

Developing music export in Europe I

EMEE

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Abbreviations used for the MEOs

Throughout the report the organisations are referred to either by their full names or abbreviations. Some of these are officially also used by the organisations themselves, others have been derived for use in this report. The list contains the names of 29 MEOs mapped in this report.

Abbr.	Organisation	Country / region	
AME	Austrian Music Export	Austria	AT
CNM	Centre national de la musique	France	FR
DME	Dutch Music Export	The Netherlands	NL
FMX	Faroe Music Export	Faroe Islands	FO
HMB	Hamburg Music Business	Germany	DE
HOTS	Hungarian Oncoming Tunes	Hungary	HU
ICEC	Institut Català de les Empreses Culturals	Spain / Catalonia	ES-CAT
IEB	Institut d'Estudis Baleàrics	Spain / Balearic Islands	ES-IB
IM(de)	Initiative Musik	Germany	DE
IM(is)	Iceland Music	Iceland	IS
IML	Italia Music Lab	Italy	IT
KLX	Kultur lx – Arts Council Luxembourg	Luxembourg	LU
LALA	Lala Music Export Slovakia	Slovakia	SK
LMBA	Lithuanian Music Business Association	Lithuania	LT
ME	Music Estonia	Estonia	EE
MEG	Music Export Greece	Greece	GR
MEL	Music Export Latvia	Latvia	LV
MEXP	Music Export Poland	Poland	PL
MEU	Music Export Ukraine	Ukraine	UA
MF	Music Finland	Finland	FI
MFI	Music From Ireland	Ireland	IE
PRSF	PRS Foundation	United Kingdom	UK
PUG	Puglia Sounds	Italy / Puglia	IT
SCZ	SoundCzech	Czech Republic	CZ
SIG	SIGIC – Slovenian Music Information Centre	Slovenia	SI
SME	Swiss Music Export	Switzerland	CH
VIBE	VI.BE	Belgium	BE
WBM	Wallonie-Bruxelles Musique	Belgium	BE
WPT	Why Portugal	Portugal	PT

1. Introduction and Context

1.1. What is music export? Terms and concepts

Music export is a widely used catchphrase to refer to a range of practices and outcomes of artists, creators, music companies and other music organisations aiming to work internationally, which means crossing borders to reach new audiences, creative and market opportunities. Clarifying the concept of music export helps to understand how the different artists and professionals engage in and with music export, whether on a personal career, business strategy, or at local, regional, national or European policy levels. In the 2019 study on European music export strategy,¹ music export was defined narrowly with a focus on earning music-related revenue from foreign markets while also noting the broader context of “internationalisation”:

“Music creation and consumption is to a considerable degree international, meaning that much of the music composed, performed, recorded and released in one country also finds its way across borders to other countries, regions and continents - even more so with the advent of Internet and music streaming platforms. This is an important driver of cultural diversity everywhere and cultural exchanges within Europe are especially valuable. Additionally, the movement of music (including its creators, performers and audiences) across borders also generates a set of important revenue streams for national music industries: the latter is what is meant when talking about music export”.²

From this view, music export “happens” when artists, creators, rights holders, music companies, etc. earn music-related revenue from outside of their national borders, or from non-residents. The main music-related export revenue streams are:

1 — European Commission, DG EAC, Jacquemet, B., Le Gall, A., Saraiva, N., et al., (2019). Music moves Europe : a European music export strategy: final report. Publications Office. <https://data.europa.eu/doi/10.2766/68347>. Page 6.

2 — *Ibid.*

- performance fees for artists performing at festivals and concerts
- composition and production fees for music creators creating new music for commissions from foreign partners
- music publishing revenues generated by the live performances, broadcasting, streaming, synching, etc. of musical works
- recorded music revenues from physical sales of records and revenues from digital distribution, including the streaming services or other digital platforms.
- other artist brand related revenue streams, i.e merchandising, brand partnerships, etc.

In addition to music itself (performances and licences for the use of works, performances and recordings), “music-related revenue” can also include all sorts of music service fees, commissions, etc. when a music company provides services outside of their own country, whether in PR, marketing, social media, synch,³ music supervision, artist management, etc. In that sense “music export” is as open a term as “music ecosystem” itself.

This narrow concept of music export aligns well with the general use of the term “export”. For example, according to Eurostat, “export consist of transactions in goods and services ... from residents to non-residents”.⁴ This includes also transactions happening in the resident country, meaning that when music festivals sell tickets to audiences from other countries, this is also considered export revenue.

This narrow definition could be clearly marked against the much broader, open and vague notion of “internationalisation”, which can include all possible aspects of cross-border activities, such as cultural cooperation, cultural diplomacy or country branding. However, as will become clear from the profiling of the music export organisations, “music export” and “internationalisation” are mostly used interchangeably and in unspecified ways, whether among the industry professionals or (mostly cultural) policymakers. Thus, music export in any given discourse might refer to the economic outcomes (export revenue) of cross-border activities, or any other kind of international practices where music is in some way involved and moves across borders.

The lack of clarity and fuzzy use of these terms does not create problems for the music exporters themselves – the artists, creators, music professionals and companies. Economic and cultural dimensions of working in music,

3 — Synch stands for synchronisation and means the licensing of music for use in an audiovisual media, whether film, TV series, advertisement, video games, etc. Technically even using a pre-licensed track from the TikTok library to add music to your video is technically synching, though the term is ordinarily used for the practice of brokering a specific piece of music to a specific production.

4 — Eurostat (2017). Statistics explained. Glossary: Export. Online: [Glossary:Export - Statistics Explained](#).

whether locally or internationally, are so organically intertwined for both creators, the industries and audiences, that it can be seen as a non-issue. However, the same lack of clarity hampers data collection, analysis and making insightful statistics about these activities and their outcomes. This, in turn, has an influence on what kind of policy and political resources can be mobilised for the sector and specifically all the organisations working between the sector and policy levels.

1.2. What is music export capacity and how to develop it?

What skills, knowledge, resources and ecosystemic enablers are needed for music exporters to succeed in building sustainable cross-border careers and businesses? Whatever the exact answer in content and detail, it is often summarily referred to as **music export capacity**.

1.2.1. Capacity

Capacity development or capacity building has become a generic term that might refer to any kind of training, knowledge development or any activity where someone learns something new. To give more clear and focused meaning to developing music export capacity, it's helpful to briefly review the concept of capacity more broadly.

The concept of capacity building (and later development) stems from the wave of development cooperation and related policy initiatives from as early as 1960's and 1970's, with a thorough revision of approaches taking place throughout the nineties.⁵ A widely used 2005 OECD definition of "capacity" explains it as "the ability of people, organisations, and society as a whole to manage their affairs successfully".⁶ Capacity is thus not a passive and stable state, but a shifting ability, a *power* in some sense to perform, produce or achieve something.⁷ Core capacities can consist of acquiring new knowledge and skills to meet evolving challenges, defining and analysing the needs and key issues in the surrounding environment, formulating strategies and taking action, reflecting on the outcomes and adjusting courses of action

5 — Greijn, H., Hauck, V., Land, A., Ubels, J. (2015). Capacity development beyond aid. Online: https://www.idos-research.de/uploads/media/CAPACITY_BOOKLET_ENG_WEB.pdf.

6 — OECD (2005). The Challenge Of Capacity Development: Working Towards Good Practice. Online: <http://gsdrc.org/docs/open/cc110.pdf>.

7 — UNDP (1998). Capacity Assessment and Development. In a Systems and Strategic Management Context. Online: <https://www.cbd.int/doc/pa/tools/Capacity%20assessment%20and%20development.pdf>.

accordingly.⁸ Furthermore, capacity needs to be understood on several levels: individual, organisational and enabling environment or (eco)system levels.⁹ Capacity development can thus be thought of as “the process by which people, organisations and society as a whole create, strengthen and maintain their capacity over time”.¹⁰

In **music**, the export-related objective of artists, creators and music entrepreneurs can be assumed to be: creating and growing international careers and businesses, while maintaining them in an environmentally, economically and socially sustainable way. Often we first and foremost think of the resources required – most often financial (whether through revenue, investment or support), but also network (of local and international professional partners) and information resources. But assuming these were readily available, would all artists and entrepreneurs be able to use them effectively to achieve their long-term goals and build sustainable careers and businesses? This is where the concept of capacity becomes useful – it is not only the resources available, but the knowledge, skills and ability to make use of them that defines capacity.

1.2.2. Factors shaping music export capacity

Before outlining what music export capacity on an individual, organisational and ecosystemic level might contain, it is useful to review the various contextual factors that influence it. As noted already in the EMES study, “music export capacity (of artists and music companies) depends heavily on the local music sector ecosystem and its level of development – is there education, training, support, funding available, access to international professional networks, well-functioning CMOs, supportive governmental policies etc.”.¹¹ However, there are also other factors.

In a follow-up study, a list of key factors influencing music export capacity was outlined and these can broadly be grouped as (i) country-level factors; (ii) cultural factors; and (iii) genre/scene-level factors.¹²

8 – Ibid, p 10.

9 – OECD (2005), p 10.

10 – OECD (2010). Capacity Development: A DAC Priority. Online: <https://www.oecd.org/dac/conflict-fragility-resilience/governance/docs/46682429.pdf>.

11 – European Commission, DG EAC, Jacquemet, B., Le Gall, A., Saraiva, N., et al., (2019). Music moves Europe : a European music export strategy: final report. Publications Office. <https://data.europa.eu/doi/10.2766/68347>.

12 – European Commission, Directorate-General for Education, Youth, Sport and Culture, Sadki, C., Hergovich, F., Sillamaa, V. et al., Implementing steps to develop and promote European music export – Final report, Publications Office of the European Union, 2023, <https://data.europa.eu/doi/10.2766/298177>.

Country-level factors

The size of the domestic market

Developing a strategic and sustainable international career supported by a long-term export strategy requires investment. A crucial aspect is whether the domestic music market is large and well developed enough for artists to be able to earn sufficient revenue locally, before undertaking any export activities. Artists from smaller countries, especially those working in more niche genres, are often pushed to aim for a more international career much earlier in their development. This can be mitigated by a well-developed music sector infrastructure with a lot of expertise, experience and international networks accessible through local peers (A good example of that would be Sweden).

The level of development of the domestic music sector infrastructure

A key factor shaping the music export capacity of artists/creators and their management is how well the local music sector infrastructure is developed. Whether and how easily are relevant expertise, experience and international networks accessible through local peers is crucial. Most importantly for export development, the local music sector infrastructure can include music export organisations, targeted funding for international activities and many kinds of trade associations combining and making available high-level sector expertise.

Regional markets

A smaller country can still benefit from a larger neighbouring market in case the barriers of entry are very low, such as sharing a language, etc. Examples include the German-speaking area of Germany, Austria and Switzerland and the francophone area of France, Belgium, Luxembourg and Switzerland. Higher regional integration can be noted in the Nordics (for example via the work of NOMEX). Another example is Ireland which benefits from the leading position of anglophone music on the global scale and also the proximity of the UK music market and industry - one of the biggest and most developed in the world. The latter presents also a challenge through a potential talent drain.

Cultural policy support

As also reflected in the variety of policy responses to the COVID crisis, the existence of national and/or regional (including city level) cultural or music policies varies greatly from country to country. However, national and/or regional policy-level support is key to ensuring the functioning of sector organisations and also making available direct public funding for export activities.

Cultural and language specificities

Language

As also confirmed by interviews,¹³ language differences matter. Countries with native languages that have large and multinational audiences have a natural advantage in making music in their own language. Anglophone repertoire has been in a special status with audiences listening to English language songs globally. Yet, other “big” languages benefit from larger markets as well.¹⁴ In contrast, artists and creators from smaller countries with a “smaller” language often need to make a choice whether to focus on the domestic market or try to break to an international level, making music in English (or another foreign language). This differs from scene to scene, for any kind of traditional music singing in the native language, however “small”, is acceptable and appreciated for these audiences. Few artists have managed to build multilingual careers (perhaps a good, but rare example is Brainstorm or Prata Vetra from Latvia with committed audiences from three different language bases: Latvian, Russian and English for international).

The language barrier can be exacerbated when the local alphabet is different from the near-universally used Latin alphabet in the Western hemisphere.

The “Western” repertoire is increasingly facing the same challenges when trying to enter the fast-growing Asian music markets. Not only is there less demand for songs in English or other Western languages, but setting up a career will require a full set of services being able to manage all the communication and other services in the local language and on the local digital platforms, etc.

Local repertoire

Cultural preferences and legislation. Artists faced with the choice of whether to focus on the domestic (language) or international market, need to navigate the limits set in some countries on local language repertoire in local media, etc. Another aspect can be whether there is any preference in the local market for non-native language repertoire. In some countries in Europe, the local music audiences are very much preferring only local language repertoire (for example in Italy, the share of local repertoire is around 83%).¹⁵

Country “image”

In addition to the internal cultural specificities, stark differences in the country’s “image” in terms of whether the music from there is perceived to be

13 —More than 30 artists, managers and industry professionals from different European countries were interviewed for the EMX project study

14 —This was also confirmed in the EMES study

15 —EMEE (n.d., unpublished). Italy Market Profile

“professional”, “cool” or at least marketable seem to persist even in Europe

Scene/genre level factors

Music export potential and the appropriate strategies to develop it can be different depending on the music genre and the way a particular scene works. For example, whether it is song or album driven, popular with larger audiences or more niche, native to digital platforms or still highly dependent on live performance, how active are the audiences in social media, and many other aspects. Therefore, in addition to the many factors arising from where the artist is based, they have to tailor the business and export strategies according to the logic of a particular music genre and scene.

In conclusion

It still greatly matters in which country a particular artist is trying to develop an export oriented career and business. In most cases in Europe, the strengths seem to converge in big markets (such as Germany, France and the UK) where large domestic markets have enabled the growth of strong and well-developed music sector infrastructure, including export-oriented capacities. This is in some cases also strengthened by strong cultural policy support. In contrast, many smaller European markets struggle with limited local market size accompanied by higher cultural and language barriers to export development. Some smaller or medium-sized European countries benefit from being adjacent to a larger market, however, the downside is a potential talent and copyright drain.

1.2.3. Music export capacity

What are the capacities needed to achieve goals and make effective use of resources available? And how can they be developed? Capacity is an open concept and needs to be clarified by describing the context of a particular field and the actors operating within it.¹⁶ The multi-level approach to understanding capacity has been adapted to reflect the specifics of the music ecosystem, with a focus on music export. In short, the three levels are (i) **music exporter** level with a clearly defined (singular) focus on developing export opportunities for an artist project or a music business venture of some kind; (ii) **sector organisation** level with a broad collective interest to increase export opportunities for the whole sector or some target groups within it; (iii) **music ecosystem**

16 —See for example: Isaza, Carolina & Kit, Patricia & Lozano Herrera, Juan Carlos & Balanzó, Alejandro. (2015). Capacity: A Literature Review and a Research Agenda. SSRN Electronic Journal. 10.2139/ssrn.2824486.

level referring to a national or a regional development level of the whole sector and to what degree it serves as an enabling environment for music exporters and organisations who support them.

Music exporter level – at the core of any music project is the music itself, the authors and performers, artists and their professional teams and music companies who all work to take the music to audiences. They are the music exporters. The focus is on a singular project or business interest – artist(s), roster, repertoire catalogue, venue, festival, etc. – and making that successful.

The core elements of capacity on this level are:

- **Knowledge** about how the music ecosystem in general and other music markets in particular work and relevant up-to-date information to navigate them;
- Practical **skills** and **experience** to plan strategically, make use of the available opportunities and resources, including international networks, work in teams and take action;
- **Ability** and **willingness to learn and adapt** continuously in order to remain effective in navigating the fast-evolving environment of the music world.

Key resources that need to be available for this level are various kinds of information, training, services and financial credit, investment, and support opportunities.

Sector organisation level – there are many kinds of organisations in the music ecosystem with a collective interest focus – unions, trade associations or development organisations, and also institutions with a public mission (i.e. music centres or arts councils). These organisations represent a broader interest and work to support the sector actors to achieve success, often acting as intermediaries between the sector interests and policymakers, political level or others, both public and private.

The core elements of capacity on this level are:

- **The ability to mobilise, engage or organise the sector** to either identify and articulate collective interests and effectively represent them or gain sufficient understanding of the needs and gaps in the sector and provide relevant services and support. There are several ways to structure a dialogue with the sector, but all of them require a sustained and well-managed effort over longer time periods.
- **Expertise, skills and experience to design and implement programmes and actions** for the benefit of the sector target groups, including support and development programmes, delegations, presence and visibility at various events, etc.

- **Expertise to consult and advise the sector** on music export related issues. This can include expertise on the music sub-sectors and on the various music scene specific practices.
- **Skills and resources to grow and sustain a network** of professionals and collaboration partners, whether for joint action or to mediate contact to artists and professionals.
- **Strategic and administrative ability** to plan, implement and evaluate projects, collaborations, etc., both on the domestic and international levels.
- **Competencies to engage in policymaking and advocacy** to enhance the political profile of the sector and mobilise resources, both from the public and private sectors.

The core resources for establishing the above described capacity for a music sector organisation, or more specifically a music export organisation, are **competent and experienced staff and financial resources**. Both need to be maintained over a longer time period on at least a minimally stable basis.

Music ecosystem level – capacity on an ecosystem level becomes an abstract concept and is most usefully understood as the characteristics or factors of that system that enable and support the growth of the capacity of sector actors. The enabling factors for music export capacity in national or regional music ecosystems are:¹⁷

- Artists have sufficient knowledge and access to training and education regarding how to develop their careers;
- There are enough professionals and music companies able and willing to support artists in their career further along the development path;
- There are sufficient training and education, career and strategic mentoring, business development advice, etc. resources available to artists, professionals and music companies;
- Artists, professionals and music companies have access to relevant funding to support their (export) development;
- Music sector organisations (such as music export offices and other support organisations) receive sufficient resources from both government and music sector to offer all or at least some of the key services to the music sector;
- Collecting societies are working efficiently and effectively;
- Government level music and more generally cultural and creative sector policies are well aligned with the music sector development needs.

17 – This is based on and adapted from: EMES, p. 9.

An important class of actors to provide an enabling music ecosystem are **policymakers** and the key resource they, in turn, need to make effective policies is relevant and up-to-date data, information and insights about how the sector works and what its needs and opportunities are.¹⁸

It is easy to see how the different levels are nested. The resources the music exporters need are provided to them (ideally) by the music export organisations whose capacity in turn draws on the music ecosystem and is (ideally) strengthened by a mix of public and private support.



Figure 1. Nested levels of music export capacity development and the capacity needs on each level.

18 — A more detailed analysis of what kind of data is needed for constructing which kind of knowledge and gaining which insights, and who could be involved in organising it will require a separate analysis entirely.

1.2.4. What is known about the current state of music export capacity in Europe?

In 2019, the EMES study provided probably the first comparative analysis of the state of music export development in Europe. The main results can be summarised as follows:¹⁹

- The major hurdles in music export capacity development are to an important degree local and the first challenge for artists is taking the first steps out of their home territory, not out of Europe. In order to improve the capabilities of music exporters to earn sufficient revenues that can be reinvested into music export development, especially to non-EU markets, it is fundamental to make the intra-European music export work across the EU. Europe needs to become the “home market”, a single music market, especially for those for whom their national domestic market is unavoidably limited.
- There are significant disparities between European countries regarding the level of development of the music ecosystems. It still matters a lot where an artist or an entrepreneur starts out to develop a career or a business. Some factors, such as the limited size of the market, cannot be changed, but others, for example, knowledge and capacity in general, can be developed significantly.
- The pervasive lack of data on and conceptual approaches to the workings of the music ecosystems holds back the sector to present the potential and future opportunities clearly and convincingly, leading to ...
- ... a lack of music (export) strategies and policies on a national and regional level as without sufficient knowledge-based understanding the policymakers cannot design effective strategic approaches or justify increasing investment.

There are no clear indicators (yet) for appraising music export capacity, whether on music exporter, sector organisations or music ecosystem levels. Data and trends about the circulation of European repertoire and artists within Europe could provide an indirect indication of shifting capacity, but this is notoriously elusive. Assessing the needs of the artists, professionals, music companies and also sector organisations provides another perspective. While it has been done in a few studies, these are only brief glimpses. Studying European countries more thoroughly will be significantly laborious (though still very much needed). A third perspective will open when the enabling factors in the European music ecosystems will be described and compared in a coherent framework – this is what the EMES is designed for. The MEOs were mapped in 2018, then again internally in EMEE in 2020 and this report is based on a third round, this time using the EMES framework as a conceptual map.

19 – The EMES study, p 39-40.

In summary, we have a general understanding of the main gaps in music export development in most European countries. With this and the following reports we will have more insights into how the MEOs and other actors in the music ecosystems are working to provide knowledge, support and other resources; and how these compare across European countries. Also, what policies exist and how well they work. What is still needed in the future is a data-driven view of the circulation of artists and repertoire. Many necessary pieces of data already exist, but are kept in proprietary organisational vaults and bringing them together faces legal, administrative and also cultural and ideological hurdles.

However, what we already know is enough to provide a clear rationale for European-level cooperation in developing music export capacity. There are activities – as anticipated in the EMES study and validated through pilots in the EMX project – that can be done on a European level as joint actions, for example, market studies or trade missions. As an example, most European MEOs or other sector organisations are too small and resource-constrained to ever organise a stand-alone trade mission focusing on the electronic music scene in Mexico. There is a lack of organisational capacity and resources, but most likely also a critical mass of interested participants just in the right development phase in a small country at any given time. Yet, on a European level, this can and has worked (the EMX trade mission to Mexico took place in May 2022).

To develop a coordination instrument for such European-level collaborations, the EMES report outlined an early version of a European Music Export Strategy, explained in the next chapter. This strategy can serve as a roadmap for these future joint actions. It also provided the first conceptual framework to understand and take stock of music export capacity on an organisational and national or regional music ecosystem level.

1.3. European Music Export Strategy as a framework for strategic cooperation

In 2019, the European Commission with funding from the Music Moves Europe initiative commissioned a study on a “European Music Export Strategy”.²⁰ The study was produced by a consortium led by Le bureau export, including MICA – Music Austria and KEA European Affairs.²¹ EMEE as a network of MEOs, was

20 — European Commission, DG EAC (2019). A European music export strategy: final report.

21 — The project was managed by Fabien Miclet and featured contributions from many representatives of various European music export organisations.

too young to officially join the consortium, but served as the wider advisory committee to ensure that the study remains aligned with relevant issues from the field and made use of the broad-based European expertise and information available through the EMEE membership. The study laid out the current state, needs and gaps of music export as a field of activity in the European music ecosystems. Most importantly it also outlined a strategic framework. The core elements of the European Music Export Strategy (EMES) are a **6-step development path**, an accompanying **toolbox** and a **multilevel stakeholder view**. EMES organises the main themes in developing music export capacity into 6 steps and links the needs and goals of different level stakeholders to them.

In 2019-2022, again with the funding from the Music Moves Europe initiative, another project “Implementing steps to develop and promote European music export”, or the EMX project for short, was undertaken to pilot some of the approaches proposed in the EMES study. Other actions are carried out within the EMEE’s network project²² and have also been taken further in the LIVEMX project launching in 2023.²³

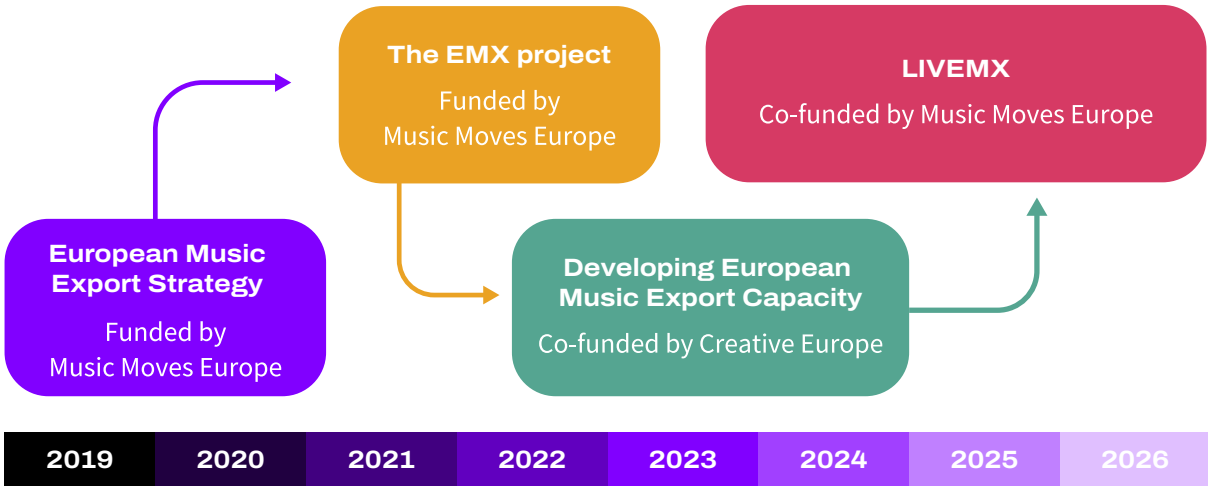


Figure 2. The projects establishing and implementing the European Music Export Strategy.

1.3.1. EMES – a framework for strategic cooperation

Essentially, as the EMES doesn’t have a single owner (nor funder), it can be most usefully understood as a **framework for strategic cooperation**, allowing the different stakeholders – European music export organisations (MEOs), EMEE (as a European network), the Member State governments and European institutions to align their strategic objectives, programmes, funding and actions with a coherent set of goals. The EMES provides a map to understand

22 – “Developing European Music Export Capacity”, funded by Creative Europe.
 23 – Over the next three years (2023-2025), LIVEMEX will support 90 music sector beneficiaries with grants and capacity-building actions focusing on three topics: “music export”, “music venues” and “digital circulation and engagement”.

who does (or could be doing) what to develop music export capacity across European countries. We can map, on the EMES framework, the overall policies on both European and Member States level, the European projects done by EMEE, the individual activities done by the MEOs and eventually other organisations and networks. Thus, the EMES framework becomes an organising principle of sorts with the 6 steps (or themes) at the centre (see figure 3).

