

ONE VOICE for EUROPEAN MUSIC

“Europe Day” report
May 9, 2024

Introduction

This document is the result of a collaborative work between 22 Belgian professional music organisations representing a wide spectrum of the local music sector, spurred by [Vi.be](#) and [Wallonie Bruxelles Musiques](#) in the context of the “[One Voice for European Music](#)” policy initiative. It is moreover supported and signed by 18 European music organisations.

Launched in 2021 by the French [Centre National de la Musique](#), the “One Voice” platform brings together dozens of European music organisations rallied around the objective of improving the regulatory and funding conditions for music at EU level.

The guiding principles of the “One Voice” initiative remain unchanged since its ignition three years ago. Complementing the crucial advocacy work delivered through the AB Music Working Group¹ and the European Agenda for Music², its main objective is to bring together many relevant and active European music organisations in order to create a single voice for European music and to set in motion a new dynamic around key themes: funding, regulatory action, circulation, mobility, knowledge of the sector, innovation, the green transition, etc.

The objective of this process is to produce, on a regular basis, a set of inclusive and consensual, realistic, concise and actionable recommendations in order to fully unlock the potential of the [Music Moves Europe](#) framework, in the general interest of the European music sector.

During each rotating presidency of the EU, the One Voice initiative is led by a representative panel of national organisations tasked with creating the groundwork for a set of recommendations which can be endorsed at EU level.

The “One Voice” initiative has delivered various sets of policy measures over the course of the French (1st semester 2022)³, Czech (2nd semester 2022) and Swedish (1st semester 2023) EU Presidencies, and the present document is the result of the co-constructed process carried out under the Belgian Presidency (1st semester 2024).

¹ [AB Music working group report](#), EU Publications Office, 2016

² <https://europeanagendaformusic.eu/>

³ [One Voice for European Music Global Report](#), CNM, 2022

A wide range of Belgian and European music organisations have been invited to support and sign this document, spanning across many different music genres, sub-sectors, structure types and policy agendas, provided that they were open to the idea of reaching a consensus in the name of the general interest of the European music sector. The full list of signatory organisations is attached at the end of this document.

1. EU Funding for music

The “One Voice for European Music” signatories call on the EU institutions to substantially increase the funding effort for music in the EU budget.

As raised by MEP Tomasz Frankowski in an exchange of views with Commissioner Ivanova at the EP on March 11, 2024, the music sector needs “visibility and predictability” for the 2028-2034 funding period.

While the inclusion of a clear reference⁴ to music in the legal basis of the 2021-2027 Creative Europe programme and the launch of a “Music Moves Europe” sectoral action since the 2021 annual work programme have raised considerable interest and hopes within the music sector, the funding directly earmarked for music has proved to be vastly insufficient so far.

When looking at the current Creative Europe programme, so far only about 10 million euros have been allocated *specifically* to music actions, including for the funding of a conference held by the Commission with stakeholders in Brussels in February 2024. While the [LIVEMX](#) programme is an interesting new tool at the disposal of the stakeholders, its scale is far too small to have a systemic impact on the European music ecosystem. The [Music Moves Europe dialogue](#) is a welcome new initiative to create a culture of debate and exchange within the sector, but its objectives are not yet aligned with harnessing the much-needed policy support which was foreseen by the sector following the publication of the Creative Europe 2021-2027 legal basis.

The sector hears the Commission’s argument that music is better financially supported than any other artistic discipline in the horizontal funding lines within the “Culture Strand” of Creative Europe. However, even if these amounts were actually earmarked specifically for the music sector (which is not the case), the level of funding they represent would still be far off the mark of a coherent and ambitious strategy for a sector which contributes around 31 billion euros annually to the EU's GDP⁵, employs more people than the audiovisual sector⁶, and was the second most impacted creative sector during the COVID-19 crisis⁷.

⁴ “To respond to shared needs within the European Union, sectorial actions shall be supported in those cultural and creative sectors, notably music, whose specificities or specific challenges require a more targeted approach complementing the horizontal actions”, [Regulation of the European Parliament and the Council establishing the Creative Europe Programme \(2021-2027\)](#).

