

Music and the European Union

Towards a degree of support
commensurate with the challenges?

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1. Music's late recognition

The European Union, a reticent cultural player

Initially thought of as a vector for peace between old world bellicose nations, constructed as a strictly economic project, then perpetuated as a legal framework for facilitating the exchange of goods and services, the EU has belatedly recognized the importance of a cultural theme as a creator of bonds and proximity between populations. It was at the turning point of the 1980s that the first concrete initiatives to support culture saw the light of day on a European level, but it was only following the Maastricht treaty in 1992 that culture, foreseen as a competence of Member States in accordance with the principles of subsidiarity and proportionality, was enshrined into the legal system of the European Union.

In 1990 the MEDIA programme was created in response to years of requests by professional institutions within the audiovisual sector for a specific tool for cross border initiatives, thus institutions in the European Union brought European culture into a new era. Henceforth consecrated within the multi-year financial budgets, this blueprint for cultural action allowed the EU to financially support projects in the fields of cinema and television with an “added European value.” This initial tool was then complimented by the Culture 2000 programme, which allowed for all of the different families of art, creative production, and cultural industries to benefit from funding, however it was awarded with a smaller budget than the MEDIA programme. This dual situation between, on the one hand, a financial tool dedicated to the cinema and audiovisual sectors, co-created and tailor-made with its representatives and, on the other hand, a lesser tool aimed at supporting all of the non-audiovisual sectors, crystallized over time, and endures to this day.

So, what happened then to the European Union's support for the music sector, a heavyweight in the creative and cultural industries in Europe? It should be noted that it has not been considered as such, but instead as “a cultural sector among other cultural sectors.” Instead, the music industry, despite its considerable economic impact^[1] and its undeniable contribution to a European “soft power” around the world (and for this reason, holding a comparable influence as the audiovisual sector), had until now been supported timidly.

Yet, who would contest that music has a significant impact on the daily lives of Europeans? From Mozart to Stromae, via ABBA and Édith Piaf, our musical heritage is of invaluable wealth. The European musical ecosystem is also responsible for a tremendous potential for innovation, as embodied by actors like Spotify and Shazam. It is an endless breeding ground for diversity and artistic creativity at the center of a vast range of aesthetics, from opera to hip-hop, from Portuguese fado to Norwegian black metal. Yet it is also fragile, as record companies have shown, due to the difficulties caused by peer-to-peer, the problems posed by an international concentration of industrial groups, or the more recent and

particularly resounding problems of live performances faced with a health crisis, which has caused lasting damage to the economic equilibrium. In the end, and above all, it is fragmented into a multitude of particularly heterogeneous territories with regards to professional structures, the size of markets, international penetration of repertoires, or the availability and the comparability of data. Faced with these challenges, why should it subsequently be denied the leverage of European support?

Birth of a dialogue

It was only after the adoption the Creative Europe programme in 2014 that the European Commission opened for the first time a dossier on providing specific support to the music sector. Becoming aware of the need for a differentiated support for the stakeholders within this sector it thus revolves around two principles: on the one hand, the idea that for the past fifteen years, with the arrival of the digital era, “the creation, the production and the consumption of music have been fundamentally changed [...], indicating changes which will touch all of the other cultural industries” ^[2] ; and on the other hand, the identification of a “need, made apparent by the sector, for support from the EU towards creativity, diversity and competitiveness, within the context of globalization.” ^[3]

This awareness initially took the form – modest but welcomed by the sector’s major actors – of round-table talks organized by the European Commission in Brussels, in the premises of the mythical concert hall of l’Ancienne Belgique (or “AB”). For the first time in the history of cultural actions in European institutions, more than forty organizations, considered to be the most representative of the different components of Europe’s musical “family,” were invited by the Commission, on December 10 and 11, 2015, to share their priorities with regards to public policy. This exercise – considered to be a success – would give rise to three other thematic workshops organized in the Spring of 2016: “Data and metadata in the music sector”; “Empowering creators and nurturing creation: education, training and professionalization”; “Cultural diversity: mobility of artists and circulation of European repertoire”; and finally, “Innovation and creativity: how best to support music start-ups in a fast evolving context?”

The first landmark for a differentiated European action for the music sector, was thus placed with the publishing of the “AB Music Working Group Report,” ^[4] whose recommendations which arose from the work groups were officially presented at MIDEM, in June 2016. But, despite the good will shown on a number of key subjects – such as the perspective of a European action for data collection within the sector, or support programmes for the exportation of music and touring performances –, it lacked a financial and institutional framework. The report provided no solutions for these problems and the Commission was conscious of these limitations, as despite the hope the report offered, it did not really provide any concrete opportunities for financial or regulatory support.