European Music Export Strategy

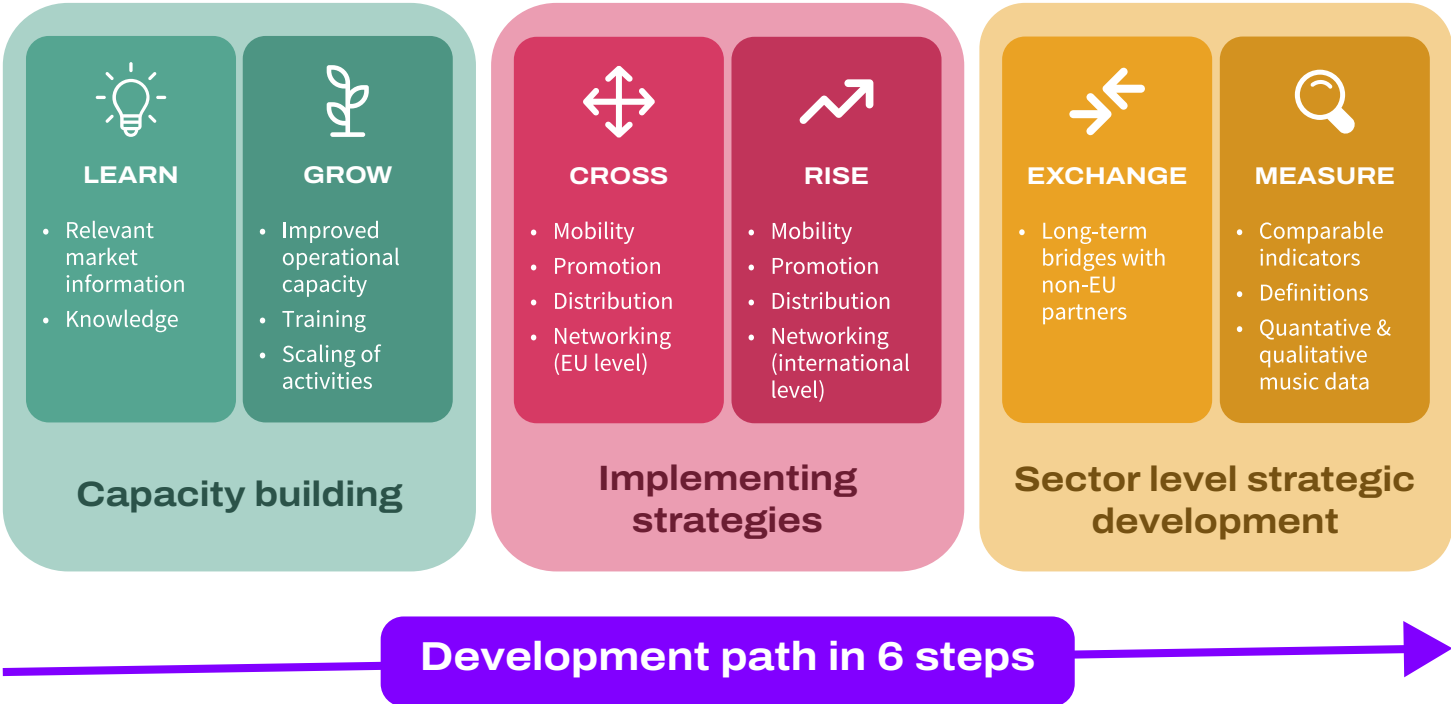


Figure 3. European Music Export Strategy, 6-step development path.

Each of the six steps represents a strategic objective (Table 1). These objectives describe a desired future state in the language of the present – a state that the joint efforts to develop European music export capacity might seek to bring about.







	Step	Strategic objective
Capacity building	 1. LEARN	Relevant and up-to-date information and knowledge on music markets and industry trends is available for all European music professionals to LEARN and make active use of it.
	 2. GROW	Artists, creators and entrepreneurs find a supportive environment to GROW their knowledge, skills, experience and capacity in every European country. This is made possible as the music ecosystems in Europe are well developed, constantly improving and providing artists, creators and music companies with the needed support to realise their full international potential.
Implementing strategies	 3. CROSS	Artists, creators and music companies can easily CROSS European borders to present their music to audiences elsewhere in Europe – this is supported by strategic and administrative collaboration between national and regional public and private organisations, coordinated bilaterally and on a European level.
	 4. RISE	European artists, creators and music companies RISE to the global level, being competitive and successfully getting European music to be heard by music listeners across the world. This is supported by European, national and regional level strategic programmes and other collaborations.
Sector level strategic development	 5. EXCHANGE	European music organisations develop long-term bridges and partnerships with non-EU partners through EXCHANGE of experiences, best practices and business contacts. This will also provide ways to invite key players to visit Europe and discover our talent.
	 6. MEASURE	The international success of European talent can be MEASURED through a well-organised system of music data collection, analysis and publication of research.

Table 1. The strategic objectives linked with the 6-step development path.

EMX project



LEARN

- New market studies of India and Mexico
- Revised market studies on China, the US, Canada and South Africa
- An EMX resource center pilot version



GROW

- A European music export capacity building programme pilot



CROSS



RISE

- Canadian Export Hip-Hop & Rap Lab
- An electronic music trade mission to Mexico



EXCHANGE



MEASURE

- A qualitative study on the impact of COVID-19 on music export practices in Europe

Figure 5. The activities of the EMX project mapped onto the EMES framework.

The strategic objectives of EMES are set on a high level and can serve as signposts for aligning policy goals, music strategies and actions on multiple levels towards a shared vision. Naturally, there are differences between what is already being done in one country or organisation and how to go about filling the gaps. However, with EMES it is possible to map the gaps in a single framework and thus on the one hand have a useful (if general) benchmark with other countries or regions and on the other a way to align goals for cooperation. As EMES is being developed, further indicators will be assigned for the strategic objectives while a repository of existing policies and actions will be collected and organised under each of the six steps.

1.3.2. Stakeholders involved in EMES

In the current version, EMES sets the music exporters – artists, professionals and music companies – at the centre and outlines three other groups of stakeholders with linked missions and roles to play in contributing to the development of the music export capacity of music exporters (see table 2).

Group	Activities	Needs	Role
Music exporters	Exporting music	Information, knowledge, skills, advice, capacity building, professional networks, investment and funding.	Implementer and beneficiary
MEOs	Providing services, support and resources to music exporters; developing strategic opportunities through international partnerships; advising on music policy-making.	Professional and organisational capacity, stable and sustainable funding models, access to information and data, collaboration and networking at European and international level.	Implementer, strategic partner and service provider
National and regional governments	Making policy, providing support and funding, facilitating data collection and analysis, participating in European music policy making.	Information about the sector at a national and European level, its development potential, its challenges and needs; support from the music sector to design and implement relevant policies and programmes at a national and European level.	Enabler, policy maker, and funder
European Institutions	Making policy and designing support programmes at the European level.	Information about how the sector is performing on a European level, its international development potential; European cooperation opportunities; political support for its policies, including from the sector, from stakeholder associations and from EU Member States.	Enabler, policy maker, funder (MME, CE)

Table 2. The different stakeholders and their roles in EMES.

The **music exporters** are the actual implementers and end beneficiaries in this framework. It is they who ultimately carry out the exporting of the music they create, perform, release and distribute. The EMES framework needs to be constantly aligned and informed by the ground-level needs and specific objectives of the music exporters.

The **MEOs** are the dedicated strategic partners in the sector providing services and resources to the music exporters, while also working with the policymakers on both national and, via **EMEE**, European level. The MEO's value proposition to the music exporters needs to be broad and cover LEARN, GROW, CROSS and RISE themes. In addition, often through EMEE, the MEOs develop international and European cooperation frameworks and longer-term projects that generate opportunities for the music exporters²⁴ which reflect the EXCHANGE theme. Finally, the MEOs also collect feedback, analyse the sector needs and produce policy-relevant knowledge for advocacy and policy-making, linked to the MEASURE theme.

The **EU member states and other European countries** are natural enablers of their music ecosystems through effective policies and support for the music exporters directly, and/or through the MEOs and other sector organisations. While there is most likely already considerable high-level alignment between most national cultural policies and the EMES strategic objectives, the former tend to be very general, often not providing sufficient sector specific objectives, actions or indicators to measure results. Much can be done to map out more clearly the national and regional music ecosystems using the EMES framework, to spot both gaps and effective instruments in place, and clarify the possible next steps to strengthen the existing policy instrumentarium and resource allocation. In turn, the national policymakers need consistent, comprehensive information and partnership from the MEOs to provide them with relevant data, information and insights and, ideally, to join a co-creative policy-making process. Making sure that the MEOs are sufficiently resourced to provide the needed partnership is a mutually beneficial goal.

The **EU institutions**, most notably the **European Commission**, are already spearheading the Music Moves Europe initiative, but more can be done to strengthen sector-specific policies in the Creative Europe programme. Here, a consensus is needed from the **Council of the EU**. There are further avenues to pursue in order to develop EU-level music policies. For example, more targeted calls for researching the music ecosystems in the Horizon programme,²⁵ more pronounced presence in the EIT Culture & Creativity²⁶ or ways to find synergies between the international projects of the MEOs and EU delegations.²⁷

24 — Good examples are the EMX project and LIVEMX, but also HEMI, Global Music Match and many others.

25 — More info: https://research-and-innovation.ec.europa.eu/funding/funding-opportunities/funding-programmes-and-open-calls/horizon-europe_en

26 — More info: <https://eit.europa.eu/eit-community/eit-culture-creativity>

27 — More info: https://neighbourhood-enlargement.ec.europa.eu/eu-delegations_en

1.4. Methodology of the report

A first mapping of the EMEE members took place as part of the EMES project in 2018. Another round of internal interviews was conducted in the autumn of 2020. The sample of 29 MEOs misses 3 MEOs that are currently also EMEE members – Musika Bulegoa (the Basque music office), We Move Music Croatia and RAW Music (RO). The latter two joined EMEE after the mapping period had ended. There are other music export organisations in Europe (and elsewhere) not part of the sample. This is due to the focus on EMEE members for now.

This report builds on the methodological approaches and categories used previously and develops them further. The data was mainly collected through interviews with the MEO representatives, a review of the organisation’s website and documents (i.e. activity and financial reports, articles of association and others). In total 29 organisations took part in the mapping. It’s important to note that certain types of data, such as those relating to finances or time allocation, were not either accessible (due to internal regulations, etc.) or presented methodological challenges in terms of distinguishing the relevant aspects from the broader organisational dataset. Therefore, while the general sample is 29 organisations (n=29), for some aspects it is smaller and in those cases, the sample size has been referred to.

It must be noted, that in many cases the graphs and tables representing aspects of organisations and their activities are necessary simplifications of the underlying, often very idiosyncratic and rich, contexts. Brief explanations have been provided for these cases, but more often than not these serve more as pointers towards future research than exhaustive descriptions.

The mapping covers four themes: (i) missions, strategic planning and links to policy; (ii) governance and management; (iii) financial models; and (iv) activity profiles. The first three are covered in chapter two, while the activities, following the 6-step structure provided in the European Music Export Strategy, make up chapter three.

2. Music export organisations in Europe

There is no one model or a clear definition for a music export organisation (MEO). For the same reason, there is no one effective blueprint for setting up a new MEO. As will become clear from the rest of this report, context matters and the 29 organisations mapped reflect the specific and unique circumstances in a country or region, in a particular period in time. However, there are certain shared themes in the missions, the scope of activities and the organisational profile that provides a common denominator: all these organisations strive towards providing artists, and (in most cases) professionals and music companies, the support and services they need to develop their careers and businesses on an international level.

2.1 The mission(s) and links to policy fields

2.1.1. Missions and policy alignment

There is no single format or approach to articulating the mission among the organisations reviewed. Some provide a very general and open mission, others a description of the organisation or the specific goals and activities it has committed to. The main themes that run through the various missions or profiles are:

- Promoting and representing artists, professionals, companies and music from the country or region towards international music markets and industries.
- Strengthening the capacity of, or creating opportunities for artists, professionals and music companies to build international careers and businesses – whether through financial support, various services or education.

- Developing professional networks and connecting artists, professionals and music companies from their country with their international counterparts.

Most MEOs (25 out of 29) benefit from some form of public funding and thus are, at least on some general level, linked to certain policy fields and goals. From that perspective, MEOs can be seen as implementing public policies or at least contributing to its goals (NB! In four countries or regions under review, the MEOs receive no public funding at all and therefore lack a direct connection to public policy goals).

The key area of interest here is which policy goals are the MEOs helping to achieve through the support received and how the outcomes are evaluated and communicated to policymakers. As already noted in the first chapter, music export development connects organically with at least three policy fields: (i) cultural, (ii) economic and trade, and (iii) foreign policies.

While not mutually exclusive, depending on which links dominate, the overarching policy goals that might come attached to any public funding received will have some influence on the MEO, if not directly how it operates, then at least how it needs to communicate its results. The “link” in this context refers to where the public funding is from and what is the expected “return on policy investment” that the MEO needs to deliver in return. It can also refer to particular collaboration projects between ministries or agencies of a policy field and the MEO. Finally, it can also take into account the broader alignment between the goals of the MEO and public policy, especially the language used when describing the goals and outcomes.

The following brief analytical summary on policy links relies on the MEO’s interviews and reflections. A more thorough analysis of policy documents and strategic plans, funding and project links, etc. would potentially reveal a more detailed picture but is left for a future research project.

2.1.2. Links to policy fields: the prominence of cultural policy

A clear majority (22) of the MEOs have close links to the cultural policy field and for 17 of them these are exclusive (no links to other policy fields). Only 4 have some links to foreign policies via ministries of foreign affairs or other agencies, and 7 have some links to economic, or more specifically trade-related policies (figure 6). It is useful to note that a link (as defined above) doesn’t necessarily mean that the MEO receives direct funding from relevant public institutions. Out of those 25 receiving any kind of public funding, 11 receive it directly from the Ministry of Culture and 9 through various arm’s length cultural funds, such as arts councils, etc. 2 organisations receive funding from ministries related to economic affairs (including trade), 3 from ministries of foreign

affairs or their agencies and especially in regional cases, such as Catalan arts in Catalonia, IEB in the Balearic Islands, and Wallonie-Bruxelles Musique in Belgium, the funding comes from the regional government, therefore it is not so clearly linked to a specific policy field (more on this in section 2.7.1. Income).

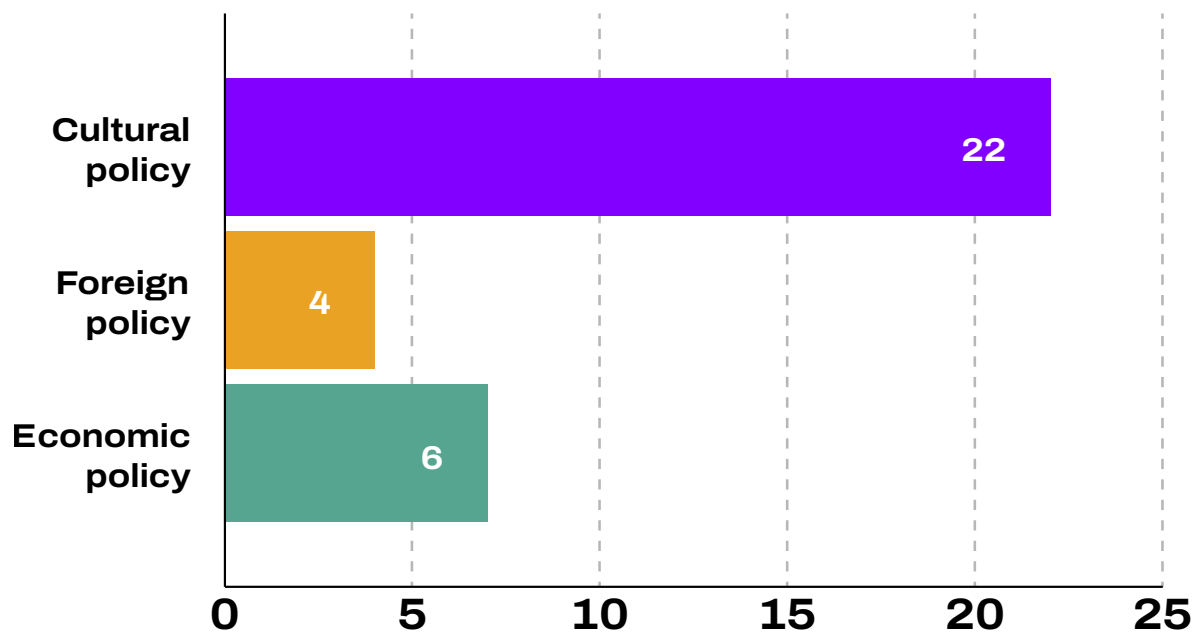


Figure 6. Links between MEO's missions and policy fields.

Cultural policy goals, as set on a governmental level, are usually broad. In a 2022 internal survey to EMEE members, 15 out of 25 respondents report that there is some music policy, whether general and vague (12) or detailed (3) in their country or region. 7 report a broad cultural policy that has no specific details on any sector level and 3 report that there is no relevant cultural policy or a strategic plan to speak of. On the one hand, broad public cultural policies leave the MEOs with more flexibility to set their own objectives and plan activities. On the other hand, the lack of specific policy commitments on the political level leaves the MEOs and the sector at large with less basis to advocate for longer-term strategic and targeted policy measures and funding strategies. Also, it means that most music export development is planned and funded through short-term projects, rather than medium and long-term strategic and structural funding.

While cultural policies vary widely across European countries and a more in-depth account will require a separate research project, the general themes that the MEOs feel are relevant to their cultural policymakers include (i) international promotion of national or regional culture; (ii) international opportunities for artists and creators, more recently (in some countries) also professionals and the music industry in general; and (iii) strengthening competences in the sector, including entrepreneurial and business skills, etc.

The more narrow economic focus on music export as generating revenue and creating economically viable careers and businesses is not mentioned as being among the main concerns of the cultural policymakers nor a required element when reporting the use of funds. This might reflect the cultural policies being focused on cultural and not so much on economic returns, but it is also importantly pragmatic as both targeting for and evaluating the efficiency of economic growth measures for music, or culture more broadly, is challenging (more on that in chapter 3.5. MEASURE).

2.1.3. Legacy ideas and new challenges in cultural policy-making

Cultural policies in Europe have a particular legacy and historically have been devoted to safeguarding cultural heritage and the so-called high arts,²⁸ which in music meant exclusively Western classical music.²⁹ While over the past decades, there have been many developments in cultural and more specifically music policies, with notable differences from country to country, there are still issues that many cultural policymakers struggle to appreciate. Based on the interviews, these can be briefly summarised as follows:

- **Binary views on cultural practices**, including “cultural vs commercial”, “serious vs popular”, “arts vs entertainment”, “creative vs industry”, etc. This usually – and specifically to music – includes a fixation on certain music “genres” or scenes as culturally valuable to the exclusion of all other forms and practices. Music policy built on these tenets struggles to rationalise policy support to various music scenes outside the “legitimate”.
- **Focus on creation and performance, but not the professional infrastructure** around the talent, with the exception of certain cultural institutions (i.e. opera, symphony orchestra, etc.). This reflects the notion that the professional entourage is part of the ‘industry’, reflecting therefore only commercial interests and shouldn’t be under the purview of cultural policy.
- **A static view of the cultural processes** which tends to follow a crude version of the market failure argument. According to this argument certain music genres, scenes, practices and relevant institutions are always failing in the market and require permanent policy support, and others are permanently taken care of by market competition. This view fails to take into account the development arch of both artists/creators and professionals in the sector.

28 —See for example: Hesmondhalgh, D. (2019). *The Cultural Industries* (4th); Mulcahy, K. V. (2006). *Cultural Policy: Definitions and Theoretical Approaches*; O’Brien, D. (2014). *Cultural Policy: Management, Value and Modernity in the Creative Industries*.

29 —See for example: Alfaro, O. (2019). “Art music”; and Keller, M. (2019). “Classical music”. In: Struman, J (ed.). *The SAGE International Encyclopedia Of Music And Culture* (Vols. 1-5).

Again, there are significant differences in cultural and music policies between European countries, but according to the interviews, remnants of the above-described and other legacy views on cultural policy making can still be felt, also in those countries where the cultural policies are rhetorically more inclusive and open.

An important dimension running through contemporary music policy-making is the **cultural and creative industry** (CCI) concept. When grappling with whether and how cultural policy should attend to those music scenes and practices that traditionally were left to the “industry” and the “market”, an often used option is to conceptualise these as belonging to the CCI policy field (rather than the traditional cultural policy). The CCI concept has been introduced as a policy field in most countries in Europe in some way, but there are important lackings when it comes to including music actors.

Firstly, if the CCI policy has been delegated under the Ministry of Culture, it often seems to be less well developed and lacking both policy instruments and substantial funding. Secondly, if the CCI policy is more linked with other innovation and business development policies, often curated by the Ministry of Economic Affairs, etc., then the programmes are mostly designed for larger companies with higher turnovers and start-up-like growth curves. Where this is the case, music companies which are mostly very small do not meet the entry criteria and are left out.

Many MEOs report some changes in music policy-making, especially after COVID-19 which also mobilised sector stakeholders to organise more actively and effectively for political representation. However, the progress is slow, non-linear and sometimes unreliable. The challenges to drive it more effectively are:

- The pervasive **lack of data and research** about the sector that would support a more fact- and knowledge-based understanding of both needs and opportunities.
- **Lack of resonant narratives** around success stories that would demonstrate the potential of the music ecosystems.
- The **limited capacity of the sector stakeholders** to engage in long-term strategic development and interest representation at a political level.

2.2. Strategic objectives, planning and reporting

Given the flexible, dynamic, but also uncertain policy landscape on the one side and a fast-changing industry landscape on the other, the MEOs need to remain agile and reactive when it comes to strategic planning. This is further reinforced by the very short-term (often < 1 year) financial planning horizon and the mostly very limited staff capacity most of the MEOs are working with. 11 MEOs don't have a long or medium-term strategic plan as such, they are instead working to the general goals set in their mission (i.e in the article of association) and then planning activities per year. Often in these cases, the funding application for certain projects is the main planning document. 7 MEOs have a general strategy of sorts, providing overall open-ended goals that are not necessarily linked to particular activities or indicators, and are not set for a particular time period. 9 MEOs report having an operational strategy, meaning it links overall goals with certain action plans on a defined time scale, thus providing a real management tool. One organisation is working on their first proper strategy and one is so new that no strategy has yet been outlined.

There is no particular correlation between whether organisations are public or private, bigger or smaller, newer or older. However, if an organisation is limited in terms of staff capacity and is facing a highly short-term and uncertain financial planning horizon, then drawing a longer-term strategy becomes a luxury. Mostly, strategic documents are not publicly available but remain internal to the organisations. There are general public strategic documents available for Catalan Arts (ICEC),³⁰ IEB³¹ and SoundCzech (ATI).³² Music Estonia has a comprehensive [strategy](#) available on their website. Music Finland has a general strategic document (in Finnish) available on [their website](#), but this does not reflect the more detailed operational management strategy. VI.BE has published a comprehensive policy plan,³³ that outlines main goals, activity lines and the general approach.

30 — Online: <https://drac.cultura.gencat.cat/handle/20.500.12368/1650>

31 — Online: http://www.iebalearics.org/static/pdf/ieb_memoria_2018.pdf

32 — Online: https://www.soundczech.cz/documents/2020/2020_soundczech_zamereni_role_cile.pdf

33 — Online: https://issuu.com/poppunt/docs/vibe_beleidsplan_02_pagina_s

		Publicly available	Internal
Operational strategy	9	ME, MF (a general strategy), VIBE	CNM, DME, HMB, MF, MFI, PRSF, SME
General strategy	7	ICEC, IEB, SCZ	HOTS, IM(is), IML, PUG,
Mission / goals	11	AME, LALA, LMBA, KLX, MEG, MEL, MEU, MExP, SIG, WBM, WPT	
Other	2		IM(de), FMX

Table 3. Types of strategies of the MEOs.

The main benefit of a medium to long-term strategy is that it provides high-level goals that can be linked to the various activities, whether on a project or a more programmatic basis. The main obstacle to this is the short-term financial planning horizon.

Example: First Music Contact's Artist Career Development Pipeline in Ireland

While not a traditional organisational strategy, the Artist Career Development Pipeline (see figure 7) operated by First Music Contact is a comprehensive and strategic set of activities, resources and actions that help Irish artists to get ready for export internationally. Starting with information, advice and structured consultancy that artists can book for when ready, and making use of the Breaking Tunes platform, Irish artists can then benefit from the Ireland Music Week showcase platform and funding to play at other key showcases (such as Eurosonic, SXSW, The Great Escape and others). The attention to making the resources fit the needs of artists developing through the pipeline, including inviting professionals to IMW that have been very clearly matched to the artists performing, etc., has over the years produced effective results. For example, artists such as Fontaines, Hozier and Pillow Queens and many others have at earlier stages of their careers made good use of the career development pipeline.

