes place within a set of parameters agreed to by both partners. Before you will be able to make an online application the commissioner and the artist/s to be commissioned will have to separately register with the online services site

- Beyond Borders (Max EUR 16.800): Beyond Borders is a co-commissioning and touring programme run in partnership with PRS for Music Foundation, Creative Scotland, Arts Council of Wales, Arts Council of Northern Ireland and Arts Council of Ireland / An Chomhairle Ealaíon. Established in 2010 Beyond Borders supports high quality co commissions and tours, stimulating collaboration between composers, performance groups and music organisations. The programme awards up to €16.800 to co-commissioning and touring projects including any associated recording costs. This will be the third year that the Arts Council of Ireland joins PRS for Music Foundation, Creative Scotland, Arts Council of Wales and Arts Council of Northern Ireland as one of the programme partners.

- Next Generation bursary award (Max EUR 20 000): The purpose of the Next Generation artists award is to support a group of promising artists across all disciplines at an early but pivotal stage in their career. Recipients will receive EUR 20.000 and will also take part in a collective week-long residential programme in spring 2020. Joint applications and interdisciplinary applications are welcomed. The selection panel will comprise, a non-voting Council Chair, two Council members, and a number of external panellists. This award is designed to support emerging artists to: buy time to develop their work and practice; support unique development needs to advance their own practice (this might be through engagement with a mentor, research, non-formal study and/or non-vocational training, collaborative partnerships, etc.). Applicants must detail the development need that would most advance his or her career at this time. It will prioritise those who; demonstrate ambition and vision for their work; show potential to develop and strengthen a distinctive and assured creative practice; show how they will benefit artistically from timely support for their artistic development; demonstrate in a compelling way how the award and financial investment of this level and at this particular time will have a transformative effect in bringing them to the next stage of their artistic development. In addition to the general purpose and objectives of the award (outlined in section 1.2), priority across all artform and practice areas will be given to emerging artists of proven talent, assurance and potential who: demonstrate ambition and vision for their work show potential to develop and strengthen a distinctive and assured creative practice; show how they will benefit artistically from timely support for their artistic development; demonstrate in a compelling

way how the award and financial investment of this level and at this particular time will have a transformative effect in bringing them to the next stage of their artistic development.

- Open Call award (EUR 400 000): The Arts Council announces an Open Call to the artists and arts organisations of Ireland to create collaborative ground breaking projects of ambition, impact and scale that encourage discourse, provocation or response to place and identity as part of contemporary Ireland. Open Call is a programme for artists and arts organisations to develop and shift their practice and profile work on a national scale, creating high profile arts central to people's lives. The purpose of the award is to support projects which: Are brave in the pursuit of creative risk taking and seek to develop the ambition of the artist Encourage discourse, provocation or response to place and identity as part of contemporary Ireland. Evidence collaborative practices between artforms and artform practice areas (cross artform) Demonstrate the pursuit of /open up opportunities for making work/collaborating in new territories of arts practice. Extend the reach and impact of a project, with a fresh and dynamic approach to public engagement. In this context, public engagement may refer to participants and/or audiences Establishes and evidences effect project partnerships, which may include high profile international dimensions and collaborators in terms of public visibility and resource-based partnerships

- Touring and dissemination of work scheme (Unlimited award): Applications are invited for proposals seeking funding in support of initiatives that are of high artistic quality and that generally have a strong audience focus. This scheme is designed to support the touring and dissemination of work in certain arts disciplines for tours starting between January 2020 and June 2020. The Touring and Dissemination of Work Scheme is open to applications from organisations and individuals. Applications which demonstrate collaboration / partnership between networks, consortia or other collective groupings of presenters are encouraged, particularly where these indicate a high degree of engagement with audiences and collaboration with the producing entity or artists. Applicants in receipt of other Arts Council funding are eligible to apply, provided it is clear that the touring or dissemination activity for which funding is sought is additional to those activities for which Arts Council funding has already been offered.

- New National Opera company: This scheme helps Irish productions from the great operatic repertoire, with overall investment in opera of EUR 4.7 Million. This encompasses:

- open call for main-scale Irish opera provision: The arts council seek proposals from experienced professional producers of opera to regularly produce an annual programme featuring between three to four main-scale, predominantly core repertoire, fully professional opera productions per season. It focusses on international casting, creative input and co-production but should predominantly feature Irish or Irish-based opera artists and other professionals, and should be of the highest possible artistic quality, preferred structure for the entity with which a funding agreement will be signed is a not-for-profit corporate entity (such as CLG), with appropriately configured governance. It is also possible for short term established structures to apply
- Support for the further development of Festival Opera and smaller-scale touring Opera across Ireland
- Bursaries for opera artists (Max EUR 10 000): The purpose of the award is to support professional artists to develop their art practice. It provides artists with the time and resources to think, research, reflect and critically engage with their art.

The objective of the Opera Bursary Award is to support individual professional artists in the field of opera in the development of their artistic practices. The award emphasises the value and benefit to an artist's development derived from an extended process of engagement with their practice. The award therefore provides artists with the time and resources to think, research, reflect and engage with their artistic practices. Potential proposals could be those that: Enable a composer, librettist conductor or performer working in any opera genre to buy time for the development of their artistic practice; Facilitate the development or completion of a specific body of artistic work; Enable artists to invest time in focused advanced study, with appropriate mentoring, of a particular repertoire or area of professional development.

- Traditional arts: The traditional arts feature great diversity in regional accent and technique and are at the heart of communities throughout Ireland. The traditional arts are defined as comprising traditional music, song, dance and oral arts such as storytelling. Current Traditional Arts Policy is aligned to the key objectives and desired outcomes of its overall policy Making Great Art Work. The traditional arts project award supports initiatives in the field of traditional music, song, dance and the oral arts commencing in 2020. The purpose of this award is to support stand-alone projects which enrich the traditional arts landscape by facilitating artists in bringing creative, ambitious and high-quality projects to audiences. There will be two strands in the Traditional Arts Project Award:

- Strand 1 - Small and Medium Scale - max EUR 20,000
- Strand 2 - Large Scale - max EUR 80,000

The Arts Council works also closely with agencies such as Fáilte Ireland and Culture Ireland to ensure that Irish audiences and visitors to Ireland will continue to experience the highest quality in traditional arts in the future and to bring traditional arts to the wider Irish diaspora and new international audiences.

- Creative Schools: Special focus on arts programmes for children and young people, including central role for Arts Council in Government's new Scoileanna Ildánaca/Creative Schools initiative in 150 schools and a special investment of EUR 600,000.

- Festival investment scheme (Max. EUR 35,000) Arts Festivals: The Council recognises the distinctive role arts festivals play in sustaining a vibrant and sustainable arts profile at a local level. Festivals provide opportunities for artists and audiences to experience new work and ways of making work. The Council acknowledges the valuable contribution made by voluntary committees in developing these festivals. The scheme will be open to multi-disciplinary festivals and single artform festivals. There are three bands of funding available:

- Band A: Up to EUR 7,000
- Band B: Between EUR 7,001 and EUR 20,000 (Festivals which have been established for a minimum of two years and executed a minimum of two consecutive festival programmes).
- Band C: Between EUR 20,001 and EUR 35,000 (Festivals which have been established for a minimum of five years and executed a minimum of five consecutive festival programmes)

The banding structure of funding available matches the different developmental stages of festival practice. Band A for smaller festivals, new festival ideas, Band B for small to mid-

scale festivals seeking to build capacity, Band C for festivals strategically driven with a commitment to artistic leadership. The Festivals Investment Scheme is a non-recurring competitive scheme.

- Venues Funding: The purpose of Venues Funding is to invest in and support the essential infrastructure required to sustain and develop the arts in Ireland. Venues Funding is intended to support both the operating (core) costs of organisations and the activities that your organisation undertakes to deliver your mission. Recipients of Venues Funding must play a critical part in delivering the policy priorities of Making Great Art Work, the Arts Council's ten-year strategy. In offering Venues Funding, the Arts Council wishes to ensure: The delivery of excellent art and/or excellent arts activities, events and services A supportive environment for the development of the arts Excellent professional development opportunities for practising artists and/or arts professionals That more people will enjoy high quality arts experiences, including more diverse audiences Increased engagement by the public with the arts, in particular by new communities, people for whom access to the arts is difficult, and by young people and children Standards of excellence in governance and management in the arts.

- Markievicz award: Provide support for artists from all backgrounds and genres to buy time and space in order to develop new work that reflects on the role of women in the period covered by the decade of centenaries 2012-23, and beyond. Markievicz Award recipients will receive EUR 20 000, and awards will be made to up to five applicants each year. Joint applications are welcomed. The award is administered by the Arts Council on behalf of the Department of Culture, Heritage and the Gaeltacht, and is open via a public call to artists working in all arts genres supported by the Arts Council.

- Strategic Funding: The purpose of Strategic Funding is to invest in and support the essential infrastructure required to sustain and develop the arts in Ireland. Recipients of Strategic Funding must play a critical part in delivering the policy priorities of Making Great Art Work, the Arts Council's ten-year strategy. In offering Strategic Funding, the Arts Council wishes to ensure: The delivery of excellent artwork and/or events activities and services; excellent professional development opportunities for practising artists and/or arts professionals; that the diversity of contemporary Ireland is reflected in the work it supports; that more people will enjoy high-quality arts experiences; increased depth of engagement by and with the public Standards of excellence in governance and management in the arts. It aims to support organisations that are formally constituted and have a track record for the delivery of the arts.

- Information and studies: Since 2014, the Arts Council has commissioned a series of reports on The Arts in Irish Life that present the primary findings of annual market-research studies carried out by Kantar Media TGI. They provide information about arts attendance and engagement in Ireland based on nationally-representative surveys.

Related to this Arts Audiences is an initiative of the Arts Council in partnership with Temple Bar Cultural Trust. Arts Audiences seeks to initiate and support audience-focused thinking, most particularly where audience development and marketing meet. The Arts Audiences website has information about activities and events.



- ***Support from the Department of Education and Skills***

- Music Generation (EUR Million 2,5 per year): Music Generation was formed by a partnership between U2, Music Network, the International Funds for Ireland and the education sector has enabled a series of Music Education Partnerships (MEPs) to be established around the country on a phased basis to provide vocal and instrumental music tuition for young people. The intention was that the philanthropic contributions would fund 50% of the initiative in the early years of development with local Music Education Partners (ETBs and local authorities) providing the other 50%, and that programmes would be continued into the future with Exchequer funding when the philanthropic donations cease.

Philanthropic funding for Phase 1 of Music Generation was phased out and the Department of Education and Skills has taken over 50% funding of Music Generation between 2014 and 2016, with the balance provided by partners in the local MEPs. In 2016 all funding for established Phase 1 Music Education Partnerships came from the DES and the local partnerships, without philanthropic support.

Agreement was given for Phase 2 of Music Generation to proceed by the Department of education and Skills in 2016. Funded initially by philanthropic donations (U2 and The Ireland Funds) it involves the launch of up to 9 new Music Education Partnerships. These are initially being funded by philanthropic funding, including from U2, but will move, as for Phase 1, towards exchequer funding.

Music Generation currently reaches over 41,000 children and young people annually. This number will increase annually as more MEPs are established and rollout

- Creative Ireland Programme (support to music education): One of the commitments in the Creative Ireland Programme is that by 2022 every child will have access to tuition in Music, Drama, Art and Coding. Creative Youth which was launched in December 2017 is a plan to enable the creative potential of every child and young person. The plan sets out measures to deliver on this key goal of the Creative Ireland Programme. This Plan will be progressed over the next five years in partnership with the Department of Education and Skills, the Department of Children and Youth Affairs and the Arts Council. This report can be accessed at the following link <https://creativeireland.ie/en/library>.

- ***Support to music provided by the Department of Culture, Heritage and The Gaeltacht (DCG)***

- Direct support to the National Concert Hall (EUR 3.048 Million in 2018): The National Concert Hall is Ireland's National Cultural Institution for music. Since 1981, it established as the home of classical and orchestral music in Ireland and in addition have welcomed all musical genres, acknowledging and celebrating diversity of artistic expression and musical experiences.

- Culture Ireland (EUR 4.1 Million in 2018): Culture Ireland creates and support opportunities for Irish artists and companies to present and promote their work at strategic international festivals and venues. They develop platforms to present outstanding Irish work to international audiences, through showcases at key global arts events, including the Edinburgh Festivals and the Venice Biennales. Culture Ireland operates a range of funding programmes to support and promote the presentation of Irish arts internationally and these include showcasing the best songwriters and composers. Culture Ireland will receive an increased allocation of EUR 4.1m, including funding for the creation of Cultural Ambassadors in key locations around the globe to grow Ireland's cultural footprint.

- Music Capital scheme (EUR 245,000 in 2018): The Department of Culture, Heritage and the Gaeltacht funds the Music Capital Scheme which provides grants to groups and individuals for the purchase of musical instruments. The Minister launched the new Music Capital Scheme with an increased allocation this year amounting to EUR 245 000. Music Network manages the Scheme on behalf of the Department

- Comhaltas Ceoltóirí Éireann - Traditional music (EUR 1.6 Million in 2018): Comhaltas Ceoltóirí Éireann (CCE) was founded in 1952 and is involved in the preservation and promotion of Irish traditional music. It is a non-profit cultural movement with branches nationally and worldwide. Its aims and objectives are to promote Irish Traditional Music, dancing, and the Irish Language, to foster and promote traditional singing both in English and Irish and to create a closer bond among all lovers of Irish music and traditions on a global basis. The organisation has continued to grow and its membership has expanded across the globe to places as far away as Tokyo and Columbia.

- Culture Night (EUR 320,000 in 2018): Culture Night is an annual all-island public event that celebrates culture, creativity and the arts. In 2017, over 3,000 events took place in over 1,400 venues in 43 towns and cities many of which relate to music. The event has grown both in public perception, media coverage (including [journal.ie](http://journal.ie), RTÉ news, RTÉ radio and the RTÉ Nationwide programme) and is reaching capacity in terms of venues and programming capability within the funding currently provided.

- Ceiliúradh CLG - Other Voices (EUR 125,000 in 2018): Other Voices is one of Ireland's most unique music events. Since 2002, the annual gathering has established itself as an important annual musical festival with an international audience.