The key role of the European parliament

The institutional turning point came from the European parliament, notably due to the investment of three members of the parliament, Javier Lopez, Bogdan Wenta and Christian Ehler, who would take up the banner in the wake of the AB report. First of all by presenting in April 2017 a budgetary amendment for the implementation of a “preparatory action,” greatly inspired by the recommendations made by the AB work groups. Then, in parallel, through the event “A European Funding Programme for Music,” which took place within the Brussels parliament on June 28, 2017, and was the opportunity for the Cultural and Creative Industries intergroup (CCI) to call for the material implementation of a specific support framework designed for the sector, based upon the MEDIA sub-programme. ^[5]

These two parliamentary initiatives accelerated the process considerably, on an institutional level. Indeed, this preparatory action, entitled “Music Moves Europe: Boosting European music diversity and talent,” which was voted in November of 2017, would allow for the creation of specific financial support for music, alongside the Creative Europe programme, with an initial budget of 1,5 million euros. In addition, in the wake of this event organized by the CCI intergroup, a coalition would form at the European parliament in order to support, as part of the negotiations for the Creative Europe programme 2021-2027, the inclusion of a tailor-made support programme for the music industry. The first discussions took place at the beginning of 2018, just before the Commission’s submission for a multi-year financial framework between 2021-2027.

Thanks to this preparatory action, in a previously unseen fashion in the European Union’s cultural political programming, music had become a distinct subject, a sector with specific recognition. Now all that remained, was to put into effect this first draft political ambition.

2. Music Moves Europe, towards a European policy

The initiation of Music Moves Europe

Launched in February 2018 by the European Commission, the preparatory action Music Moves Europe initially focused on three main areas: a European strategy for exporting music; ^[6] the feasibility of a European observatory for the sector; Clarke M., Vroonhof P., Snijders J. *et al.*, “Feasibility Study for the Establishment of a European Music Observatory. Final report”, Publications Office of the European Union, 2020. and the mapping out of market trends for music and its funding needs. ^[7] These subjects were studied in detail, resulting in official reports produced by a consortium of stakeholders from the sector.

These reports called for projects focusing on strategic themes like, professional training, support for venues, or the highlighting of European content. Thus they have established a genuine consensus, within the core of the sector, on the subject of a European policy for music.

This was further reflected upon during a sector meeting organized by the Commission on May 20 and 21, 2019, in Brussels.^[8] A virtuous dynamic was put in to place, marked by an increased engagement by the sector, in the wake of these projects. If the health crisis of Covid-19 destabilized somewhat the rhythm of projects undertaken in 2020, it is undeniable that this preparatory action – renewed three times in annual budgets voted upon by the European parliament – constituted an encouraging start, with the objective of putting into place an ambitious architecture of support for music, on a European level.

A change of paradigm for the Creative Europe programme

Recognizing this dynamic, the European parliament mobilized itself to transform these attempts and to obtain the financial support appropriate for the music sector within the multi-year budgetary framework for 2021-2027. While the Commission's initial budgetary offer considered that it was premature to propose a specific "music" sub-programme, it did however make reference to a "sectoral action," while highlighting the need to base this upon the future results of the preparatory action. As part of the inter-institutional negotiations which started at the end of 2018, several amendments were proposed by the parliament's Culture and Education Committee (CULT) encouraging it to go further and in particular inviting the parliament to pay "particular attention"^[9] to music in comparison to other cultural sectors within the Creative Europe sub-programme.

The parliament's negotiators thus mobilized themselves during the budget negotiations, which were marked by discussions surrounding an important stimulus package for the European economy following the health crisis of Covid-19, and also by the consolidations of tensions between interventionists and more fiscally conservative Member States. Despite a relative reticence of Member States during this phase of inter-institutional negotiations, the representatives of CULT managed in the final days leading up to the adoption of the multi-year financial perspectives, in December 2020, to convince them to include within Creative Europe's programme's legal basis, an important note, stressing the need to provide support aimed at certain key sectors, "notably the music sector" (the only cultural sector to be highlighted in this manner in the provisions of the article^[10]). While this note might seem limited, it nevertheless opened up new possibilities, granting unprecedented latitude to the Commission to test new means of long-lasting support through the sectoral action for music, as part of the programme.