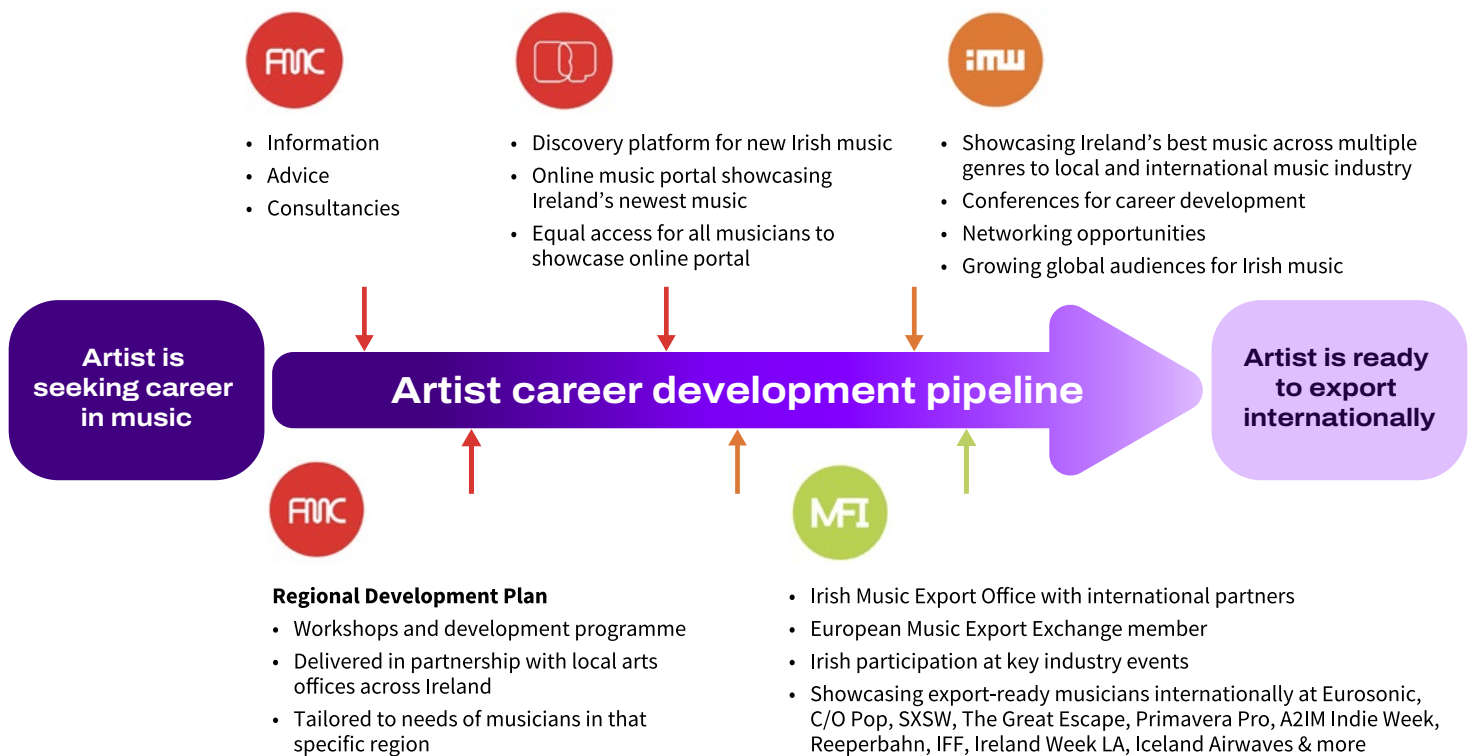


Figure 7. FMC's Artist Career Development Pipeline. (source [FMC website](#))

As more developed strategies remain mostly internal to the organisations, **activity reports** can provide the most detailed insights into how the MEOs work and what they do. Still, in most cases (17) such activity reports are prepared and provided directly to the funders and are not public. Three organisations do not compile any annual activity report (funders request only project-based reports). In 11 cases, the MEOs provide publicly available activity reports in various formats.

Examples of public activity reports:

Kultur | lx Arts Council Luxembourg

Kultur | lx provides a thorough annual activity report (in French) on their [Media & Resources](#) page. The report covers all programmes and activities, provides full lists of beneficiaries and the support they have received, and also useful break-downs of grants and activities per sector. For example, the music sector has received 30,6% of the overall support given. Each activity is described briefly through articulating the target groups, goals and results of the activity. The report also gives an overview of the governance and finances of the organisation.

Music Finland

Music Finland provides a dynamic webpage view in Finnish ([Vuosikertomus 2022](#)) of their annual report consisting of six articles and providing insights into the year in terms of main activity lines, actions, output statistics (numbers of participants and beneficiaries, support given by type, events, etc.), general management and financial reports. The report also features insights from the Finnish music industry and music export reports, prepared and published by Music Finland's in-house research team.



Austrian Music Export also has a dedicated website in English to [Activities & Projects](#) which contains links to annual reports, such as [Activities 2022](#). The report provides a narrative overview with pictures and links to media about music export projects and initiatives, festival highlights, communication, fairness and action, and an outlook for the next year.



Music Export Ukraine provides a website in English for annual activity reports for the past five years (2015-2018 is in one), for example, [MEU - Activities 2023](#). These pages provide overviews of all major projects done in the given year, links to articles written by and about them and their activities.

2.3. Target groups

As outlined before, music exporters are artists, creators, professionals and music companies who work with them – all of them have a role to play in taking music across borders. These are, therefore, the natural target groups of the MEOs in the general sense. The main casual categories used for target groups are “artists” (including implicitly not only performers but also creators) and “professionals” (which can refer to an independent individual or a representative of a music company). In some cases “music companies” are also the focus. It is often unclear (and in some cases fuzzy in principle) whether the “artist” category includes both natural persons and self-employed or otherwise registered artists.³⁴

All in all, almost every MEO reviewed works with “artists” (with only one exception which is also now changing towards an all-inclusive approach). 26 of the 29 work with “professionals” and 25 with “companies”. The few cases that exclude professionals and companies all have to do with eligibility rules for funding. The PRS Foundation’s “International Showcase Fund” is focused on supporting artists’ international activities, though the application can also be submitted by the management³⁵. Furthermore, they also run programmes which support professionals such as [Keychange](#) and [Power Up](#). Similarly, MFI provides funding for artists (band members + one sound engineer). Puglia Sounds cannot provide support for the companies for specific regulation reasons. Initiative Musik used to be limited only to funding artists, however more recently they have opened programmes that also target professionals. Restrictions for participation in programmes might also be based on the limits the funders set on the use of the funds. For example, Music Estonia’s programmes that were financed by Enterprise Estonia from the EU structural funds were limited to legal entities.

A specific concept is often used to refer to the artists who are or should be in the focus of the MEO’s main activities: the **export-ready artists**. This is an informal phrase which mostly is not defined in any specific way and reflects an intuitive set of characteristics. However, a few MEOs have articulated what they mean by export ready.

34 — The status of artists is different in Europe and the general profiles of natural persons vs self-employed persons can also vary, i.e in some countries also natural persons can issue invoices, while in others this is not possible, etc. Diving into this issue exceeds the space of the current report.

35 — See here for eligibility: [International Showcase Fund – PRS Foundation](#)

Who is export ready?

What is export ready? – Iceland Music

“There are a number of criteria that artists and musicians must satisfy in order to be considered export ready. These include, but are not limited to:

- Having released music which is available on all major streaming services, such as Spotify or iTunes.*
- New work must have been released by the artist in the last five years.*
- The artist must have had experience playing music to a live audience.*
- There must be a defined structure around the music project. Artists may be asked to demonstrate that they have given thought to marketing efforts around their music, or that they have worked with an entourage: managers, record labels, promoters or other music industry outside of Iceland.*
- Artists must have promotional material available on the internet, such as in the form of pictures, music, a homepage or social media presence”.*

What artist is “export ready”? – Music Export Ukraine

“There are a number of criteria that artists must meet in order to become export ready. The artist should have TWO or more of the following:

- A manager with an international network*
- An international agent*
- A publishing deal*
- A growing momentum (industry/media buzz)*
- Publicity in influential international media*
- Proven interest from international events/festivals/venues*
- International distribution through established channels*
- A label with a focus on export and intentions of working internationally*
- A professional set up (manager, label, agent, etc) for domestic market*

Artist also needs to have an online portfolio:

- *Social media ready (Facebook, Instagram, SoundCloud, profile on streaming services, YouTube channel, website)*
- *Your press-pack (EPK) ready: 3-5 nice photos, links to live performance, 1-2 links to singles, press releases in your native language and in English, quotes from media about your music, everything available with the link.*
- *Contacts of your manager/tour manager”*

Frame of Action – Swiss Music Export

“Swiss Music Export supports the work of artists identified as having a realistic chance of success in their respective target market. Their music must show clear export potential. They must also demonstrate the existence of a realistic and promising export plan”.

2.4. Focus scenes

Do MEOs work with all kinds of music or are some scenes in focus and others excluded? In short and in general, 14 MEOs are genre-agnostic and open to working with all kinds of music. 15 MEOs are focusing on some kinds of music and excluding others. However, a “genre” is a vague and problematic term for categorising artists and professionals as there are several contextual aspects to take into account to understand what this means in practice.

The description that some music scenes are “excluded” can be misleading and misrepresent the context. As already explained in the EMES study, the “genre” focus of most MEOs grew out of prioritising those scenes that were previously left out of cultural / music policy purview and neglected in terms of investment into the development of artists, professionals and infrastructure. For example, hip hop, rap, metal, various styles of electronic music, etc. – often referred to more broadly as “popular” music. Historically, these music scenes were perceived as commercial, market funded and therefore self-sufficient.³⁶ In summary, it’s a logic of inclusion rather than exclusion. By now, some of the MEOs have broadened their scope to include all kinds of music scenes, while others have kept some form of focus on the, variously interpreted, “popular” music scenes.

36 – See also the EMES study, p 51.

The 15 MEOs that limit their focus to certain kinds of music all exclude working with the so-called classical music sector (a broad term that covers several sub-scenes in itself). Mostly, it is assumed that classical music is embodied by the bigger institutions and collectives with a typically solid public funding base of their own. Given the very limited resources and small size of most of the MEOs, there is little they could offer to these bigger institutions.

9 MEOs aim to include all other than classical music (in the above definition) and what can be described as a local version of *schlager* music. This includes contemporary art music (sometimes also contemporary classical) in their focus, which mostly means working with composers and solo or smaller groups of performers rather than bigger collectives.

4 MEOs focus on so-called popular music only – a complex term with many potential meanings. In general and most aptly in this case, “popular” means everything outside of classical, contemporary, jazz and traditional / global music scenes. An admittedly fuzzy description. In all four cases, the rationale for this is a division of roles and areas of responsibility (and funding) in the music ecosystem – the aforementioned music scenes that are not part of “popular music” are funded and taken care of by other organisations.

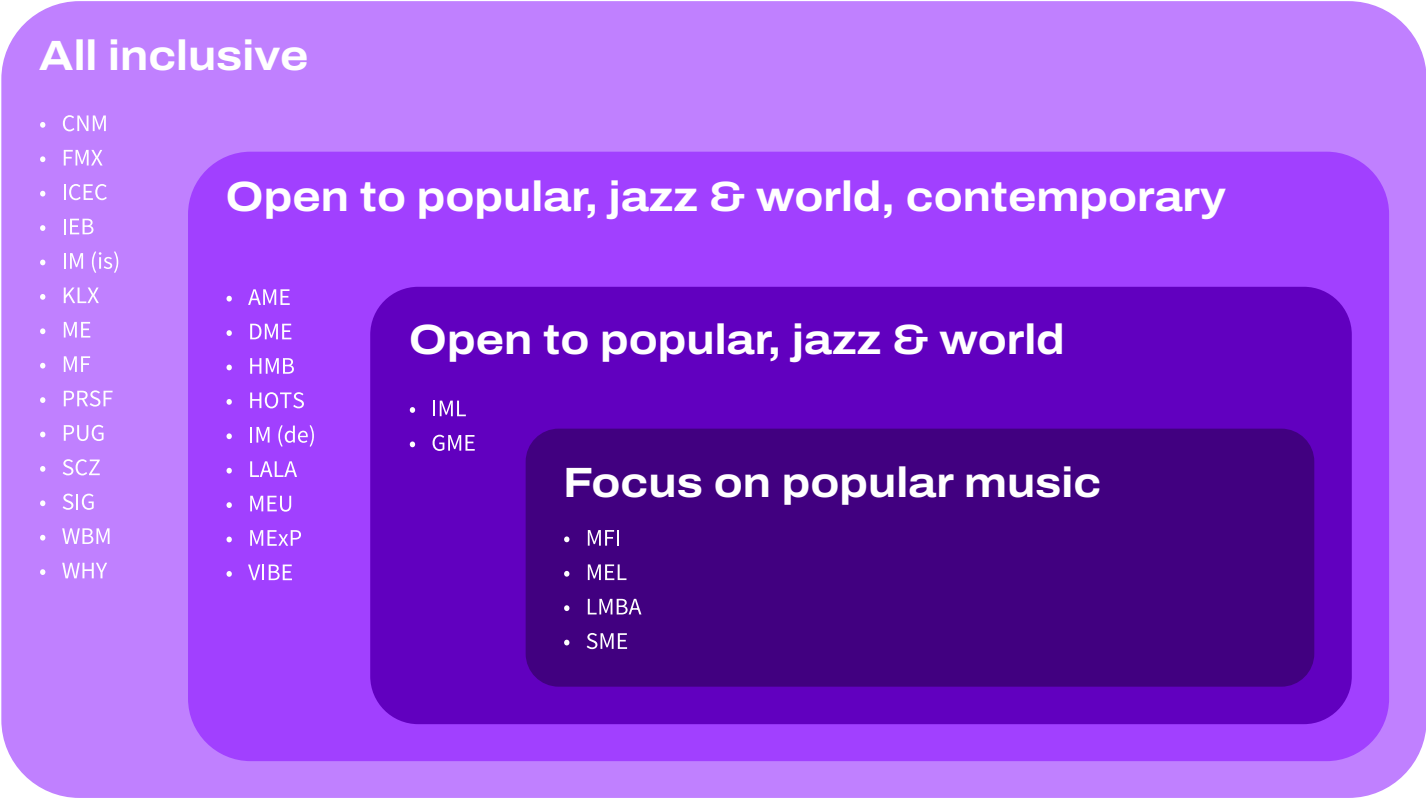


Figure 8. Which music scenes MEOs work with.

It must also be noted, that when an MEO is by principle agnostic towards music genres and thus open to working with artists and professionals from

all music scenes, it doesn't mean this happens in practice. In many cases, the MEOs admit that in reality, it is still mostly only certain scenes that are more represented in the programmes and funding.

A useful aspect to analysing this is not through a principled stance of openness or focused exclusion, but rather which support methods are applied, programmes designed and which international events are most often visited. Such an instrumental approach is best captured in the Swiss Music Export definition of their focus: “Pop” is defined by SME in its broadest way as “music whose business methods fall within the framework of pop or rock music and which can usefully be supported with the tools available to SME”.³⁷ This is echoed in the interviews with many other MEOs – it is about the core methods and approaches in the MEO's toolbox and to which types of artists and professionals from which music scenes can they be most helpful for. Rather than a principled stance, it is about the capacity and resources needed to provide a wide-enough selection of programmes to potentially cover all music scenes and their specific needs.³⁸

2.5. Focus markets

The concept of “target markets” features prominently in the generic vocabulary of export development. A target market refers to a strategic prioritisation of certain countries or regions for a sustained presence and long-term results. For MEOs, there are three different perspectives from which to think in terms of target markets: (i) pro-active leading; (ii) following the industry (bottom-up); and strategically following high-level political / policy priorities (top-down).

Pro-active leading refers to MEOs developing knowledge, networks, presence and opportunities in a market over a longer period of time. This might include organising delegations to professional events or independently; inviting professionals to visit, network and see local talent; incentivising artists and professionals with targeted funding opportunities; and developing longer strategic cooperation programmes, that might include artistic exchange, co-creation, B2B networking, etc. Such a proactive approach requires basic financial stability and a longer planning horizon, and staff capacity to invest time in and grow their expertise and contacts. Finally, the target market must be interesting for a critical number of artists and companies, although such interest can be cultivated by MEOs through researching, establishing connections and communicating to the industry the potential opportunities.

37 — In this direct quote, “pop” music can be interpreted broadly, as the same as “popular” music.
Source: <https://swiss-music-export.com/infos/info-desk-sme/>

38 — In 2023, the EMEE forum focused on how to work with niche and under-represented music scenes and helping them develop export capacity. These include among others electronic music scenes, metal, contemporary art music and hip hop & rap – for all these scenes and others, the MEOs are looking for new and more specific ways to work with.

Following the industry refers to the MEO providing open and flexible support measures that allow artists and professionals to develop their own strategic priority markets. In some cases when there are several artists booked for a showcase festival, etc., the MEO might also attend to provide promotional and networking support. The MEOs in general have a fairly good overview of the general preferences and interests of the artists and professionals. Firstly, through informal consulting and advising and, secondly, through funding applications (for those that operate grant programmes).

Political/policy priority markets, given that they are identified by the government or public agencies, might provide an opportunity for the MEO to align activities, attach them to high-level delegations and networks, or in some cases access specific funding around these priorities.

Following the industry and its priorities is the default approach of nearly all the MEOs and for good reason. Music is not one market, but many – each genre is a market as well as each sub-sector and these operate on several levels, between major businesses vs independent operators. For smaller and even medium-sized countries in Europe, it would be difficult to mobilise a critical number of artists or companies in all music scenes or sub-sectors at any given time. More importantly, each artist’s career path is unique and it is notoriously difficult to anticipate who will attain success where, when and through which strategy. Artists and their teams themselves run increasingly data-led strategies, following where the audiences are. Therefore it makes sense for the MEOs to be led by them.

Accordingly, all MEOs to some degree, subscribe to this reactive follow-the-industry approach. At least 12 MEOs can be described to have a pro-active leading approach as well and 5 describe specific ways there are priority markets marked at the political or policy levels.

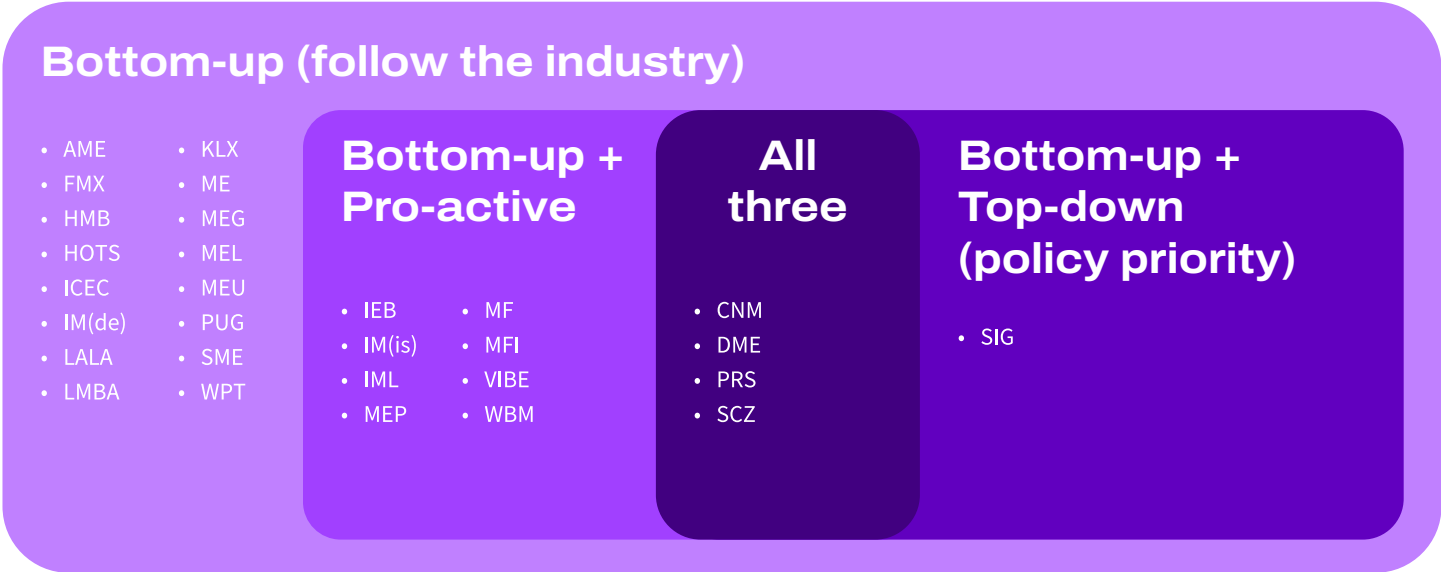


Figure 9. How MEOs combine approaches to setting strategic target markets.

Example: Priorities of the Netherlands' international cultural policy

For each of the 4-year cycles of the Dutch cultural policy, the Ministry of Culture assigns international cultural policy focus territories. These have three objectives: (1) a stronger Dutch culture sector; (2) more room for the arts to contribute to a safe, just and future-proof world; (3) cultural diplomacy. For Dutch Music Export this sets funding priorities – 75% of the funding needs to go towards these territories.

For objective 1 the focus territories are Belgium (Flanders), Brazil, China, France, Germany, Indonesia, Italy, Japan, Spain, South Africa, South Korea, Turkey, United Kingdom, United States.

More information: [Priorities of the Netherlands' international cultural policy](#)

In terms of which countries are a priority, the most common principle is that **neighbouring markets** are the most important ones. Most MEOs do not have more specific statistics regarding where artists from their countries perform. Those that provide grants have a better overview of the degree to which artists who are beneficiaries of the grants represent the broader sector. Here, the pervasive lack of data on the circulation of artists and repertoire is hindering a better overview of the overall music sector mobility. Based on the interviews, the general priority list seems to be: neighbouring markets, Europe in general, the US and North America, the UK, Asia, and Latin America. For regional organisations (i.e. IEB and ICEC), the national market is also an important consideration.

Example: The target territories

The two examples illustrate well the dominance of interest among the artists and professionals towards the neighbouring markets. In these cases, they are strengthened by the shared language area.

Swiss Music Export provides a breakdown of the target territories of the artists and professionals supported through the “Business Support” programme.

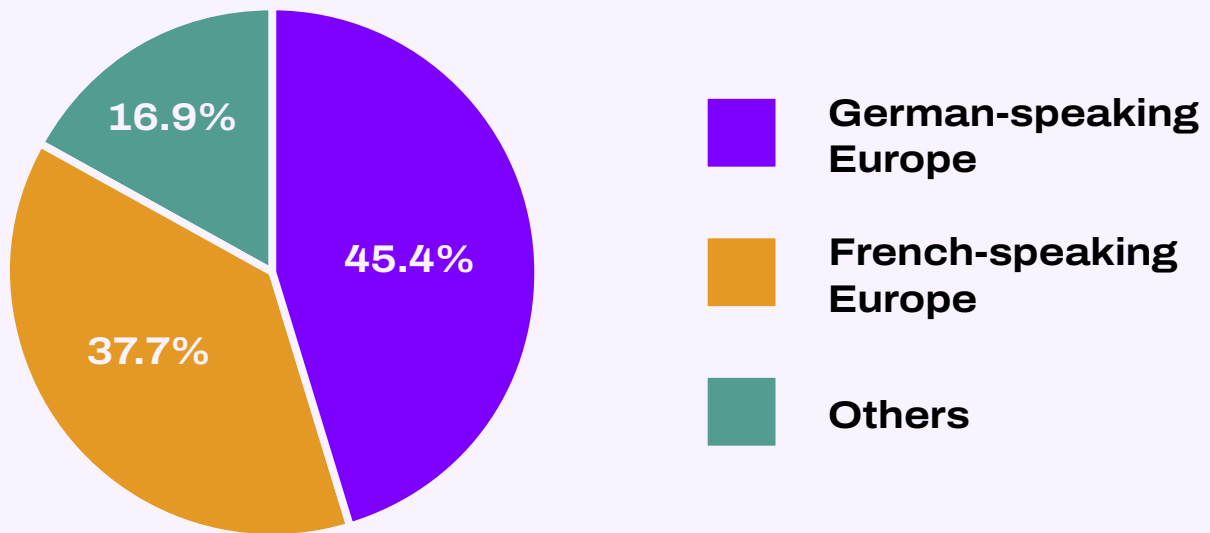


Figure 10. the target territories of Swiss artists in 2021.³⁹

Kultur | lx provides a thorough breakdown of which countries were targeted by the projects supported (not music-specific).

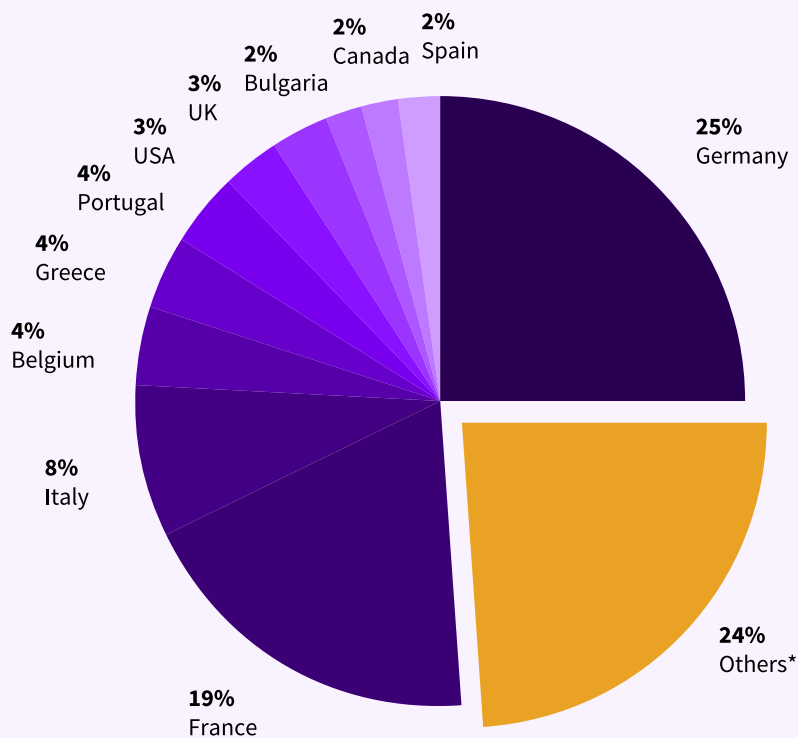


Figure 11. Target countries for support in 2022 in Kultur | lx.⁴⁰

* Others: Argentina, Austria, Chile, Cyprus, South Korea, Croatia, Denmark, Estonia, Finland, Hungary, Japan, Lebanon, Lithuania, Macedonia, Mexico, Norway, Netherlands, Poland, Czech Republic, Romania, Serbia, Singapore, Slovakia, Slovenia, Sweden, Switzerland, Taiwan, Turkey, Vietnam

39 —Source: Activity Report SME 2021, p 14. Online: [Swiss Music Export » About SME](#)

40 —Source: Activity report 2022, p 26. Online: https://www.kulturix.lu/wp-content/uploads/2023/03/KULTUR-LX-Rapport-Annuel_2023_M.pdf

In summary, for the MEOs it is only reasonable and practical to think in terms of concrete target markets when they have the capacity and resources to lead a longer-term strategic development and presence there, or these are emerging from the preferences of the artists and professionals. This is most obviously the case of neighbouring markets – they are target markets because the artists and professionals consistently prioritise them. In general, rather than fixing a list of target markets, the MEOs benefit from having a dynamic methodological approach to accommodating the emerging needs of the artists and professionals and being able to react to their preferences, at least to a reasonable degree. Increasing the ability of the MEOs to assume proactive leadership in developing non-European markets means overcoming the natural limitations of small countries and music ecosystems and thus points towards European-level cooperation as a method to do so.

