

ONE VOICE for EUROPEAN MUSIC

A European Strategy for Music

Warsaw, 26th June 2025

Introduction

The following document is the result of a six-month cooperation between **20 European music organisations** in the context of the “**One Voice for European Music**”¹ policy initiative.

Launched in 2021 under the French Presidency of the European Union, the “One Voice” advocacy platform brings together an ever-wider range of European and national-level supporters, with the objective of establishing a comprehensive policy strategy for the music sector supported by ambitious funding mechanisms at EU level.

Complementing the collective advocacy work delivered through the AB Music Working Group² and the European Agenda for Music³, the main objective behind “One Voice” is to formulate a **strategy** with adequate and relevant recommendations regarding working conditions, circulation of repertoire, mobility, digital policies, education and training, cultural diversity, business models, innovation, the green transition and many more topics.

During each rotating presidency of the EU, the One Voice initiative is led by a representative panel of national and European organisations tasked with creating the groundwork for a set of recommendations which can be endorsed at EU level⁴.

The **Bydgoszcz Music Summit**, held under the auspices of Bydgoszcz UNESCO City of Music, created the conditions for several signatories to convene and initiate joint work on the present document. This process was supported by **Culture Hub Poland**, which contributed its strategic materials on the national music ecosystem and actively engaged in the development of the initiative. Throughout the six-month **Polish Presidency of the European Union**⁵, this document was co-constructed using a bottom-up collaborative method, through which all EU-level participants had the opportunity to bring forward their own proposals. The result is an overarching strategy for the sector addressing several issues and formulating policy recommendations which are supported by all signatories.

As the Polish Presidency comes to an end, the EU is at a crossroads on many subjects directly impacting the music sector: the next generation of EU funding programmes is set to be discussed by the European institutions, the implementation of the AI Act is still underway, and issues such as working conditions for artists or the economics of music streaming are high on the EU agenda. In a climate of growing threats to artistic freedom, challenges to musical

¹ <https://onevoiceforeuropeanmusic.eu/>

² <https://op.europa.eu/en/publication-detail/-/publication/f5479d95-2fca-11e7-9412-01aa75ed71a1>

³ <https://europeanagendaformusic.eu/>

⁴ The “One Voice” initiative has delivered various sets of policy measures over the course of the FR (1st semester 2022), CZ (2nd semester 2022) SE (1st semester 2023) and BE (1st semester 2024) EU Presidencies.

⁵ <https://polish-presidency.consilium.europa.eu/>

diversity and intensifying global trade competition, these discussions are more important than ever.

In this context, the present document ambitions to address these issues comprehensively and to formulate a **European strategy for music**. Its main points are outlined as follows :

1. A reinforced support framework for the European music sector

- 1.1 A dedicated music strand in the Creative Europe programme
- 1.2 Establishing a European Music Observatory
- 1.3 Boosting international development for European music
- 1.4 Spurring education, societal impact and innovation

2. A European policy for music in the age of artificial intelligence

3. Planning for a future-proof European music ecosystem

- 3.1 Improving the rights and working conditions of European music creators and professionals
- 3.2 Following up on the European Parliament's report on music streaming
- 3.3 Competition, fiscal reforms, infrastructure and territorial development

This document will be unveiled during the **Music Week Poland** event⁶ in Warsaw (June 26-29), in a dedicated presentation bringing together signatories, music sector representatives and cultural policymakers.

Part 1 : A reinforced support framework for the European music sector

1.1 A dedicated music strand in the Creative Europe programme

In the regulation of the European Parliament and the Council establishing the Creative Europe Programme (2021-2027), the European Union considers that *“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 (...)”*.

While the launch of the **“Music Moves Europe”**⁷ sectoral action in the current Creative Europe programme's “Culture” strand was unanimously welcomed by representative music sector organisations, its implementation is considered too modest by the signatories, with only three calls for proposals in five years (for a total of ten million euros) specifically made available by the European Commission on top of previously existing horizontal actions, prizes and complementary actions via other EU funding programmes.

The signatories consider that the upcoming proposal for the Creative Europe programme 2028-2034 should incorporate a specific **“Music Strand”**,

⁶ <https://musicweekpoland.com/>

⁷ <https://culture.ec.europa.eu/cultural-and-creative-sectors/music/music-moves-europe>

appropriately funded and specifically designed for music organisations and beneficiaries, in a way which reflects the economic, social and cultural value of the music sector in the European Union⁸. The signatories call on the European institutions to tackle this matter with the necessary ambition and coherence in the next multi-annual financial framework.