Taking stock of things: in the space of five years, which represents a relatively short period in the terms of how the EU functions, music as a political subject had gone from a lack of status, to an *ad hoc* framework of support, which though modest was unprecedented, and then a specific recognition within the financial regulation of the Union. Does this change of paradigm foretell the advent of an authentic funding programme in the years to come?

3. On course for a Music sub-programme?

A margin for maneuver before 2027

Within the wake of the institutional progress mentioned above, 2021 was marked with three innovations within the European action aimed at supporting the music sector.

To start, within the context of the third and final year of budgetary deployment of the preparatory action Music Moves Europe, the Commission entrusted a group led by the European Music Council with the responsibility of testing new financial tools which should eventually feed into the annual work programmes of Creative Europe and constitute the backbone of the sectoral action for music. This support laboratory focuses upon three themes: an ecological transition, technological innovation, and the concept of the sector's resilience. Simultaneously, the Commission opened, via the programme's sectoral action, a call for proposals on specific subjects such as exports and the cooperation between venues. An envelope of 4,5 million euros has already been set aside for the 2022 financial year. These different appeals allow for a financial support which is stable, targeted, and regular, while being destined for a wide variety of actors.

Then, this sectoral action will offer the opportunity to enshrine, for the following period, a "structured dialogue" between the Commission and stakeholders within the sector, based upon the model used for the event in 2019. The framework for this discussion invited an initial call for proposals for 2022. This will allow for the perpetuation – up until the next negotiation for the 2028-2034 programmes – of the virtuous dynamic which has been fully implemented by major players within the sector, and with the objective of creating a genuine sub-programme for music. Taking inspiration from the European Film Forum ^[11] model – a tool which has been well-received by actors within the audiovisual sector – this dialogue indicates the Commission's willingness to maintain substantive discussions with the sector, on the format and ambitions of future European support towards music.

Finally, alongside these initiatives, the Commission also launched in 2021, through the Horizon Europe research programme, a call for proposals focusing upon developing the work initiated through the study on the feasibility of a European observatory for music. The budgetary margin for maneuver for the lasting implementation of such a sectoral tool for the collection and analysis of data is not – according to the Commission – sufficient with the Creative Europe programme at this time, so it has been decided to use the much greater financial weight of the Horizon Europe programme, in order to continue this work. The proposition of an observatory, piloted by the EU and financed by other means than Creative Europe, but within the EU budget, might arise from this call in future years. If this initiative was to come to light, then it would allow for the music sector to equip itself with an invaluable instrument for mapping out its needs, within the context of a reflection upon

the establishing of a future sub-programme dedicated to music.

Creative Europe 2028-2034

This virtuous movement which, though it may have experienced some delays and sticking points (notably with regards to the doubts of some Member States on the opportunity to continue this integration of European culture), has nonetheless allowed for the preparation of a fertile ground, favorable towards financial support for the music ecosystem. From the basic status of a non-audiovisual artistic sector within the wider “culture” label of Creative Europe in 2014-2020, the music has become a strategic sector that is recognized and distinguished at the very core of the programme’s legal foundation. Carried by the momentum of the preparatory action, Music Moves Europe, and bolstered by the foundations established by Creative Europe, music is therefore well placed to aspire to being granted an *ad hoc* sub-programme on the horizon of 2028.

In concrete terms, there are numerous options that would allow for the outline of this future programme, such as the creation – previously sketched out in a study undertaken as part of the preparatory action – of a European strategy for the export of music; but also for the implementation of custom made tools destined to assist venues, education and professional training, technological innovation, and ecological transition; even the possible creation of an observatory for music. These stakes, which are subject to a high demand for support from the sector (even more so as a result of the health crisis), are not only legally adapted for being managed on a European level (this responsibility can be adopted by the EU, by virtue of a principle of subsidiarity), but also constitute an undeniable economy of scale, if employed across the twenty-seven Member States, rather than separately. To give an example, one need only imagine the benefits of a pooling of resources and a standardization of tools used for the collection and analysis of data on the sector, within a European observatory, instead of an entanglement of indicators, of methods and definitions that are not comparable, in each country; or even that of a European coordination of financial resources for export, notably within emerging markets, in order to offer a solution to the juxtaposition of national strategies that are sometimes too modest to exist outside of the EU, and whose benefits seem even more evident after almost two years of borders, being continuously borders.