2.6. Governance and structure

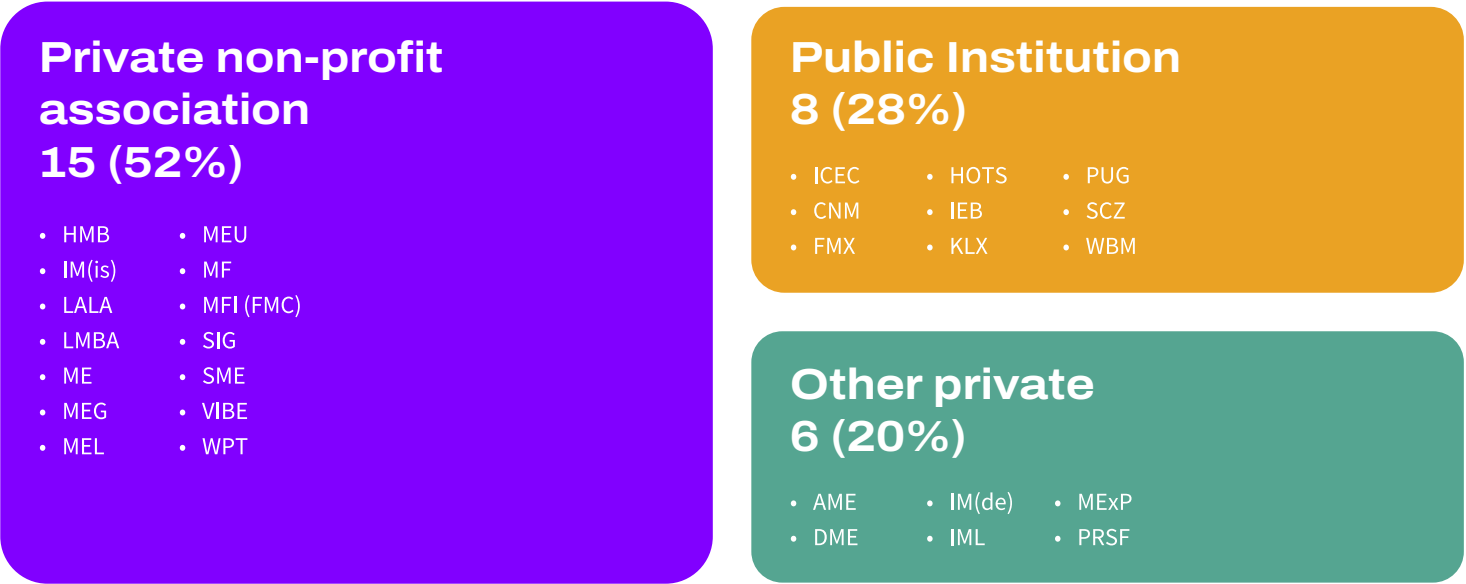


Figure 12. Legal status of MEOs.

About half (15) of the MEOs mapped are private **non-profit associations** and these include: Hamburg Music Business, Iceland Music, Lala Slovak Music Export, Lithuanian Music Business Association, Music Estonia, Music Export Greece, Music Export Latvia, Music Export Ukraine, Music Finland, First Music Contact (the operator behind Music From Ireland brand), SIGIC (Slovenian Music Information Centre), Swiss Music Export, VI.BE and Why Portugal.

6 MEOs are other **private organisations**: Dutch Music Export, Italia Music Lab and Music Export Poland are foundations, PRS Foundation is a charity and Initiative Musik is a gGmbH.⁴¹ Austrian Music Export is structurally a joint project of two parent organisations: MICA – Music Austria, best described as a music information centre, and Austrian Music Fund. Both parent organisations provide a project manager, other staff and funding for the AME project.

Six MEOs have an open memberships structure: Music Estonia, Lithuanian Music Business Association, Music Export Latvia and Hamburg Music Business are membership organisations for music companies. Italia Music Lab was founded by SIAE (the CMO for authors in Italy), who remains a permanent member of the foundation, but other private or public entities can join as ordinary members.⁴² SIGIC is a membership organisation for natural persons, with the statutes declaring that “any citizen of the Republic of Slovenia who is active in the field of music culture” can become a member.⁴³

There are 9 **public institutions** among the MEOs and these present a diverse landscape of organisational setups.

ICEC or **Catalan Institute of Cultural Enterprises** is a public institution of the Department of Culture of the Generalitat de Catalunya that works for the development and consolidation of the cultural sector.⁴⁴ ICEC has sectoral departments, including one for music, and then independently an internationalisation unit (*mercats*) which includes a music project manager and four external offices in Berlin, Brussels, London and Paris (for all fields). The brand for internationalisation is “Catalan Arts”.

CNM or **Centre national de la musique** is a new public institution created under French law in 2020. In music export development it was preceded by one of the oldest MEOs in Europe **Le bureau export**, which merged into CNM among many other sector organisations. CNM has an internationalisation team with links to an observatory and also a department of EU affairs.⁴⁵

FMX or **Faroe Music Export** is the music export platform for the Faroe Islands, founded in 2019. Essentially a government office, part of the Ministry of Foreign Affairs, Industry and Trade, and working closely with the Ministry of Culture, FMX works at an industry level to support the export of Faroese music.⁴⁶

41 — In full, *gemeinnützige Gesellschaft mit beschränkter Haftung* or a non-profit company with limited liability under German law.

42 — Source: Statuto Della Fondazione Italia Music Lab, (3).

43 — Source: Constitutive Act. Sigic - Slovenian Music Information Centre, Association, article 9.

44 — More info: [Qui som. Institut Català de les Empreses Culturals](#)

45 — More info: [About us - CNM - Centre national de la musique](#)

46 — More info: [About - FMX](#).

HOTS or **Hungarian Oncoming Tunes** is the music export brand for supporting and educating Hungarian acts to expand their activities on an international scale. HOTS is operating within Hangfoglaló, a subdivision of the National Cultural Fund in Hungary, coordinated by Petofi Media Group Nonprofit Kft.⁴⁷

IEB or **Institut d'Estudis Baleàrics** is an organisation created by the Government of the Balearic Islands for the promotion of the language and culture of the Balearic Islands. One of the strategic aims of the IEB is the consolidation of the Balearic islands as a structured cultural market and the promotion of the islands' culture, including music, undertaken among other things via BCULTURE brand, grant programmes and FIRA B! Showcase festival. There is a music department that manages the grants and FIRA B! And many other aspects of internationalisation.⁴⁸

Kultur | LX is the Arts Council of Luxembourg and was created in July 2020 as an initiative of the Luxembourg Ministry of Culture.⁴⁹ The MEO function was previously managed by music:LX which has now merged into Kultur | lx, becoming their music department.

Puglia Sounds is a project of the Puglia Region in support of Puglia's professionals and artists in the music sector. Puglia Sounds was born in 2010 and is implemented by the Teatro Pubblico Pugliese – Regional Consortium for Arts and Culture.⁵⁰

SoundCzech is a sub-office of the **National Arts and Theatre Institute** of the Czech Republic, performing a broad range of activities aimed at promoting Czech music in the Czech Republic and its export abroad.⁵¹

WBM or **Wallonie-Bruxelles Musique** is the specialised music agency of Wallonie-Bruxelles International (WBI) – a public administration in charge of international relations carried out by the Wallonia-Brussels Federation, the Walloon Region and the French Community Commission of the Brussels-Capital Region.

47 – Source: [Hungarian Oncoming Tunes](#)

48 – More info: [Institut d'Estudis Balearics. About us](#)

49 – More info: [About us - Kultur | lx](#)

50 – More info: [What is the Puglia Sounds project](#)

51 – See more: [About - Sound Czech](#) and [SoundCzech | Institut umění – Divadelní ústav](#)

2.7. Financial models

A note on methodology and limits on data

Due to some restrictions of using the financial data of some organisations and methodological difficulties of distinguishing music (export) related financial data from the larger organisational data set, the data used comes from a varying sample set. For example, for some organisations, the budget for music export-related projects and grants is available, but the budget for staff and overhead costs is not. For others, the overall budget is known, but the breakdown of certain types is not, etc. If the sample per example is less than the total (29), it will be marked.

In most cases, the data is for 2022, but in a few cases, it refers to an earlier year.

The income structure is known for all 29 organisations in terms of the percentage per type of source, but not in absolute figures. The breakdowns of both income and cost structures are averages of percentages and not calculated through the sums of absolute figures, thus ensuring that the averages are undistorted by the significant differences in the sizes of absolute budgets.

2.7.1. Income

The funding of the MEOs draws on a mix of sources, both public and private. In absolute figures (n=23) the funding mobilised across all sources is around 20 mln euros. Adding the best estimate for the ones with full data missing, the total of the 29 MEOs surveyed will likely remain between 22 and 23 mln euros. Given the significant differences in budget sizes (see figure 13) and the data gaps, breaking the income structure down based on the absolute figures would provide a distorted image. Therefore, in figure 14, the breakdown is presented as an average of percentages.

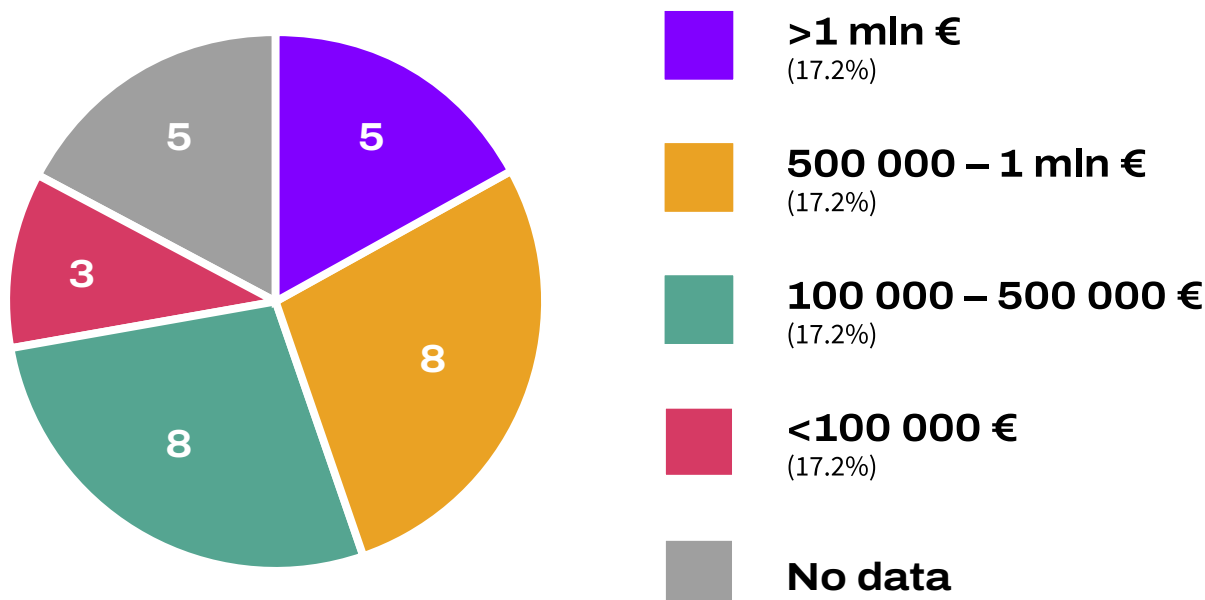


Figure 13. MEOs grouped by budget sizes in absolute terms (n=29).

Public funding plays the biggest role in the income structure, with 25 MEOs out of 29 receiving public funding in some form from various sources. While EU funds have been separated in the breakdown for clarity, these can be added to the general public funding share and thus arrive at nearly 70% of the overall funding pie.

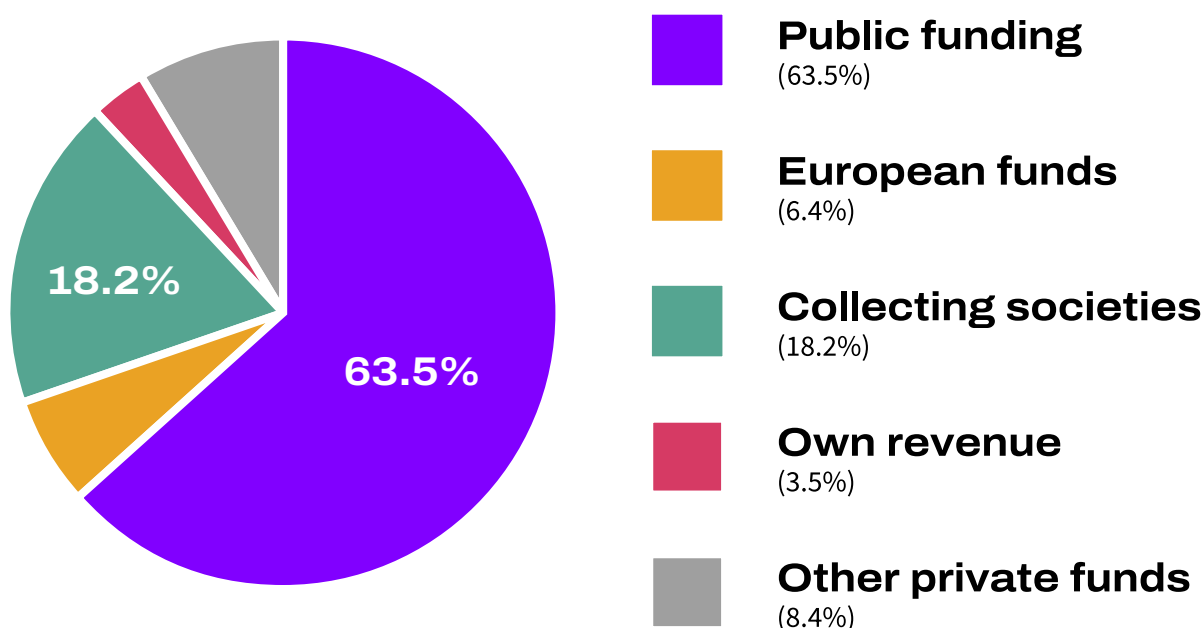


Figure 14. Breakdown of the sources of funding (averages of percentages).

Breaking the public funding further down (figure 15, n=25) shows that ministries of culture are the most important funders making up 37,3% of the funding pie. Arts councils and other similar funds (24,7%) are usually funded by ministries of culture and as a source reflects the particular national setup of the flow of funds to organisations. Therefore, it can be claimed that ministries of culture are in various ways contributing more than 60% of the public

funding. Regional governments (most importantly Catalonia, Balearic Islands, Puglia and the Faroe Islands) usually make up 100% of the funding of these regional MEOs. City funding in general is rare, though there are instances. Funding from ministries of foreign or economic affairs remain marginal (in 3 and 2 cases respectively), however, for those few this funding is an important element in the mix. Most clearly, for Italia Music Lab the only source of public funding is the Ministry of Foreign Affairs (or its agency), making up *ca* 16% of the overall funding mix. The other two MEOs who receive some funding from MFA are Austrian Music Export and Initiative Musik, but their share is fairly low. Two MEOs also receive some funding from the Ministry of Economic Affairs, Initiative Musik and Music Finland,⁵² with the shares being 11% and 21% of the public funding mix respectively.

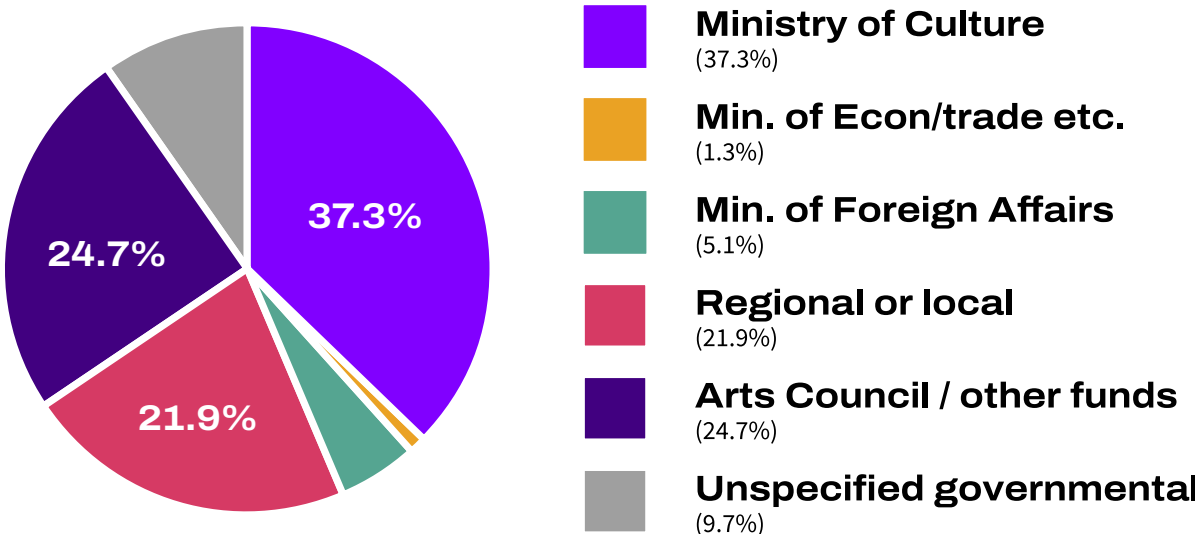


Figure 15. Breakdown of public funding sources (n=25)

An important private source of funding are the CMOs. For 3 MEOs funding from the CMOs makes up at least 10% (AME, ME, MF) and for 7 it makes up 50% or more (DME, IML, MEL, MExP, PRSF, SME and WPT).

In most cases, European project funding is an additional source covering additional project activities and does not figure in the budgets over a longer period of time. While in previous years the MEU financial model contained a mix of local and European funding, as of 2023, the EU funds are currently the only source of income they can operate with. Music Estonia has consistently participated in many European and other regional projects over the past year. The share of EU funds was high in the 2018 mapping (20%) and is currently around 31%.

In figure 16, the budget breakdowns of all 29 MEOs have been presented as relative shares by type. This view hides the significant differences in absolute sizes but makes clearly visible the prominence of public funding and also the CMO contributions.

52 — The Ministry of Economic Affairs and Employment of Finland.

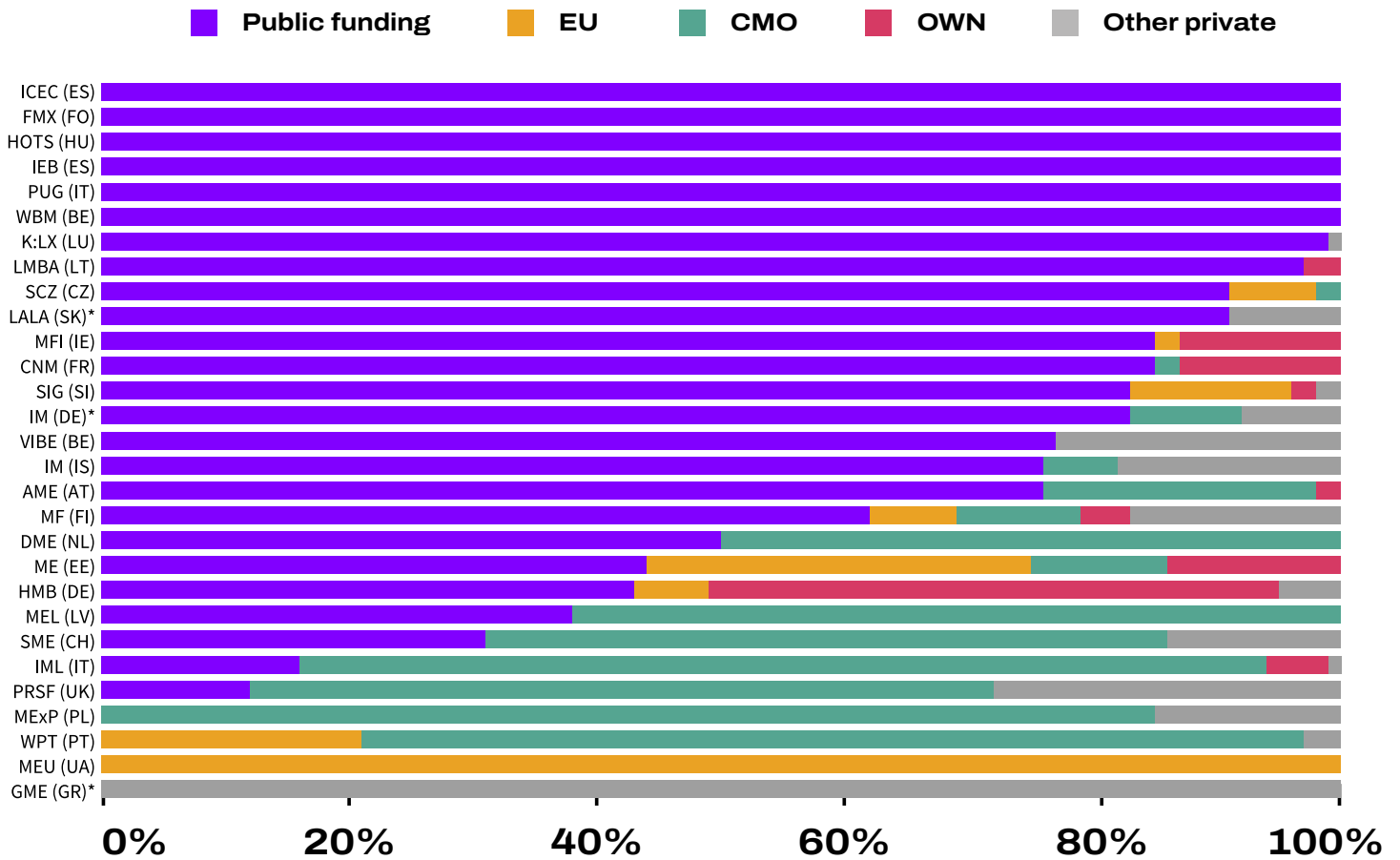


Figure 16. Share of funding sources for each MEO. (*2018 data).

Some MEOs earn revenue through membership, participation (as in workshops, etc.) or service fees. These and other diverse types of incomes generated by the MEOs themselves make up the “own revenue” category. Other private funds can include project funding, sponsorship, donations, etc.

2.7.2. Expenditure

The expenditure has been analysed into four main categories: staff costs, overheads, grants (funds distributed through programmes) and project activities (expenditure directly by the organisation). The latter category includes everything from the MEOs attending showcases, conferences and trade fairs to organising training, etc. As with income breakdown, the expenditure shares are averages of percentages and undistorted by the (differences in) absolute figures. In very general terms, as seen in figure 17, the costs fall into roughly equal three groups (staff and overhead together about 36%, grants 30% and project activities 35%). However, there is significant variance among the organisations (see figure 18).

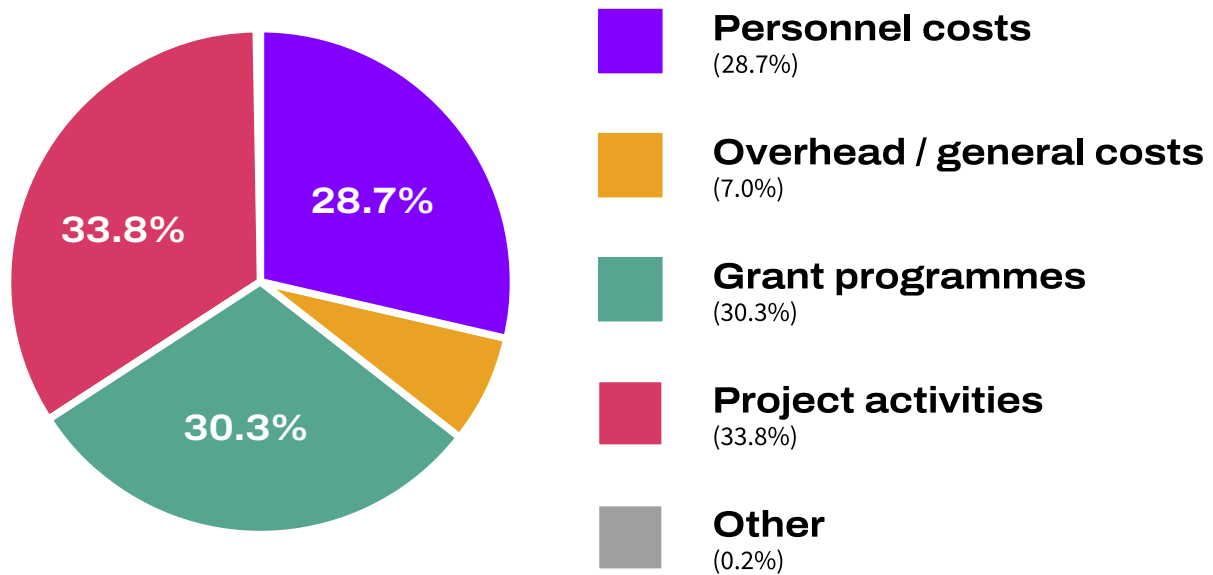


Figure 17. Breakdown of expenditures by type (averages of percentages; n=28).