1.2 Establishing a European Music Observatory

As previously articulated in various collective advocacy documents⁹, the signatories call on the European Institutions to establish an independent, EU-funded body designed to map and analyse the various dynamics and policies governing the European music sector and to help the EU formulate relevant and proportionate policy measures. The creation of such a body, which general characteristics could be inspired by an existing EU feasibility study¹⁰, is also supported by the European Parliament¹¹.

The signatories believe that the upcoming discussions on the next Multi-Annual Financial Framework of the EU should incorporate this element and consider that **the European Music Observatory should be a central feature of the set of tools funded by the future “Music Strand” in the next Creative Europe programme 2028-2034.**

1.3 Boosting international development for European music

In recent years, various reports, studies and policy documents have documented how Anglo-American repertoire continues to dominate international music markets¹², while other genres such as K-Pop or Reggaeton have exponentially grown their global audience reach¹³. Meanwhile, European music continues to struggle reaching audiences across national borders. Even inside of EU borders, the cross-border circulation of European repertoire faces significant challenges. At the same time, a wide variety of adverse economic conditions and fiscal, administrative or competition barriers continue to hinder the cross-border activity of musicians and the ecosystem around them (managers, agents, record labels, publishers, promoters, etc.) across EU and international territories, inhibiting language and genre diversity¹⁴.

Moreover, for many European artists and professionals in smaller national markets, crossing borders is often not a choice but a necessity for survival. For them, international development is not only a growth strategy but a fundamental issue of equity and viability. While much remains to be done at national level, certain

⁸ https://www.ifpi.org/wp-content/uploads/2024/09/Music-in-the-EU-2024_IFPI.pdf

⁹ <https://onevoiceforeuropeanmusic.eu/>

¹⁰ <https://op.europa.eu/en/publication-detail/-/publication/a756542a-249d-11eb-9d7e-01aa75ed71a1>

¹¹ https://www.europarl.europa.eu/doceo/document/TA-9-2024-0020_EN.pdf

¹² <https://op.europa.eu/en/publication-detail/-/publication/d7de0905-68c5-11ea-b735-01aa75ed71a1>

¹³ <https://www.theguardian.com/commentisfree/2023/nov/12/k-pop-reggaeton-english-language-music->

¹⁴ <https://op.europa.eu/en/publication-detail/-/publication/24cf4a94-efbf-11ed-a05c-01aa75ed71a1/language-en>

objectives and activities cannot effectively and efficiently be achieved without EU-level action.

The EU has commissioned various studies to reflect on this situation in the past years, but ambitious and structured action is missing to tackle these challenges commensurately to the challenges at play. The signatories consider that a **comprehensive action plan is needed to sustainably support EU creators, artists and music professionals in their effort to develop their careers across national borders**, and that the future “Music Strand” in the next Creative Europe programme 2028-2034, for which a proposal will be presented this summer, should include, inter alia, the following elements :

- The effective endowment of a **“European Music Export Strategy”**, as called for by the European Parliament¹⁵ and articulated in various policy documents¹⁶. Such a strategy should be suitably funded via the future “Music Strand” of in the next Creative Europe Programme 2028-2034, and establish measurable short, mid and long-term objectives and targets in terms of cross-border circulation of EU acts and discoverability of European works and prominence of EU repertoire, both within the EU and globally;
- Comprehensive and long-term **music mobility schemes for musicians**, authors and music professionals within the future “Music Strand” in the next Creative Europe Programme 2028-2034, supporting all aspects of mobility (information, financial and administrative challenges, regulations applying to musical instruments, double taxation, visibility, etc.) and building on successful existing initiatives (e.g. European Platforms for the promotion of emerging artists¹⁷) with the aim of creating **lasting impacts on the cross-border circulation of European repertoire**. In addition, they should incorporate environmental aspects for touring and mobility patterns, and pay particular attention to professionals from underrepresented and underfunded regions, ensuring equitable access to international opportunities;
- Adequate funding resources for market research and joint European trade missions;
- Ambitious funding measures supporting music diversity in **music venues, clubs and festivals** programming and supporting emerging European repertoire;
- Increased visibility to the **InvestEU Culture and Creative Portfolio Guarantee Product**¹⁸, ensuring this innovative loan guarantee instrument is applied in a way which is balanced across all cultural sectors and benefits

¹⁵ https://www.europarl.europa.eu/doceo/document/TA-9-2024-0020_EN.pdf

¹⁶ See 11, 14

¹⁷ <https://culture.ec.europa.eu/creative-europe/creative-europe-culture-strand/european-platforms>

¹⁸ https://www.eif.org/InvestEU/guarantee_products/index-portfolio-ccs

the music sector in a way which is commensurate with the sector's contribution and needs.