The festival has expanded along the Atlantic Way from West Kerry North to Derry and now attracts an expanding array of artists from across the musical spectrum to perform at this intimate musical event which is transmitted worldwide online and as a television series. Past performances include Ellie Goulding, Amy Winehouse, Elbow, The National, Damien Rice, Snow Patrol, Ryan Adams and many others.

- Festival Musictown (allocations: EUR 10,000 in 2018): The festival aims to develop a greater appreciation and understanding of Dublin's music and 'music-makers' through concerts, talks, workshops and walks.

- Cross Border Orchestra (EUR 100,000 in 2018): This has previously been awarded money through the Co-operation with Northern Ireland Scheme and accounted for a good percentage of the funding available in that scheme. The CBOI's Peace Proms is a unique and ambitious musical education programme in which 20 000 children from 250 schools throughout the island of Ireland participate annually. It is a musical and cultural celebration and provides a unique platform for young people to showcase their talent while promoting peace, unity and tolerance through music.

- Music in Great Irish Houses (EUR 20,000 in 2018): For 45 years the Music in Great Irish Houses Festival has been a highlight of the Irish cultural calendar, entertaining, exciting and exhilarating audiences through good times and bad. Stately Irish houses are juxtaposed with some of the country's iconic, modern buildings and the diversity of Irish architectural and interior design. Without assistance through current funding, the event would not be in a position to take place.

- Veronica Dunne International Singing Competition (EUR 15,000 in 2018): A triennial international classical singing competition held in Dublin, Ireland. The competition invites the most talented young singers to compete on this global stage, with a star-studded Jury, international press coverage and exposure to the most influential people in the industry.



- Bernadette Greavy Bursary/ Competition (EUR 4,000 in 2018): n.a.

- Small Scale Local Festivals and Summer Schools Scheme (EUR 75 000 in 2018): Also run by the DCG This is reserved for appropriate festivals, summer schools and other such similar events. The Scheme is designed to support local cultural festivals and summer schools which are not in receipt of other public monies and which may not be eligible under funding criteria for larger scale events supported by Fáilte Ireland, the Arts Council and similar bodies.

The total amount of funding available to this fund is EUR 75,000. The maximum amount of funding per applicant is proposed to be in the order of EUR 5,000.

▪ ***Support from Culture Ireland***

Culture Ireland promotes Irish arts worldwide. They create and support opportunities for Irish artists and companies to present and promote their work at strategic international festivals and venues. They develop platforms to present outstanding Irish work to international audiences, through showcases at key global arts events, including the Edinburgh Festivals and the Venice Biennale

- Delegates bursaries to participate in diverse international music fairs (Womex, classical Next...)

- Grants to artists for performing at the Culture Ireland Showcase at Tradfest 2020.

▪ ***Tax incentives and specific tax regulation applicable to the music sector***

The income earned from the sale of artistic works may be exempt from Irish Income Tax (IT) in certain circumstances. This applies for the revenue earned for musical compositions. A request has to be sent to the fiscal administration and if they make a determination for a piece of work, the artists has a tax exemption for the year in which the claim is made. This means that income up to a maximum of EUR 50 000 per annum from these works are exempt from IT.

**Support at regional level:** n.a.

**Support at sub-regional level:** n.a

## Italy

In Italy, there is a structured and annual funding system for classical, lyric and symphonic music, supported directly by government funds, but there is no such funding system for contemporary folk music.

### Support at national level

#### ▪ ***Support from the Ministry of Culture***

The budget earmarked to support music for 2018 was EUR 60,239,724.76. It's a budget reserved for live shows, and it goes mostly to orchestras and classical music or jazz festivals.

#### ▪ ***Instituti di Cultura - The Network of Italian Cultural Institutes***

The Institutes' purpose is to promote the image of Italy and its culture, both classical and contemporary. The music sector can rely on the institutes in order to gain experience abroad as they are: organising e.g. music events; establishing contacts between Italian and foreign cultural spheres and facilitating an intercultural dialogue founded on democratic principles. There are 83 Italian Cultural Institutes (IIC) around the world undertaking promotion, training and events.

#### ▪ ***Tax incentives and specific tax regulation applicable to the music sector***

- Lower VAT rate for concerts: **There is a lower VAT for concerts but the rule is** however unclear. 10% subsidised VAT can be applied for vocal and instrumental concerts (those that involve mainly live performances), and any other type of show (e.g. theater or magic), which are held in places set up specifically to host concerts and shows such as concert halls, auditoriums and theatres or even squares, stadiums or concert areas temporarily used for this purpose. In essence, the show must be predominant attraction. Bars, pubs, restaurants, hotels ... and all the places where musical and show business are just entertainment for customers are therefore excluded. A doubt remains for the eligibility of festivals.

- Musicians established in a cooperative (cooperativa di spettacolo) can reduce the Vat from their purchases.

- There was a "music bonus" to buy musical instruments but it has been cancelled this year.

- Every year, 18-year olds receive EUR 500 to spend on culture (including records, concerts, music courses etc)

- Art Bonus tax incentives for those who donate to support Italian culture, including classical music foundations, orchestras, festivals.

### Support at regional level

The situation is different in the regional context, as each region is autonomous in defining strategies for funds to support music and culture in general. There is a significant difference in some regions such as Lombardy, Tuscany, Emilia or Lazio, where there are annual

funding lines for support for music productions and young artists, and other regions where they work on a year-to-year basis, identifying and issuing specific calls for these activities. From the evidence gathered, it is clear that in the regional context, the use of European structural funds to support these initiatives is more and more frequent.

- Regions Departments of Tourism and Culture: Every region in Italy has its own office for culture and tourism, they invest some funds in internationalisation., The contacts can be found under "Support Funding Scheme", region by region

- Emilia Romagna Region and City of Bologna: Both the region and the city are very active on music related issues. ER Region passed a "music law", while Bologna is UNESCO City of Music. Both institutions publish calls on music export.

- Upload Sounds programme: run by the Culture Departments of Trentino, Alto Adige and Tyrol (regions in the northern part of Italy, near Austria) which has an export section with calls for funding dedicated to artists of the region

### **Support at sub-regional level**

n.a.

## Latvia

### Support at national level

#### ▪ ***Support from the Ministry of Culture***

The Ministry of Culture of the Republic of Latvia implements "Strategy for music", which is a complementary document to the Latvian state culture policy guidelines "Creative Latvia" for the period from 2014 to 2020. The main task of this strategy, according to "Creative Latvia's" priorities, is to determine goals in the long and short term in the music sector (including infrastructure development etc.). The Ministry of Culture is responsible for the implementation of common cultural policy objectives and the development of the sector as a whole.

The Ministry of Culture has established the Latvian Music Council which is composed of music authorities and the chairmen of concert organisations. The Council's main task is to participate in promoting proposals, provide solutions to the issues related to the field of music, evaluating and analysing the music sector.

The Ministry of Culture administratively supervises 6 state-owned concert organisations : 1) Latvian National Opera and Ballet, 2) Concert Organisation "Latvijas Koncerti", 3) Latvian National Symphony Orchestra, 4) State Academic Choir "Latvija", 5) Liepāja Symphony Orchestra, 6) Chamber Orchestra "Kremerata Baltica", which are state limited liability companies and the Ministry is 100% shareholder. The Ministry delegates concert organisations with certain strategic tasks according to the document "Creative Latvia" priorities and goals.

The Ministry of Culture has delegated specific tasks to 3 non-governmental music organisations which are to be implemented by tender procedure:

- 1- "Latvian Music Information Centre" to select, accumulate and promote information, to organise seminars, tutorials and training programmes, to develop international cooperation and represent Latvian music industry in international cooperation projects, including music markets in the field of professional academic music;
- 2- "Modern Music Centre" to organize workshops, tutorials and professional training programmes for jazz music professionals, to create and develop international cooperation and to promote and represent Latvian jazz music institutions, artists and producers in international projects;
- 3- "Latvian Music Development Association / Latvian Music Export Office" to promote modern rhythmic popular music export.

The Ministry of Culture implements the following State budget lines:

- 1- 19.07.00 "Arts and literature";
- 2- 22.02.00 "Cultural events, cooperation agreements and programmes";
- 3- 67.06.00 "Implementation of projects and activities of the European Community initiative";
- 4- 22.12.00 "Latvian National Centenary Programme";
- 5- 25.00.00 "State Culture Capital Foundation".

- ***Support provided by the creative business incubator***

The Latvian government indirectly finances support programme to the music sector through its creative business incubator (Radošo industriju biznesa inkubators – RIBI). Participants can receive 50% co-financing for various services such as marketing strategy development, website development and prototyping. Support activities are organised according to the needs of clients, attracting experts and lecturers from different fields, as well as entrepreneurs who are willing to share their experiences.

- ***Support provided by the Nordic council of Ministers***

The ministry of culture contributes to finance mobility programmes via culture support scheme of the Nordic Council of Ministers.

- ***Support provided by Music Latvia***

Music Latvia Music Export office of Latvia founded in 2012. It aims to facilitate the promotion, marketing and sales of Latvian music abroad. It aims to provide:

- Music promotion grant: Continued support for various contemporary rhythmic popular music export promotion events
- Educational seminars for the music industry, songwriting camps: Music Latvia organises a variety of seminars and songwriting camps.
- Representation at international conferences, maintenance of the platform [www.musiclatvia.lv](http://www.musiclatvia.lv), etc. According to the Cultural Policy Guidelines 2014-2020 "Creative Latvia" 5.3. .6. "Tasks and activities to be carried out within the framework of the priority action lines", paragraph 2.4. "To promote the development of the creative industry sector export" section 2.4.6. "Create a Music Export Target Programme at SCCF" - a special support programme for the State Culture Capital Foundation - "Support for Foreign Concert Tours and Non-Academic Music Festivals" has been created in cooperation with music industry professionals. The programme continued until March 2019, with 9 projects funded with a budget of EUR 70 485.00.
- Creative Partnerships Programme (RaPaPro): This programme aims to build new creative partnerships in secondary professional culture education schools. Such schools involve art, design, music, dance high school educators, students, local government representatives, entrepreneurs, social groups and other representatives of local communities by generating ideas and developing them in the real world; with the aim of promoting the development of young entrepreneurs and the acquisition of interdisciplinary competences. In 2018, 7 partnership projects were implemented by the Vocational Education schools, 19 Competence Centres, the "National Art High School", Jānis Ivanovs Rezekne Music High School, Alfreds Kalnins Cesis Music High School, Rezekne High School of Art and Design, Jelgava Music High School, Stanislav Brock Daugavpils Music High School Vocational Education Competence Centre, "Riga School of Design and Art" together with partners involved.
- Awards: The Excellence Award in Culture has been secured by the Ministry of Culture to express the Latvian state's recognition for outstanding international achievements in culture, which have made a significant contribution to the promotion of Latvian cultural

values, promoted a positive image of Latvia, raised Latvia's prestige in the world and cultural value in Latvian society. 24 applications were received by nominating candidates for the Excellence Award in Culture to represent the following cultural sectors: visual arts, design, architecture, cinema, cultural heritage, music, literature and bookkeeping. Applications were evaluated by the National Council for Culture. The award was organised in cooperation with Jāzeps Vītols Latvian Academy of Music. On November 28, 2018, three excellence awards in culture were presented for international achievements received by writer Nora Ikstena, film director Rolands Kalniņš, as well as the Latvian National Museum of Art. On April 26, 2018, an award ceremony was held for young people on achievements in international competitions and artistic arts in 2017. The prize was awarded to 45 students of cultural education institutions aged 10-20 years and 51 educators and concertmasters.

#### ▪ ***The State Cultural Capital Foundation (SCCF)***

The State Culture Capital Foundation (SCCF) is a public foundation mainly finance by the cultural Ministry. The SCCF has received targeted donations from companies and individuals for a total amount of EUR 1,140,547.00 in 2017, and also regularly receives support from national public enterprises such as the electricity company Lavenergo. It also coorganises events with other public bodies.

The aim of SCCF is to promote balanced development of cultural and artistic creation and preservation of cultural heritage in the country in accordance with the national cultural policy guidelines, and to organise calls for the funding of cultural projects. Its operational strategy is based on a 5-year plan which will be renewed in 2020.

The State Culture Capital Foundation is provides funding for the entire CCS sector (Literature, Music and Dance, Theatrical arts, Film arts, Visual arts, Cultural Heritage, Traditional Culture, Design, Architecture and Interdisciplinary arts). It manages for each sector several funding programmes i.e. grant for projects, scholarships, mobility funding and sector targeted programmes which are focused on increasing culture access in regions or supporting regional arts institutions.

The SCCF in number:

Number of project and target programme competitions organised	39
Number of submitted projects evaluated by SCCF	4526
State support for creative process and creative initiatives of society in the field of culture (number of regional cultural programmes of SCCF)	4

Source: SCCF Website

Music is entailed in the performing arts section of SCCF. It provided EUR Million 1,1 funding in 2017 and EUR Million 1 in 2018. It represents around 10% of the total funding provided by the SCCF. The biggest funding lines are funding for cultural projects and finding for sector targeted programmes

#### ▪ **Support from Ministry of Finance**

The Ministry of Finance provides grants for projects through several music programmes. There are specific programmes for music as such and the budget indications are given overall for the programmes but there is no breakdown for the supported projects. It is therefore not possible to discern to which degree the Ministry of Finance is supporting music but only to have an approximate of indirect financing.

Its policy objective: To ensure success-oriented professional culture education / National Culture Policy Guidelines "Creative Latvia 2014-2020"

- 19.07.00 – Support to Art and Literature: The Ministry of Finance of Latvia provides grants for the representation of Latvian culture in important international forums - at least 3 international book markets (including Leipzig, Bologna, Frankfurt) and two music industry fairs. Latvian rhythmic, popular music representation at international industry fairs / conferences / festivals.

- 20.00.00 – Cultural Education: The aim of this policy objective is to provide opportunities for the acquisition of cultural education that meet the needs of the society and the labour market, promoting the competitiveness of both cultural professionals and the accessibility of cultural education to the public in the context of lifelong learning. It results in four main activities: 1) financial support to cultural education institutions (vocational secondary education institutions, higher education institutions), i.e. the Jāzeps Vītols Latvian Academy of Music; 2) ensuring the remuneration of teachers working in local government music, art and dance professional education programmes and financing of vocational secondary education programmes of local governments; 3) quality monitoring of cultural education programmes; 4) providing methodological support to cultural education institutions

- 22.02.00 Cultural events, cooperation agreements and programmes:

- Provision of sectoral annual awards (Latvian Literature Year Award, International Jānis Baltvilks Prize for Literature and Book Art; Annual Award for Design, Annual Award at the Theater Night of the Gamblers; Great Music Prize, Excellence Award in Culture; Provision of the Cabinet Prize Ceremony); cash prize.
- Valka County Council for Literary Musical production "Five Days in November", celebrating the 100th anniversary of the founding of Latvian Provisional National Council in Valka.

