EUROPEAN CULTURAL
AND CREATIVE INDUSTRIES
INNOVATION POLICY PLATFORM

Adapting the European music industry to the platform economy

POLICY RECOMMENDATIONS
FROM POLICY LAB #5

JULY 2025

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Funded by
the European Union

This project has received funding from
the European Union's Horizon (2021-2027)
Research and Innovation programme
under grant agreement No.101112111

Key Recommendations

The following policy directions address the structural challenges and emerging opportunities facing the European music ecosystem in the platform economy. Grounded in the outcomes of the 5th ekip Policy Lab and aligned with the vision of the European Music Ecosystem report (2025), these recommendations offer actionable steps to foster innovation, fairness, and sustainability. Ensuring fair treatment of artists also enables greater participation of a diverse range of artists in innovation processes, fostering inclusiveness and diversity, ultimately strengthening Europe's competitiveness.

Based on ekip's building blocks for open innovation ecosystems, the recommendations include the following.

Sustainable competitiveness

1. Strengthen creator organisations as open-innovation and bargaining hubs
2. Tackle platform and label conflicts to unlock innovation and fair competition

Regulation & governance

3. Establish a European framework for data standardisation and rights management to power interoperable innovation
4. Harmonise legal terminology to enhance cross-border collaboration and innovation capacity

Social dimension

5. Embed multi-stakeholder governance for open innovation
6. Make cultural and linguistic diversity an innovation advantage
7. Empower audiences as co-innovator

Research and Innovation

8. Support alternative innovation models for a fairer music ecosystem

> ***"Platformization of music shapes discovery, distribution, and revenue."***

Infrastructures

9. Recognise digital platforms as core infrastructure in the music ecosystem
10. Require more transparency and fairness in platform operations
11. Replace pro-rata with fairer models to align incentives for innovation

Skills

12. Build technology, data and business skills across the ecosystem

Investment & funding

13. Introduce platform taxation to finance innovation capacity and ecosystem development
14. Design funding that rewards cultural contribution, diversity and sustainability as drivers of innovation

1 Introduction

The European music industry is undergoing rapid transformation due to platformisation, which refers to the growing influence of streaming services, social media, and algorithm-driven technologies. While these developments offer new opportunities for artists and audiences, they also raise concerns around fairness, transparency, and the sustainability of independent music creation. Recent studies suggest that although overall revenues in the music ecosystem have gradually returned to levels seen during the CD era, the shift from physical sales to streaming has changed income structures. Many artists now rely on live performances and merchandise for earnings, while using streaming primarily for visibility, which raises ongoing questions about how value is distributed across platforms, labels, and creators (European Commission, 2020a).

> *"Independent artists face low income and algorithmic barriers."*

This paper aims to support policy responses that strengthen fairness, inclusion, and innovation in the European music ecosystem. It outlines the main challenges posed by platformisation, highlights opportunities for action, and presents concrete policy recommendations to ensure a more equitable digital music landscape.

The document is structured as follows:

- A background on the policy problem and vision
- A review of key challenges and opportunities
- Policy recommendations developed through stakeholder engagement
- Methodology and materials used in the Policy Lab process

This report is based on the outcomes of the 5th ekip Policy Lab on the platformisation of the music industry and a follow-up Validation Workshop. These brought together a broad range of stakeholders representing music creation and performance, music production and marketing, education and research, policy making and advocacy, funding and project development, rights management and consulting, distribution and dissemination, music technology and start-ups, as well as consortia and networks. The group also included a representative of a global fair trade music streaming platform built around a "listen local, support local" approach. Their combined insights have informed the findings and recommendations set out in this report.

While strengthening the European music ecosystem is a broad and multifaceted policy objective, this report focuses specifically on the technological transformations driven by platformisation and their implications for artists. Drawing on the outcomes of the 5th ekip Policy Lab, the emphasis is placed on understanding these changes from the artist's perspective, including how platforms shape visibility, revenue generation, and creative agency in the digital music environment.

2 Policy problem: platformisation of the music industry

2.1 DEFINITION AND SCOPE

Scope

This report focuses specifically on the relationship between artists and digital platforms within the broader European music ecosystem. While the ecosystem includes a wide range of actors and interconnections, the emphasis here is on how platformisation affects music creators, particularly independent artists, in terms of visibility, revenue generation, creative autonomy, and access to audiences. The report adopts an artist-centred perspective to explore how policy can support fairer, more inclusive, and innovation-oriented platform environments for music.