Figure 18. Breakdown of expenditure per MEO. Staff and overhead costs have been summarised (n=22). *2018 data, **2021 data.

An important feature of an MEO is whether it provides direct support in the form of grants. In total, 21 organisations give some form of grants and in most cases (17) these are regular open-call programmes. Given the differences in the overall budgets of the MEOs it is hard to build a comprehensive comparative view, but having a view of the share of expenditure that grants make-up of the total expenditure can provide some insight (see figure 19). The selection has been anonymised due to restrictions around publishing financial data in some cases.

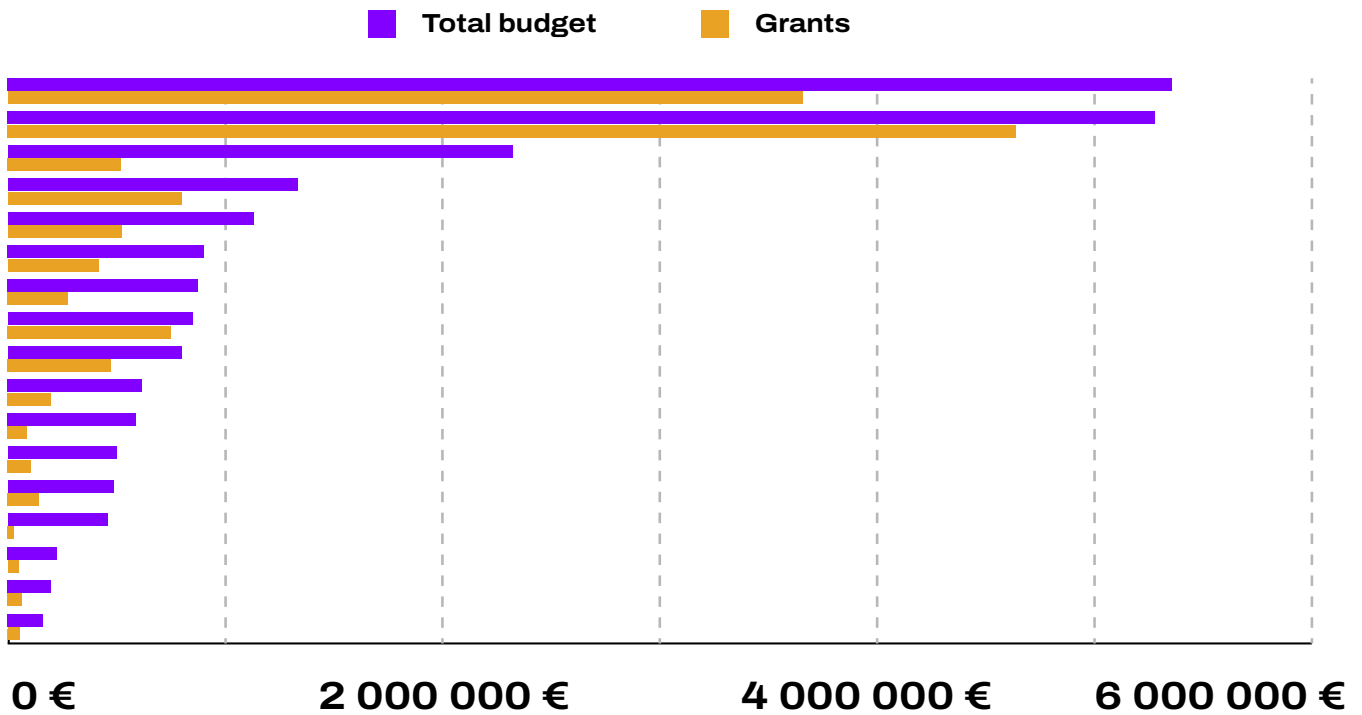


Figure 19. Total budgets and the share of grants in absolute numbers (anonymised, n=17).

2.7.3. Financial planning

The financial planning process is highly embedded in the organisational context and reflects other contingent aspects of the national or regional policy and funding ecosystems. More detailed mapping and analysis is needed to uncover the finer details of this aspect of the MEOs. However, in general, the following takeaways can be summarised from the interviews:

With a few exceptions the financial planning horizon is a year or less, meaning that some of the MEOs have to apply for various project funding within the same year which creates high levels of uncertainty for operational and strategic planning.

A symptom of this short-term planning is a systemic cash flow shortage especially at the beginning of the year for many MEOs.

As activities are often funded on a project-to-project basis and/or on a yearly project plan, any commitments to longer-term actions and cooperation will necessarily be constrained. Currently, the main alternatives are Creative Europe or other cooperation programmes that can provide funding for 3-4 year action frameworks and a significant increase in financial certainty.

2.8. Team size and time allocation

2.8.1. Team size

Most MEOs have small teams, the scale runs from <1 to 12 FTE. However, the comparison is at best indicative. There are methodological issues and a lack of more precise data to properly appraise the division of all functions across organisations. If an MEO is fully focused on working in the internationalisation/export development area, the team size is easy to ascertain. All functions, such as managing projects and grants, communication, consulting, administration, etc. are covered by the same team (with the caveat that some services might be outsourced, i.e. accountancy). However, in bigger organisations even if it is possible to distinguish the music or export team from the rest of the personnel and add up their FTE, the gains from other parts of the organisation for general support (communication, administration, IT, management, etc.) remain unaccounted for. Therefore, the FTE calculation is approximate at best. As can be seen in figure 20, 85% of MEOs work with teams under 5 FTE and 70% with 3 or less FTE.

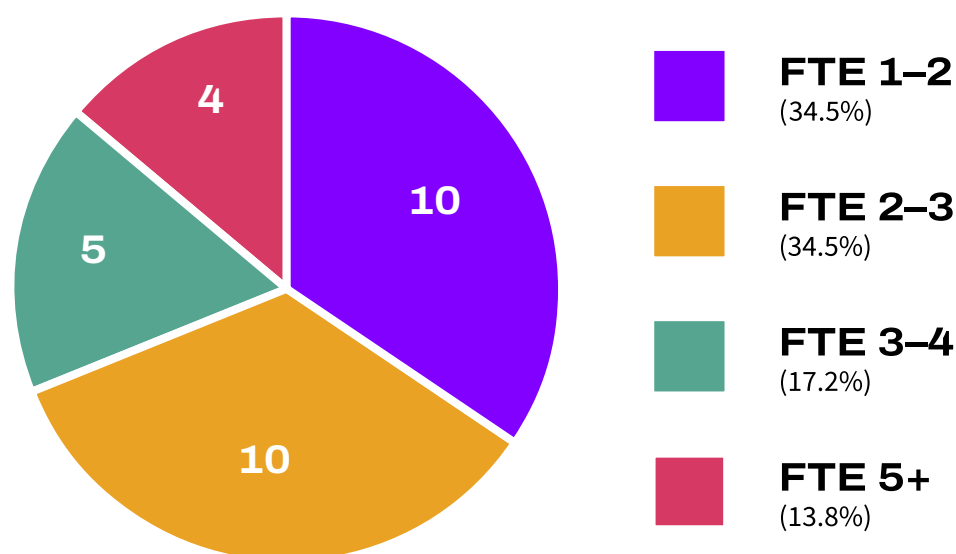


Figure 20. Team sizes, grouped by FTE.

2.8.2. Time allocation

Time allocation has been mapped using the EMES categories. Given that most organisations do not keep meticulously track of time spent per activity type, the breakdown shown in figure 21 is highly approximate and indicative. Adding CROSS and RISE (themes for exporting in Europe and internationally, respectively) together shows the MEOs spend *ca* 42% of their time on activities most directly related to supporting export – showcases, conferences, trade fairs, delegations and also cross-border co-creation. Adding LEARN (information)

and GROW (capacity building) provides the time spent on capacity building and the required information resources, together *ca* 30%. Unfortunately, there is no financial data to map time allocation on expenditures made. However, there are activities that only “spend” team time, that is staff costs. Most important of those is clearly consulting and advising artists, professionals and music companies (part of GROW) which on average might make up to 8-10% of the time allocation.

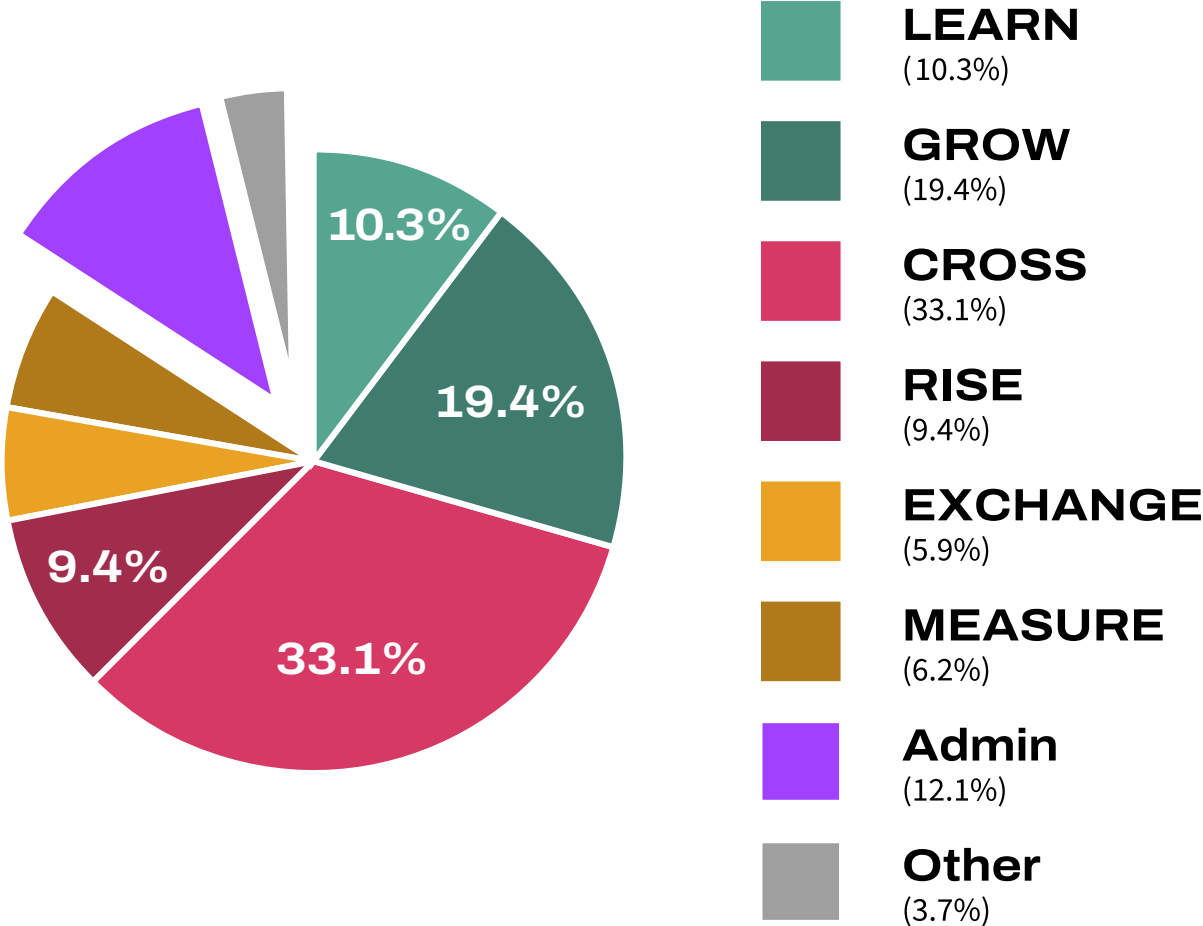


Figure 21. Time allocations of MEO teams per theme.

Example: Music Export Ukraine's approach to team building

As in many other countries in the region, the Ukrainian music industry lacks skilled and experienced professionals with different profiles to work with the artists and support them in their career and business development. To help mitigate this shortage, Music Export Ukraine has decided to invest time and resources into internships and take on board inexperienced, yet highly motivated people. The interns are engaged in particular projects whilst also receiving overall knowledge about the music industry. The internship lasts six months, after which interns can choose to stay and continue working on a particular project. The team at Music Export Ukraine has thus grown from the two founders, Alona Dmukhovska and Dartsya Tarkovska, to currently including five people and one intern, all part-time, adding up to less than 3 FTE.⁵³ In addition, some interns have “graduated” from the projects they were involved in at MEU and are now pursuing other activities in the sector. This approach leads to enhanced capacity within MEU as an organisation, while also contributing to the overall increase of skilled and motivated professionals in the Ukrainian music industry.

Due to Russian war against Ukraine, the team has been forced to find ways to work remotely, while dispersed across multiple countries – Germany, the UK, the Czech Republic and Canada, as well as Ukraine. The entirely project-based structure of MEU's activity and financial model is managed via weekly team meetings that include updates on ongoing projects and new opportunities.

53 – See more info: <https://www.musicexportukraine.com/about-meu/team>

3. How Music Export Organisations Operate

This chapter provides an overview of the various activities of the MEOs, organised into the 6-step development path as outlined in the European Music Export Strategy. As in the case of every framework or organising principle, it enhances some similarities while potentially de-emphasising the idiosyncrasies of the context and activities of each organisation. Therefore, for comparison to be possible, the different aspects of each MEO have been generalised and approximated. This is balanced with examples but fails to present the full diversity and richness of all what these 29 MEOs do in their national or regional music ecosystems.

3.1. LEARN

Strategic objective:

Relevant and up-to-date information and knowledge on music markets and industry trends is available for all European music professionals to LEARN and make active use of it.

To contribute to achieving the LEARN strategic objective, the MEOs have two key audiences: the **local artists and professionals** in their countries or regions that need information on markets and industry trends, etc.; and the **international professionals** who want to learn more about local artists,

industry and the market, how to find relevant partners and whom to contact. Therefore, LEARN can relate to collecting, curating and making information available in “passive” modes, whether on websites, or “semi-active” modes, for example sending newsletters, hosting videos, podcasts, etc. on other platforms and social media.

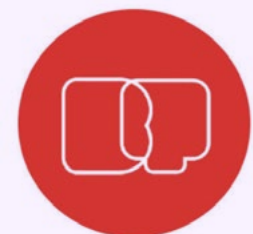
The MEOs often curate a rich selection of information either through their websites, newsletters or to a lesser degree social media. In a few cases, the MEOs have been instrumental in setting up stand-alone web pages and resources. The content hosted on MEOs websites can be organised as follows:

News – Most⁵⁴ (22, 76%) MEO websites reviewed host a news section, in most cases the news covers open calls, information about activities, programmes, etc. that the MEO offers.

Artist directory – some MEOs⁵⁵ (14, 48%) provide some sort of directory or database of artists. This can either be a comprehensive resource, aiming to host all internationally active artists, a listing of those artists who have been taking part recently in some of the MEOs programmes or have been supported by them, or a self-service platform that allows artists or their teams to manage and update the profile themselves (as is the case with SIGIC and Why Portugal). The main aim is to highlight the artists that international professionals might be interested in. However, there are notable challenges in keeping these resources updated or incentivising the artists (or their teams) to do it themselves. In two cases, special websites have been developed to provide artists with a sophisticated platform to make themselves visible and promote them through various ways: **Breaking Tunes**, developed by FMC and **What the France?**, by CNM.

Examples: Breaking Tunes and What the France?

[Breaking Tunes](#) is the “discovery portal and community for music on the Island of Ireland”, created by First Music Contact, the non-profit association running Music From Ireland (export office) and Ireland Music Week (a showcase festival). The purpose of Breaking Tunes is to “encourage community among artists as well as the scope to engage with the industry both



54 – AME, ICEC, CNM, DME, FMX, IEB, IM(de), IM(is), IML, LALA, KLX, ME, MEL, MEU, MF, PRSF, PUG, SCZ, SIG, SME, VIBE, WBM

55 – AME, DME, FMX, IEB, IM(de), IM(is), MEL, MEU, MF, MFI, SCZ, SIG, SME, WHY

in Ireland and globally”.⁵⁶ The website provides artists the opportunity to create their own profile page. Breaking Tunes is searchable and targeted towards a triple audience: artists, music industry professionals and the general audience. The recently revised website includes the following features: digital shopfronts, video display, high-res downloadable photos for artist EPK, Genre/County/Search navigation, gig listings, management info, and an “Artist Recommends” feature to allow artists to support their favourite Irish artists. A chart based on the most recommended artists (by other artists) is featured at the top of the landing page. Breaking Tunes hosts about 3700 live profiles

[What The France](#) is a website and a recommendation brand created by CNM that provides playlists, news and other content about the “finest music made in France”.⁵⁷ The website is provided in five languages (EN, FR, DE, ES, PT) and is linked to channels or accounts across many digital platforms: Facebook, Instagram, YouTube, Spotify, Deezer, Apple Music, YouTube Music, Napster, Qobuz and Soundcloud. It is also possible to sign up for a newsletter as well. There are currently nearly 300 playlists branded with “What the France?”. These can be charts & news, genre, theme, curator or events-based playlists.



Artist on tour info – in 8 cases⁵⁸ the MEO website offers some information on where and when artists from their countries or regions are performing in the world. Collecting this information is a difficult endeavour. In some cases, this can be available because these artists have been supported by the MEO (through providing grants), or the platforms allow artists to provide this information themselves. An innovative example is **Iceland Music LIVE** (see an example below) which is based on a semi-automated algorithm-driven system collecting relevant information from many sources.

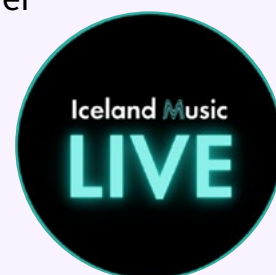
56 – Source: FMC website <https://www.firstmusiccontact.com/breaking-tunes-relaunch>

57 – More info: <https://whatthefrance.org/about-us/>

58 – AME, ICEC, CNM, IM(is), MFI, PUG, SIG, WBM

Example: Iceland Music LIVE

Iceland Music LIVE is a web resource providing a way to discover all concerts performed internationally by Icelandic artists. The “intelligent feed is updated automatically for you not to miss out on their upcoming concerts abroad!”. It allows one to search by artist, events and most importantly using a “near me” function. The artist page provides a list of concerts, links to artist resources and a Spotify playlist. Iceland Music LIVE is developed and maintained by Mobilitus Inc.



Business directory – having a well-categorised overview of the music companies in a country, whether management, labels, publishers, promoters, studios, etc. can be useful for an international professional to find a relevant partner. While MEOs serve an internationalisation/export development goal, they also have a mission to serve as a gateway of information that works both ways. 13 of the reviewed MEOs⁵⁹ provide some sort of a database of local music companies. In general, this is challenging for the same reasons as maintaining an artist database – updating it, or incentivising the companies to do it, requires a lot of capacity. The most comprehensive and developed business directory is hosted by **Music Finland** (example below).

Example: Music Finland’s business directory

[Music Finland | Your connections to the Finnish music industry](#) is a business directory containing basic information about more than 600 Finnish music companies. The directory is searchable by category of business, genre or simply by title.



Music sector/market overview – In addition to having access to artist or business directories, another useful resource for an international professional can be an overview of the local music market and sector. 6 MEOs⁶⁰ feature such

59 – AME, ICEC, FMX, IM(is), LALA, ME, MEL, MEU, MEXp, MF, SCZ, SIG, WHY

60 – AME, CNM, FMX, IM(is), IML, ME

resources in different ways with the most comprehensive overviews provided by **Austrian Music Export** (a revised version from 2021 can be downloaded), **Italia Music Export** – [Focus on Italy](#), and a selection of various reports also covering French music market and sectors in the **CNM Observatory** which offers studies both in [French](#) and [English](#).

Various editorial content – Some MEOs,⁶¹ partly because of their broader scope of activities, provide many kinds of other content besides regular news. These can be more detailed music scene and genre overviews, such as by **Austrian Music Export** and **SoundCzech**, or more thorough recent music curations, such as by **Lala Slovak Music Explorer**. Some also provide a rich selection of industry news, among others **VI.BE** and **CNM**.

Educational and other resources for the local industry – 15 MEOs⁶² feature some selection of resources for the local artists and professionals, ranging from contract templates (for example **AME**), various guides to the industry, links or lists of other resources, etc.

Export market profiles – specifically useful resources for export development can be market studies or overviews. A number of such are provided in the **CNM Observatory**, but also on the websites of **Music Finland**, **Iceland Music** and **Austrian Music Export**. In addition, **Hamburg Music** and **Why Portugal** (provided by AMAEI) make market reports available internally for members.

Playlists – 12 MEOs⁶³ also curate specific music playlists (all in Spotify). In two cases sending your music to be (potentially) featured in an MEO curated playlist is available via an open form. On the website of **First Music Contact**, under “artist area > Made in Ireland playlist”, it’s possible to find a form for sending one’s music to be added. Also, on the Icelandic version of the **Iceland Music** website (ÚTÓN), Icelandic artists can find detailed instructions and selection process for getting one’s music into the playlists.⁶⁴

All in all, **Austrian Music Export**, **Iceland Music**, **CNM** and **Music Finland** provide the most comprehensive set of resources on their websites.

In addition to website-based resources, the MEOs also use newsletters or targeted mailouts to share information both for the local industry and to international professionals. This can also include the special promotional newsletters that accompany showcase festival and conference presence. 24 MEOs provide newsletters in native language(s) to the local industry, some very regular

61 — AME, ICEC, CNM, DME, IM(de), LALA, KLX, MEXp, MF, SCZ, SME, VIBE, WBM

62 — AME, ICEC, CNM, DME, HMB, IM(de), IM(is), IML, LALA, MEU, MEXp, MF, SIG, VIBE, WBM

63 — AME, CNM, IM(de), IM(is), IML, LALA, MF, MFI, PRSF, SIG, SME, WBM

64 — You can find the instructions in Icelandic here:

[Lagalistar Iceland Music á Spotify og Apple Music – ÚTÓN](#)

(monthly, quarterly, etc.), some more needs-based. 14 MEOs also do English newsletters to international target groups.

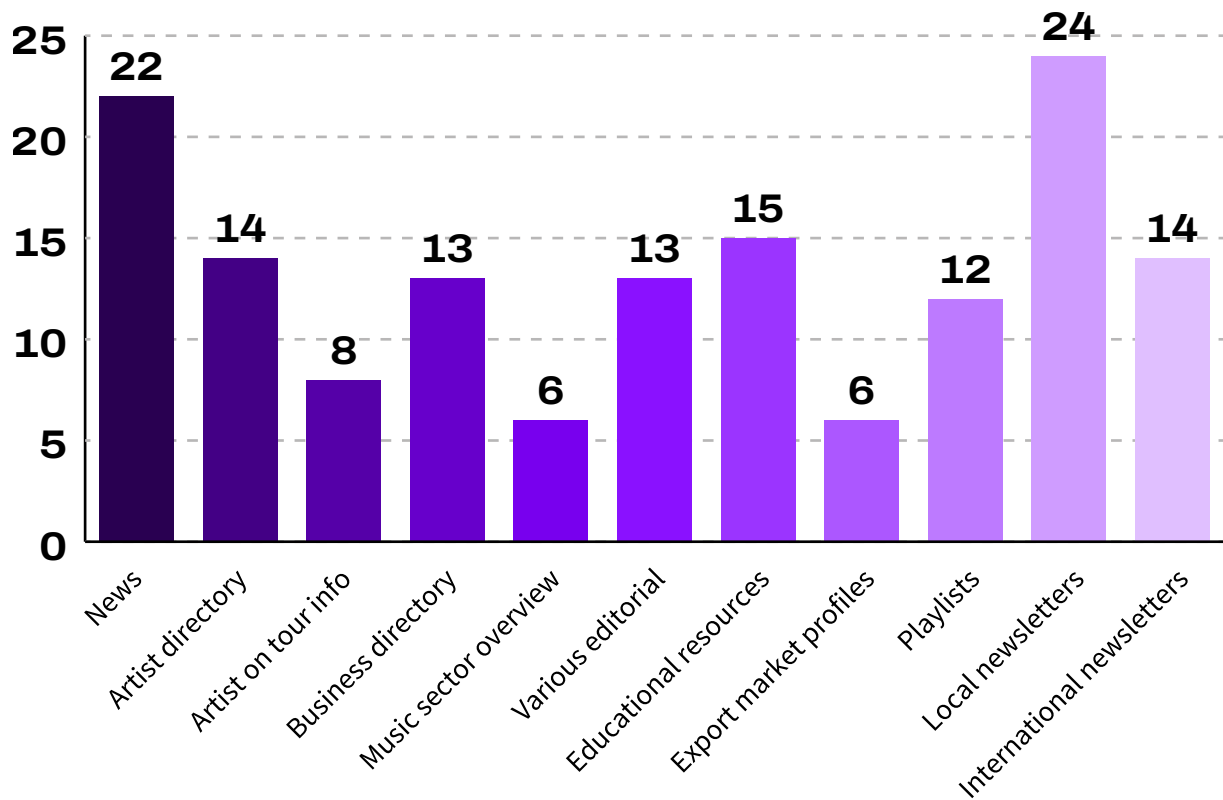


Figure 22. Types of information resources provided by the MEOs.

3.2. GROW

Strategic objective:

Artists, creators and entrepreneurs find a supportive environment to GROW their knowledge, skills, experience and capacity in every European country. This is made possible as the music ecosystems in Europe are well developed, constantly improving and providing artists, creators and music companies with the needed support to realise their full international potential.

When LEARN mainly includes passive or asynchronous ways to make information available, GROW includes all formats that are built on active participation. These are grouped into four: (i) **seminars, workshops and training programmes**; (ii) **consulting and advising**; (iii) **mentoring**; (iv) and **business**

development programmes.