- 22.12.00 Latvian National Centennial Programme: Some funding has been given to diverse national institutions in order to implement specific programmes for the centennial Programme of the foundation of the Republic of Latvia, a.o. Latvian National Opera and Ballet and Latvian Academy of Music.

- 70.15.00 Ensuring implementation of European Union Erasmus + projects: The Aim of the sub-programme is to ensure improvement of the quality of cultural education and cooperation with social partners. Its main activities is to provide funding for the implementation of projects by professional cultural education institutions subordinated to the Ministry of Culture. Programme Executor: Professional Cultural Education Institutions Under the Ministry of Culture, National Library of Latvia and Centre for Cultural Information Systems.

Some musical projects received extra-funding from the Latvian government for their implementation. It often concerns high-school projects, with a focus on mobility and music education project development.

- ***Tax incentives and specific tax regulation applicable to the music sector***

n.a.

## **Support at regional level**

- ***Support at regional level via the SCCF***

Specific funding programmes are created specifically for regional cover:

- 1) "Corporation's "Latvian State Forest" support for cultural programmes in the regions";
- 2) "Regional Culture programmes";
- 3) "Providing access to versatile professional art in national or regional development Centres in regions of Latvia".

Within the framework of regional cultural policy, with the support of SCCF, 4 regional cultural support programmes were implemented in 2018:

- 59 projects have been supported in the Vidzeme Culture Support Programme (allocated funding – EUR 126,600);
- 52 projects have benefitted from the Kurzeme Culture Support Programme (EUR 120,000 allocated funding);
- 60 projects have received support from Zemgale Culture Support Programme (allocated funding – EUR 120,000); - 65 projects supported in Latgale Culture Support Programme (funding allocated – EUR 153,326) (Ibid.)

Distribution of SCCF Programme and Call for Proposals Funding (Grant) by Type of Allocation in 2017-2018 (EUR) - national level

- ***Support at regional level via the Ministry of Finance***

Grants to support regional cultural projects and popular music (strengthening of regional cultural space):

## **Support at sub-regional level**

Counties and municipalities are organising culture programmes individually according to their budget. They are responsible for the musical collectives and concert organisations they have founded, local or sub-regional cultural events, programmes and projects, promotion and support for artistic creative process, preservation of the cultural heritage and traditions of the area.

Amateur collectives in sub-regions and cities (choirs, ensembles, chapels, etc.) maintain and develop the Latvian musical heritage and tradition of Song and Dance Celebration under the supervision and management of the Latvian National Culture Centre.



Some of the municipalities are practicing open culture project competitions, such as:

- 1) The Education, Culture, and Sports Department of Riga City Council (RD IKSD) announces: 1) annual "Riga City Council culture project competition" in January for culture (also music) projects produced and performed in Riga city; 2) "Target funding programme for festivals in Riga"; 3) "Funding competition for cultural events in Riga" (3 times per year).
- 2) Liepaja (3rd biggest city in Latvia) Culture Administration announces a competition for cultural projects every year in January, promoting high-quality cultural and creative processes, as well as the participation of city residents in cultural life.
- 3) Similar competitions are held in Jelgava city, Ventspils city, Cesis city, Rezekne city, Jurmala city.

## Lithuania

### Support at National level

In 2018 public expenditure for culture in Lithuania was approximately EUR 485.5 Million from which around 40 million was earmarked to support performing arts. The most recent strategy for culture which runs until 2020 doesn't contain a specific strategy to support music. Music was included in the classification as "art" within all the other art forms, and as a cultural industry with all the other cultural industries. A specific music support strategy will exist in the new strategic plan from 2020.

The 2019–2021 financing cycle of the Lithuanian council for culture will specifically highlight diversity, education and the increase of the availability of culture. The identified financing priorities will focus on the programmes entailing strategic and long-term funding of culture and art projects; the programmes provide for sustainable financing of successfully operating independent culture organisations and continued international events. Furthermore, the equivalent culture development model designed to facilitate funding of culture in regions will be launched this autumn; the model will bring about more extensive cultural diversity, promote the engagement of the country's residents in the cultural processes, and increase satisfaction in cultural services

#### ▪ **Support from Lithuanian council for culture**

An important part of the grants for supporting the music sector are channelled via the Lithuanian council for culture's Culture support Fund. It publishes twice a year a call for applications for project grants and individual grants

- project grants: The project grants cover a wide range of music projects (artistic production, touring...), encompassing a vast variety of musical genres. It also runs a special scheme for big musical competitions (for professional music). It allocated via its Culture Support Fund EUR 15.35 million in 2018. Funding was granted to 942 projects during the first period, and 660 projects received funding during the recently ended second stage in funding.

With 132 projects funded with EUR 2,105,850.00 and 122 projects funded with EUR 1,013,200.00, Music and Theatre were the two art forms which received the most funding in 2018.

The funding consists of financial aid to cover the production costs of public and private institutions.

It was not possible to obtain more precise information from the survey to the cultural Ministry or via the Lithuanian Council for Culture's website.

- individual grants: The individual grants encompass different kind of grants. Lithuania created state grants for artists. They can be awarded an amount of EUR 600 a month as a support to concentrate on the creative activity.

- Other state grants:

- State grants for musicians (as a part of bigger State Grants Programme for Artists) as well as various state awards (for young and for established artists).
- State pension system for important retired artists.

- ***Tax incentives and specific tax regulation applicable to the music sector***

- As part of the tax declaration process (from 2018), up to 2% of the personal income tax can be donated to artists (having status of an artist). (Personal income is generally subject to a 15% tax rate). When income is not declared or there is no request filled-in as part of the declaration process indicating the recipient of the 2% tax share, the State decides on allocation of the raised funds under its routine procedure.

- The system for granting artist status has been functioning for a long time in Lithuania. The social group of artists can benefit from additional social security systems: artists whose income is small and not regular have their social insurance and health insurance contributions covered by the State.

- ***Funding via Baltic culture Fund***

Funding via the Baltic culture Fund (cf. p.91)

**Support at regional level**

n.a.

**Support at sub-regional level**

n.a.

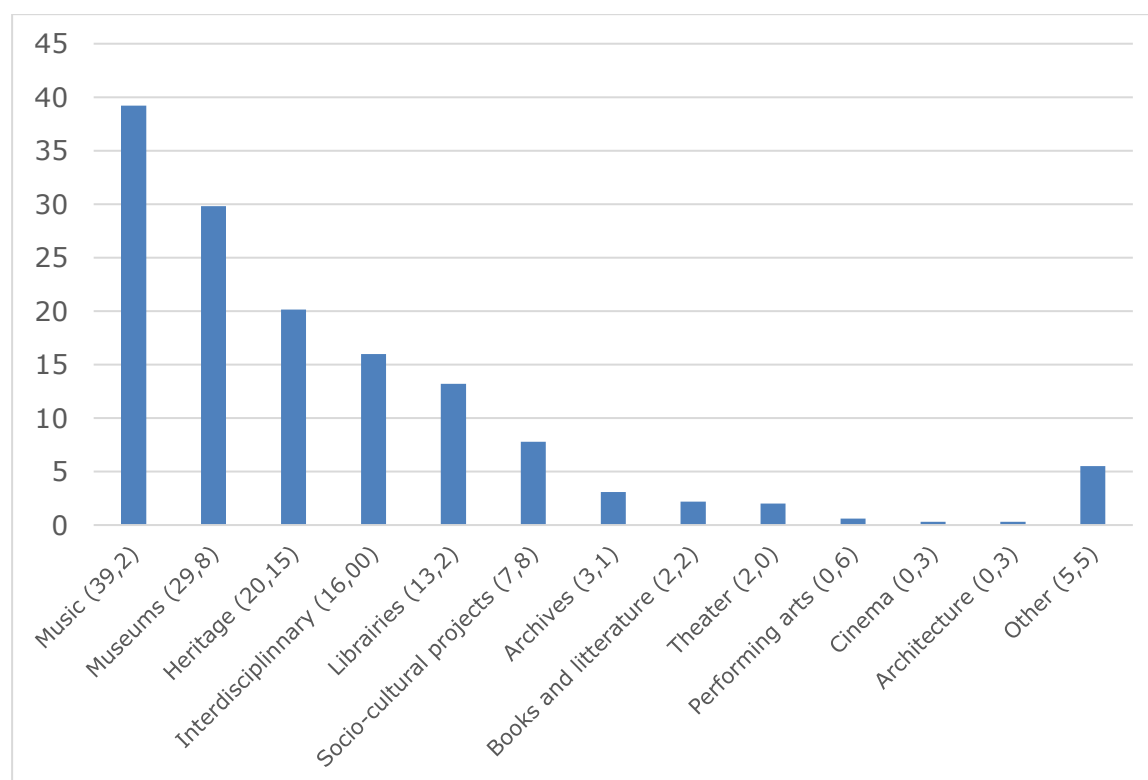
## Luxembourg

### Support at national level

#### ▪ *Support from the Ministry of Culture*

- The Luxembourg Ministry of Culture provides structural funding to the music venues of national importance such as Rockhal / Centre de musiques amplifiées, Bureau luxembourgeois d'export de la musique « music:LX » (Luxembourgian Music Export Office) and Philharmonie Luxembourg.
- It also provides grants for musicians and ensembles who apply for it.
- It also helps the sector via specific conventions with partners who propose musical projects.
- Finally, Luxembourg gives « Bourses d'aides à la création, au perfectionnement et au recyclage artistique » / Grants for creation, reinforcement and artistic recycling to which musical projects can apply for.

#### Cultural credits by artistic disciplines in EUR Million (2018)



Source: Kulturentwicklungsplang 2018-2028

Music represents 28% of the public expenditure on culture in Luxembourg. It is from far the biggest expenditure concerning the performing arts and the first expenditure of all artistic discipline before Museums and Heritage.

Average distribution in % of the voted budgetary appropriations of the Ministry of Culture in constant Euros according to the field and the cultural function of assignment from 2000 to 2018

	Creation	Production / Publishing	Disseminat ion	Preservati on	Educati on	Suppo rt	Resear ch	Undefin ed	Total
<b>Heritage</b>	-	<b>0,04</b>	<b>11,73</b>	<b>17,81</b>	<b>0,05</b>	<b>17,87</b>	<b>0,08</b>	-	<b>47,58</b>
Architectural, archaeological, audiovisual heritage	-	--	0,06	14,46	--	3,32	-	-	17,84
Archives	-	--	--	0,59	-	1,68	-	-	2,27
Libraries	-	--	--	2,39	-	4,19	0,01	-	7,15
Museums	-	0,04	0,52	-	0,05	8,68	0,07	-	19,95
Other forms of Heritage	-	-	11,15	0,37	-	-	-	-	0,37
<b>Architecture</b>	-	-	-	-	-	-	-	-	<b>0,09</b>
<b>Visual Arts</b>	<b>0,1</b>	-	<b>0,09</b>	-	-	-	-	-	<b>0,21</b>
<b>Performing Arts</b>	--	<b>9,17</b>	<b>0,11</b>	-	<b>9,51</b>	<b>0,05</b>	-	<b>0,2</b>	<b>29,21</b>
Music	--	7,37	10,46	-	9,24	0,05	-	0,2	27,14
Theater	-	1,47	10,46	-	-	-	-	-	1,47
Pluridisciplinary	-	0,33	-	-	0,27	-	-	-	0,6
<b>Printed</b>	<b>0,02</b>	<b>0,27</b>	<b>0,9</b>	<b>0,19</b>	-	<b>0,68</b>	-	-	<b>1,25</b>
<b>Cinema and audiovisual</b>	-	<b>2,81</b>	<b>0,34</b>	<b>0,02</b>	-	<b>0,13</b>	-	-	<b>3,3</b>
<b>Interdisciplinary</b>	<b>0,04</b>	-	<b>1,28</b>	-	-	<b>0,8</b>	-	<b>6,87</b>	<b>8,99</b>
<b>Socio-cultural</b>	-	-	<b>6,33</b>	-	--	<b>0,36</b>	-	-	<b>6,69</b>
<b>Other expenses</b>	-	<b>0,01</b>	<b>0,07</b>	-	<b>0,8</b>	<b>2,16</b>	<b>0,37</b>	-	<b>2,68</b>
<b>Total</b>	<b>0,16</b>	<b>12,3</b>	<b>30,5</b>	<b>18,02</b>	<b>9,63</b>	<b>22,05</b>	<b>0,45</b>	<b>6,89</b>	<b>100</b>

Source: Kulturentwicklungsplang 2018-2028

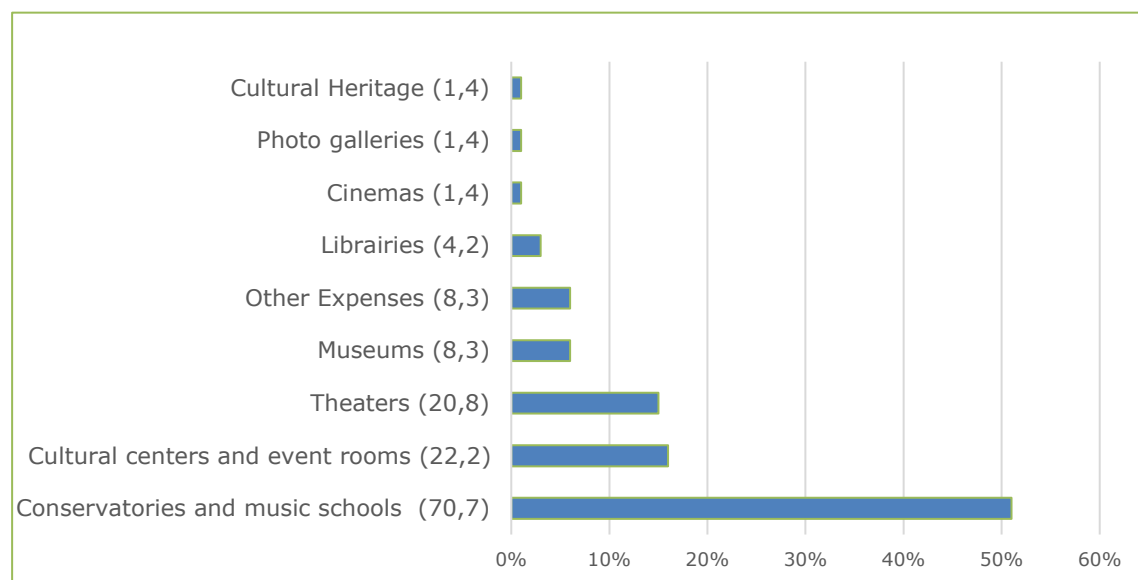
Legend: - value too low to be published / -- absolute zero or value rounded to zero  
Figures are subject to rounding, which may affect overall totals and percentages

▪ ***Tax incentives and specific tax regulation applicable to the music sector***

- Social security system: Luxembourg has special status for independent artists as well as a special social security system for artists and employees of the cultural field called "intermittent du spectacle"

## Support at sub-regional level

Distribution of the common cultural expenses of municipalities in EUR Million (2016)



Source: Kulturentwicklungsplang 2018-2028

Luxembourg provides a very large amount of subsidies to the music sector through its municipalities. In 2016, EUR 70.7 Million were earmarked to support music schools and conservatories. Another EUR 22.2 Million were used to support cultural centres and event rooms from which musicians and bands can probably rely on for rehearsals. Music is hence, from far, the biggest cultural expense at municipality level in Luxembourg. This can be partly explained by the fact that the music conservatories and theatres are cultural institution which requires a big number of workers from which the salaries are paid directly by the municipalities. However, a look at the cultural expenses per inhabitant show strong discrepancies, from EUR 1 to EUR 48 per inhabitant and half of this expense is made only by 4 Municipalities.