1.4 Spurring education, societal impact and innovation

In addition to these overarching measures, the signatories consider that the future “Music Strand” in the next Creative Europe Programme 2028-2034 should also answer transversal questions and support operators in their efforts to create a more vibrant, diverse and inclusive music sector.

Firstly, the signatories consider that the “Music Strand” should emphasize the importance of **education, professional training and access to music**, through :

- Support mechanisms guaranteeing that **access to music education, lifelong learning and participation in music** is open to all, regardless of physical or intellectual ability, gender, age, cultural origin, geographical or economic circumstance;
- **Audience development** programmes engaging youth and underrepresented groups through partnerships with schools and local communities, ensuring that cultural participation begins early and remains inclusive;
- The fostering of high-quality opportunities for **participation in music in non-formal settings**, targeted funding for **educational organisations**, and the development of educational capacity building opportunities for all music sector professionals and non-professionals;
- Facilitate that young people in the music sector acquire the necessary knowledge and skills on employment opportunities, entrepreneurship, fair practice, copyright and the broader intellectual property framework, digital and technological tools, including artificial intelligence (AI), as underlined by the recent EU Council conclusions.¹⁹

Secondly, the signatories call on the European institutions to build a “Music Strand” which respects and encourages **diversity, inclusiveness, equality and the green transition** through :

- Targeted funding incentives for **a more diverse workforce in the European music sector**, for instance by further supporting the development of programmes for creators, artists and professionals at risk or facing systemic barriers;
- The development of an EU methodology to improve the tracking of **gender diversity** in festival and venue programming, as well as in the general music workforce, through the European Music Observatory;

¹⁹ <https://data.consilium.europa.eu/doc/document/ST-8853-2025-INIT/en/pdf>

- Specific funding mechanisms actively encouraging **the green transition** of the music sector considering its specific characteristics, in the form of direct support, incentive models and capacity building tools.

Lastly, the signatories underline the importance for the “Music Strand” to incorporate an ambitious set of funding lines dedicated to technological innovation, such as :

- Specific tools for **research and development in music technology**, mapping of innovative projects and initiatives carried out by European startups, incubation and capacity building tools;
- International **visibility and networking schemes** for European music innovators.

Part 2 : A European policy for music in the age of artificial intelligence

The swift rise of commercially available general-purpose AI (GPAI) has sparked a strong debate on the unauthorised use of copyrighted works for the training of these models, the transparency of this new technology, and the anticipated detrimental impact of such practices on the music sector’s value chain, both in the EU and globally²⁰.

The signatories therefore call on the European institutions to ensure that GPAI models respect the fundamental principles of consent, transparency and remuneration and place them at centre of the AI strategy for the cultural and creative industries, with an eye to the specificities of the music sector.

The **AI Act introduced important obligations for GPAI providers**, notably to comply with the EU’s copyright law and publish a sufficiently detailed summary of the data used for training of their models. These obligations now need to be implemented and enforced. As the recent work of the Commission has raised concerns in realising these objectives, it is critical that this course is changed and the forthcoming implementation steps ensure that the rights of music creators and professionals will be respected by GPAI providers and that any use of copyrighted music works will be **authorised, transparent and remunerated**²¹. Additionally, recent reports have shown that **copyright uses for AI training go beyond the scope of the text and data mining exception (TDM)** in the 2019 Copyright in the Digital Single Market (CDSM) Directive (reference).

In this context, and as early as this year, the signatories call on the European Commission and the Member States to urgently :

- Ensure that the AI Act is implemented in an effective way that safeguards and nurtures **copyright**, and promotes the highest level of **transparency and**

²⁰ <https://www.gema.de/documents/d/guest/gema-sacem-goldmedia-ai-and-music-pdf>

²¹ <https://authorsocieties.eu/content/uploads/2025/03/right-holders-joint-statement-on-the-third-draft-code-of-practice-28-march-2025.pdf>

consent for creators and other rightsholders, considering the specificities of the music sector;

- **Ensure the remuneration** of creators and other rightsholders and preserve the sustainability of the music sector, **take measures to create a functioning licensing market** for training of GPAI models on copyright protected works, explore ways to generate continuous revenues for music creators and rightsholders from the use of AI-generated output competing with said works, and take action to protect jobs in the sector;
- Conduct a **GPAI impact assessment** to feed into current and future policy developments, establishing a clear picture of the economic, ethical and cultural impact of GPAI as well as prospective scenarios;
- Develop **funding lines** in the future “Music Strand” of the Creative Europe programme 2028-2034 for music creators and professionals to ensure cross-sector collaboration and feedback, to better understand and protect their rights, and seize the economic and creative opportunities created by AI as a technology;
- Involve music stakeholders in the “**Apply AI Strategy**”²², including through a specific strand for the music sector aiming to empower creators and professionals.
- Effectively tackle these questions within the “**Music Moves Europe dialogue**”²³ as well as in the framework of the “**AI strategy for the cultural and creative industries**”²⁴ and the “**Culture Compass**”²⁵, with a view to empower music organisations in the policy debate at EU level.