Platformisation

Platformisation is defined as "the penetration of digital platforms' economic, infrastructural, and governmental extensions into the cultural industries, as well as the organization of cultural practices of labour, creativity, and democracy" (Poell et al., 2022). In the context of the music industry, platformisation refers to the increasing reliance on streaming services, algorithm-driven content distribution, and data-centric revenue models that reshape the way artists, audiences, and industry stakeholders interact. While platforms offer new opportunities for global reach, they also introduce challenges related to artist remuneration, algorithmic gatekeeping, and revenue concentration.

The European music ecosystem

The European music ecosystem is the network of music sector actors, their environment, and their interdependencies and interactions through the production, distribution, and consumption of music, so that value is created for the system itself and for the broader cultural and economic systems it is part of (Music Moves Europe Dialogue Report: The European Music Ecosystem, 2025). This includes creators, music companies, live music venues and festivals, streaming platforms and digital intermediaries, policymakers, education and training institutions, and audiences. Its sustainability depends on fair policies, innovation, and collaborative structures that balance market dynamics with cultural diversity and long-term sectoral resilience.

2.2 BACKGROUND AND HISTORY

The trends presented in this chapter are derived from social media foresight analysis conducted by ekip partner Nextatlas. The methodology relies on identifying emerging themes through the monitoring of early adopter communities across platforms such as YouTube, Instagram, Behance, and X (formerly Twitter). Using AI-based natural language processing and computer vision models, the approach enables both top-down clustering (based on predefined topics) and bottom-up clustering (based on organically emerging themes). While offering valuable insight into evolving conversations among creative professionals, these trends reflect perceived viewpoints and sentiment rather than statistical evidence and should therefore be considered as indicative rather than conclusive.

> *"AI, fan communities, and niche markets create new opportunities."*

1. The rise of independent and decentralized music models

A growing number of artists are bypassing traditional record labels, opting instead for independent distribution and self-releasing strategies. This shift is facilitated by new digital tools, AI-driven marketing platforms, and direct-to-fan engagement models. However, the dominance of streaming services raises concerns about fair compensation, prompting discussions around alternative revenue-sharing structures and artist-centric platforms. The data reveals increasing dissatisfaction among independent musicians regarding platform-controlled algorithms and monetization policies, fuelling interest in decentralized and cooperative music distribution.

2. AI-driven music creation and curation

AI is reshaping both music production and audience engagement. From AI-assisted composition to automated playlist curation, the technology is creating new opportunities for artists while raising ethical and legal questions regarding intellectual property and creative ownership. Social media conversations indicate that while independent musicians appreciate AI tools for content creation and promotional assistance, concerns over AI-generated music replacing human creativity remain strong. This tension highlights the need for critical analysis and if necessary, update to regulatory framework and artist protections.

3. Fairer and more transparent revenue models

The existing streaming economy, often criticized for its inequitable distribution of earnings, is facing increasing scrutiny. Emerging models such as fan-driven payment systems, blockchain-based royalties, and per-user subscription allocations are gaining traction. Nextatlas monitoring highlights a rise in discussions around direct-to-fan financial models, where artists seek greater control over how they are compensated, with a growing push for transparency in revenue distribution.

4. Social media and music discovery synergies

Social platforms like TikTok, Instagram, and YouTube are now integral to music promotion and discovery. Algorithm-driven feeds dictate visibility, leading to both opportunities and challenges for artists. Nextatlas social listening identifies a major shift: social media algorithms increasingly shape streaming trends, influencing which songs become viral hits. As a result, platform partnerships between music services and social networks are becoming crucial in determining how audiences engage with and discover music.

5. Niche and community-driven music consumption

Much of the ongoing discussion among music industry stakeholders refers to the fact that audiences are moving away from mainstream music discovery and embracing personalized, niche experiences. Independent streaming services, genre-specific platforms, and fan-driven communities are gaining traction. Nextatlas reports that "micro-communities" are emerging where music fans actively seek curated listening experiences, reflecting a growing rejection of mass-market recommendation systems.