⁵ [The Economic Impact of Music in Europe](#), Oxford Economics, 2020

⁶ [Rebuilding Europe – The cultural and creative economy before and after the COVID-19 crisis](#), EY, 2021

⁷ [The impact of COVID-19 on music consumption and music spending](#), PLoS ONE, 2022

In two recent resolutions⁸⁹, the European Parliament has in fact called on the Commission to “develop a more strategic and sector-oriented approach for the music sector with a view to addressing new and upcoming challenges”, to improve its funding approach “through comprehensive action on music” and to introduce “a European industrial strategy for music to make the Union play a role in promoting the diversity of its artists and musical works, focusing on the strength and diversity of the European music sector, boosting smaller players, acquiring more investment, providing more exposure to artists and quantifying the results”. The music sector is aligned with these positions.

The One Voice platform therefore calls on the EU institutions to deliver an ambitious funding framework for music in the next multi-annual framework, including :

- A dedicated “Music Strand” within the next Creative Europe programme, with specific funding lines addressing the most elementary needs of the sector, and a level of funding aligned with the importance of music in the economic, social and cultural context of the European Union ;
- A substantial effort to streamline and make accessible funding for music within other appropriate funding programmes of the EU, such as Horizon Europe, Erasmus+, and the structural and regional funding programmes of the EU.

2. European Music Observatory

The One Voice for European Music initiative urges the EU institutions to deliver on the long-awaited project of a European Music Observatory.

This proposal, formulated by the participants of the AB Music Working Group as early as 2016, had been the subject of much discussion at EU level over the past eight years.

A feasibility study for the establishment of such a body¹⁰, commissioned by the EU in 2018 and published in 2020, highlighted the considerable added value of such a tool in the European policy landscape and proposed various technical and financial scenarios for its creation. Following the publication of the study, the Commission abstained to take concrete action on the matter, and instead provided funding for independent prospective research consortia on the theme of a “competitive, fair and sustainable music ecosystem” through Horizon Europe.

While the “One Voice” platform has welcomed the launch of these academic projects, this outsourced approach is far from consistent with the recommendation of the 2020 study, which was backed by a representative sectorial advisory committee of many European music organisations, to set up an autonomous, neutral and publicly funded EU

⁸ [Resolution on the implementation of the Creative Europe Programme 2021-2027](#), European Parliament, 2024, 16 January 2024

⁹ [Resolution on cultural diversity and the conditions for authors in the European music streaming market](#), European Parliament, 17 January 2024

¹⁰ [Feasibility study for the establishment of a European Music Observatory](#), EU publications office, 2020

body carrying out a public service mission. This observatory should be based on the four thematic “pillars” encompassing the diversity of the challenges faced by a sector as complex and fragmented as music, and bring on board the Commission, the Member-States, the Parliament and representative professional organisations to provide consistent, barometric data and analysis on the European music ecosystem as a whole.

In its resolution on cultural diversity and the conditions for authors in the European music streaming market adopted on January 17 2024, the European Parliament has renewed its wish to see the Commission deliver on a genuine European music observatory which would *“provide information on music markets in the Union by collecting and analysing data in the Member States”* as well as *“analyse and report on legal issues affecting the music sector, in particular the music streaming market, with a view to developing the sector”*.

In the wake of this resolution, a group of MEPs has submitted a proposal for a Preparatory Action, insisting on the necessity of an urgent follow-up on the feasibility study, stating that *“since its publication in 2020, the persistent lack of robust, transparent and independent data in the European music eco-system has increased the challenges over the music sector ecosystem, fully impacted by the digital transformation and the rising of AI”*. The Preparatory Action proposal also insists on the fact that such an EU body *“would be a powerful and useful instrument providing a great benefit to European stakeholders and policymakers, creating the tools to make the European music sector fairer and sustainable and promoting cultural diversity.”*

The One Voice for European Music platform supports this call and urges the Commission to act swiftly on this matter. The *“cost of doing nothing”* flagged in the feasibility study has only increased in the wake of the COVID-19 crisis, notably through challenges identified in the fields of working conditions¹¹, remuneration models¹² or mental health for music professionals¹³, not to mention the consequences of the rise of generative A.I in the music sector. The “One Voice” signatories therefore call on the EU to :

- Set-up an autonomous, EU-funded European Music Observatory, operated by the European Union as a distinct action as per the Treaty, the EU acquis and the European Agenda for Culture ;
- Bring together all relevant European music stakeholder organisations with the specific objective of defining the modalities of setting up such a body.