Part 3 : Planning for a future-proof European music ecosystem

3.1 Improving the rights and working conditions of European music creators and professionals

Various reports and studies in the past years²⁶ have highlighted the importance for the EU to consider music creators and professionals as essential parts of the social, economic and cultural fabric of the EU. As professionals evolving in a complex environment at the crossroads of diverse legal, administrative and financial environments, they need appropriate measures to unlock their full potential. In this context, the signatories call on the EU and the Member States to :

²² <https://digital-strategy.ec.europa.eu/en/consultations/commission-launches-public-consultation-and-call-evidence-apply-ai-strategy>

²³ <https://musicconferences.org/music-moves-europe-dialogues/>

²⁴ Decision of the President of the European Commission, 7/1/2025

²⁵ https://commission.europa.eu/document/download/de4a4afa-7d7f-4ebe-9920-f9c7da4909fa_en?filename=mission-letter-micallef.pdf

²⁶ <https://op.europa.eu/en/publication-detail/-/publication/01fafa79-1a13-11ee-806b-01aa75ed71a1/language-en>

- Based on a recent European Parliament Resolution²⁷, propose measures establishing a “**status of the artist**”, recognising music creators as working professionals under EU law, establishing a legal layout for fair and clear contractual principles governed by EU law, and providing a framework to tackle the issue of social security protection;
- In line with European Parliament Resolutions, introduce EU level rules to tackle coercive **buy-out** practices and to avoid circumvention of EU laws through choice of law and jurisdiction clauses.
- Encourage and promote the development of **fair practice codes for music creators and other professionals**, co-created with music sector stakeholders, promoting transparency and fair contracts for music professionals, extending social protections to freelancers and enhancing mental health support frameworks;
- Clarify the **EU Directive on rental right and lending right (2006/115/EC)**²⁸ as regards the ability of EU Member States to make use of the principle of material reciprocity. This longstanding principle derives from international copyright treaties and encourages third countries to align with the level of protection which the EU offers to its performers and phonogram producers;
- Strengthen the visibility and accessibility of existing resources focused on administrative needs (administrative status, unemployment, taxation, work permits, etc.) developed by the **Mobility Info Points**²⁹, and promote them at international and national levels;
- Include **musical instruments** as full-fledged cultural goods in EU law, facilitate their transport by air and rail, and protect the interests of performers and instrument makers when addressing CITES-related issues;
- Negotiate streamlined, reciprocal **visa and travel agreements** (which include the question of travelling with musical instruments) with non-EU countries, prioritising the specific needs of the music sector and in a way that considers music groups or ensembles made of artists from different nationalities;
- Improve the protection of **artistic freedom** in Europe by requiring the EU Agency for Fundamental Rights and national human rights agencies to systematically document and monitor violations of artistic freedom throughout the region;

3.2 Following up on the European Parliament’s report on music streaming

²⁷ <https://www.europarl.europa.eu/news/en/press-room/20231117IPR12106/status-of-the-artist-better-working-conditions-for-artists-and-cultural-workers>

²⁸ <https://eur-lex.europa.eu/eli/dir/2006/115/oj/eng>

²⁹ <https://on-the-move.org/network/working-groups/mobility-information-points>

In its 2024 report on “**Cultural diversity and the conditions for authors in the European music streaming market**”³⁰, the European Parliament has echoed the voice of many organisations in the music sector, who have consistently asked the EU to develop a clear EU framework to guarantee a “fair and sustainable ecosystem for music streaming in the Union that both promotes cultural diversity and addresses the imbalances that negatively affect the sector, especially its authors and performers, and may prevent it from flourishing”.