6. Sustainability and green touring innovations

As environmental concerns grow, the music industry is exploring sustainable practices, particularly in live performances and touring. Social media discussions captured by Nextatlas show increasing demand for eco-friendly festivals, carbon-neutral touring, and green production methods. Musicians and event organizers are being called upon to reduce their environmental footprint while maintaining high production value.

7. Strengthening collaborative networks

A thriving music ecosystem requires stronger connections between artists, industry professionals, policymakers, and audiences. Nextatlas analysis highlights growing discourse around collaborative business models, particularly within independent music networks. Emerging trends suggest that cross-sector partnerships, interdisciplinary collaborations, and shared resources will be essential for ensuring innovation and long-term sustainability.

The next decade will be pivotal in shaping a more inclusive, transparent, and sustainable European music ecosystem. Social media listening from Nextatlas underscores a collective desire for artist empowerment, fairer business models, and ethical technological innovation. By embracing open innovation, ethical AI integration, and fairer revenue structures, the industry can ensure that music remains a dynamic and culturally significant force in society.

2.4 OPPORTUNITIES AND CHALLENGES

The following sources were used to identify and summarise the opportunities and challenges related to the topic:

- Background-research based on literature review, related Horizon projects and policy strategies
- A social listening exercise carried out on social media
- The outcomes of an ekip Policy Corner on platformisation of the music industry
- The input of the participants in the policy lab on platformisation of the music industry

2.4.1 OPPORTUNITIES

The evolving European music ecosystem presents significant opportunities to address economic inequities, technological dependencies, and structural imbalances while fostering innovation, diversity, and sustainability. Based on existing research, including the MME Dialogue: The European Music Ecosystem (2025), Fairness in the EU Music Ecosystem Policy (2024), and Can Online Music Platforms Be Fair? (2023), we have identified three main opportunity areas that will shape the future of the sector:

1. Empowering Independent Artists in the Platform Economy
2. Fostering Sustainable and Inclusive Business Models in a Technology-Driven Music Sector
3. Building a European Music Ecosystem that Promotes Open Innovation

Each of these areas represents a pathway toward a fairer, more resilient, and artist-centred music industry, ensuring that technological advancements benefit creators rather than amplifying existing inequalities.

1. Empowering independent artists in the platform economy

As digital platforms become the dominant gatekeepers in the music industry, independent artists face increasing challenges in terms of fair remuneration, algorithmic visibility, and access to resources. While these platforms have enabled global distribution, they have also reinforced economic inequalities and limited artist autonomy. The Fair Muse Policy Brief (2024) highlights how the current revenue-sharing model on streaming services overwhelmingly favours major labels, leaving independent musicians with a disproportionately small share of industry profits.

Key focus areas:

- Development of equitable revenue-sharing models on streaming platforms to ensure fair compensation for independent creators. This includes user-centric payment systems and other alternative revenue mechanisms.
- Mechanisms of resistance developed by music artists to get more revenue from the algorithm. Independent musicians are finding ways to adapt to and resist platform-driven constraints, a phenomenon explored in Bonini and Treré (2024), which discusses visibility labor| and algorithmic precarity.
- Policies for algorithm transparency and discoverability to reduce the imbalance in audience reach between independent and major-label artists. Streaming algorithms systematically favour high-engagement content, often marginalizing lesser-known creators (Ranaivoson et al., 2023).
- Support structures for independent artists, such as digital literacy initiatives, access to affordable production tools, and legal frameworks to protect their rights. As highlighted in Can Online Music Platforms Be Fair? (2023), independent musicians often lack the resources to navigate complex digital ecosystems effectively.

2. Fostering sustainable and inclusive business models in a technology-driven music sector

Consolidation, initially driven by leading record labels and now reinforced by dominant streaming platforms, has created a precarious economic environment for many artists. To build a more inclusive and resilient music industry, it is essential to explore new business models that offer greater control, autonomy, and financial sustainability to artists. The From Value Networks for Recorded Music to Music Ecosystem (2024) report highlights how dependency on platforms weakens the bargaining power of artists, including the bargaining power of collectives and labels that represent them. This makes it essential to develop alternative business models that promote long-term stability in the sector.