We have seen that an efficient model of sectoral support on a European level already exists within Creative Europe, as embodied by the sub-programme MEDIA for the audiovisual sector.^[12] Providing around a dozen funding lines subject to regular calls for proposals, this tool allows for the whole sector’s value chain (producers, agents, trainers, broadcasters, distributors, festivals, etc.) to benefit from targeted long-term financing, a sectoral dialogue with the EU, as well as networking opportunities. MEDIA’s success after several decades has easily shown the added value that separate, sectoral support can provide. Furthermore, the number of aspects which could be covered by transferring such a model to music (export, knowledge, circulation, ecological transition, etc.) allows one to imagine the added value of such a tool. The different components of the music sector have expressed through their representative organizations, which are active on a European level, that they are

largely in favor of such a tool and with the idea of its architecture being based upon the themes already covered by the Music Moves Europe initiative.

A dynamic is thus at work, carried forward thanks to the sector's voluntarism and the opportunity for pooling resources in key areas, as well as the support of the European parliament and the Commission. However, it should be said that without the support of the twenty-seven Member States within the EU Council, in the context of the future budget negotiations, such a project will not see the light of day. A coherent alignment between the three institutions of the EU will therefore be necessary in order to create a music sub-programme and, if we refer to the barely cooperative positions of some Member States during the discussions for Creative Europe 2021-2027, then the battle is far from over. The sector will therefore have lots to do over the years to come to convince all of the Member States of the opportunity such a structural evolution would have in providing support to the sector, on a European level. Ambitious advocacy initiatives will be necessary, in particular in extending and reinforcing the alliance with the European Parliament, while giving proof to the Member States of the added value, the cost-benefit ratio, and the multiplying effect of an *ad hoc* sub-programme. The sector has shown its ability to create employment, growth and technological innovation, to reinvent itself and to adapt, crisis after crisis, from the surge of illegal downloading to the current health crisis, through the commercial consequences of Brexit. It must now reinforce its presence in Brussels and synchronize its strengths beyond the representation of specific sectoral interests, in order to carry out a more coherent lobbying, permeated with the idea of a collective interest. With this vision in mind, it will be important to mobilize the whole spectrum of actors within this sector, from professional trade bodies, to artists themselves, whose voices are more important than ever.

Conclusion

That is how the period we are about to enter seems to present itself: at the same time full of promise and rich in political challenges, with the hope of seeing, on the horizon of 2028, the emergence of a genuine European tool that offers support to the music sector, which now seems within reach. It is on a European level that the music sector will be able to react to the challenges of the current period, while preparing itself for those that will inevitably present themselves in the future.

Translated from French by Dom Savage

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1. The music sector contributes 81,9 billion euros to the European GDP from EU-28 in 2019 ("The Economic Impact of Music in Europe", Oxford Economics, November 2020), drawing it closer to the audiovisual sector which reached a high of 119 billion euros the same year ("Rebuilding Europe", EY, January 2021). Furthermore, the music sector employed 1,3 million people in 2019, thus a total 25 % greater than the audiovisual sector.
 2. "AB Music Working Group Report", Publications Office of the European Union, 2016.
 3. Ibid.
 4. Ibid.

5. An article on the event “Support in the European Parliament for a EU Music Programme” is available on the Impala association’s website: www.impalamusic.org/support-in-the-european-parliament-for-a-eu-music-programme.
6. Jacquemet B., Le Gall A., Saraiva N. et al., “Music Moves Europe – A European Music Export Strategy. Final report”, Publications Office of the European Union, 2020.
7. Le Gall A., Jacquemet B., Daubeuf C. et al., “Analysis of Market Trends and Gaps in Funding Needs for the Music Sector. Final report”, Publications Office of the European Union, 2020.
8. Details available on the page dedicated to the initiative “Music Moves Europe” on the European Commission’s website: ec.europa.eu/culture/node/701
9. “Report on the proposal for a regulation of the European Parliament and of the Council establishing the Creative Europe Programme” (2021 to 2027) and repealing Regulation, European Union, no 1295/2013, amendments 11 and 69.
10. Regulation (EU) 2021/818 of the European Parliament and the Council of 20 May 2021 establishing the “Creative Europe Programme” (2021-2027) and repealing Regulation (EU) no 1295/2013.
11. Details available on the page dedicated to the European Film Forum on the European Commission’s website: europeanfilmforum.eu.
12. Details available on the page dedicated to the European Film Forum on the European Commission’s website: europeanfilmforum.eu.