The various ways the MEOs have found it necessary and feasible to help the artists, creators, professionals and music companies grow their music export capacity reflect their different organisational profiles and roles in the national or regional music ecosystems. Also, it naturally reflects their own organisational capacity in terms of team size, funding and other resources available. Finally, it also depends on what other resources and opportunities are available in the sector, from formal study programmes on the music business or informal education providers, and how active other organisations are, such as trade associations, unions or cultural centres, in providing the same or similar opportunities.

3.2.1. Seminars, workshops and training programmes

Seminars, workshops, masterclasses or other (mostly) standalone training events are the most flexible approaches to filling knowledge gaps in ways that are more involved and interactive for participants. Most MEOs organise these in some shape or form: 25 out of 29 organise them at least occasionally organise them and 12 fairly regularly.

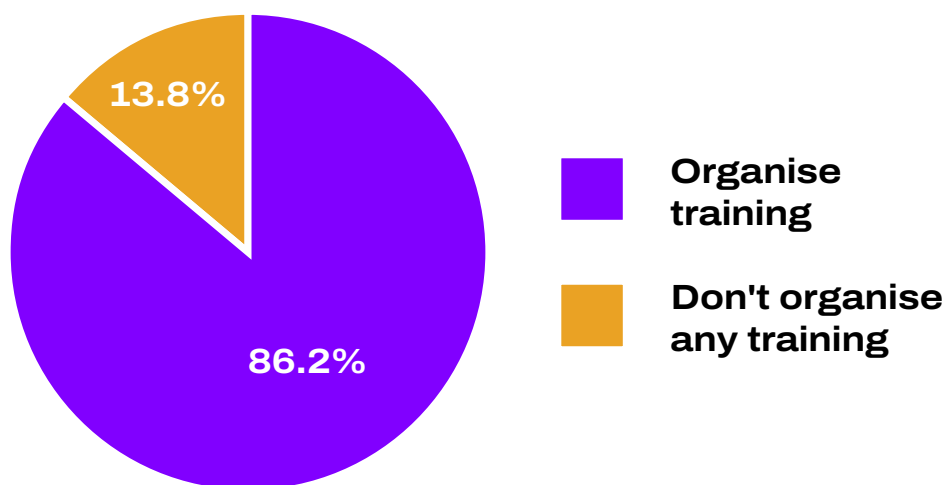


Figure 23. MEOs who organise seminars, workshops or other training events.

There are several rationales and an array of topics for the MEOs to organise such events around. Firstly, there are one-off preparatory seminars or workshops for artists and professionals attending showcase festivals and conferences. At these events they provide insights into how to plan and prepare for these events and participate in an effective way. There are always younger attendees for whom these events are new and they need to understand the basics. For more experienced artists and professionals, such preparation might also take the form of an individual consulting session.

Secondly, there are one-off needs-based events that focus on a particular

topic that is relevant at that time. These might be about industry or market trends or developments, specific market focus, digital marketing, touring strategies, career development, music production, copyright, financial management, pitching training, etc. Thirdly, some MEOs are organising more regular workshops or training courses to provide the basics or various skill upgrades for the music industry, etc. Finally, events might be built around and within more informal industry get-togethers. **Music Export Latvia** started such monthly industry meetups in Riga before the pandemic and reached up to *ca* 40 participants attending regularly. The COVID crisis forced the sessions online, but since then the interest has been returning steadily.

While **Austrian Music Export** and **CNM** organise a lot of events (around 40 and 50 per year respectively), most other MEOs organise less than 10 events per year.

Examples:

[Hamburg Music Boost](#) is a training course for employees, freelancers and music companies in the Hamburg music industry, fully subsidised by the Free and Hanseatic City of Hamburg (FHH) and organised by **Hamburg Music Business**. The topics on offer currently⁶⁵ are business English training for music industry professionals, strengthening and increasing the visibility of women in the music industry and mental health in the workplace. Another training programme that HMB is in charge of organising is the [Music Business Summer School](#) that has provided professionalisation opportunities for music publishing, live entertainment and recorded music areas for over 10 years.



[Eastern European Music Academy](#) is an initiative of **Music Export Ukraine** that has delivered several editions and cooperated with many other MEOs, including RAW Music and Lala Slovak Music Export for the 2023–2024 edition. EEMA is a “hybrid capacity-building project aimed at advancing the careers of independent music professionals from Bulgaria, Czechia, Estonia, Hungary, Latvia, Lithuania, Moldova, Poland, Romania, Slovakia, and Ukraine”. The 12 week programme consists of online workshops, practical assignments, a supportive and diverse student community of 50+ musicians and managers from



65 — At the time of writing this report in May-June 2023

11+ European countries, direct access to TOP level European and UK music business practitioners, and a fully covered alumni trip to one of the European showcases and conferences for the best students of the course.

In general, maintaining an active schedule or running regular programmes requires investment and capacity which for most MEOs is difficult to maintain outside of a specific project framework.

3.2.2. Consulting, advising

All MEOs provide some form of consulting and advice, mostly informally. This can range from administrative support eg. creating grant applications to mentoring-like one-on-one meetings to help artists figure out their international strategy. 7 MEOs have built up more structured approaches, providing a regular schedule, a way to book a meeting or a programmatic setting around consulting. The different approaches can be described as:

- Structured consulting: clients can book a meeting and often there is some preparatory guidance, either materials to read or preparation for the meeting.
- Ad hoc consulting: need-based meetings for various topics.
- Practical help and support around particular events or circumstances (i.e. planning a release).
- Phone calls to solicit professional advice: in some cases, the MEO representative is more often asked for their general industry background, knowledge and experience than being the representative of the MEO.

The number of such consulting or advice sessions per year can differ widely. In most cases, the estimations are very approximate and only in a few cases the amount of sessions has been recorded (i.e. in an activity report). Based on such estimates from 21 organisations (no data about 8 MEOs), *ca* 4100 contact sessions take place per year, ranging from emails and phone calls to prepared meetings of 1-2 hours (see figure 24).

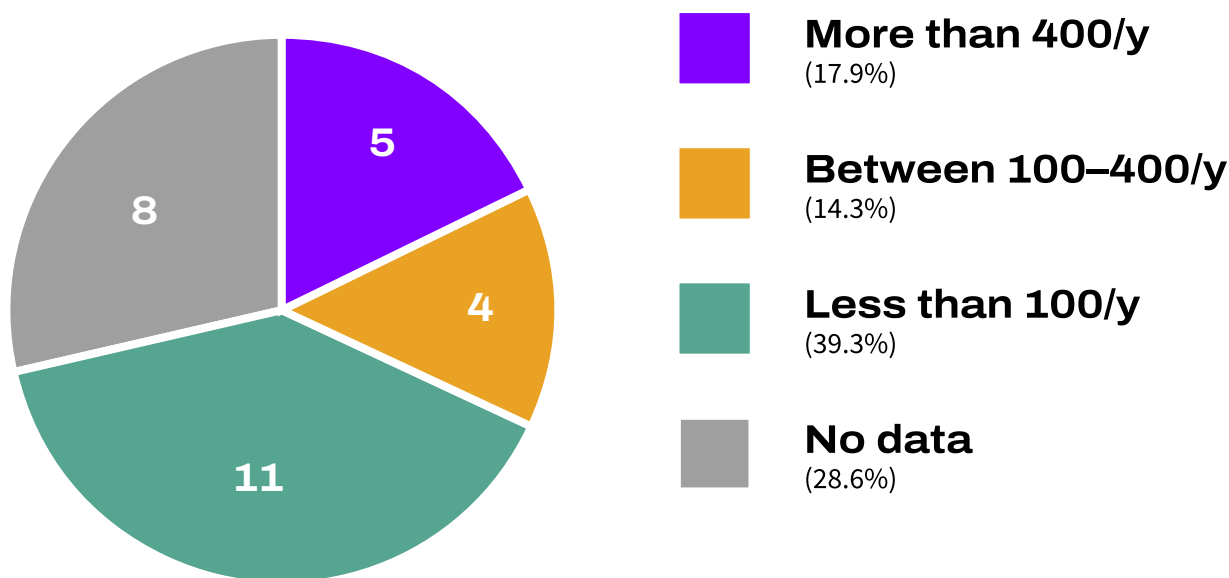


Figure 24. MEOs grouped by the average amount of consulting sessions per year (n=21).

A significant number of those (1400) have been conducted by **Austrian Music Export**, in all formats, whether meetings or phone calls. Most often the topics are contacts, copyright, contracts and funding. AME also provides template contracts for free. **Music Export Poland** also provides legal consultancy, offering free 30-minute slots with a specialist every Monday, for which they are seeing increasing demand.

Swiss Music Export reports about 200 sessions a year⁶⁶ on various topics, including preparing for showcases. **First Music Contact** (the operator of MFI) runs a programme for consulting artists (as part of the career development pipeline) that together with other advice adds up to about 500 sessions per year. Artists can book a consultancy through a form and Angela Dorgan, the CEO of FMC, consults 7 artists every Thursday.

Iceland Music through their ÚTÓN website provides advice for music projects that “want to succeed abroad”. Advice is given, for example, on concerts abroad and the selecting of markets, grant applications, showcase festivals and much more.⁶⁷ The website offers suggestions on how to prepare for the meeting (including reading the resources made available) and provides a form to book them. Similarly, **Music Finland** offers an option to contact Music Finland’s experts with individual questions or apply for personal coaching, where a Music Finland expert will help you refine your plans and goals related to internationalisation.⁶⁸ Furthermore, before booking, it is recommended

66 – Source: activity report

67 – Source, ÚTÓN website (in Icelandic): <https://www.uton.is/radgjof>

68 – Source, Music Finland website (in Finnish): <https://musicfinland.fi/fi/palvelut/valmennus-ja-mentorointi>

to read the “export guide”, a set of resources including how-tos and market studies.⁶⁹

A well-integrated, if not yet formalised, system is used in **CNM**. Professionals can request a meeting with an adviser where they present their project and international strategy, identify objectives and priority countries, what they are looking for and why. Currently, the setup is informal, but in the future, there will be a form to fill which will then help the CNM team to decide what the next steps should be and whether the professional is ready for a one-on-one with an export adviser. Information about the goals and priority markets will be recorded in a system of memos and shared with colleagues in other departments. For example, if there are enough professionals interested in a particular market, the observatory research team will know that a new study on that particular market is useful. It can also direct the export team to see what contacts they already have in place and prioritise creating new ones, attending professional events or inviting professionals to French events. All in all, the CNM export advisers might do more than 400 sessions a year, possibly more.

Finally, advising can turn into practical guidance, as happens often for Agnese Cimuška-Rekke, the CEO of **Music Export Latvia**. She will often meet with artists who have no management and try to understand their goals and aspirations, discuss how they work with social media and visibility, plan for releases, define their overall strategy, and help them find someone to work with. For many, establishing an understanding of the basic terminology is important. This will result in homework and Agnese will provide practical examples of how to put together a press release and help them make their first contacts in radio, press, etc. Later on, Agnese and her colleagues can serve as a quality check for the first steps of these artists. This manager-before-manager support is vital in the countries and music ecosystems that lack professionals to support artists. Such sessions might amount to 5-6 per week, lasting from one to several hours.

In summary, such contact with the sector, through more or less formalised and structured consulting, advising or even mentoring, is crucial to develop more organic connections with the artists and professionals, and have a better sense of what their aspirations, strategic objectives and preferred markets are. All 29 MEOs mapped engage in some form of consulting, but alongside expertise and experience in the team, it also requires staff availability. Given how the funding of most MEOs is very project activity-centric and more open-ended structural support to the organisation (including staff and overhead, etc.) is limited, it is hard for many MEOs to develop advisory capacity to a more structured level.

69 — More info (in Finnish): <https://musicfinland.fi/fi/kv-opas>

3.2.3. Mentoring schemes

Mentoring is a freely used term, but can generally be considered to mean “providing support, challenge and extension of the learning of one person through the guidance of another who is more skilled, knowledgeable and experienced”.⁷⁰ Mentoring is more than consulting and usually requires a longer-term process of several meetings. It is more demanding to set up a good mentoring scheme and therefore only 8 MEOs mapped currently engage with some form of mentoring, while many others would like to develop something in that space.

Five MEOs have a programmatic approach (see examples), including **First Music Contact** whose consultancy programme is essentially more mentoring and regular advising. **Austrian Music Export** and **Music Export Ukraine** have mentoring as part of a cooperation project. **Music Estonia** currently is running an on-demand consultancy and mentoring service⁷¹ with two options: one-time consulting meetings or a mentoring programme consisting of 5 meetings. It requires the applicant to fill a request, detailing their profile, plans and needs and requires a fee. A selection of mentors is provided on the website, but the ME team is ready to find and engage others if the brief requires it. However, such an on-demand and non-cohort-based approach is not used as much as other programmes were in the past. A similar tendency was tried at **Wallonie-Bruxelles Musique**, where a similar on-demand system was set up, free for the professionals. The interest and demand is there in the sector, but finding the right mentor can be a time-consuming process.

Many European cooperation projects focus on or feature mentoring as a component, for example, [MEWEM](#), its successor [SEWEM](#), [Keychange](#), [HEMI Music Hub](#) and others.

Examples: mentoring schemes

Musical escalator (*Hudobný eskalátor*) is a mentoring programme of LALA **Music Export Slovakia** that selects one specific artist per year and provides them with an international mentor, meeting on a monthly basis. Mentors select from the pool of applicants and the matches have been good as often the interaction lasts beyond the programme end. The outcome of the process is a well-developed vision for further career advancement. LALA has already run the programme through five successful editions. Every year brings more applicants and the main constraint to broadening the programme is funding.

70 — Quote by Andrew Pollard in “Reflective Teaching in Schools”, cited in: <https://www.ambits.eu/insights/mentoring-vs-coaching-the-differences>

71 — More info (in Estonian): <https://www.musicestonia.eu/mentorid>

Lentoon is a training programme by **Music Finland** intended for contemporary music composers in the early stages of their international career. Lentoon provides skills for building an international career and networks and develops participants' communication and interaction skills. The programme includes four one-day workshop-style training sessions and each participant also has the opportunity to receive personal mentoring with one of the program's domestic or international mentors.⁷²

[Export Artist Accelerator](#) was a “mentoring and coaching class for artists and bands in the beginning stages of their international career” organised by **Music Finland** in 2019 - 2021. The program included “coaching, practical work (including studio sessions and live performances) and network building. Each artist or band selected for the Export Artist Accelerator will also get their personal mentors for the duration of the class, as well as their own customised export plan”.

[Program Mentoring IV - Sound Czech](#) provides individual consultations on a pre-selected topic. During two meetings with a professional in a certain field (mentor), applicants will receive feedback and specific suggestions on how to proceed further. Artists apply, and mentors will decide whether to engage with the topic proposed.

Starters International Business is a scheme operated by the Dutch Ministry of Economic Affairs, specifically intended for Dutch small and medium-sized enterprises (SMEs) with international ambitions. In collaboration with **Dutch Music Export**, the scheme also applies to artists and music companies (through a legal entity) and can provide individual coaching. The scheme provides the applicant with a grant that can be used for hiring an experienced professional for mentoring.⁷³

3.2.4. Business development programmes

The last category of programmes for capacity building under GROW is loosely termed as business development programmes. These include more structured programmes targeting music companies rather than artists, however, often a way to develop your company within the constraints of a limited programme is through working with a particular artist project. 5 MEOs identify that they have business development programmes, while 4 concede that although they don't run any full programmes of this description, they have various components in other offerings that might make up this service when combined.

72 — More info (in Finnish): [Lentoon – kansainvälistymisvalmennus taidemusiikin säveltäjille](#)

73 — More info (in Dutch): <https://www.dutchmusicexport.nl/starters-international-business>

Examples:

Italia Music Export and Linecheck Music Meeting and Festival have been running four editions of **PUSH – an accelerator of Italian music export**, a program of tailor-made consultancy and matchmaking to enhance the export of Italian music. Every year teams are selected through an open call. For the 2023 edition, two labels/managers/booking agents will have the opportunity to introduce one artist and to participate in a two-month export growth process, including orientation meetings, targeted consultancy with experts from the international music industry and participation at Linecheck. The funding comes from the Italian Trade Agency. PUSH has taken place since 2018/9 and has developed over the years.⁷⁴

Musique l'image is a specific support program run by **Wallonie-Bruxelles Musique** that combines training, networking and presence in foreign markets with a focus on synchronising existing repertoire and creating new works for commission for the audiovisual industry. The programme is aimed at a selection of professionals over a period of three years. 20 participants will be selected, 50% are artists/composers and 50% labels/publishing companies. The programme offers a minimum of 3 face-to-face meetings & training sessions, important professional events in Europe and around the world, a 3-day trip to the Music & Cinema festival in Marseille, and a debriefing and closing meeting for the first part. The 2023 is a pilot and results will be evaluated for future learning.⁷⁵

Music Estonia ran a comprehensive export development programme **AMP** for both advanced and new music companies. The 15-month programme, which ran between 2020 - 2022, provided a set of activities for export capacity development to applicants with an export-focused project. The programme included export strategy analysis, eight sessions with an international mentor, involvement of an employee with sectoral knowledge (0.2 workload) in the company's activities during the programme, limited additional funding for each participant to carry out the activities of the export development plan, training, TMW passes and the opportunity to use ME's office for work and meetings, etc.⁷⁶

74 — More info (in Italian): <https://www.italiamusicexport.com/notizie/push-2023-lacceleratore-del-music-export-italiano/>

75 — More info (in French): <https://wbm.be/fr/soutiens/musique-limage>

76 — More info: <https://www.musicestonia.eu/en/programmes/amp-2>

3.3. CROSS & RISE

Strategic objectives for CROSS and RISE:

Artists, creators and music companies can easily CROSS European borders to present their music to audiences elsewhere in Europe – this is supported by strategic and administrative collaboration between national and regional public and private organisations, coordinated bilaterally and on a European level.

European artists, creators and music companies RISE to the global level, being competitive and successfully getting European music to be heard by music listeners across the world. This is supported by European, national and regional level strategic programmes and other collaborations.

While LEARN was about creating and providing information resources and GROW about increasing the music export capacity of music exporters, then CROSS and RISE are about doing music export itself. The two themes have been combined because from the perspective of an artist or music company exporting involves the same set of activities, irrespective of whether the target markets are in Europe or elsewhere. Going further requires more resources and can be more challenging, but not different in principle. For artists and their teams, export starts by crossing the border of one's home territory, not moving beyond Europe. Furthermore, digital distribution (although not equally the promotion) is nearly global from the moment of the release.

By extension, the same is true for the MEOs. The programmes designed and activities done to support music exporters for both CROSS and RISE, are in principle the same or very similar, regardless of whether the concrete actions are targeted in or beyond Europe. The main instruments are (i) financial support; (ii) using showcase festivals, conferences and trade fairs to amplify visibility and opportunities for artists and professionals; (iii) stand-alone networking delegations; (iv) local events and incoming delegations; and (v) co-creation formats. In practice, these approaches are often deeply and strategically intertwined.

3.3.1 Export funding

For many MEOs, providing financial support is the main instrument around which everything else has been developed. Providing funding is the most hands-off way to help the music exporters as everything else is up to them,

including using the funds effectively. In the past the funding has been focused on live performances and tours and the promotion around them. Now, it is increasingly diversifying across many types of activities and target groups, from artists and creators to also professionals and music companies. Furthermore, increasing the music exporters' capacity to use funds smartly has led many MEOs to run workshops or design elaborate programmes for capacity building.

The main aims of providing funds are focused around artist showcase performances and making the most out of those opportunities, networking at professional events, promotional activities around live performances or recorded music distribution and marketing and on some occasions various incoming delegations, such as visitor programmes, etc. In more recent years, funding participation in co-creation formats (songwriting or synch camps, residencies, etc.) have become ways to support and showcase creator talents.

For some MEOs, managing grant programmes is at the heart of their organisational structure and this is what they are also funded for. These are often public bodies, like Kultur | lx, IEB, ICEC or CNM, though there are a few private ones as well, such as PRS Foundation and Initiative Musik. Others, mostly private organisations, have had to develop idiosyncratic solutions to mobilise public or private funds and turn them into grant programmes. Managing grant programmes is an administrative burden, but being part of providing funding allows the MEOs to see what the artists and professionals are planning, what they aim to do and how prepared and successful they are.

Out of the 29 MEOs mapped, 21 provide some sort of grants with 19 doing this through structured programmes and 2 on a more ad hoc basis, for example as part of a particular project, etc.

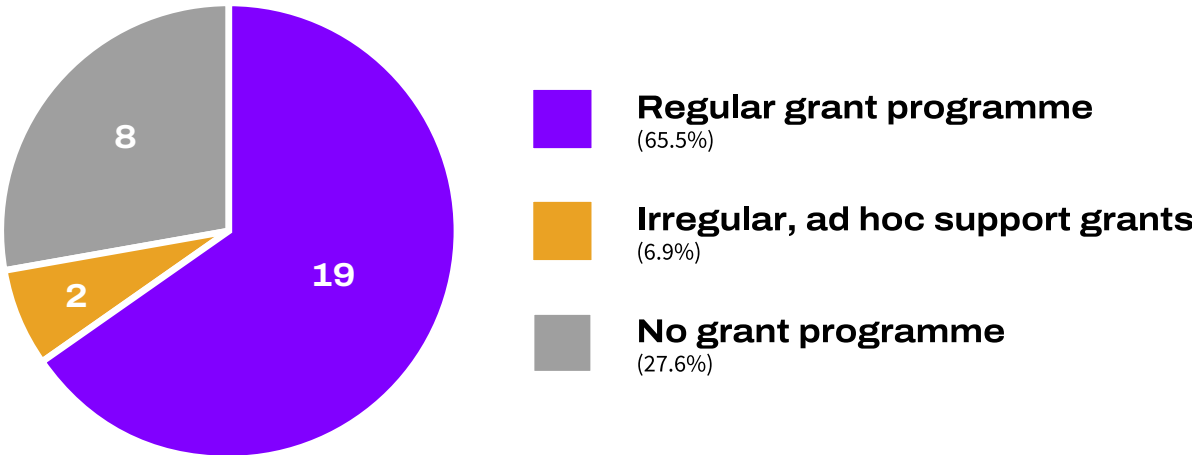


Figure 25. MEOs grouped by types of grants.

For those providing the grants through programmes (data on n=18, see figure 25), the funds allocated make up, on average, nearly 40% of the overall

budgets, but individual differences can be quite large (for example, it's more than 80% for PRSF or Puglia Sounds or around 60% for Dutch Music Export and Music From Ireland).

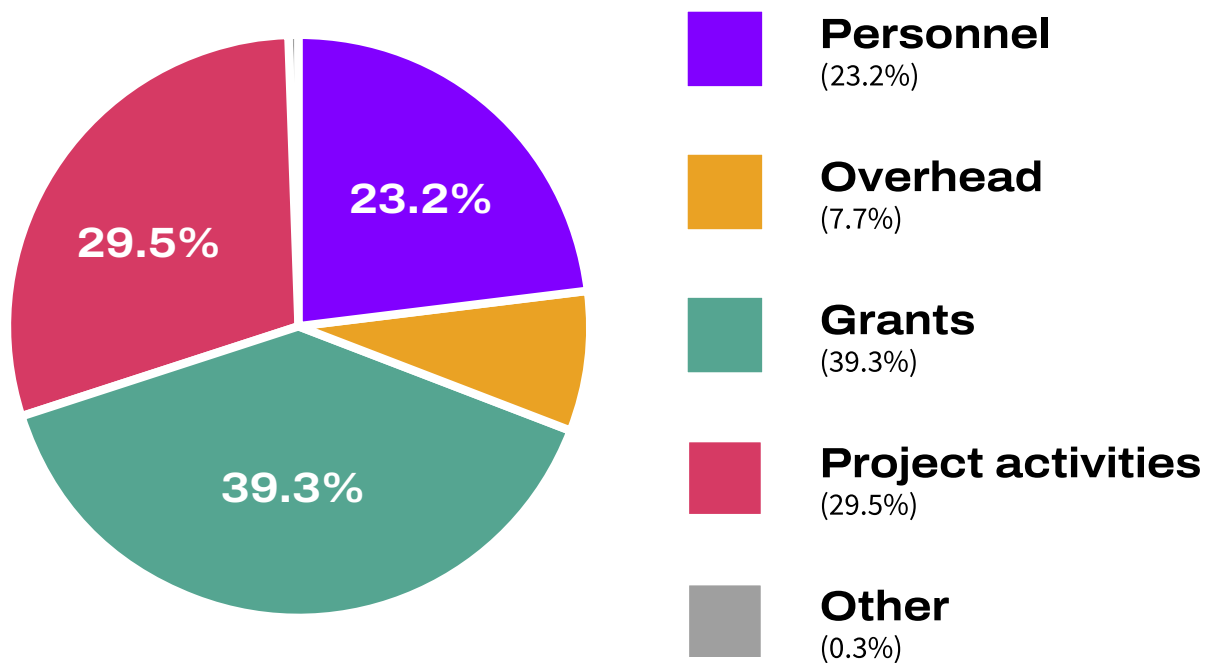


Figure 26. The share of grants allocated in overall budgets (n=18).