¹¹ [Resolution with recommendations to the Commission on an EU framework for the social and professional situation of artists and workers in the cultural and creative sectors](#), European Parliament, 21 November 2023

¹² [Resolution on cultural diversity and the conditions for authors in the European music streaming market](#), European Parliament, 17 January 2024

¹³ [The health and wellbeing of professional musicians and music creators in the EU, insights from research for policy and practice](#), EU publications office, 2023

3. Music export, circulation of repertoire, mobility of music workers

The “One Voice” platform calls on the EU institutions to make progress on the delivery of a coherent and ambitious European Music Export Strategy.

The EU has commissioned and published two studies^{14 15} on the matter in recent years, which both concluded the importance of an EU-led action in the field of cross-border circulation of European music. Such action, which cost would be modest, would greatly contribute to the visibility and the commercial potency of European works, regardless of genres and language, on an international scale. The diagnosis established before the COVID-19 crisis – non Anglo-American European music lacks circulation potency outside national borders – has worsened following two years without consistent touring and the continuous concentration of the recording and streaming market, which justifies the implementation of this strategy even more.

In its resolution on cultural diversity and the conditions for authors in the European music streaming market adopted on January 17 2024, the European Parliament has backed this vision, stressing that “*music has great potential to further promote European culture, history, heritage, values and diversity*”, adding that “*music also has the potential to contribute to the Union’s soft power*” and calling on the Commission to “*develop a comprehensive European export strategy on European musical works*”.

The music sector wholeheartedly supports this call for the inclusion of music as a key element of Europe’s soft power arsenal and believes this represents an immense source of untapped potential for the EU as a whole.

In this context, the “One Voice for European Music” signatories renew their support to:

- The establishment of a genuine strategy, based on the recommendations of the published studies, especially with regards to the European music export “toolbox”, which has already been experimented and showed great potential ;
- A specific focus on mobility funding for musicians, authors and music professionals within the Creative Europe programme ;
- The valorisation of local repertoire and European works through targeted actions, especially in the case of smaller territories and underrepresented linguistic regions, including through EU-level rules to ensure prominence and discoverability of European works as asked by the European Parliament’s Report on music streaming;
- Funding lines dedicated to comparative research, market intelligence, capacity building programmes and trade missions for European music professionals ;
- An increased support to music clubs and festivals, which are instrumental to the nurturing of emerging EU talent.

¹⁴ [A European music export strategy : final report](#), EU publications office, 2020

¹⁵ [Implementing steps to develop and promote European music export](#), EU publications office, 2023

4. Institutional dialogue and policy co-construction

In order to improve mutual understanding and spur a culture of results between the music sector and the EU, the signatories of the “One Voice for European Music” initiative also encourage the EU to, inter-alia :

- Reinforce the Music Moves Europe dialogue with a tangible EU policy roadmap within its mandate, on issues such as EU funding, EU regulatory framework and the topic of an “*industrial strategy for music*” addressed in the European Parliament’s resolution on cultural diversity and the conditions for authors in the European music streaming market adopted on January 17, 2024 ;
- Ensure that the new EU AI Office considers the specific challenges faced by the music sector in terms of generative AI training, transparency of content use and potential infringements to the AI act by developers, through the mobilisation of experts of the music sector and representative sectoral organisations.
- Consider EU-level rules to ensure transparency of algorithms and recommendation systems of music streaming services including those of user uploaded content platforms to avoid streaming manipulation, fraud and payola schemes;
- Introduce effective EU-wide legislative solutions to prevent coercive buy-out practices imposed on European music authors by the non-EU-based VOD services and online platforms;
- Thoroughly address, within the mandate of the European Agenda for Culture and the Music Moves Europe dialogue, the following issues by bringing together EU institutions, Member-States representatives and professional music organisations in a spirit of consensus-building and efficiency:
 - Administrative, social and logistical issues such as the harmonisation of VAT rules, double taxation, withholding taxes, visas, work permits, ATA carnet issues, custom practices, and musical instruments regulations ;
 - Challenges around remuneration and the distribution of value within the streaming music ecosystem, through an open and unbiased discussion in the wake of the European Parliament’s resolution on cultural diversity and the conditions for authors in the European music streaming market adopted on January 17, 2024 ;
 - The key subject of sustainability of music practices on and offline, the green transition of the sector and its contribution to the fight against climate change and the preservation of natural resources and ecosystems ;

- Crucial topics such as the value of grassroots music clubs and festivals, the improvement of working conditions of authors, creators and performers, music education and training (notably in the context of the [Pact for Skills](#)), the alignment of EU's music policies on the UN 2020 goals, diversity and representation in the music sector.