## Netherlands

### Support at national level

- ***Support from the Ministry of Culture***

The Dutch Ministry of Culture does not have a dedicated section for Music. The estimated budget earmarked for music projects is EUR 100 million per year.

- ***Fonds PodiumKunsten / Performing Arts Fund***

The Performing Arts Fund NL is the most important culture fund for music, music theatre, dance and theatre in the Netherlands and provides support on behalf of the government to every form of the professional performing arts.

- Grant for composition or Libretto: The Fund can grant support for composition or libretto commissions that contribute to the composition climate in the Netherlands. Therefore, foreign organisations can apply for support as well. This will be the case for foreign organisations that want to commission a Dutch composer or librettist. This is relevant when a commission can contribute to building an audience for the composer or librettist in question.

Commissions from foreign organisations will be considered within their specific foreign context. A key factor for consideration will specifically be the value the commission will have for the composer or librettist in question. Why has the foreign commissioner chosen a Dutch composer or librettist? Will the commissioned piece become a staple in the organisation's repertoire? What does this mean for future concerts? How likely is it that other organisations at home and abroad will perform the composition? Will the commission contribute to further foreign interest in the composer or librettist?

- Fast Forward: The programme 'Fast Forward: talent in international context' was launched on 1 January 2014, with the goal of giving talented mid-career makers a chance to work on the international stage. They are offered the opportunity of working with leading international producers, and part of this collaboration is to produce a production or concert under the banner of this international producer. This way, makers can boost their international development and positioning. Fast Forward 2 will run for two years: 2019 and 2020. With the programme's support, between 12 and 15 makers are expected to complete a (multi-year) artistic collaborative project abroad. A sum of EUR 1.7 million is available for the programme.

- Grant for Dutch presentation abroad: The Performing Arts Fund NL can award a grant to venues and festivals abroad for the programming of performances and concerts by Dutch companies, ensembles and performers. The grant can be applied for by a venue or festival located outside the Netherlands with a substantial international programme. Grants will not be provided when the first presentation takes place within 4 months after the deadline.

Applications can be made for the programming of performances or concerts by companies, ensembles or performers based in the Netherlands. It is also possible to submit an application for more than one performance by a single organisation or for multiple performances by more than one organisation

The amount of the grant is determined on the basis of the travel and transport costs for the relevant performance(s) or concert(s). An additional contribution towards the costs of fringe programming (e.g workshops, masterclasses, lectures) can be awarded, where applicable. In 2017 the Performing Arts Fund had a budget of EUR 960 000 for international

projects available. This budget includes the grants for international presentations in The Netherlands and for special Exchange projects.

- Dutch performing Arts: Dutch Performing Arts is a programme set up by the Performing Arts Fund with the aim of increasing the visibility of Dutch performing arts outside the Netherlands.

Dutch Performing Arts seeks to intensify the contact between Dutch artists and international customers. In addition, Dutch Performing Arts wants to increase the interest of international programmers for the Dutch performing arts and to stimulate the international ambitions of Dutch institutions with global potential. To this end, Dutch Performing Arts organises showcases at key events at home and abroad and visitor's programmes for relevant international guests. Furthermore, Dutch Performing Arts travels abroad to represent the Netherlands on the spot and/or to do research.

#### ▪ ***DutchCulture***

DutchCulture supports artists and organisations on obtaining funding for international projects in the areas of culture, media and heritage.

The DutchCulture Infopoint can also advise on working with a Dutch partner in the Netherlands as an artist, performer or specialist in the cultural sector.

#### ▪ ***Dutch Music Export (DME)***

DME is an initiative by Fonds PodiumKunsten, Buma Cultuur and Stichting Popculturalie created in 2008 with the foremost goal to bolster the international position of Dutch pop music on the world stage in a substantial and measurable way. DME advocates a structural and sustainable plan of action to back a productive congregation of internationally active and accomplished artists. DME accommodates rappers and DJs who operate within a myriad of fields, as well as pop music viable for both mainstream and niche market. DME provides

- Support on international Showcase Events
- Co-financing international marketing & promotion
- Hosting and organisation of networking events (drinks, dinner etc...)
- Education and professionalisation of the Dutch music industry

#### ▪ ***Buma Stemra***

Buma Stemra is Dutch copyright collecting society. It implements several support schemes from which music professionals can benefit such as

SIB-regulation for Starters International Business: This procedure works with special vouchers for the individual coaching of entrepreneurs.

#### ▪ ***Tax incentives and specific tax regulation applicable to the music sector***

n.a.



## Support at regional level

n.a.

## Support at sub-regional level

- ***Amsterdam Fund for the Arts – Amsterdams Fonds voor de Kunst (AFK)***

- Professional Art Scheme: The scheme Professional Arts focuses on creating and presenting artistic and cultural projects and programmes, in all artistic disciplines and all the possible hybrids between those disciplines. Supports up to EUR 25 000 for natural persons. For legal personas there are no such limitations.

- ***The Pop Union – De Popunie***

-Music Export Rotterdam: grants for participation in events , travel grants. The applying band/artists must be born or residing in Rotterdam, or the majority of the band/artist must be born or residing in Rotterdam. The fee of the band must not exceed EUR 1 000 net per show. Only tours with multiple shows are eligible for the grant.

- ***The Hague Pop Centre – Haags Pop Centrum***

Tour Support: Event participation grants and travel grants. The applying band/artists must be born or residing in the Hague, or the majority of the band/artist must be born or residing in the Hague. The fee of the band must not exceed EUR 1 000 net per show. The grant covers travel costs including transport costs of the backline and accommodation, based on low budget/economy class prizes. Only band members are eligible, crew is not.

## Poland

### Support at national level

The main sources of public funds for supporting the music sector are the Ministry of culture and local governments.

#### ▪ **Support from the Ministry of Culture**

Each year, the Ministry announces a call for various support programmes. It provides three grants targeted directly at the music sector.

- Music grant global programme to support the excellence of the polish music nationally and abroad (yearly EUR 5,478,326)
- Music track: The goal of the program is to preserve and foster the circulation of non-commercial recordings of musical works, musical and scientific publications as well as popular science regarding music and dance. (yearly EUR 798,922)
- Grant for composition (yearly EUR 525 006)

The music sector can also apply for the following grants

- Artistic Education
- Cultural Education
- Folk and traditional culture
- Cultural Infrastructure
- Promotion of polish culture abroad
- Digital culture
- Development of creative sectors

#### ▪ **Support from the Adam Mickiewicz Institute (AMI)**

The AMI is a national cultural institute, whose mission is to build and communicate the cultural dimension of the Polish brand through active participation in international cultural exchange. The Institute has carried out cultural projects in 70 countries. All of the Institute's projects carry the flagship brand "culture.p"

- Implementation of programmes: The AMI implements several programmes from which the music sector can benefit

- the Polska 100 Programme: an international cultural programme accompanying the centenary of Poland regaining independence whose goal is to promote Polish culture and cultural exchange between artists, creators and institutions worldwide.
- The Asia programme: In 2017 as part of the Asia Programme there has been further classical music and jazz concerts in China, presentations of Polish visual artists in Japan, artistic co-productions in India and projects targeting young culture audiences in South Korea.

- Promotion of Polish composers abroad: The objective of the Institute's music projects is to increase the presence of Polish music in the repertoire of international professional musicians, both Polish and foreign. For this purpose, the Institute pursues collaboration with international musical institutes and festivals, and supports the international presence of Polish institutions and performers.

- I, CULTURE Orchestra Programme: The I culture Orchestra is a youth orchestra established by AMI in 2011 that gathers young musicians from Poland, Armenia, Azerbaijan, Belarus, Georgia, Hungary, Moldova, and Ukraine.

- Open Poland Programme: This programme involves building lasting, long-term relationships between artists, academics, and opinion leaders in the Ukraine, Belarus, and Georgia. It serves as a platform for artistic exchange from which stakeholders of the music sector can benefit.
- The AMI is also one of the two entities involved in the Polish music export strategy next to Music Export Poland Foundation. It manages the Don't Panic! We're from Poland project.

▪ ***Tax incentives and specific tax regulation applicable to the music sector***

- Tax relief: The remuneration which results in the payment for the use of copyright or related rights in 2018 and 2019 will be reduced by 50%, 20% or by employee - flat tax-deductible costs - depending on the industry and the value of revenues.
- Act on Personal Income Tax: Poland has a tax reduction for income earned on copyrighted content.

### **Support at regional level**

n.a.

### **Support at sub-regional level**

Katowice, Krakow, Gdansk and Lublin are considered as music friendly cities.

- Warsztaty Kultury (Lublin): Based in Lublin, Warsztaty Kultury provides a series of workshops dedicated to artists all along the year. It also holds 4 yearly festivals.

- Katowice – Unesco City of Music: Katowice is a dynamic city (over 300 thousand inhabitants), which, having undergone a revitalization from a heavy industrial to cultural centre, became the leader of a 1.5 million Silesian metropolis in this field. On 11 December 2015 it became a creative city of Unesco in the field of Music. Thus, it conducts a wide variety of music projects: Every year Katowice hosts 27 music festivals. It organised in 2017 the edition of WOMEX, one of the biggest music fairs.

- Music Hub: Music Hub is a development incubator in the field of music, established as a component of Katowice's application to the UNESCO Creative Cities Network as the city of music. The inspiration for such place came from Peter Gabriel's collaboration with artists from all over the world in his Real World Studio. It provides to musicians a rehearsal rooms for small and larger bands; a storehouse for equipment and instruments, a workshop space, a recording studios (located in the building and mobile).
- Musicgrants: Musicgrants is grant programme of Katowice the City of Gardens – Krystyna Bochenek Institution of Culture, whose aim is to promote the idea of a UNESCO creative city and the programme „KATOWICE – UNESCO Creative City of Music”. The recipients of the programme are entities carrying out artistic and cultural projects directed to the inhabitants, promoting Katowice and/or held within its borders. The subsidy can be claimed both by natural persons, NGOs as well as entrepreneurs, which makes Musicgrants one of the most novel solutions in the field of support for artistic and cultural activity in Poland. In 2018 the total amount

allocated to Musicgrants in second enrolment reached approximately EUR 22,830. It is a real support for anybody who has an idea for an original project within the widely understood field of music, an opportunity to gain a financial support from EUR 200 to EUR 5,700. The projects worth subsidising are recommended by a community commission, from the projects whose authors meet the requirements of the programme regulations and have correctly filled out the application form.

## Portugal

### Support at national level

In Portugal, support for the arts sector is channelled mainly via DGAARTES, the Portuguese Arts Council.

#### ▪ **Support from DGARTES (Portuguese Arts Council)**

Concerning arts funding, Portugal grants financial support to the arts through DGARTES. Funding is provided in the areas of visual arts (architecture, design, new media, plastic arts and photography), performing arts (contemporary circus and street art, dance, music and theatre) and cross-disciplinary projects. The funding schemes are regulated by the Decree-Law no. 103/2017, August 24th and the Administrative Rule no. 301/2017, October 16th. DGARTES has a budget of around EUR 16 Million from which around EUR 3.7 Million is directed toward the music sector.

- In the music field, the support is given to orchestras, music schools, small musical groups, soloists, publishers of musical scores and records, as well as associations dedicated to the creation, dissemination and promotion of Portuguese music and musicians, among others.

Those funding schemes support music in the fields of creation (composition of musical works or interpretation of repertoire by a musical group), programming (including the production of cultural offer such as music festivals and programming of concert cycles), national and international circulation (itinerancy of groups or works throughout the country and abroad), edition (publishing recorded music and scores), research (archival practices and documentation on musical heritage) and training (master classes or internships aimed at professional musicians).

- DGARTES also subsidises cultural associations through the restitution of the VAT of musical instruments acquired by brass bands, philharmonic bands, music schools, fanfares, folkloric groups and other cultural associations that commit themselves to musical activity.

- It also coordinates the auditions for the European Union Youth Orchestra and organizes training and career development programmes for young Portuguese musicians.

- Finally, in the editing area, DGARTES manages the "Portugal Sound collection", which includes records and scores of traditional, erudite and contemporary music by Portuguese authors and musicians.

- A separate funding scheme exists for the regional orchestras - three medium-sized professional orchestras located in the northern, central and southern regions of Portugal.

DGARTES also implements several support schemes:

- The support for projects: The project support programme is aimed at eligible entities that wish to carry out activities on an annual basis, aiming at the dynamism and renewal of the national artistic fabric. This program also includes incentive lines complementary to projects previously approved under national and international funding programs, or whose viability depends on a small percentage of support.