Key focus areas:

- Encouraging decentralised and collaborative platforms that empower artists and smaller stakeholders while reducing dependency on monopolistic intermediaries. As demonstrated by emerging blockchain-based and cooperative music platforms, decentralisation offers a new path for fairer distribution of value. These platforms could also support collective licensing models, simplifying rights management and strengthening the negotiating position of independent creators.
- Promoting innovative funding mechanisms that prioritize long-term sectoral resilience, including crowdfunding models, fan-based subscriptions, and public-private investment in music infrastructure. The Driving a Green, Digital & Innovative European Cultural Heritage (2024) report emphasizes the importance of alternative economic models to support creative industries in the digital age.

3. Building a European music ecosystem that promotes open innovation

To sustain a dynamic and forward-thinking music ecosystem, cross-sector collaboration and policy support are necessary. Strengthening Europe-wide networks and investing in emerging technologies can foster an environment where artists and other industry stakeholders (e.g. labels, representatives), technologists, policymakers, and cultural institutions work together to drive sustainable innovation.

Key focus areas:

- Developing policy frameworks that encourage cross-sector collaboration between music, technology, education, and urban development. The MME Dialogue (2025) and Fair Muse Policy Brief (2024) stress the need for integrated policymaking that supports creative industries beyond market-driven logic.
- Supporting initiatives that foster experimentation with AI and other emerging technologies while safeguarding artistic agency and cultural diversity. As explored by Ranaivoson et al (2023) and Bonini and Treré (2024), AI-driven platforms significantly influence how music is created, distributed, and consumed—a trend that must be harnessed responsibly.
- Establishing and strengthening Europe-wide networks and platforms to facilitate knowledge sharing, resource pooling, and community-building among stakeholders. A collaborative approach is essential for navigating digital transformation and ensuring independent creators remain competitive in an increasingly platform-dominated landscape.

The European music industry is at a turning point, with the potential to reshape its structures to be more equitable, sustainable, and open. By focusing on empowering independent artists, fostering innovative business models, and promoting cross-sector collaboration, the industry can create a thriving ecosystem that benefits all stakeholders.

Seizing these opportunities requires proactive policy measures, industry-wide cooperation, and investment in solutions that benefit creators and producers who prioritize diversity, fairness, and long-term sustainability over short-term digital metrics. Through strategic interventions and collaborative initiatives, the future of European music can be one where technological progress enhances, not undermines, artistic creativity and economic fairness.

2.4.2 CHALLENGES

The platformisation of the music industry has brought both unprecedented opportunities and deep structural challenges. On one hand, digital platforms have made it possible for local, independent artists to reach a global audience in ways that were unthinkable only a few years ago (MME Dialogue: The European Music Ecosystem, 2025). On the other hand, these platforms have fundamentally reshaped the way music is created, discovered, and monetised, concentrating power in the hands of a few dominant players and making artists increasingly dependent on algorithm-driven visibility. This not only limits the diversity of music offered but also creates bottlenecks for the international distribution of music that does not conform to dominant commercial formats (Fairness in the EU Music Ecosystem Policy, 2024; Can Online Music Platforms Be Fair?, 2023).

From a holistic perspective, the impact of platformisation affects both users and content creators as two sides of the

same coin. The content suggested to users is dictated by platform algorithms, which in turn influences how artists' music is distributed and accessed, ultimately shaping their earnings and career sustainability. Platforms eternining which artists gain exposure and which remain invisible (Ranaivoson et al., 2023).

1. The visibility paradox: creativity vs. algorithmic control

As highlighted by Bonini and Treré (2024), artists today must navigate a dual reality. While they continue to create music for live performance, festivals and audience development, which often serve as pathways to attract interest from labels, venue managers and digital platforms, they are also increasingly compelled to adapt their work to platform requirements. Unlike previous media infrastructures such as radio or television, where gatekeeping was managed by human curators, today's platforms use automated recommendation systems that prioritise engagement metrics over artistic value. This leads to the emergence of a "visibility game" (Cotter, 2019), in which musicians must optimize their content to fit the algorithmic logic of streaming platforms, often at the expense of creative freedom.