In the following table, 18 MEOs and their support programmes have been briefly described. FMX is opening an export support programme as well, but it still lacks public information. It must also be noted, that while 10 MEOs do not provide regular support programmes, there is other funding available in some of those countries, whether from public funds, CMOs or other sources.⁷⁷

An overview of funding programmes

Org	Description
AME	Four grant programmes: Showcase Funding / International Tour Support (labels, publishing companies, producers and recording studios who are WKO members; max €1000); Focus Acts – Tour Support Program (Austria-based acts, musicians and ensembles; €5000); Focus Marketing (until 2022; max €5000); International Tour Support In The Framework of Our Activities at Festivals or Showcase Events. More info: https://www.musicexport.at/service-information/funding/

⁷⁷ – On The Move and Music Export Poland recently published a comprehensive overview, the “Music Mobility Funding Guide” - Focus on Europe”. Available online: <https://on-the-move.org/resources/funding/music-mobility-funding-guide-focus-europe>

Org	Description
CNM	<p>Three 2-tiered internationalisation programmes for genre areas: “current music” (musiques actuelles), classical music and jazz. Very wide scope of activities. 50% max share of all grants obtained and for tier 2 projects must have 2-3 co-applicants. Aid ceiling: €400 - €10 000 for tier 1 and €10 000 - €80 000 for tier 2 (differs per area).</p> <p>More info (in French): Aide au Développement international et à l'export musique</p>
DME	<p>Four programmes: marketing (€5000-€20 000); showcase support (50% of travel, hotel and visa costs can be reimbursed with a different maximum per event); Dance Hiphop R&B Depot (max €2500); Structural Multi-Year Support (max €50 000 for 2 years); International Visitor support (travel and accommodation expenses for international professionals).</p> <p>More info: https://www.dutchmusicexport.nl/regelingen?lang=en</p>
HMB	<p>Hamburg Music International Export Programme: for small and medium-sized music industry companies from Hamburg, for travel expenses, participation fees at trade fairs, conferences and market development programs as well as communication costs (max 70% of the total costs of the project, no more than €2500).</p> <p>More info: https://www.musikwirtschaft.org/en/projects/hamburg-music-international/</p>
ICEC	<p>Support for international distribution projects of the artistic catalogue of companies and entities in the music sector that contribute to the presence of Catalonia's cultural creation abroad. For promotion, attendance of trade fairs, showcases, marketing, salary, and external services. (Max 55% of the total cost of the project, no more than €20 000 + de minimis requirement).</p> <p>More info: https://canalempresa.gencat.cat/ca/integraciodepartamentaltramit/tramit/PerTemes/Subvencions-a-projectes-dinternacionalitzacio-del-sector-de-la-musica</p>
IEB	<p>A grant programme to support the “external projection” with two grant lines: (A) support for mobility (depending on the number of travel parties, ranging from €1000 - €9000); (B) support for the external projection (promotion and production-related costs to support tours, live performances and presence at professional fairs, etc. Max unit per person costs indicated).</p> <p>More info: http://www.iebalearics.org/en/grants/music/</p>

Org	Description
IM(de)	<p>Three programmes for internationalisation. International tour funding: musicians can apply for financial support for international music releases and performances abroad. (Max 75% of total costs, per person grants between €100 and €200 depending on territory). Programs for small and medium-sized companies and individual entrepreneurs: “GO! Export”, for international trips that are part of a mature export strategy, such as visiting international showcase festivals and industry meetings in target countries (max 50% of total costs, same amount ranges as ITF); “DO! Export”, for organising events and campaigns to market their artists abroad (max 70% of total costs which can be no less than €3000; max grant amount is €10 000). More info (in German): https://www.initiative-musik.de/export/</p>
IM(is)	<p>The Icelandic Music Export Fund supports musicians and professionals with marketing and travel grants for concert tours and marketing abroad. Marketing grants are between ca > €1000 and <€7000. Travel grants are between >€500 and <€700 per person, depending on the territory. Travel grants are allocated on a monthly basis. More info: https://www.uton.is/music-export-fund</p>
IML	<p>Four grant programmes: Showcase support, Play abroad, Jazz IT abroad, and Promo. Showcase support provides reimbursement for attending a fixed list of showcases (for the 1st half of 2023: Eurosonic, MENT Ljubljana, The New Colossus Festival, SXSW, Jazzahead, The Great Escape, Primavera Pro). Support is €300 for European and €600 for international events per person, artists + 1 person. Additional support €60 per child for parents. Play Abroad and Play IT jazz (for jazz musicians specifically) are touring grants (max €7000 per project). Promo is a grant for various costs around promoting Italian music abroad (max €6000 per project). More info (in Italian, a calls page): finanziamenti Archivi - Italia Music Export</p>

Org	Description
<p>KLX</p>	<p>Five support programmes are relevant for music. Support for prospecting, research and career development (including networking, training, etc.; per unit cost ceilings); Support for touring and dissemination of work; Support for exhibitors attending trade fairs and trade shows; Promotion support; and Luxembourg focus programme (for organisations who want to invite foreign professionals to events and exhibitions). No grant amount limits have been provided, pending decisions. Grants <€10 000 are decided in-house, and >€10 000 with a selection committee that is made out of national experts. More info: https://www.kulturix.lu/en/support-1/</p> <p>In addition, residencies also provide direct funding for an allowance and cover for travel and production. Some of them are open to music.</p>
<p>ME</p>	<p>Showcase and conference support for artists and professionals. A fixed list of events for which the support is guaranteed upon booking (in 2023: Reeperbahn Festival, WOMEX, Eurosonic and Jazzahead!), other per application and committee decision. Flat rate support for Europe and international events, per artist (€1400 / €1900) and professionals (€500 / €700). More info (in Estonian): https://www.musicestonia.eu/fondid/eau-ja-music-estonia-ekspordifond-iii-voor</p>
<p>MF</p>	<p>Music Finland's export support consists of project support and strategy support. Project support is granted for a single project (live, marketing or songwriting/composing) and is suitable for trips or PR campaigns of artists and creators individually or in groups, or companies (Max 50% of total costs, grant between €500 - €10 000). Four expert committees: pop and rock, jazz and folk, contemporary and classical, and songwriters. Strategy funding is aimed at funding companies' larger export plans, which can consist of one larger export project or several smaller projects. Eligible: companies who have been exporting for a long time. (Max 50% of total costs, grant between €3000 - €20 000). More info: https://musicfinland.fi/fi/export-support</p> <p>In addition, Fast Track music export program supports artists and creators whose international careers have already taken significant development steps or a broader strategic export investment aimed at increasing the companies' international business. Fast Track funding grants are between 10 000 - 50 000 EUR (max 60% of total costs.). More info: https://musicfinland.fi/fi/palvelut/tukihaku/fast-track-musiikkivientiohjelm</p>

Org	Description
MFI	<p>Showcase support: at a fixed list of events, Music From Ireland will subsidise costs for artists, pay for, prepare and host showcase gigs and cover costs of the backline. For 2023, MFI is funded to cover Eurosonic, SXSW, co/pop, The Great Escape, Primavera Pro, A2IM, Pop-Kultur, Reeperbahn Festival, IFF, and Iceland Airwaves. Artists booked at these showcases will automatically qualify for funding. Artists are given a certain amount towards the travel expenses of each band member and one sound engineer. After the event, MFI collects all receipts, submits them for payment and then the grant will be paid after the event. More info: https://www.musicfromireland.org/faq</p>
PRSF	<p>The International Showcase Fund offers export support for UK-based artists, bands, songwriters and producers who have been invited to perform or create new music at international showcasing festivals or conferences. Every year, participation in more than 50 showcase festivals is supported. Max 90% of total costs, artists/writers + manager. Grants can go up to £4500 per group (detailed information at the programme website). More info: International Showcase Fund - PRSF for Music Foundation NB! Other PRSF programmes also allow some degree of international activities.</p>
PUG	<p>There are three export support programmes. Puglia Sounds Export is an international tour support (for “young” projects, max €4500, min 2 concerts; for “senior” projects max €10 000, min 5 concerts). Music Fairs and Conventions: supports participation (€900 in Europe, €1200 internationally). Partnership agreements with international networks EJN – Europe Jazz Network, FWMF – Forum of Worldwide Music Festival and national I-Jazz, KeepON Live, Rete Italiana World Music, JIP – Jazz Italian Platform, Italia Jazz Club; for supporting co-programming (applicants are live producers programming Apulian artists). More info: https://www.pugliasounds.it/en/what-is-the-puglia-sounds-project/open-calls/</p>
SCZ	<p>Currently four support programmes. “Connect” supports exchange concerts at the international level, which are intended to support the presence of Czech musical artists abroad (max CZK 20 000, ca €840). “LinksOUT” supports music professionals in participation in showcase festivals and conferences (flat fee support per event and call). “OnRoad” supports already internationally active music artists by helping to cover travel and other expenses (up to CZK 20 000, ca €1250). “PROvisit” supports participation in stand-alone delegations (CZK 12 000, ca €500). More info (in Czech): https://www.soundczech.cz/cs/vyzvy for calls and https://www.soundczech.cz/documents/2021/tabulka_programy-soundczech_2021.pdf for programmes.</p>

Org	Description
SME	«Business Support» provides direct support for (i) Creation of an updated promotion kit, and (ii) promotion and marketing activities abroad. The programme is aimed at both artists and structures (e.g. labels).
WBM	WBM runs a travel support programme, providing up to €400 for participating in professional events, meant for professional delegates (there's another programme for showcasing artists). There is a fixed list of eligible events, updated in the application form. ⁷⁸ There are six general support programmes from WBI, open to all sectors. The WBI programmes are: mobility support for participating at showcases, conferences and trade fairs (up to 100% of the costs, artists and their entourage). Tour support for covering a deficit (up to €4000 of the deficit per request). Promotional support for distribution of recorded music (up to 75% of the costs with ceilings extending from €1500 to €3000, depending on the territories). Organising presentations or launches (i.e. a release, etc.) (flat fees per territory). International residency support (transport and accommodation costs). Prospecting support for attending professional events that are not covered by WBM travel support. (Up to 50% of the costs, €38.10/day regardless of the country prospected). More info (in French): https://wbm.be/fr/soutiens

3.3.2. Showcases & conferences

Professional events such as showcase festivals, music conferences and trade fairs are prominent in the MEO's yearly calendar. They provide a platform for getting artists in front of professional audiences, growing professional networks and enhancing the overall visibility of the country or region. The MEOs attend these events to both amplify the opportunities of artists and professionals present as well as maintain and develop their own networks. There are many professional events and the number is increasing. The fullest list is provided by Italia Music Export: [Archivi Showcase](#) with over a hundred European and international events listed.

The professional events are clearly packed with high potential and opportunities, but the chances of achieving good results for the artists and professionals are highly uncertain. There are many good practices to adhere to when attending, but none of them provide any guarantees. Even more so, the predominantly *ad hoc* character of networking is often seen as a value as much as a risk. Therefore, the MEOs do not use any single approach but have developed a number of them (see below), combining the most suitable to mitigate the uncertainty, navigate the challenges and enhance the chances of success for the artists and professionals involved.

78 — At the time of writing in July 2023, the following events were eligible for the rest of the year: Waves Vienna, European Jazz Conference, Reeperbahn Festival, MIL, MaMA Festival & Convention, ADE, WOMEX, Monkey Week, Crossroads, Avec La Langue, Visa For Music.

Participating at a showcase is a high risk investment for the artist and their team as the performances are mostly not or low paid and costs need to be covered. The MEOs in general try to help mitigate these risks by providing funding to cover travel and showcase costs, often also promotion.

Competition for the attention and attendance of the professional delegates at these events is high and the MEOs try to create additional value for their showcasing artists by amplifying the artist's promotion and doing their own, such as leaflets, mail-outs and direct invites to delegates, or sometimes hiring a PR partner.

A country-focused showcase can provide additional opportunities for artists. Over the years, many MEOs have done partnership deals with showcase festivals to organise special country specific showcase events during the festival. These open extra slots for artists from their country to perform, usually for a price. On the one hand, the additional opportunities can be valuable for the artists, the MEO and for general country visibility (often important for the funders back home). On the other hand, the extra stages and events add to the attention competition and are not always treated by the host event as an equally valuable part of the programme. That can be balanced by additional promotion by the MEO, but in principle, this runs the risk of driving a race to the bottom where everyone (who can afford it) is incentivised to spend extra for attention. This can also raise a question around curatorial integrity of the event as well as overloading the programme. In principle, partnerships containing “pay for play” are not necessarily a problem, as long as there is value for money. However, more often than not such deals are felt to be transactional with a bare minimum provided by the host event, and are therefore falling out of favour among the MEOs.

Many showcase events have used a focus country approach (i.e. ESNS, Waves Vienna, etc.) where partnerships with the MEOs have been fruitful. However, for smaller countries, these are not always viable as they simply might not have the required funding now the critical volume of artists and professionals to make use of the opportunity and thus justify the investment. In such cases, a regional and collaborative approach can work, as is exemplified by the Baltic MoMENT 2023 at MENT Ljubljana.

Example: The Baltic MoMENT at MENT Ljubljana 2023

The Slovenian showcase festival and conference MENT Ljubljana partnered with the three Baltic MEOs to organise their first regional focus feature at the

2023 edition. The partnership with Music Export Latvia, Music Estonia and the Lithuanian Music Business Association included a dozen artists from these three countries, along with a wide variety of Baltic industry players sharing dedicated insights into the region's music markets and scenes – from its recording industry and the media landscape to its singing, rocking and dancing revolutions. The Baltic moMENT programme kicked off with Baltic music movies screenings at Kino Šiška.

As an example of how important such special features can be for mobilising one-time funding, the Baltic MoMENT 2023 programme was supported by the Baltic Cultural Fund in partnership with the Estonian Ministry of Culture, the Ministry of Culture of the Republic of Latvia, the Ministry of Culture of the Republic of Lithuania, the Lithuanian Council for Culture, the Embassy of Estonia in Prague, the Embassy of Latvia in Hungary and the Embassy of the Republic of Lithuania to the Republic of Austria, to the Republic of Slovakia, to the Republic of Slovenia.

In addition to artists showcasing, these events are also platforms for professional networking and the MEOs have several approaches to navigate the challenges and make use of these events on behalf of their delegations.

Supporting professionals and music companies to attend in addition to the artists is a feature of many, though not all, funding programmes reviewed in the previous sections. Another way the MEOs can help the professionals is by negotiating group discounts on behalf of delegations.

Establishing useful connections can be a challenge, especially for newcomers. As these events are crowded and it is not easy to navigate the mostly informal ways delegates are connecting, unless you already have a strong and well-established network. The MEOs support professionals, artists and organisations by organising and facilitating networking settings. Structured networking, such as speed meetings and other curated matchmaking setups, i.e. lunches, dinners, etc., can be useful, MEOs will invite a well-curated list that matches, where possible, the needs of the particular group of professionals they represent. A more informal approach is to organise networking receptions, usually open-invite (though often with a pre-registration to collect who is/was attending) and casual events. Such receptions often also have extra slots for artists who then get a second performance opportunity.

Example: Belgium Booms

Based on excerpts from [Belgium Booms](#):

Belgium Booms supports and promotes Belgian artists abroad and helps both artists and their entourage to build a sustainable international career.

**BELGIUM
BOOMS**

Belgium Booms is a collaboration between **VI.BE** (Flanders) and **Wallonie-Bruxelles Musiques** (Wallonia & Brussels), with the support of Sabam for Culture and PlayRight+. The initiative empowers Belgian acts at showcase festivals, music fairs and conferences while facilitating their entourage in expanding their professional international network. Activities include organising network moments and speed meetings for professionals, facilitating professional delegations at music fairs, and promoting Belgian showcases with PR support and on- & offline promo campaigns.

Belgium Booms does not select artists but supports acts that are selected by partner festivals and conferences.

Networking hub and country visibility at trade fairs. While most professional events have no fixed presentation spaces any more, there are still a few trade fairs that maintain their importance through being the main meeting places for certain music scenes, especially Jazzahead!, WOMEX and Classical:NEXT, though there are others. It is unclear to what degree the investment into a booth is useful for networking, but it does provide visibility opportunities through a country focused stand. Most of the trade fairs mentioned are filled with country or regional presentations rather than single-company ones (though there are those as well). To compete for attention, the MEOs and other hosts regularly organise receptions with food and drinks to draw in the delegates. Within the limited time and space of a trade fair, this has a race-to-the-bottom dynamic where having receptions is the norm, not a special addition. All the while, the most sought-after delegates (i.e. festival bookers, label A&Rs, etc.) see best to avoid the main trade fair or move around incognito so as not to get overwhelmed with “sellers”.

This dynamic exemplifies the broader issue of **unbalanced delegate pools** at these events which reflects the natural asymmetry of many “sellers” and fewer high-level “buyers”. The country stands, often operated by the MEOs, have become mediating spaces where general information about the country is provided, but access to the “buyers” is limited. In general, the country

stands are appreciated by the professionals who then can use it for meetings and don't have to organise a fixed presence for themselves. Also, they seem to bring and keep a delegation of professionals together which is good both for networking and community support.

The MEOs visit these events even if their artists or professionals don't in order to **develop partnerships and their own networks**. Many MEOs from smaller countries note that for their emerging artists they recommend smaller events, at least in the beginning, as they cannot navigate yet the bigger ones. But being present as an MEO is still necessary to network and develop.

Finally, preceding the professional events, the MEOs might organise introductory seminars or provide individual advice for the artists and professionals attending. Also, collecting feedback after the event to evaluate the results as far as possible.

Given the dynamic scene of professional events, there is no clear answer to the question: which professional events do MEOs go to regularly. However, to a degree it's possible to identify some key events that are mentioned as being necessary destinations each year. The one event that all 29 mapped MEOs feel it's necessary to go to is Eurosonic Noordslag (ESNS). The other bigger and regularly attended events in Europe are Reeperbahn Festival in Hamburg (September) and The Great Escape in Brighton (May). There are also three trade fairs that are focused on certain music scenes: WOMEX for traditional and global music, Jazzahead! and Classical:NEXT. From non-European events, SXSW is mentioned most as a regular destination (see figure 27).

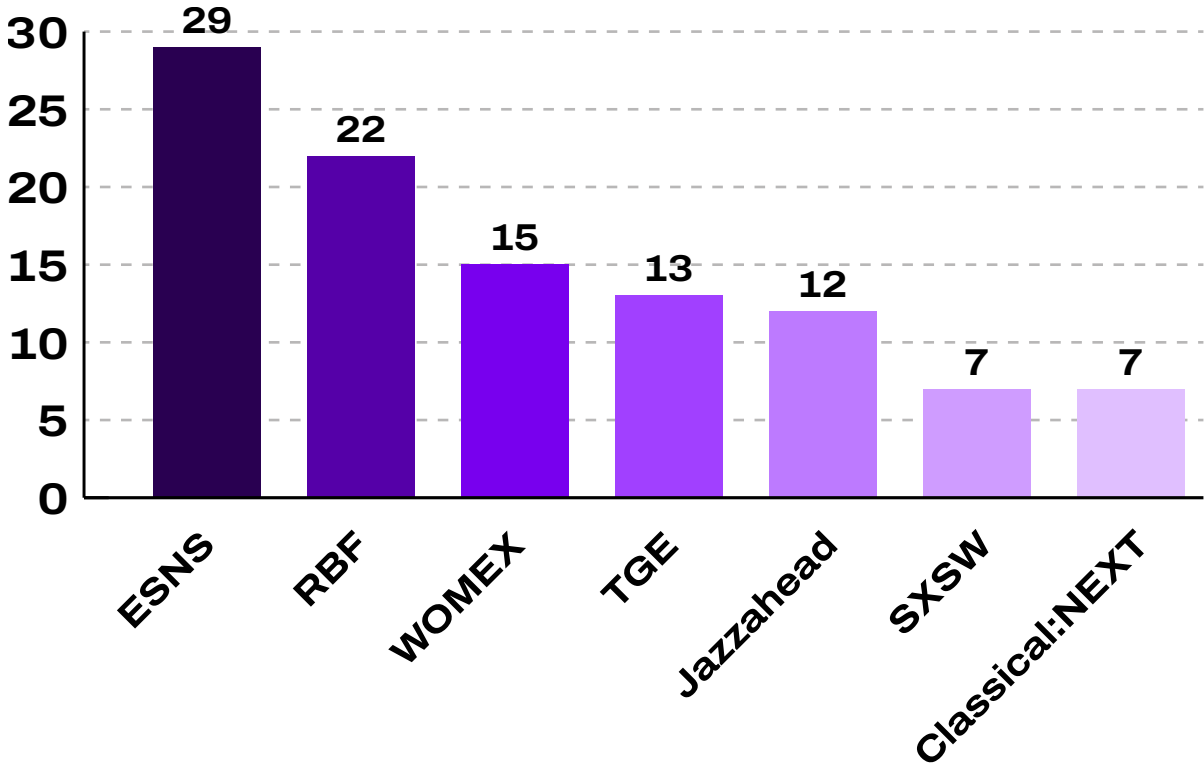


Figure 27. The 7 most often mentioned professional events visited regularly.

Next to the bigger events that most MEOs feel they need to attend, there are many medium or smaller events that might have regional importance. Waves Vienna, Tallinn Music Week, MENT Ljubljana, BIME and c/o Pop were mentioned more often.

Example: ESNS – the go-to professional event for MEOs in Europe

Excerpt from [About ESNS](#) and [ESNS Exchange](#):

Founded in 1986, ESNS hosts an annual four-day showcase festival and music conference across venues in Groningen, the Netherlands. Each January, ESNS showcases 350 emerging European artists to over 40,000 visitors. The festival and conference attract over 4,000 music industry professionals, including 400 international festivals. By day, the front-running conference hosts over 150-panel discussions, interviews, keynotes and more. By night, European acts perform across 40 locations in the heart of Groningen from Wednesday to Friday. The showcase festival has an impressive history and proven track record of kickstarting the international careers of artists like Altin Gün, Alina Pash, Arlo Parks, Deki Alem, Dua Lipa, Fontaines D.C., girl in red, Hania Rani, The Haunted Youth, July Jones, Meduza, Priya Ragu, Pip Blom, Pongo, Queralt Lahoz, Sans Soucis, Sigrid, Trupa Trupa and Wet Leg.

Next to providing a stage for new music, ESNS supports artists by organising the talent development program ESNS Exchange, which facilitates the bookings of European acts on festivals outside their home countries and generates extensive media exposure for these artists in cooperation with the European Broadcasting Union (EBU, including over 30 radio public broadcasters), MEOs and local media. The festival also grants several prestigious awards, including the Music Moves Europe Award, European Festival Award and the Popprijs.

There are some main **challenges** that need to be addressed through a higher-level dialogue and collaboration. These are mostly so-called “wicked” problems⁷⁹ and cannot be solved, but rather collectively mitigated.

- Many MEO’s note that there are **too many events** to be able to consistently be present and develop a working approach. Every country needs a local showcase platform to provide local talent more opportunities

79 — “Wicked problems” is a term used in policy sciences and public administration to describe problems that are “difficult or impossible to solve because of incomplete, contradictory, and changing requirements that are often difficult to recognize” (Source: Wikipedia). Thus, wicked problems cannot be solved, but mitigated through optimal tradeoffs that need constant maintenance.

and early stage opportunities. As there are always more artists than slots at showcase festivals, the increasing number of events can mean more opportunities for artists. On the other hand, it means that at most events, artists and their teams are to a large degree after the same limited pool of high-level delegates; the bookers, A&R representatives, playlist curators, media etc.

- The increasing number of events and competition for valued delegates overloads their calendar and can result in **unbalanced delegate pools** at events, meaning that there are too many “sellers” and too few “buyers” to go around. This is especially visible at trade fairs where the many most sought-after festival bookers hide their badges and avoid the trade fair area during the day in favour of doing meetings elsewhere. On the one hand, it is crucial for younger artists and professionals to attend these events to learn and network. On the other hand, too many “sellers” who are trying to pitch “too high too early”, can crowd (and wear) out the more experienced professionals, whether in informal receptions or more formal networking formats, who then might need to find other places to conduct their business thus reducing access to them.
- The events attract professionals from all subsectors of the industry with various interests and experience levels. While the creative chaos and ad hoc nature of a lot of the networking that takes place has some value in itself, more could be done to **help the delegates to better navigate the events** on their own, find each other and set up fruitful meetings. This begins with the **user experience of the delegate database** and how early one can start to work with it.
- The intense, dynamic settings and high levels of uncertainty are inevitable components of the opportunities present. There cannot be any reasonable expectation from any side that these events should somehow be able to provide higher certainty of success with lower risks for all participants. However, much could be done to **improve ways to understand and evaluate the results and impact of these events**, especially for the artists performing, but also for the professionals and MEOs to learn to prepare and navigate better in the future. Perhaps the events could make more data and analysis available for the MEOs about the overall outcomes of the events (i.e. how many bookings were made across some period after, etc.). It is true (as will be addressed also in the MEASURE chapter), that in most cases, the true impact will take time to manifest and quick results are the exception, but then it is all the more reason to figure out a longer-term and higher level approach where the MEOs and professional events can together better understand how to make these platforms as useful and effective as possible.

3.3.3. Trade delegations and other networking trips

In addition to the many professional events – and often due to some of the challenges related to navigating them effectively – MEOs also organise stand-alone trade missions and showcases, delegations, or other networking trips to cities and countries for which there is a sufficient show of interest from the professionals.

Trade missions usually have a well-defined focus and are first and foremost meant for making relevant contacts. They bring together a group of professionals to provide them with a schedule of curated meetings with professionals in the target territory. A trade mission might also include visits to local venues or company offices and some round table or panel discussions.

Trade missions are mostly stand-alone, but sometimes they also link with an existing professional event, adding a curated programme. Only 11 of the 29 MEOs mapped have organised trade missions with any regularity and almost all of them (10) have organised both stand-alone and event-related missions. 5 have focused on non-European and 3 on European territories, while 5 have done both (figure 28).