- The support in partnership: The partnership support programme is a platform for convergence of objectives and strategies, integrating areas of confluence and promoting actions and results of intersectoral or transversal nature that fit the objectives of the present diploma. This modality allows the culture area, through DGARTES, to associate itself with other public and private donors to jointly launch other support lines.

- The programme of sustained support: The sustained support programme is aimed at professional structures with continuous activity, aiming at its stability and consolidation. In this biennial and four-year programme, the technical and human resources indispensable to the normal functioning of the eligible entities are contemplated, and those that associate the cooperation of the municipalities with their activity are also valued.

- DGARTES will also implement a special Biennale support programme for 2020-2021): EUR 17,580,000.00 will be split between visual arts, music, dance, theatre, contemporary circus and street art. It is hence not possible to discern exactly how much money will finally flow to the music sector.

- Internationalisation: EUR 200,000.00
- Dissemination, internationalisation, Public engagement, Publishing, research and formation: EUR 190,000.00
- Creation: EUR 1,260,000.00
- Programming and public development: EUR 500,000.00
- Complementary support to Creative Europe projects: EUR 100,000.00
- Partnership support programme: EUR 500,000.00

- Balcony Arts (Balcão Artes): DGARTES' Arts Desk aims to simplify their services, providing useful information to the artistic sector, facilitating the access, completion and submission of application forms and speeding up the process involved in the allocation and management of support.

- Sustainable Support (for 2 or 4-year periods); The sustained support program is aimed at professional structures with continued activity, aiming at their stability and consolidation. In this program, with the biennial and quadrennial aspects, the technical and human resources indispensable to the normal functioning of the eligible entities are contemplated, and those that associate the cooperation of the municipalities with their activity are also valued.

- Support to Projects: This grant is dedicated for project in Creation, Programming, Internationalization and supports Complementary actions to Creative Europe Programme;

- Support to regional Orchestras: The Portuguese State, through the various bodies responsible for supporting the arts, has, since 1992, promoted the creation and development of regional orchestras, with the intention of providing the whole country with professional musical structures, enhancing the cultural and social development of the population. Support for regional Orchestras is essentially characterized by a partnership between central government and local authorities, which has allowed the whole country to benefit, for almost 30 years, from a quality musical offer, which, in addition to classical music, it encompasses other musical genres and favors the dissemination of music, training and raising awareness among new audiences, while it has also been a welcoming platform for young musicians who have recently graduated there and had the opportunity to start a professional life there.

▪ ***Tax incentives and specific tax regulation applicable to the music sector***

n.a.

**Support at regional level**

A separate funding scheme exists for the regional orchestras - three medium-sized professional orchestras located in the northern, central and southern regions of Portugal.

**Support at sub-regional level**

n.a.

## Romania

### Support at national level

#### ▪ ***Support from the Ministry of Culture***

The Ministry of Culture is giving support to national performing arts institutions. The support amounted in 2018 to around EUR 77 million. (Ministry budget).

The budget allocated to cultural activities, except the financing of musical institutions, is between 2-5% of the Ministries' budget, depending if there is an Enescu year. The Enescu is an international classical music festival during almost a month and is supported mainly by the Ministry of Culture.

#### ▪ ***Support from the National Cultural Fund - AFCN (approx. EUR 350 000 per year)***

Established in 2005 AFCN is the main public financier of the cultural offer in Romania. AFCN's mission is to finance projects that support Romanian contemporary creation and the valorisation of heritage, which contributes to the good understanding of the artistic phenomena as well as to the widest access of the public to culture. There are two different type of call for proposals which are published twice a year. The AFCN publishes also three times a year a call for proposals to support editorial projects.

- Call for cultural projects: The call for cultural project covers 12 cultural fields, including music. The budget for music for the first round of calls is approx. EUR 210,000. The submitted projects have 10% of co-financing rate. It supports any kind of music projects.

- Call for multiannual cultural programs: This call aims to support large-scale proposals, with sustainability premises, focused on production of new artistic projects. It is open to any artistic field. The budget for the first call of 2020 is approx. EUR 850,000. The support for each project is between EUR 31,700 and EUR 42,300. The co-financing rate for multiannual programmes is 25%.

- Editorial Projects: The editorial call for proposals to which the music sector could be eligible are

- Book publication for a budget of EUR 117,000 per call
- Publication of magazines for a budget of EUR 53,000 per call.

#### ▪ ***Tax incentives and specific tax regulation applicable to the music sector***

- VAT reduced from 19% to 5% for concert tickets.

- Income tax for artists (author's rights and neighbouring rights) is 10% applied to 60% of total income (40% of all such revenue is subject to tax credit/is not taxable). Above a certain threshold (EUR 8 851 as of 2019, gross income corresponding to author's rights and neighbouring rights; the threshold represents the yearly minimum wage in terms of taxable income), social security and public health insurance contributions are due. Below the threshold, contributions are optional and there are certain deductions for health insurance in this case.

- There is a flat rate for the public health insurance contribution (EUR 45 /month, as of 2019) and a minimum rate for social security (EUR 115 /month, as of 2019).

- There are no contributions due for the author's rights and neighbouring rights revenue in the case of artists who are employed, irrespective of the level of such revenue.



- This taxation system (including the threshold) is applicable to all forms of independent income (self-employment, author's rights and neighbouring rights, including payments by collective societies of artists and writers, occasional service contracting, but also agricultural lease, renting and financial investments; dividends are not due contributions). The system was introduced starting in 2018, and it negatively affects young and emerging artists with revenues below the threshold, who tend not to opt for social security and public health insurance.

**Support at regional level**

n.a.

**Support at sub-regional level**

n.a.

## Slovakia

### Support at national level

#### ▪ *Support from the Ministry of Culture*

The Ministry of Culture of the Slovak Republic does not implement a specific policy for the music sector. The music sector is partially included within The Strategy of the development of culture in the Slovak Republic and Strategy of the development of the creative industry in the Slovak Republic (followed by Action plans). There are no specific measures targeting the music sector, the interventions are focused more on general support in the field of culture and creative industry.

#### ▪ *Support from the Music Centre Slovakia*

Policy for the music sector is also implemented through The Music Centre Slovakia which is a state-subsidised institution established by the Ministry of Culture of the Slovak Republic. Its mission is to encourage Slovak music culture by organising concerts, bringing pieces of Slovak composers to the stages, publishing sheet music and music books, documenting the music life in Slovakia and promoting Slovak music culture abroad.

#### Budget of the Slovakian Music Centre (in EUR)

	2015	2016	2017
Total Revenue (excluding Revenue Financial Operations)	2,997,569.00	2,895,206.00	3,598,874.00
subsidies from the state budget	92,370.00	216,200.00	382,682.80
Share of public money	3.08%	7.47%	10.63%

Source: Slovakian Music Centre Annual Report 2018

#### Breakdown of state funding (in EUR) to the Slovakian Music Centre

		2015	2016	2017
transfers	from the state budget	19 270.00	5 000.00	11 980.00
	from the self-governing regions (VÚC) budget	n.a.	2 400.00	6 900.00
	from municipal budget	n.a.	12 850.00	11 045.00
	from other subjects	44 500 .00	1 000.00	9 521.00
	from the EU budget	n.a.	n.a.	n.a.
grants (subsidies)	Total domestic grants	39 700.00	105 450.00	223 030.00
	of which from chapter MC SR	33 400.00	89 500.00	120 200.00
	foreign grants	n.a.	n.a.	6.8
	of which EU programmes	n.a.	n.a.	n.a.

### ▪ **Support from the Slovak Arts Council**

The Slovak Arts Council is a public institution providing support for artistic activities, culture and creative industries, which was established on 1.1.2015. The Fund replaces a substantial part of the subsidy system of the Ministry of Culture and is independent of central government authorities. The Fund provides funding, in particular, for the creation, dissemination and presentation of works of art; promoting international cooperation; educational programmes in the fields of art, culture and creative industries; scholarships for individuals who are creatively or scientifically involved in the development of art and culture. In the individual programmes, the state aid scheme applies to their funding. Slovak Arts Council launched its first support activity in 2016 and had a budget of EUR 20 Million for 2019.

The support towards the music sector is organised as such.

#### - Music dedicated programmes:

- 1.3.1: Production and presentation of works of art – music
- 1.3.2: Festivals, contests, concerts – classical and experimental activities
- 1.3.3: Festivals, contests, concerts – jazz and other genres
- 1.3.4: International mobility and presentation – music

#### - Music: research and education programmes

- 3.3.1: Research, publishing and translating activity – music
- 3.3.2: Educational activities – music

### ▪ **The Music Fund**

The Music Fund is another body active in funding the music sector. It is a national cultural institution established by law - ActNo.13/93 with a stable budget of approximately EUR 115,000<sup>165</sup>. The main focus of the Fund is to support creative, scientific and artistic activity in the field of musical art, with particular regard to the creative area of classical music, popular music, reproduction artists and music science and criticism. The main part of the Fund's activity is non-profit. The Music Fund focuses on the following activities:

- helps to create material conditions for the development of musical art of all genres by providing funding to music creators and organisations under the Music Fund Support Fund. It supports administrative and organisational activities, wages, personal costs.

- Classical Music / Musical Works Premiums

- awarding Music Fund prizes. The prize awarded is a written document and a financial premium of EUR 1 000.

- Ján Levoslav Bella Prize for musical work or creation enriching Slovak music
- The Frisco Kafend Award for Outstanding Performance
- The Jozef Kresánek Prize for significant musicological work
- Pavel Tonkovič Prize for Original Act in the Field of Slovak Music Folklore
- The Ladislav Martoník Prize for significant jazz production and interpretation
- Karol Pádý Award for creative and passionate development of brass music
- Gejz Dusík Prize for Significant Contribution to Popular Music.

<sup>165</sup> Music Fund's annual Report (2018)

- publishes the Catalogue of Notable Titles for Sale and the Catalogue of Notable Titles for Rent
- borrowing music material from foreign publishers

Overview of individual forms of support activities provided by the Music Fund in 2018

1. Classical Music / Musical Works	In EUR
Music Fund Awards / Ján Levoslav Bella Award	1,000.00
Bonus ( <i>Prémie</i> )	17,500.00
Scholarship	200.00
Prizes for music journalism and musicologists	170
<b>Sub-total</b>	18,870.00
<b>2. Classical Music / Interpretation Performances</b>	
Music Fund Prizes / Fríka Kafendu Prize	1 000.00
Bonus ( <i>Prémie</i> )	11 400.00
Music Fund Prizes for Competitions	800.00
Scholarships	970.00
Prizes for music journalism	197.00
Contributions for the production of a profile CD	5,000.00
<b>Sub-total</b>	19,367.00
<b>3. Classical Music / Musical Works</b>	
Music Fund Awards / Jozef Kresánek Award	1 000.00
Bonus ( <i>Prémie</i> )	8 000.00
Scholarships	2 255.00
Prizes for music journalism and musicologists	340.00
<b>Sub-total</b>	11,595.00

<b>4. Classical Music / Grants</b>	27,500.00
<b>5. Popular music / Popular music</b>	13,530.00
<b>6. Popular Music / Jazz</b>	
Music Fund Awards / Ladislav Martoník Award	1,000.00
Scholarships	200
Grants	12,400.00
<b>Sub-total</b>	13,600.00
<b>7. Popular Music / Other popular music genres</b>	

Music Fund Awards / Pavel Tonkovič Award, Karol Pádý Award	2 000.00
Grants	5 800.00
<b>Sub-total</b>	<b>7 800.00</b>
Editorial music titles published by the fund's publishing section in 2018 (no classification by genre available)	5 415.50
<b>Total</b>	<b>117,677.50</b>

Source: Music Funds Website

### ▪ **Kult Minor**

Fund for the Financing of Minority Cultures was approved by the National Council of the Slovak Republic in 2017. The main purpose of the fund is to preserve, express, protect and develop the identity of cultural values of national minorities by providing funds to support their cultural and scientific activities through subsidies or scholarships. Potential applicants may apply for financial support for projects in the fields of cultural, educational or editorial activities; the activities of theatres, artistic groups and cultural institutions; free-time activities; artistic creation; in the field of protection, professional processing and digitization of cultural heritage of national minorities; in the field of promoting the development of the use of languages of national minorities; support of exchange programmes, etc.

The Slovakian Ministry of Culture is obliged to provide Kult Minor with at least EUR 8 Million per year. The Kult Minor programmes dedicated to music are the following:

#### PROGRAMME 3: SUPPORT FOR THEATER, MUSIC, DANCE, ART AND AUDIOVISUAL ARTS

- Music: The sub-programme aims to support professional music creation and disseminating, music concerts, festivals, competitions and the international mobility of musicians. The subsidies are awarded in the form of project grants or scholarships.

- creation and dissemination of musical works (project grant and scholarship): The aim is to support the creation, study and public presentation of original works of composers, musical interpretations of all musical genres. This grant also support physical (as CD or DVD) or digital music distribution.

- music festivals, competitions and concerts (project grant): Support to professional music festivals competitions, concerts and events and activities directly related to these events.

- musical activities (project grant): Support to several activities and professional music activities such as innovative concert forms, educational music events, panel discussions, seminars or workshops...

- international mobility (project grant): The aim is to support international mobility, collaboration, creation and networking in the field of musical art. The grant can also

be used to support artists' mobility in the field of music (presentation of artists in the framework of international art cultural cooperation, participation in summer schools, workshops, competitions, symposia, seminars, conferences, workshops, etc.)

▪ ***Tax incentives and specific tax regulation applicable to the music sector***

There are no special incentives but legislation about income tax 595/2003 Z. z., specifically relevant for artists is paragraph § 43.

**Support at regional level**

At regional level the supporting programmes and subsidies are mainly focused on culture, or partly on cultural industries. This support is provided through grant systems, almost every year each region allocates a specific amount from their budget and sets rules for possible applicants.

- Music support in the Bratislava region: Within their Strategy for the Development of Culture for 2015 – 2020 Self-government of region Bratislava has created the Region of Bratislava Subsidy Scheme (functional since 2015). Having compared other regional schemes, the Region of Bratislava Subsidy Scheme has allocated the biggest financial amount for support of culture and established expert commissions for each support programme and an independent advisory body, Council for Culture and Arts of self-government of region Bratislava whose mission is to provide expertise on applications with the aim to guarantee transparency, independence and qualification of the grant scheme. This mechanism is unique among all regions. Bratislava's regional subsidy scheme launched its first support activity in 2015. The structure of support activity is divided into the several programmes including the music sector.