Conclusion

As per article 167 of the treaty on the European Union, the EU is responsible for the “flowering of the cultures of the Member-States”. The “One Voice for European Music” signatories believe that the above-listed set of policy and funding measures, while respecting the principles of proportionality and subsidiarity, will greatly support the EU in this task, and contribute to a more economically healthy, socially virtuous and culturally powerful European music sector. Moreover, these recommendations are for the most part based on the EU’s own existing policy corpus (EU studies, European Parliament resolutions, EU regulation on the “Creative Europe” Programme).

This policy document will be presented officially at the occasion of the celebration of Europe Day (May 9) 2024. The context of the organisation of the European elections (June 6-9) makes this set of recommendations all the timelier and more relevant, since there will be a new parliament and a new commission after the summer, spurring a new cycle of policy making at EU level.

The One Voice for European Music initiative, represented by all its signatories, strongly call on the Commission, the Parliament and the Council to claim ownership of these recommendations and make them a reality. The signatories count on the EU institutions to advance these important points before the beginning of the next funding period (2028-2034), in order for the sector not to lag behind in a fast-shifting economic, technological and regulatory environment.

Music deserves to be at the forefront of the EU cultural policy, and the signatories of this document pledge to ensure that the EU follows up on unlocking the potential of the sector.

Belgian organisations who have collaborated on the creation this document :

- **BIMA** (Belgian Independent Music Association)
- **BMPA** (Belgian Music Publishers Association)
- **BRMA** (Belgian Recorded Music Association)
- **Clubcircuit** (Umbrella organisation of music clubs in Flanders)
- **COMAV** (Composers Archipelago Flanders)
- **Court-Circuit** (Live Music Venues & Clubs Association)
- **Cult! & Cultcircuit** (network organisation of culture houses in Flanders and Brussels)
- **FACIR** (federation of artists and interpreters)

- **FeBeME** (Electro-acoustic musicians federation)
- **Flanders Folk Network**
- **FLIF** (independent labels association)
- **FMIV** (Federation of music festivals in Flanders)
- **MMAF** (Music Managers Federation)
- **Muziekgilde** (Flemish association for professional musicians)
- **Muziekmozaïek** (non-profit organisation for jazz & folk)
- **OkO** (Employers' federation and networking organisation of professional arts organisations in Flanders and Brussels)
- **Playright** (Collective society for neighbouring rights)
- **SABAM** (Belgian association for authors, composers and publishers)
- **VI.BE** (Support centre for artists and the music industry in Flanders and Brussels)
- **VLAMO** (the Flemish Amateur Music Association)
- **Wallonie-Bruxelles Musiques** (Export office)

European and international organisations supporting this document :

- **Center for Music Ecosystems** (Research and Policy nonprofit organisation)
- **ECHO** (European Concert Hall Organisation)
- **ECSA** (European composers and songwriters alliance)
- **EJN** (European Jazz Network)
- **EMEE** (European Music Exporters Exchange)
- **EMIA** (European musical instrument alliance)
- **EMMA** (European Music Managers Association)
- **GESAC** (The European authors societies)
- **IMMF** (International Music Managers Forum)
- **Impala** (European association of independent music companies)
- **LIVE DMA** (European network of live music associations)
- **Liveurope** (Live music platform for emerging european talent)
- **Opera Europa** (Professional association of opera companies and festivals in Europe)

National organisations from EU Member-States supporting this document :

- **CSFI** (Chambre syndicale de la facture instrumentale), FR
- **FAMDT** (Fédération des musiques et danses traditionnelles), FR
- **FEDELIMA** (Fédération des musiques actuelles), FR
- **Musikzentrum Öst** (Music Center), SE
- **UPFI** (Union des producteurs phonographiques français indépendants), FR