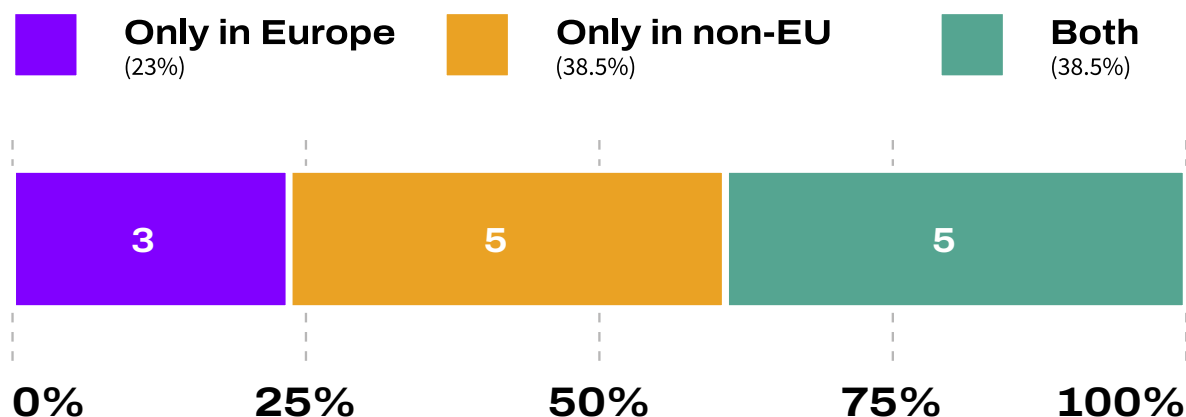


Figure 28. Trade mission target territories (n=11).

There is no clear format for a trade mission, they might range from very targeted and curated trips to providing a few extra elements to a group of professionals that are attending an event anyway. Such missions can also tap into other resources, both financial and network, i.e embassies, business or political delegations, etc.

For most MEOs, organising stand-alone trade missions is beyond their capacity and also project-based funding for such trips can be very hard or impossible to find. Cultural policy resources favour projects with a clear component of international visibility – artists at showcases or country stands at trade fairs are therefore better understood and appreciated, while business contact-oriented

trade missions are much less so. Even though these might be strategically crucial to set the foundations for further actions with more visibility.

Another reason that for many MEOs stand-alone trade missions are sub-optimal, is the critical volume of participants to justify the investment. A trade mission needs to be targeted narrowly to be efficient. For smaller music ecosystems, there are relatively few professionals per narrow music scene or subsector that could make up a group at any given time. Therefore, European-level trade missions could be the key to unlocking these benefits for professionals from smaller countries.

Example: European trade missions in the EMX project

The EMX project (see also part I of this report) included two trade missions, a digital one focusing on hip hop and rap music and targeting Canada; and a physical one focusing on the electronic music scene in Mexico. Both were attended by 15 European professionals from different countries, thus creating opportunities that would otherwise be unavailable. The national or regional MEOs of many of the countries represented would not have the means, capacity nor the critical volume of industry participants to organise these alone.

Such missions can also include showcases that have been organised in partnership with the target territory venues, promoters, etc., such as LX Jazz nights, two evenings of presentation with Luxembourgish jazz musicians in Brussels, Belgium, at Jazz Station, organised by Kultur | lx in 2021.⁸⁰

3.3.4. Local events and incoming delegations

If taking the professionals out to visit another country can be useful for really targeted action, a reverse action of inviting professionals to a local event allows for a group of delegates from very diverse territories to converge. This is the very logic of working with (or organising) the local professional events. Another option is to organise such incoming delegations, often also called visitor programmes, in connection with other local events, most often regular festivals.

Most MEOs (23, see figure 29) engage with some form of incoming delegations. 10 of them organise or co-organise professional events themselves, while also

80 — More info: <https://www.kulturlx.lu/en/lx-jazz-nights/>

cooperating with other local events (12), funding visitor programmes (4) or doing stand-alone incoming delegations (3).

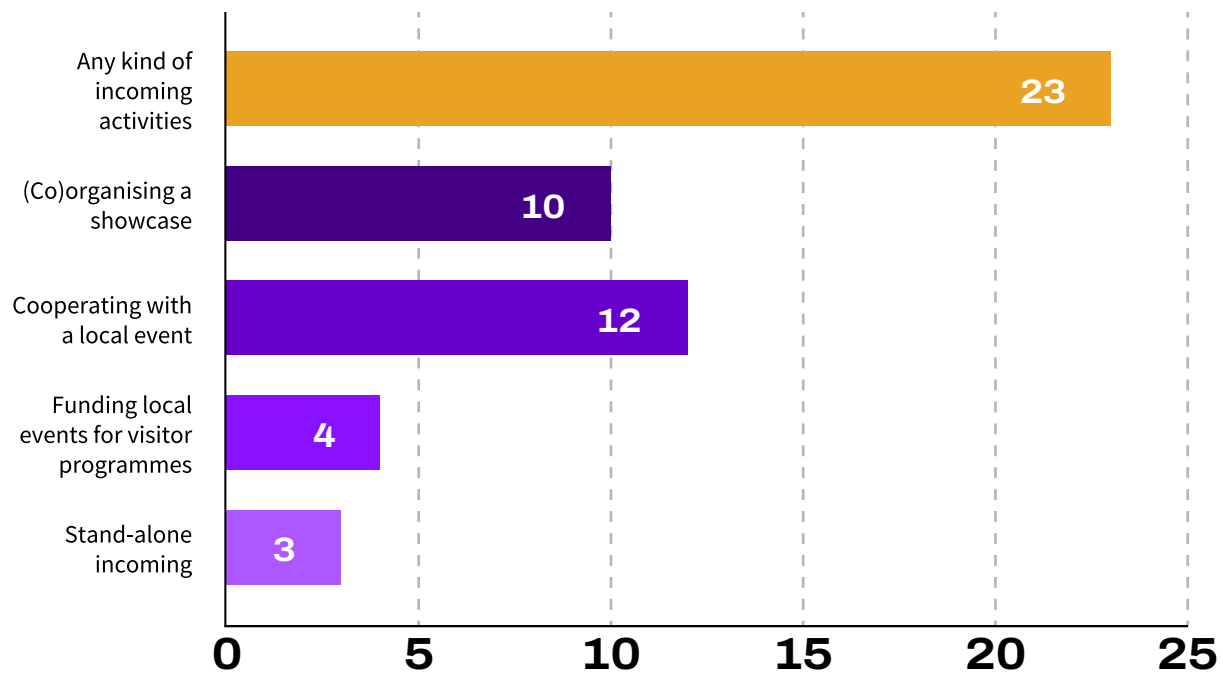


Figure 29. MEOs organising incoming delegations (n=23).

Professional events (co-)organised by the MEOs

5 MEOs are also organising local showcase events:

- **IEB** is in charge of [Fira B!](#), the professional market of music and performing arts of the Balearic Islands, taking place in Palma in October since 2015 and including a professional programme Fira B! PRO.
- **LALA Slovak Music Export** organises [Sharpe Festival](#), taking place in Bratislava, every spring since 2018. The event hosts showcases and a conference programme.
- **Lithuanian Music Business Association** organises [What's Next in Music?](#), held annually in early September in Vilnius, Lithuania since 2015. The event hosts showcases and a conference programme.
- **First Music Contact** organises [Ireland Music Week](#) taking place in Dublin, every October since 2003. The event hosts 50 Irish artist showcases as well as a conference programme.
- **Puglia Sounds** organises [MEDIMEX – International Festival & Music Conference](#), taking place every June since 2011. Since 2018, Medimex has become a travelling event within the Puglia Region with the latest edition taking place in Taranto.

While not organising the events themselves, the following MEOs collaborate closely, often coproducing some of the conference programmes, inviting delegates, etc., with their local professional platforms:

- **Austrian Music Export** and [WAVES VIENNA](#)
- **Iceland Music** and [Iceland Airwaves](#)
- **Italia Music Lab** and [Linecheck](#)
- **Music Estonia** and [Tallinn Music Week](#)
- **SIGIC** and [MENT Ljubljana](#)
- **Why Portugal** and [Westway Lab](#)

There are other co-operations as well, for example between Hamburg Music Business and Reeperbahn Festival (doing the Hamburg House), Dutch Music Export and ESNS and Amsterdam Dance Event, Music Finland and Music & Media Finland, Swiss Music Export and m4music, and others.

Cooperating with local events

The main way for the MEOs to collaborate with local regular events is by inviting (often also contributing funds) international delegates and creating a local programme for them. The main objective is to make use of the concerts and the general setting of the festival to present local artists to international delegates. This is especially relevant for those music scenes where there are no or not many professional showcase events, such as jazz, traditional and global music, contemporary art music, metal, hip hop and rap, and other scenes. Such incoming delegations can provide a highly focused and intimate setting for a small group of guests and a carefully curated programme - a good and complementary alternative to the business of professional events.

Examples:

Swiss Music Export spends about 10% of their budget on bringing over delegates and working with local events, including Label Suisse, BSides Festival, One Of A Million, BScene, Bad Bonn Kilbi, Paléo, Swiss Live Talents, Soundtrack Zurich,⁸¹ etc.

81 — This is a professional event, but focused on film and media music. More info: <https://soundtrackzurich.com/>

Faroe Music Export works with G! Festival.

Austrian Music Export works with the International Jazz Festival Saalfelden, who book a lot of Austrian acts. AME invites 20 international guests, mostly bookers. Also the Kick Jazz Festival / Porgy and Bess, and others. CNM works with incoming delegations for these festivals (some of them also showcases/conferences) Babel Music XP, Soeurs jumelles, MaMA, Les Trans / Bars en Trans, Nancy Jazz UP! Europe, Jazz(s)Ra and others. CNM also organised Jazz Export Days (May 2023) – an international networking event to showcase the diversity of the French jazz scene, in association with the French festival Jazz sous les Pommiers in Normandy.

In addition to programming the conference part of Iceland Airwaves, **Iceland Music** also organises a so-called “industry party”, leading up to the festival. It includes 2 days of masterclasses and networking events, involving the industry professionals flown in for the conference. They organise networking meetings, bringing international delegates and media, together with Business Iceland and events such as Dark Music Days and Reykjavik Jazz Festival

In addition to ESNS and ADE, **Dutch Music Export** collaborates with summer events such as Lowlands or Doomstad, a metal festival in Tilburg.

Music Finland, for example in 2022, worked with festivals Tuska, Flow Festival, Tampere Biennale, Tampere Jazz Happening and We Jazz.

VI.BE works with festivals such as FiftyLab, Belgian Jazz Meeting, We are Open showcase, etc. They invite bookers, pay for their travel, accommodation and organise local networking (speed meetings, dinners, etc.).

Funding visitor programmes

A few MEOs, such as ICEC, IEB and WBM (through the WBI programme) provide funding through a support programme for local events to organise visitor programmes themselves.

Example: IEB grants to festivals and fairs

Institut d’Estudis Baleàrics has a support programme providing subsidies to

fairs, festivals, conferences, etc. that promote “external projection” and take place in the territory of the Balearic Islands. For 2023, the budget of the programme is €950 000. To be eligible for a subsidy, the events must programme at least 30% of artists from the Balearic Islands and invite a minimum of 50 participating programmers and distributors. The grant can go up to €75 000 and cover 100% costs of bringing the professionals.

More info: <http://www.iebalearics.org/en/grants/events-planning/>

3.3.5. Co-creation formats

As mentioned above, the approaches of the MEOs to export development have over the years been very focused on live performances and touring that match well with the showcase festival model. Furthermore, this approach works better for certain scenes than others. Lately, however, more MEOs are increasingly thinking about how to work with authors and their representatives. **Co-creation** formats are a broad category of different types of events, including songwriting camps, synch camps, residencies, etc. A co-creation event can serve as a showcase for the writers involved because often they can show their skills to artist managers, labels and publishers, or client companies (i.e. film or ad producers, etc.). In addition, if a co-write turns out to be successful, then it's a value in its own right, both in terms of revenue and portfolio.

Co-creation can also thus be an effective element in a broader export development strategy. Co-writing and releasing a track with a local artist can be a good way to enter the market and start building local audiences. Also, co-creation is a truly mutually beneficial activity, creating well-aligned incentives from all parties involved.

Out of the 29 MEOs mapped, 11 are in some ways connected with co-creation events (see figure 30). This might mean organising such events fairly regularly or even programmatically, such as Song Castle or Synch Castle programmes by **Music Finland**⁸² or the yearly writing camp RIGALIVE organised by **Music Export Latvia**. Co-creation events can also be fruitful collaborations, as can be seen from the **She Is The Music Songwriting Camp**, produced by **Italia Music Export** and She Is The Music in partnership with CNM, WBM, The Spanish Wave, VI.BE and Kultur | lx.⁸³

82 — More info: <https://musicfinland.com/en/news/international-co-write-camp-song-castle-returns#:~:text=Song%20Castle%20is%20one%20of,local%20food%20and%20clean%20air> and <https://musicfinland.fi/fi/kuulumisia/tapahtumat/synch-castle-2023>

83 — More info: <https://www.italiamusicexport.com/news/join-she-is-the-music-songwriting-camp-2023-powered-by-italia-music-export/>

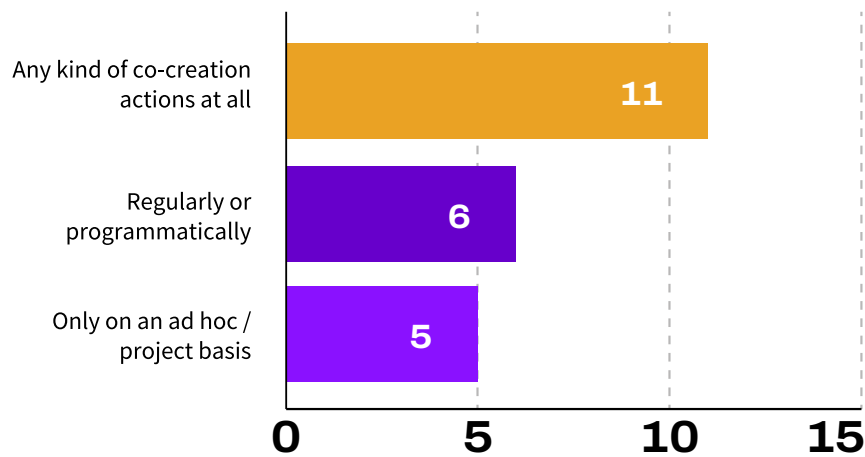


Figure 30. MEOs who are involved in co-creation (n=11).

Examples of songwriting and synch camps:

Music Latvia has organised the songwriting camp **RIGaLIVE** for the last 8 years, taking place in November, in Riga, Latvia. Music authors, lyricists, performers, and song producers can apply for participation with the goal to create potential radio hits by working creatively in teams. The event also includes lectures and master classes, held in cooperation with industry professionals. On the second and third day, creative work on the creation of songs takes place. During each of the creative songwriting days, the participants are divided into teams consisting of three people – a music author, a performer, and a producer. Each group then spends eight hours working on a new song, recording a demo version of it. At the end of each day, the new songs are evaluated by experts – experienced professionals of the international and local music industry.

By now, applications are coming in from 12-14 countries. The participation fee is 100€ and if Music Latvia helps to release the song (PR etc.), then 10% of the master rights of the recordings created will be signed to Music Latvia. The camp is funded by LAiPA, the Latvian neighbouring rights association together with the Latvian Ministry of Culture. More info: <https://musiclatvia.lv/en/rigalive/>

Music Export Poland has organised three writing camps (in 2020, 2022 and 2023) with a focus on **synch**. Half of the 15 composers participating are Polish and half are from other countries, both in Europe and elsewhere. The focus is on writing for live briefs from film, TV series or other audiovisual producers with the aim of creating suitable music for the projects. The camp lasts for

four days and every day ends with a listening session with international music supervisors attending. A good example of a success story is the Polish film music composer Miro Kepinski who attended one camp, and composed music for a documentary film which led to further commissions, including “Furioza”, a Polish feature film that achieved great popularity on Netflix.

3.4. EXCHANGE

Strategic objective:

European music organisations develop long-term international partnerships through EXCHANGE of experiences, best practices and business contacts with international partners. This will also provide ways to invite key players to visit Europe and discover our talent

The MEOs engage in an increasing number of collaboration projects, whether bi- or multilateral, funded by themselves or external sources, including European funds. There are at least two dimensions to why this is useful. Firstly, as can also be seen from some of the examples above, the collaboration between MEOs to host each others’ delegations, curate networking or co-organise songwriting camps has an obvious value exchange.

Secondly, longer-term strategic cooperation is needed to create new opportunities that currently do not exist for most MEOs. This is where the European Music Export Strategy and all the actions already piloted come to play. There are efficiencies to be gained by doing certain things together. For example, creating new knowledge and making it available (LEARN) is best done without duplication. Creating is best done collectively. Another area where the MEOs need to join their forces to achieve scale is long-term strategic presence at international markets (RISE), something that for most MEOs is too difficult, expensive and inefficient to attempt alone. Only on this level will it be sustainable to create broad collaboration frameworks with international partners that will create mutual value exchange. The European MEOs have been gradually building towards this by starting EMEE, developing the European Music Export Strategy and finding ways to put it into practice.

European cooperation projects can be an effective way to achieve the strategic objectives of EXCHANGE. The most lasting and broad-based example

is the **ESNS Exchange** project with currently 23 partners (22 of them EMEE members) and 24th (Iceland Music) joining in 2024. The current members are Austrian Music Export, Dutch Music Export, Gre.ex Music, Initiative Musik, ICEC, Italia Music Export, LaLa Slovak Music Export, CNM, Lithuanian Music Business Association, Music Estonia, Music Export Ukraine, Music Finland, Music From Ireland, Music Latvia, Kultur | LX, SIGIC, SoundCzech, Swiss Music Export, UK Export Network: Presented by PRS Foundation, Wallonie-Bruxelles Musiques, VI.BE and Why Portugal.

Other European projects include [HEMI Music Hub](#), [Eastern European Music Academy](#), [Europe in Synch](#), [EXCITE](#), [Europavox](#), etc. There are also good examples of international collaboration projects, not funded by the Creative Europe programme nor limited to European partners, that serve to achieve the EXCHANGE objectives and involve the MEOs, such as [Global Music Match](#) or Country Connections.

In conclusion, collaborations and cooperation projects that serve to achieve the strategic objectives of EXCHANGE need planning and implementation periods longer than one year to be truly effective. This makes it a challenge for the many MEOs currently working with short-term planning and funding regimes. Collaboration between the MEOs on a European level, whether bilaterally or through the EMEE network, can open up opportunities, but more research is needed to map out the particular challenges, results and broader outcomes of such endeavours.

3.5. MEASURE

Strategic objective:

The international success of European talent can be MEASURED through a well-organised system of music data collection, analysis and publication of research.

There have been a lot of discussions and many conclusions from studies and consultation reports⁸⁴ stating that there is a significant data gap in music. This also hampers a better understanding of how artists and repertoire move

84 – For a more thorough review, see “Feasibility study for the establishment of a European Music Observatory” (European Commission, 2020). Online: <https://op.europa.eu/en/publication-detail/-/publication/a756542a-249d-11eb-9d7e-01aa75ed71a1>

across borders or how effectively music export practices are producing results. Such data would perhaps help the MEOs gain more insight into what works in music export development and what does not. Furthermore, explanations based on sound knowledge, backed up by more transparent data, would help the MEOs and the sector more broadly to advocate for more specific policies and mobilise investment.

Alas, there is not yet enough to go on as things stand now. There are three main dimensions to relevant data when it comes to understanding better the effectiveness of music export measures and policies: (i) output indicators of particular actions: direct feedback from the participants regarding their subjective reflections as to what works and why; and statistics of participation and other directly relevant indicators (how many contacts initiated, etc.); (ii) Outcome of the activities: to what degree do the direct outputs convert into more general outcomes. For example, for how many trade mission participants or showcasing artists did these events lead to follow-up business deals?; (iii) sector-level aggregated data. Mainly, has there been an increase in the sector-level indicators, such as export revenue growth (or lack of it)?

All of these indicators are not only hard to collect data for but also face conceptual problems. The macro-level sector view is significantly hampered by the lack of usable classification systems. The NACE codes⁸⁵ are out of date and do not reflect the whole CCI well, but are especially lacking when it comes to the music sector. Therefore, it is hard to reach a data-driven sector view even if the real events might warrant significant movement in revenues, etc. The outcome of the activities is, on the one hand, hampered by the longer timelines significant results can be expected to manifest. On the other hand, there is a considerable attribution problem - in case of success, it is very hard to ascertain who exactly and what events led to this and thus accredit them appropriately. A common-sense appraisal will suggest that each and every success is a unique outcome of a mix of parameters and always to a considerable degree dependent on the artistic merits of the project. Still, in rare cases, a set of steps – like a flow of bookings or signings after a single performance in front of the right audience can really work. On the other hand, the lack of quick results should in no way be interpreted as a lack of value. The potential can accumulate over time and what seems a direct outcome of one event can in fact be a longer development reaching its breaking point.

The outcome lag and attribution problem are significant challenges, and make it difficult for the MEOs to explain the value of their work to funders and policymakers. There is no simple solution. More research projects, some looking at broad sets of figures, some taking up process tracing on case studies, and

85 – The NACE codes are used to designate the various statistical classifications of economic activities in the EU. More info: https://ec.europa.eu/eurostat/statistics-explained/index.php?title=NACE_background

others doing qualitative research on the subjective experiences of artists, professionals and MEOs will have to be made. Also, better exchange of datasets and collaboration on sharing them for shared analysis is needed. A worthy initiative is the ESNS Analytics platform that brings together data from several sources. However, this is needed on the European music ecosystem level if we are to gain insights into the circulation of artists and repertoire, both in Europe and internationally.

3.5.1. Measuring output: collecting feedback and data on participation and satisfaction

Most MEOs collect feedback from participants right after the events happen – whether showcase and conference attendance, writing camps, capacity building programmes or other. 16 of them do it by some kind of a written survey, 9 informally through conversations and 4 do not collect any feedback. These MEOs that provide funding can also see the results as part of the reporting which can include feedback and outcome questions. Only very few MEOs have managed to collect feedback on certain activities also 6 months later, aiming to catch the results manifesting over time. Overall, such feedback is a very partial view as the answers tend to be short and general, mentioning if activities were felt to be effective or contacts useful, or not, but not delving into why. All in all, such feedback won't often provide much to the MEOs they can use to improve their programmes. Secondly, the professionals might lack a comparative perspective and be happy to return to the same events every year to meet good colleagues, while not being aware of potential alternatives. The general nature of such feedback has led some MEOs to give up collecting it (via surveys) entirely and rather rely on other ways, such as deeper conversations with groups of industry representatives, etc. Perhaps the most valuable source of continuous feedback, in general, is the consulting function that, in some cases, provides the MEO team with several hundred contacts with the sector professionals across many topics.

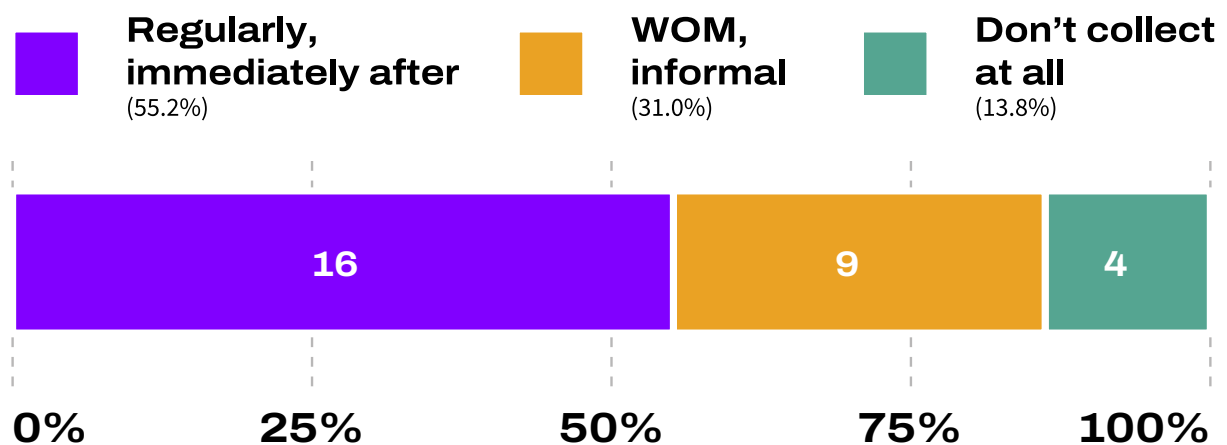


Figure 31. How MEOs collect feedback.

3.5.2. Measuring outcomes: economic and other data

The output indicators are part of a regular reporting regime, whether of the professionals to the MEOs, or the MEOs to their funders. For more high-level policymaking, however, more general data-driven insights would be needed. There are only a few countries that have any general overview of their music economies. For most countries in Europe, the IFPI reports covering the recorded music markets are the only source of any figures. More can be found in France (CNM and others), the UK (“This is Music” reports by UK Music),⁸⁶ Finland and Germany. Stand-alone studies have been made in The Netherlands, recently in Italy (by Italia Music Lab, but not yet published in English) and elsewhere. Only two EMEE members have engaged in developing music economy reports – Music Finland (yearly) and Music Estonia.

Example:

Music Finland has been compiling a report on the Finnish Music economy for more than ten years and it also includes an overview of music export by sub-sectors. When the overall music economy report draws on published and provided data from the CMOs, trade associations and public sources, the music export report is based on a company survey.

See more:

[Finnish music industry in 2021](#)

[Finnish music export in 2021](#)

The methodology is explained at the end of the Finnish language report:

[Suomen musiikkialan talous ja vienti 2021](#)

Music Estonia conducted a music market mapping in 2021 and the report covers the years 2018, 2019 and 2020. Methodologically, the report follows closely the Finnish approach and the results (currently in Estonian only), can be found at: [Muusikaturu andmed](#). The report does not provide any insight into music export due to a lack of data.

86 – Online: <https://www.ukmusic.org/research-reports/this-is-music-2022/#:~:text=UK%20music%20industry's%20contribution%20to,%C2%A35.8%20billion%20in%202019.>

In summary, evaluating the outcomes of music export development practices in Europe – whether by the MEOs, or the music exporters themselves, is currently not possible in any detail as even the few country-based reports of music economies are not detailed enough to properly reflect the export dimension of the sector. They are also methodologically different across countries and therefore the results are not comparable. Only a European-level music data framework can create the conditions of any comparable data collection and analysis. And as long as we are seeking to understand the cross-border movement of music, country-based idiosyncratic solutions are not useful on their own.