- The rest of the regions in Slovakia have the smaller supporting grant systems that are aimed to support cultural and artistic activities in general, not specifically focused on music sector.

**Support at sub-regional level**

n.a.

## Slovenia

### Support at national level

#### ▪ **Support from the Ministry of Culture**

The music industry does not have a special place, neither in the Ministry's underlying legislation, nor in its policy. On a declarative level, the term music market was introduced in a strategic document called the National Programme of Culture 2014-2017. The establishment of the Music export office was planned, with the aim of fostering the music market. On the other hand, all activities related to the music industry are profit oriented (or perceived as such) and therefore systemically fall under the jurisdiction of the Ministry of Economic Development and Technology.

- Direct subsidies (operating grant to national institutions (around 39 EUR Million): The Ministry of Culture is primarily (legally) responsible for financing the national institutions (public sector) such as - Slovenska filharmonija - Philharmonic Orchestra; Slovene National Theatre Maribor – Opera and Ballet; Slovene National Theatre Ljubljana – Opera and Ballet and Cankarjev dom – Cultural and Congress Centre.

The Ministry of Culture is legally bound to pay for the salaries, operational costs, programme costs and investment (maintenance) of the respective institutions. The majority (approximately 95%) of the Ministry's budget in the field of music therefore covers functioning of the abovementioned public institutions. The remaining funds (approximately 5%) are distributed among the NGO sector through calls for proposals and tenders.

- Economic and social Council Funds (ESS): The ESS funds are support mechanisms that aim to support employment from which the sector can benefit.

- Grants: Apart from the abovementioned public institutions, the Ministry of Culture is financing the NGO-sector and music programmes and projects of individuals through various calls for proposals and tenders, such as (on regular basis):

- 4-year programme scheme (financial support to bigger producers, festival organisers and umbrella associations)
- 4-year project scheme (financial support to smaller producers, festivals, organisers)
- 1-year project scheme (financial support to smaller producers, festivals, organisers, individual musicians)

Some of these grants can also be used for projects abroad, thus serving the internationalisation of the Slovenian music sector.

- Scholarships: The Ministry provides scholarships to undergraduate and postgraduate students.

#### ▪ **Support from the Ministry of Foreign Affairs**

- International Cooperation for Culture: In collaboration with the Ministry of Foreign Affairs the Ministry of Foreign Affairs support events abroad focused on international cultural presentation of Slovenian artists. In the relation to international cultural collaboration, the Ministry offers one-month residencies to Slovenian artists in New York, Berlin, London.

- The Cultural Fund: The Cultural Fund is an instrument which enables the implementation of many quality cultural projects with the help of diplomatic and consular missions. The

main guideline for co-financing is to encourage more sustainable forms of cooperation between creators. From the Cultural Fund, around 150 cultural projects are co-financed each year from various artistic fields. The Ministry of Foreign Affairs and the Ministry of Culture jointly co-decide on the co-financing of these cultural projects. In cooperation with the Government Communication Office, the Slovenian Film Centre, the Public Book Agency, the Centre for Slovene as a Foreign Language, RTV Slovenija, Ljudmila and many other stakeholders, the Ministries strengthen their international cooperation and recognition of Slovenian art and culture abroad. Their concern is to create greater visibility of Slovenian art and culture abroad

- ***Javni sklad Republike Slovenije za kulturne dejavnosti - JSKD/ Public fund for cultural activities***

The JSKD conducts public invitations and calls for co-financing of cultural projects and programmes for cultural societies and associations of cultural societies. The funds are intended for co-financing projects that are performed as events (concerts, performances, exhibitions, projections and other publicly available cultural activities), education and professional training or publishing, film and video projects and smaller investments in infrastructure dedicated to culture (equipment and investment maintenance). According to the contract with the competent Ministry, the JSKD also conducts public calls for individual fields of activity (network of multimedia centres, community arts) or for specific user groups (ethnic minorities). In cooperation with the municipalities, the JSKD also issues funds for the regular operation of cultural associations at the local level.

- ***SIGIC – Slovenian music information centre***

- Music Slovenia: Music Slovenia is an export brand without a legal status held by an informal consortium carried out by SIGIC, publishers, collecting societies, producers, ministries, etc.

The Slovenian Music Information Centre can provide some consulting and free training.

- ***Tax incentives and specific tax regulation applicable to the music sector***

There is no tax deduction or stimulation regarding the investment in culture but the Ministry of Culture is responsible for covering social security contributions of selected self-employed musicians (app. 150 of 481 registered as self-employed). It represents around EUR 2.5 Million per year.

### **Support at regional level**

There are no public financial schemes on the regional level. Regionally structured projects usually apply for the EU or Interreg fund.

### **Support at sub-regional level**

The existing funding schemes on the local level are in the domain of municipalities. Financial subsidies in the field of non-professional culture are distributed through JSKD - Public fund for cultural activities and its local offices (situated in all bigger towns)



## Spain

### Support at national level

- **Support from the Ministry of Culture**

The National Institute of Performing Arts and Music (Instituto Nacional de las Artes Escénicas y de la Música, INAEM) is the organism of the Spanish Ministry of Culture and Sports that shapes and develops support programmes related to theatre, dance, music and circus.

#### Direct support (operating grants):

INAEM is directly financing "creation centers": National Orchestra and Choir of Spain (OCNE), the Young National Orchestra of Spain (JONDE), the National Center for Musical Diffusion (CNDM) and the Teatro de la Zarzuela. It is also financing the national Music Auditorium. INAEM is also financing the Documentation Center for the Performing Arts and Music (CDAEM)

#### Call for projects:

INAEM funded music projects in 2019 music projects via the following programmes for a total of EUR 3,407,000

Name of the support programme	Budget 2019
B1.1. Support programs for performers and groups of lyrics and music for tours in Spain	EUR 570,000
B2. Support programs for performers and groups of lyrics and music for tours abroad	EUR 345,000
B3. Support programs for non-profit entities at the state level for lyric and music activities	EUR 630,000
B.4 Support programs for festivals, shows, contests and congresses of lyric and music	EUR 1,512,500
B5 Lyric seasons support programs	EUR 284,500
B6. Support programs for composition assignments linked to premiere	EUR 65,000

- **Support from ICEX**

ICEX is the Spanish exterior commerce agency founded in 2006. ICEX is the main partners of the platform *Sounds from Spain* along with the National Institute of Performing Arts and Music (INAEM) and the following private institutions: Artistas Intérpretes y Ejecutantes (AIE), SGAE Foundation, Asociación de Representantes Técnicos del Espectáculo (ARTE), Productores de Música de España (PROMUSICAE) and Unión Fonográfica Independiente (UFI).

Their main objective is to promote the internationalisation of Spanish music for which they organise activities abroad like taking part in renowned international fairs, events and festivals like South by South West (EUR 65,000), Womex (EUR 42,500), MusikMesse (EUR 36,000), Pulsar, etc. They have carried out successful projects in this sense in the US, China, Japan, Mexico and Argentina.

- ***Tax incentives and specific tax regulation applicable to the music sector***

- Tax incentives for investment on cinema production, audio-visual series and performing arts and music shows, applied to the Company (or Society) Tax. Investments for the production and live performances of performing arts and music shows will have a deduction of 20% from the Company Tax.
- Tax incentives for investment on cinema production, audio-visual series and performing arts and music shows, applied to personal income Tax. Donations of up to 150 euros benefit from a tax deduction of 75%, and above that amount, 30%.
- VAT regulation: Reduced VAT of 10% for services of performers, artists, directors and technicians (as physical persons) and for organisers of music shows.

## **Support at regional level**

- ***Music support in the Basque Country***

- Support from the Department of Culture and Linguistic Policy: In 2019, several grants: for the organisation of festivals, for unitary music projects (EUR 155,000), for music cycles (EUR 50,000), for entrepreneurship music initiatives (EUR 205,000), for the printing of musical scores (EUR 30,000) and others.
- Support from Instituto Vasco Etxepare: In 2018, grant for the “promotion of mobility of the Basque creators: music”, for the organisation or participation in exhibitions or activities related to contemporary art outside the Basque Country.

- ***Music support in Catalunya***

- Support from the Ministry of Culture: The budget of the Ministry of Culture of Catalunya was EUR 277.91 million. Approximately EUR 3.6 million was dedicated to music. The Catalan government had developed a plan for the development of the music sector that had to be on hold because of budgetary restrictions.
- Support from ICEC: The Catalan government offers a programme of free training run by the ICEC, SDE the company development service. It is open to all the cultural sectors, including music, around topics like legislation, marketing, international strategies etc.
- Catalan Arts delegates: Besides having a Catalan Arts delegate in Barcelona, the Catalan government also has some in London, Berlin, Paris and Brussels. They offer free consultancy to all music companies and artists who want to work in the international market. They also help cultural companies to visit international fairs and publish promotional material.

### **Support at sub-regional level (example)**

- ***Music support in Madrid Community***

In 2019, the city council of Madrid provided grants for “private companies in order to carry out music projects” (EUR 450,000), targeted at music companies performing the following activities:

- production and premiere of live music shows (Zarzuela, opera, popular music and music theatre)
- recording, edition and audiovisual and online broadcasting
- production and exhibit of live seasons or festivals

## Sweden

### Support at national level

In Sweden, the Ministry of Culture directly support a few national music institutions. The support schemes for arts and culture (including the music sector) are not directly managed by the Ministry but are administered by three main public agencies under the Ministry of Culture.

On a general level, there are three funding lines 1) the Swedish Arts Council that awards grants for organisations, 2) the Swedish Arts Grants Committee for individual professional musicians and artists and 3) the Swedish Performing Arts Agency for cooperation projects as well as development and internationalisation initiatives. The Swedish Arts Council administer the main part of the state budget for the music sector.

#### ▪ **Support from the Swedish Arts Council (*Statens kulturråd*)**

- Project grant for collaboration with composers: The grant aims to encourage commissions of new musical works. The grant can be applied for by organisers, arrangers, institutions etc.
- Yearly grant for groups of musicians (min. 2 persons): The grant is mainly aimed at public activities/concerts. Institutions may not apply for the grant.
- Touring grant for groups of musicians (min. 2 persons): The grant covers a part of the costs for national and international tours. Institutions may not apply for the grant.
- Yearly grant for music organisers/arrangers/promoters: The grant can be applied for by concert organisers that have considerable, permanent and regular activities. The grant should contribute to diversity in the musical offer all over Sweden.
- Project grant for music organisers/arrangers/promoters: The grant can be applied for by concert organisers for public presentations. Institutions may not apply for the grant and it aims to engage independent professional musicians.
- Grant for music publishing: The grant can be awarded to independent publishing companies, writers-publishers, majors and majors affiliated in Sweden. The aim is to support a diverse offer of artistically valuable/precious music recordings.
- Yearly grant for regional music institutions
- Project grant for development of regional music institutions and organisations in the Swedish regions
- Support schemes for music centres and alliances (Musikcentrum, Musikalliansen)
- Yearly grants for international networks and organisations: For example, the organisation Export Music Sweden receives funding from the support scheme for internationalisation of the Swedish music sector (all musical genres) and export of Swedish music abroad.

▪ **Support from the Swedish Arts Grants Committee (Konstnärsnämnden)**

21% of the applications to the Swedish Arts Grant committee originated from the music sector.

- Yearly working grant for individual professional musicians and artists
- Project grant for international cultural exchanges and cooperation and traveling grants: Grant for Swedish artists' participation in international exchanges and cooperation. Foreign artists can be invited to Sweden by Swedish artists for cooperative work. Travel grants for Swedish artists and musicians.
- Long term working grant (in general ten years): Working grants to give professional artists and musicians the possibility to create and develop artistically.
- Project grant: Project grants for professional musicians for experimentation, development and/or cooperation (budget and timeframe part of the application).
- Grant for residence stay abroad: For Swedish based freelancers, professional musicians and artists.
- Grant for residence stay at Studio Acusticum in Piteå, Sweden: For freelancers, professional musicians.
- International Music Programme (KIM): The programme aims to create, develop and deepen the composers contacts with foreign institutions and professionals such as agents, producers, critics, colleagues, audiences and markets and thereby contribute to the artistic development and improved possibility for employment and income. The goal is to strengthen the artists own networks and opportunities to create sustainable international contacts.

▪ **Culture Bridge (Kulturbryggan, part of the Swedish Arts Grants Committee)**

- Project grant: The grants can be applied for by individuals or organisations in all artistic sectors for projects that aims to create art in a new way and with a new content.
- Grant for structural development: Grant for projects to establish places/buildings/working places for art and culture production in parts of Sweden where these arenas do not exist or are insufficient.

▪ **Swedish Performing Arts Agency (Musikverket)**

- Project grants: Project grant for cooperation projects (national or international). The aim is to promote a diverse offer of music of high quality and artistic innovation in the whole country. Aim to strengthen the independent music sector.

Grant for cooperation with independent music professionals (until 2018):

- Strategic development projects: For example, the project Samspel which aims to create better structures for cooperation for live music and touring in the whole country. Sweden.
- ISPA Fellowship Programme: ISPA Swedish Fellowship Programme is a leadership programme for producers that aims to strengthen the internationalisation of the independent music sector in Sweden.

- **Elektronmusikstudion, EMS**

By funding the world class studio for electronic music (founded in 1964) Elektronmusikstudion, EMS, the Swedish Performing Arts Agency support residence possibilities, training and collaborative project with international and Swedish based musicians and artists.

- ***Tax incentives and specific tax regulation applicable to the music sector***

n.a.

**Support at regional level**

n.a.

**Support at sub-regional level**

n.a.

## The UK

### Support at regional level

#### ▪ *Support from the Arts Council England*

Funded by the British government and with funding from the National Lottery, the Arts Council England provides a wide range of funding. The funding policy of the Arts Council has been recently amended. It has a new funding policy since April 2018.

From 2018 until 2022 the Arts Council will invest across three key funding streams:

- EUR 458 million per year in 828 arts organisations, museums and libraries in their National Portfolio. This will include:
  - EUR 378 million of State funding
  - EUR 80 million of National Lottery funding.
- EUR 110 million of National Lottery funding per year in Arts Council National Lottery Project Grants, their open-access funding programme.
- EUR 81.3 million per year in their Arts Council Development Funds which will focus on diversity, resilience, innovation in business models, leadership development and creating more pathways for a wider range of people to become part of the arts and culture sector.