The signatories therefore call on the European institutions to proactively consider this subject, and provide clear and swift measures by the end of the current Commission and Parliament mandate, so as to :

- Explore **alternative methods and models for the allocation of digital streaming revenue**, to ensure a distribution which would be more balanced throughout the value chain of the music sector, reward investment in creation over catalogue acquisitions, and achieve better remuneration and creation of value for creators (as currently researched in several EU studies³¹³²);
- Establish a way to **collect and analyse data** on the discoverability of European musical works via music streaming services (for instance through the “European Music Observatory”);
- Take legislative measures to tackle **streaming manipulation** practices;
- Improve the **identification of music creators** on streaming services through metadata, and encourage dialogue among all music industry stakeholders to find common solutions in this context;
- Improve the **transparency** of the algorithms and content recommendation systems on streaming platforms;
- Improve the **visibility and discoverability** of European musical works on streaming services, through targeted and balanced regulatory means;
- Introduce a « European industrial strategy for music » which would promote the diversity of artists and musical works as well as their exposure and discoverability, boost smaller players, improve access to finance and quantify the results of such a strategy.

3.3 Competition, fiscal reforms, infrastructure and territorial development

Lastly, the signatories urge the European Institutions to consider, during the next four years, a new approach for competition, fiscal conditions, music infrastructure and territorial development. More precisely, the EU should examine

³⁰ https://www.europarl.europa.eu/doceo/document/TA-9-2024-0020_EN.pdf

³¹ <https://culture.ec.europa.eu/news/european-commission-launches-study-on-discoverability-and-promotion-of-cultural-diversity-online> ;

³² <https://fairmuse.eu/>

the following policies to support these fragile yet essential characteristics of the music ecosystem :

- Comprehensive action to prevent **market concentration** in both the **live music market** (e.g horizontal integration of festivals, venues, ticketing companies and event promoters) and the **recorded music market** (e.g. acquisitions of independent European music companies by major international music groups), with a view to spur **fair competition** within the entire EU music ecosystem. The European Music Observatory should be tasked with monitoring these dynamics and informing possible regulatory action;
- Ending **VAT discrimination** between cultural products by applying reduced VAT for all cultural products and services offline and online to boost access to culture across the EU;
- Introducing exemption thresholds in the **OECD model tax treaty**³³ (or, where applicable, introduce and/or increase national exemption thresholds in national tax law) for performers and authors, and tackle the financial impact of withholding tax and double taxation of musicians and technicians by revising the tax credit option;
- Legislative proposals to improve transparency and fairness in **the live event ticketing market**, limiting dynamic pricing methods and regulating secondary market practices;
- Reforming the **European Heritage Label** framework³⁴ to recognize **live music venues and festivals** as cultural heritage sites, ensuring their protection and promotion across Member States;
- Introducing a framework to integrate **music districts and music-friendly urban policies** into EU-funded urban planning and territorial development projects.

Conclusion

The EU-level advocacy organisations supporting the “**One Voice for European Music**” initiative are convinced that the proposals articulated in the present document, in line with the principles of proportionality and subsidiarity, will significantly support the EU in its mission as per article 167 of the treaty on the European Union, and will contribute to a sustainable, more competitive, more innovative and culturally more powerful European music sector.

This document is the result of a collaborative work between **20 EU-level organisations from across the music ecosystem**, representing thousands of national and local-level music organisations and operators throughout the EU. The

³³ <https://www.oecd.org/en/topics/policy-issues/tax-treaties.html>

³⁴ <https://culture.ec.europa.eu/cultural-heritage/initiatives-and-success-stories/european-heritage-label>

strategic recommendations resulting from this process, which are for a significant part aligned on the EU's own existing documentation on the subject (EU-commissioned studies, European Parliament resolutions and reports, EU regulation on the Creative Europe programme, "Culture Compass" proposals), could not exist without the effort and the commitment of the people behind these organisations (the list of signatories of this document is provided below) nor the thorough support of the **Bydgoszcz UNESCO City of Music** and **Culture Hub Poland**.

The One Voice for European Music initiative strongly calls on the European Commission, the European Parliament and the EU Council to carefully examine this **European Strategy for Music** and formulate concrete proposals to make them a reality. 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.

List of signatories :

- **AEC** – Association of European Conservatoires
- **CME** - Center of Music Ecosystems
- **CHP** – Culture Hub Poland
- **ECSA** – European Composers and Songwriters Alliance
- **EJN** – European Jazz Network
- **EMEE** – European Music Exporters Exchange
- **EMIA/CAFIM** – European Music Instrument Alliance / Confederation of Music Industries
- **EMMA** – European Music Managers Alliance
- **Europavox**
- **FIM** – International Federation of Musicians
- **FoMC** – Federation of Music Conferences
- **GESAC** – European Grouping of Societies of Authors and Composers
- **IMPF** – Independent Music Publishers Forum
- **Keychange**
- **Live DMA**
- **Liveurope**
- **MCN** - Music Cities Network
- **MTE** - Music Tech Europe
- **REMA** – European Network for Early Music
- **RESET!**
- **YOUROPE**