Funded activities from 1 April 2018 to June 2019

- National Portfolio organisations (NPO): Out of the 841 funded NPO by the Arts Council, 102 give music as their major discipline. They are funded from EUR 40,000 to EUR 24 million. There is no coding concerning the music genre but it seems to be quite comprehensive.

- Music Project Grants: Project Grants are open to applications for music projects from individuals, groups and organisations working in the music sector.

Eligible actors and genres: artists, bands, orchestras and other groups, labels, promoters, managers, concert halls and other live music venues. The music genre may fit into one, or possibly more of the following genres or music types, but can also be from a completely different style altogether: classical, jazz, brass bands, world music, contemporary popular music genres (e.g. indie and alternative, rock (including blues, modern, post-rock and math-rock etc.), metal and punk, electronica (including house, drum & bass and experimental forms), urban (including hip-hop, grime and rap, jungle etc.)).

Supported activities are: developing new material; rehearsing for live events; performances and showcasing; touring live shows; recordings; making creative digital content such as music videos or live broadcasts; purchasing musical instruments and equipment.

The following activities are excluded from support: music recording without appropriate plans to distribute it, activity (such as performances or recordings) where the intention is to make a profit (e.g. from ticket or record sales), buying musical instruments or recording equipment (including software) without showing artistic development and substantial public benefit from doing so, self-promotional activity (including recording and performance) with no clear benefit to the public, either in the short or long term.

The music project grants also offer information sheets on all the aspects of the applications.

It offers grants from EUR 1,200 to EUR 120,000.00 to support a wide variety of arts-related activities from individuals or organisations active in dance, visual arts, literature, theatre, music and combined arts. It is possible to receive support for more than EUR 120,000 for international projects. Such grants are however exceptional.

From April 2018 to March 2019, 4076 projects have been funded with EUR 88.7 million. Out of these 637 projects were music projects (15,63%), which were funded with EUR 11.5 million, which represents 13,02% of the funding.

- Additional ringfenced budget of EUR 2.78 Million to support Grassroots Live Music Sector: This funding is available to those whose main function is to host and/or promote live music events in venues. This grant is particularly aimed at supporting those venues and promoters who work in the grassroots part of this sector (ie. those working with new, developing talent in small to mid-size venues).

All types of music and genres are included with a focus on electronic (including house, electronica, drum & bass, dubstep, experimental, etc), hip-hop, grime, etc, indie and alternative, metal and punk, pop, rock (including blues, modern, post-rock etc).

It also supports projects that develop diverse approaches to music programming, incorporating for example classical, jazz, folk, and/or world music alongside contemporary pop.

Projects may present live music programming, but they might also include activities that put live music venues and promoters in a better position to deliver their work in the long term. For example: purchasing some essential equipment; carrying out building work, developing new routes into off-stage roles, or business planning.

Excluded from support are individual bands, managers or agents wishing to tour using this project grant. There is in fact a separate field in the main Project Grants programme to support such activities.

- Development Funds: The 4 development funds focus on diversity, resilience, innovation in business models and leadership development.

- Creative People and Places: Creative People and Places 2019-23 allocates around EUR 26.6 million between 2019-23 to 109 places identified as the 'least engaged' in arts and culture across England, according to the Active Lives survey November 2015 to May 2017. These places are in parts of the country where involvement in the arts is significantly below the national average. The projects should be led by consortia and should include community groups and/or grass-roots organisations as well as cultural organisations such as museums, libraries or arts organisations. Other partners might include private-sector organisations, clubs, housing associations or universities.

There is no available compiled information on how many music projects among those funded are directed towards the development of community engagement in arts and culture.

- Developing your Creative Practice: Developing your Creative Practice is a new development fund designed to support independent creative practitioners (Individual artists and/or creative practitioners) to ensure excellence is thriving in the arts and culture sector. The grants range from EUR 2,215 to EUR 11,080. The overall budget for the 2018-2022 period is EUR 16 Million.



Funded activities are: Research and development opportunities, building new networks, creating new work.

Since its launch in 2018 15% of the 550 projects supported by the fund had music as main discipline. They have been awarded with around EUR 770,600.00. It represents 14,37% of the provided funding for that period.

- Elevate: This fund aims to improve the resilience of organisations making a significant contribution to the Creative Case for Diversity, to encourage an increase of diverse led organisations within the National Portfolio. It funds activities focused on organisational development and resilience.

Eligible actors are: Arts organisations, accredited museums, museum support organisations and libraries not in receipt of National Portfolio funding during 2018-22.

The grants range from EUR 111,000 to EUR 166,100.

The first round of this fund redistributed EUR 5.9 Million to 40 organisations. One of them is dedicated to music and has received EUR 155,085 in funding.

The second round will distribute EUR 3 Million and the grants will range from EUR 8,300 to 111,000.

#### ▪ ***Tax incentives and specific regulations applicable to the music sector***

- There are some tax incentives and specific regulations for the music sector including clarification of a creators' ability to average profits in successive years). A large proportion of music employees in the UK are self-employed and much of the income generated through rights exploitation falls within the scope of VAT.

- Seed Enterprise Investment Scheme: The Seed Enterprise Investment Scheme (SEIS) offers great tax efficient benefits to investors in return for investment in small and early stage startup businesses in the UK. SEIS was designed to boost economic growth in the UK by promoting new enterprise and entrepreneurship.

- The UK's Musicians' Union also offers Tax Savings Guidance for musicians.

- Enterprise Investment Schemes offer tax advantages to investors, with specialists in the creative industries including Amplify 6, which develops business models which encourage investment in music.

- UK Government Tax incentives: Creative industry tax reliefs were first introduced by the government in 2012 to incentivise investment and support the growth of the sector domestically and internationally. Currently, there are tax incentives for orchestra, film, theatre, animation, high-end television, video games, children's television and museums and galleries. The success of tax reliefs for the screen sector is highlighted in Screen Business, a new report commissioned by the BFI outlining how screen sector tax reliefs have powered economic growth. It sets out how film, high-end, children's and animation television and video games tax reliefs have delivered nearly £8 billion to the UK economy, generated over 137,000 jobs in 2016, and promoted spillover growth in tourism, merchandising, sports and other industries.

### ▪ **Support from the Arts Council Scotland**

As with ACE, the Scottish Arts Council was formally created as an independent organisation after the breakup of the ACGB in 1994. Creative Scotland (CS) has the same remit as ACE although focused in Scotland. It receives Grant-in-Aid money from the Scottish Government and a share of the proceeds of the National Lottery.

In April 2014, Creative Scotland published its 10 Year Plan: Unlocking Potential Embracing Ambition: a shared plan for the arts, screen and creative industries 2014-2024. The Plan highlighted Creative Scotland's five ambitions and the priorities over the next 3 years to help achieve these ambitions. These priorities were reviewed at the end of this period and were not changed. The annual plan for 2018/19 sets out how Creative Scotland will continue to develop strategies for its three key areas of responsibilities: the Arts, Screen and Creative Industries. The new funding round for regularly funded organisations begins on 1 April 2018, and will run for three years until 31 March 2021. Funding of EUR 111.45 million was awarded to 121 organisations over the three-year period

In 2017/18, Creative Scotland committed EUR 78.7 million of grant funding to the arts, screen and creative industries in Scotland arising from EUR 47.2 million of Scottish Government grant-in-aid funding and EUR 31.2 million of National Lottery funds. The annual levels of grant commitments are shown below for the five-year period.

Annual levels of grants commitments of the Arts Council Scotland (in million EUR)

	2013-14	2014-15	2015-16	2016-17	2017-18
Grant in Aid	54.2	51.8	52.5	45.4	47.2
National Lottery Fund	46.6	34.3	33.8	30.3	31.2
Total	100.8	86.1	86.2	75.7	78.4

Source: Creative Scotland's website

- Regular Funding: Regular funding seeks to ensure Scotland has a wide range of arts and creative organisations through which artists and creative people can deepen and deliver their work, their engagement with the public, and their professional networks. Regular funding is one of the key means by which the ambitions, priorities and connecting themes highlighted in the 10-year plan will be addressed. 2017/18 was the final year of regular funding for the three-year period from April 2015 to March 2018.

Regular funding is provided to organisations engaged in crafts, dance, film, Literature/publishing, Multi Art Form, Music, Theatre and visual arts.

There were 118 organisations receiving regular funding in 2017/18, EUR 30 million was allocated from grant-in-aid and EUR 6.6 Million allocated from National lottery fund amounting to EUR 36.5 Million. 21 organisations receiving regular funding are music organisations, representing 17.8% of the funded organisations.

- Open Project Funding: Open project funding aims to support the arts, screen and creative industries, with projects that explore, realise and develop creative potential, widen access to their work, and enrich Scotland's reputation as a distinctive creative nation connected to the world. The fund is open to both individuals and organisations for awards up to EUR 168,980. The fund awarded 460 grants consisting of EUR 808,850 of grant-in-aid and EUR 11.04 million of National Lottery funding during 2017/18 amounting to EUR 11.82 Million.

Awards were made to applicants based in all of Scotland's 32 Local Authority areas and active across a range of art form specialisms (Crafts, Dance, Design, Digital, Screen, Literature/Publishing, Multi Art Form, Music, Theatres and Visual arts).

107 music projects have been awarded in 2017-18 for a total of EUR 2.26 million. It represents 23% of the awarded projects and 19% of the awarded funds. It included e.g. touring and showcasing in international events.

- Targeted Funding: Targeted funding is used to address specific activities and development needs in a sector, specialism, or geographic area. In 2017/18, it operated 44 targeted funding programs in cooperation with other funds (17 Arts and Engagement funds, 10 Screen funds, two Creative Industries funds, five Strategy funds, funding for five Sector Organisations and five other funds, such as the EXPO fund and Festivals Edinburgh funding).

In 2017-18, 477 awards were made under this programme amounting to EUR 29.3 million including EUR 1.68 million of funding as part of ongoing capital funding commitments. EUR 16.45 million was funded from grant-in-aid and EUR 11.94 million was from National Lottery. The EUR 16.45 million of grant-in-aid funded targeted includes EUR 15.55 million of grants relating to restricted funding for specific Scottish Government sponsored projects.

There is no indication on how much has been awarded to music projects.

Focus of awarded projects of Creative Scotland in 2017-18		
	Nr. of projects	Value of awards in EUR
Digital	12	179,383
Touring	20	388,149

Source: Creative Scotland's website

#### ▪ **Support from the Arts Council of Wales**

As with Arts Council England and Creative Scotland the Arts Council of Wales (ACW) was formally created in 1994 as an independent charity. The ACW has the same remit as the Arts Council England and Creative Scotland although it focuses on Wales and receives GIA funding from the Welsh government and a share of proceeds from the National Lottery Distribution Fund.

ACW will review its Small Grants Applications from July 2019.

ACW organises its funding around four main areas. There is no classification of projects by types of activities. It is hence not possible to know how much funding has been allocated to the music sector.

#### Support to Individuals

##### - Small and large lottery funded grants

- Research and development: support for research and development projects that strengthen creative practices and help build the appropriate collaborations.
- Production: funds the production of work of any artforms (as well as in cross-artform work such as circus) that demonstrate they will be of high quality and have a clear, artistic vision, that is innovative and compelling as well as the formation of high-calibre creative professionals. It focuses on new and contemporary work that seeks out and engages wider audiences. The work must be suitable for presentation

in Wales' arts centres, galleries, theatres and concert halls, either as part of a tour or at a single venue or gallery. It also supports site-specific and outdoor work.

Excluded from production funding are projects that have not sufficiently considered the audiences they are trying to reach, or any barriers that might prevent them engaging projects that have not demonstrated a commitment to deliver high quality work.

- **Music Industry Development for individuals:** Aims to develop a sustainable and vibrant music sector in Wales by investing in projects and new ways of working that can support the artists career at crucial points of their development. Support applications from artists who create original music and are at a 'tipping point' in their career. ('tipping point' means being ready to break through to the next level of its career development). The focus is also set on projects that will strengthen the foundations of the music sector in Wales, for example developing and offering new services to the sector. It must, in this case, clearly show how they will have a lasting and sustainable impact on the music sector in Wales.
- **Professional Development:** This funding helps creative professionals enhance and invest in their creative practice or skill. It could mean attending an industry recognised training course, a masterclass, or taking up coaching, mentoring or creative apprenticeship opportunities. It focuses on projects that strengthen the business side of the artists practice (e.g. helping to diversify in new markets or finding other ways to generate income)  
Excluded from funding are: Full-time or part-time undergraduate or postgraduate courses in further or higher education institutions, Individual tuition, lessons or vocational training.

#### Support to Organisations

##### - Small and large lottery funded grants

- **Training and professional development for organisations:** help build new and more resilient business models for arts organisations, companies, venues and galleries. It supports training and professional development opportunities, projects that enable creative professionals to develop creative and technical skills in order to raise the quality of their artistic work. It also supports projects that invest in the organisation's staff or board members in order to improve its governance, enterprise, financial management and business sustainability.
- **"Taking part" funding:** participatory arts programmes that reach out and meaningfully engage people with a focus on high quality projects that reach out to people living in areas of acknowledged deprivation. It also supports projects for children and young people, as we know that an active engagement with the arts can transform the way they learn and explore the world around them, as well as helping them develop life skills and raise aspirations.
- **Research and development for organisations:** Funding to support experimentation, new collaborations and new ways of working of organisations. Research and development can help deepen or strengthen an organisation's work by providing an opportunity to develop new concepts, test ideas, research new markets and build new partnerships. All projects must involve at least two organisations (or an organisation and individual) working together to develop creative practice and ideas.

- Programme support for venues and galleries: Funding to support high-quality, distinctive and exciting artistic work that enhances a venue or gallery's programme. It supports ambitious, professional programming that encourages audiences to enjoy and experience a wide range of activity. It aims to enable venues and galleries to programme work that is beyond the reach of their core business. This should help address geographical gaps in provision and reach out to audiences. This could mean introducing existing audiences to different types of work, or reaching out to new audiences and hard-to-reach groups. Strong focus on experimental projects as the grant descriptions states "We're not afraid to take managed risks as long as you can convince us your ideas are well thought through with a clear artistic vision and excellence at its heart."
- Production for organisations: funds the production of work that is innovative and compelling. Particular focus on the new and contemporary; in work that seeks out and engages wider audiences. Wales' standing as an artistic nation will be defined by the quality of the work we support through this strand. It is vital support as it enables venues and galleries to programme a diverse range of exemplary work that originates from Wales. The supported artistic works must be suitable for presentation in Wales' arts centres, galleries, theatres and concert halls, either as part of a tour or at a single venue or gallery. It supports site-specific and outdoor work. It particularly supports 'national touring' projects, which means that a project must tour to at least one venue or gallery in three out of four regions of Wales. It supports productions in any artform, (as well as in cross-artform work such as circus), that demonstrate they will be of high quality and have a clear, artistic vision.
- Music industry development for organisations: Aims to develop a sustainable and vibrant music sector in Wales by investing in projects and new ways of working that can support the artists' career at crucial points of its development. Support applications from artists who create original music and are at a 'tipping point' in their career. ('tipping point' means being ready to break through to the next level of its career development). The focus is also set on projects that will strengthen the foundations of the music sector in Wales, for example developing and offering new services to the sector. It must in this case clearly show how they will have a lasting and sustainable impact on the music sector in Wales.
- Business organisational development: Funding to help arts organisations become more resilient and self-sustaining. Help build new and more resilient business models for arts organisations, companies and venues or galleries, as well as help improve organisational effectiveness where appropriate. Focuses on work and business practice diversifications. It also supports projects that carry out market research in order to grow markets, and that attract others to invest in your business. This investment doesn't need to be financial, but can be about knowledge, sharing best practice, advocacy and support. It supports projects that empower and equip the staff or board members of an organisation to develop its capability. It pays particular attention to projects that consider the principles of sustainable development, economically and environmentally.
- Audience development: It support high-quality audience building projects. Focus on imaginative, new ideas.
- "Criw Celf" funding: Developing talent in the visual and applied arts for young people (of school age). Criw Celf provides children and young people with an opportunity to develop their artistic skills, working outside of a school setting

alongside professional artists in a variety of different gallery and site-specific settings. In the same way that an orchestra or choir provides an opportunity for young musicians to join together to perform, Criw Celf offers an opportunity for aspiring young visual artists and designers to spend time with their peers and with professionals working in the sector to develop their talent. Criw Celf focuses on young people who have been identified with school teachers as having a particular potential or talent in the visual and applied arts. The programme introduces them to a rich and varied menu of artistic genres (e.g. painting, sculpture, ceramics, glasswork, 3D work, printing, film/video, photography and jewellery-making) and opens their eyes to the breadth of career possibilities that Art & Design can lead to. It includes occasional trips to galleries and special events. Each young person is given an art pack containing a range of quality art materials which they can use at home in between sessions. There are also opportunities for the young people's creative work to be exhibited in professional settings. Only organisations based in Wales are eligible to apply for Criw Celf funding - Individual creative professionals can't apply.

- Festivals: support focused, time-limited festivals with vibrant, high quality arts programmes of events and activities which are a celebration of the diversity and uniqueness of Wales. They must have a clear artistic focus and a commitment to creating a programme of quality work. It cannot fund programmes of activity that could take place in a theatre or gallery an event where the arts are a minor part of a different type of festival event year-round programmes of work.

#### Strategic initiatives

- Capital Funding (for strategic initiatives): Improve access, or create a sustainable energy initiative, with funding for small capital projects.
- Sharing Together: support a strategic initiative aimed at encouraging the creation of new networks, and the strengthening of existing networking opportunities. Funding is specifically targeted at initiatives which focus on promoting Equality & Diversity including (but not restricted to): Engaging hard-to-reach audiences  
Developing diverse audiences for the Arts  
Increasing participation in the Arts by disengaged communities  
Developing sustainable funding models to enable this activity. Up to EUR 2,200. Open for individuals and organisations.
- Creative learning through the arts grants
  - Creative collaborations: Supports partnerships between organisations and arts practitioners. This strand focuses on arts, cultural and creative activities that are out of the ordinary and not run-of-the-mill. Schools and/or arts organisations can apply for funding of between EUR 5,630 and EUR 16,900 to develop more ambitious and sustained projects.
  - Go and See: Funding for visits to high-quality arts events in galleries, theatres, arts centres and other venues. Schools can apply for up to EUR 1,126 at any time in the year and will receive a decision within six to



eight weeks. Up to 90% of the costs of the experience are awarded (up to the EUR 1,126 limit).

- Grants for international work

- Seeding for the future: development programme which enables emerging and established artists and producers who have not yet taken work to the Edinburgh Festival Fringe but are looking to do so. The programme will run alongside Arts Council of Wales' curated showcase initiative, Wales in Edinburgh. Professional producing companies and creative professionals can apply to this scheme. The company or the artist should be based in Wales or have worked extensively in Wales. (open for individuals and organisations)
- International Opportunities Fund for individuals: supports Wales-based professional arts practitioners to undertake international visits, aimed at the development of international work and the presentation and delivery of artistic work outside the UK. (open for individuals and organisations)

▪ ***Support from the Arts of Northern Ireland***

Funding for Individuals

- Support for the Individual Artist Programme: This scheme is dedicated to artists of all disciplines and in all types of working practice, who have made a contribution to artistic activities in Northern Ireland for a minimum period of one year within the last five years. In a limited number of cases, individual technical staff/administrators of professional artistic companies may also be eligible. Employees of statutory bodies, undergraduates and postgraduates are eligible to apply but they must prove that the funds which they are seeking are for work/costs which are not properly the concern of their employer and/or are not related to their academic study.

- General Arts Awards: Scheme dedicated to Artists of all disciplines and in all types of working practice. In general, applicants should expect an upper award limit of EUR 3,380 for one project only. For projects of an exceptional nature or of extremely high quality, awards up to EUR 4,500 will be considered.

- Artists' Career Enhancement Scheme (ACES): These awards aim to deepen the developmental impact of Arts Council's support for artists, with a targeted package of training, mentoring and support provided for successful applicants. As the public body charged with the support and development of the arts in Northern Ireland, it is appropriate for the Arts Council to seek partnerships which would engage the expertise and experience of both funded and non-funded organisations to help support the development of artistic talent in Northern Ireland. These awards aim to support career artists whose practice is of high quality, original, challenging and innovative. The awards are designed to support artists in their professional development, enabling successful applicants to raise their profile and significantly enhance their career. There are a limited number of awards of EUR 5,630 in each artform area.

- Major Individual Awards (MIA): These awards are intended to create the circumstances in which established artists with national/ international recognition may develop extended or ambitious work. Artists of all disciplines and in all types of working practice who have not previously received a major award. Four awards of EUR 16,900 each are being offered.

- **Artists' International Development Fund (Individuals):** The Artists' International Development Fund is a EUR 56,326 annual programme jointly funded by the British Council and Arts Council Northern Ireland and is open to individual artists and organisations. The aim of the programme is to support early stage international development opportunities for individual, freelance and self-employed artists and organisations based in Northern Ireland. It will afford recipients the opportunity to spend time building links with artists, organisations and/or creative producers in another country. It supports individual international developmental opportunities for talent and artistic excellence from Northern Ireland and, thereby, enhance Northern Ireland's international artistic development, reputation and standing. Artists of any artform can apply for small grants from EUR 1,130 to EUR 5,630.

- **Self-arranged residencies:** These awards enable individual artists wishing to work outside Northern Ireland to take up self-arranged residencies. Applications relating to residencies or rent of premises at venues already in receipt of Arts Council funding are not eligible. Artists of all disciplines and in all types of working practice can apply. Disabled artists are under-represented in this programme therefore priority will be given to applications from individual disabled artists. The maximum award is EUR 5,632.

- **Travel Awards:** The Travel Awards Scheme is a rolling programme. Applications must be received 4 weeks before the intended date of travel. These awards enable individual artists and established music groups (up to 4 members) or arts administrators to travel from Northern Ireland to develop their skills and expertise. Applicants must provide evidence that they have been invited by a host organisation in the country to which they intend to travel.

- **International Showcase Fund:** Grants of up to EUR 5,632 for artists, bands and managers who have been invited to play an international showcasing festival or conference, to contribute to travel, visas, accommodation and expenses. Delivered by the PRS for Music Foundation in partnership with the Arts Council of Northern Ireland and Invest Northern Ireland. These awards enable individual artists, bands and managers to travel from Northern Ireland to develop their skills and expertise. Applicants must provide evidence that they have been invited by a host organisation in the country to which they intend to travel.

- **Momentum Music Fund:** The Arts Council of Northern Ireland in partnership with Invest Northern Ireland supports the Momentum Music Fund to offer grants of EUR 5,632 – EUR 16,900 for artists/bands based in Northern Ireland to break through to the next level of their careers. Activities eligible for support include recording, touring and marketing. Artists/Bands applying for the Momentum Music Fund must be at a crucial tipping point in their careers, showing current progression and growth as an artist with the potential to significantly develop their careers over the next two years. Applications can be made by artists/bands directly or representatives of the artist. Those who can apply on behalf of an artist are: Manager, Label Publisher, Booking agent, PR/Plugger, Lawyer, Trusted advisor to the artist

- **Young Musicians' Platform Award:** The Arts Council of Northern Ireland, in collaboration with BBC Northern Ireland, offers awards for young, exceptionally talented solo musicians/singers in Classical, Jazz and Traditional Music Individual between 18 and 26 or 29 years for singers, who are ready to enter the professional world as artists. The financial award associated with this scheme will allow applicants to spend a sizeable amount of time learning from a master musician/ teacher/composer etc. abroad. The BBC will facilitate this scheme by offering two professional broadcast performances to 5 successful applicants, in the period January – December 2019. An Audition Panel consisting of representatives of the BBC, ACNI and independent adjudicators will select extracts from the applicant's



programme to include 3 contrasting pieces in style and period, one of which will be contemporary. Reasonable expenses will be paid for return travel to and from Belfast.

- Indian residencies schemes: The Arts Council of Northern Ireland has two residency opportunities in India, where it has been forging links with the British Council, Shruti Foundation, Sanskriti, the Jaipur Literature Festival and others. It offers two one-month residencies in the historic town of Ramgarh Shekhawati in the princely state of Rajasthan.

Artists of all disciplines and in all types of working practice, who have made a contribution to artistic activities in Northern Ireland for a minimum period of one year within the last five years can apply for a month-long residency. In a limited number of cases, individual technical staff/administrators of professional artistic companies may also be eligible. Employees of statutory bodies, undergraduates and postgraduates are eligible to apply but they must prove that the funds which they are seeking are for work/costs which are not properly the concern of their employer and/or are not related to their academic study. Employees of statutory bodies, undergraduates and postgraduates must submit evidence of this.

- Vedaaranya Artists' Residency at Ramgarh Shekhawati Rajasthan: The value of the residency is EUR 2,590. The grant covers also: Costs of flights to and from India with a one-night hotel stay in Delhi either end, Internal transport to and from Delhi or Jaipur airports, Visa, artist must supply two photographs, Daily stipend of EUR 11,3 Vaccination and Travel Insurance costs up to EUR 225.
- The Sanskriti Foundation: The Northern Ireland arts council offers to two 6-week residencies. The value of the residency is EUR 2,816. The Arts Council also covers: Costs of flights to and from India, Internal transport to and from the residency, Visa, Daily stipend of EUR 11.3, Vaccination and Travel Insurance costs up to EUR 225.

#### Funding for Organisations

- Annual Funding programme: The programme is divided into 2 distinct elements – core and programming. All applicants must complete both elements of the application and it is anticipated that clients will receive funding from both Exchequer and Lottery sources. It provides annual funding for a.o. music and opera organisations. The amount provided to music and opera organisations is not known.

- Small Grants Programme: This programme aims to assist organisations to deliver arts projects which contribute to the growth of arts in the community for new and existing audiences and which reflect the diversity of Northern Ireland's society and culture.

- Lottery project Funding 2019-20: The aim of this programme is to assist organisations to deliver arts projects which contribute to the growth of arts in the community for new and existing audiences and which reflect the diversity of Northern Ireland's society and culture.

- Equipment and Minor Refurbishment Programme: This programme to enable organisations to purchase equipment and/or carry out minor refurbishment to their premises which will enhance their artistic services.

- International Programme for Organisations: The programme is open to organisations in any artform. It supports travel and projects abroad. There are two funding streams included within this programme:

- Artists' International Development Fund (Organisations): Funds travel to organisations abroad.
- Professional Arts Abroad: focuses on networking and internationalisation of artists.
- Resilience Programme: The Resilience Programme has been jointly developed by the Arts Council of Northern Ireland through its National Lottery funds and Belfast City Council. The programme will work with a number of Belfast-based arts organisations that have city-wide reach and only those organisations that are in receipt of Arts Council of Northern Ireland Annual Funding (AFP) and Belfast City Council Core Multi-annual Funding (CMAF) are eligible to apply.

Participating organisations will benefit from a customised support programme including one-to-one coaching, masterclasses and peer learning. Arts organisations will then develop a change management plan to help them identify new opportunities for future development. Financial assistance may also be made available to support organisations as they implement their new plans.

- ***Support from the British Council***

The British Council Music team works with the organisation's global network of arts managers and partners to plan, resource, deliver and evaluate high-impact arts projects involving professional artists and organisations from the UK. It aims to strengthen the international profile of UK music and creativity, to communicate the diversity of UK society, and to establish long-term partnerships overseas.

The Music team also has its own weekly radio show, The Selector, featuring the best new music from the UK.

Working in over 100 countries across the globe, it develops and supports music work in a variety of ways including: residencies for British musicians so they can experience new cultures and grow their audience, performance opportunities for musicians overseas, events that bring musicians of different cultures together to create new work, industry events to connect professionals around the world and encourage a healthy exchange of ideas, and education work in schools and professional development opportunities.

However, the British Council itself is not a funding body and cannot respond to ad hoc requests for funding or touring support. It works very closely with other public bodies involved in supporting UK music overseas including Arts Council England, Creative Scotland, Arts Council Wales, Arts Council Northern Ireland and the Department for International Trade (formerly UK Trade and Investment or UKTI) and the equivalent bodies in the rest of the UK. Each body has its own purpose and it aims to support and complement each other rather than duplicate.

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