While algorithmic visibility plays an increasingly important role in an artist's success, it is not the sole determining factor. Nonetheless, the need to remain visible on platforms contributes to what Duffy (2020) calls 'algorithmic precarity', a condition where aspects of an artist's career are shaped by opaque and constantly shifting platform rules, often outside their control. Small adjustments in algorithmic priorities can suddenly reduce an artist's reach, affecting their income and professional viability. This problem is compounded by the lack of transparency in algorithmic decision-making (Ranaivoson et al., 2023). The question arises: should artists adapt to algorithms, or should policies demand algorithmic fairness andaccountability?

2. Revenue inequality and the unfair distribution of streaming profits

The platform model has also reinforced economic inequalities within the music industry. The Fair MusE Policy Brief (2024) and From Value Networks for Recorded Music to Music Ecosystem (2024) highlight that major labels and high-streaming artists disproportionately benefit from the current revenue-sharing structures, while independent artists struggle to earn a sustainable income. The user-centric payment model has been proposed as a potential solution, but the industry's major players have resisted its implementation. This raises a fundamental challenge: how can policies enforce fairer remuneration models that reflect real audience engagement rather than platform-driven distribution dynamics?

3. The ethics of algorithm manipulation

Given the stakes involved, artists and content creators have begun developing strategies to "cheat the algorithm", tweaking their releases, metadata, and engagement patterns to increase visibility. As Bonini and Treré (2024) suggest, visibility has become an active labor practice, often requiring musicians to act not only as artists but also as social media strategists and marketing specialists.

A key ethical dilemma emerges: is it acceptable for artists to manipulate algorithms in pursuit of greater visibility? On one hand, platforms themselves are structured in ways that privilege engagement-based ranking over artistic merit. On the other hand, boosting visibility for some artists inevitably reduces exposure for others, reinforcing the zero-sum nature of streaming economies.

Rather than placing the burden on artists to navigate an unfair system, policies should focus on ensuring algorithmic transparency, regulating platform accountability, and diversifying discovery mechanisms so that artistic value, rather than digital optimization, becomes the key driver of success.

4. The dependency trap: can artists thrive beyond platforms?

Another significant challenge is the growing dependency of artists on digital platforms for audience reach and monetization. As highlighted in Can Online Music Platforms Be Fair? (2023), major streaming services and social media platforms have positioned themselves as indispensable intermediaries, reducing artists' role in managing the distribution of their own music.

While digital platforms provide global reach, they also centralize economic power and limit independent alternatives. The challenge for policymakers is to support alternative business models that reduce platform dependency and create more direct revenue streams for artists. This could include cooperative music platforms, decentralized streaming models, and government-backed funding for artist-led distribution networks.

5. The need for cross-sector collaboration

The MME Dialogue report (2025) emphasizes that addressing these challenges requires collaboration beyond the music industry. The intersection of

music, technology, policy, education, and urban development presents opportunities for innovative solutions that move beyond reactive policy measures and instead create a proactive, sustainable ecosystem.

For example, Driving a Green, Digital & Innovative European Cultural Heritage (2024) highlights how digital innovation can enhance audience engagement while maintaining cultural sustainability. A more holistic approach could include:

- Incentivizing ethical AI use in music discovery and recommendation.
- Funding cross-disciplinary research on algorithmic fairness in creative industries.
- Developing public alternatives to commercial platforms, ensuring greater autonomy for artists.

Ethical AI in this context refers to algorithmic systems that promote fairness, transparency, diversity, and accountability in how music is recommended and surfaced to users. This means, for instance, ensuring that AI-driven recommendation systems do not disproportionately favour major-label content or reinforce existing biases in language, genre, or geography. Policymakers could incentivise ethical AI through regulation (e.g. algorithmic transparency requirements), funding for responsible tech development, and support for public-interest alternatives to commercial recommendation engines. This could also include requiring platforms to offer user-customisable recommendation settings or to implement discoverability quotas for minority-language or independent music.

> *"Fair policies and innovative models can empower creators."*

The policy challenges surrounding the European music ecosystem reflect structural imbalance in digital platform economies. While these platforms provide unprecedented access, they also introduce new forms of precarity, algorithmic gatekeeping, and economic inequality. Addressing these issues requires a coordinated policy response that goes beyond individual regulations and instead fosters a systemic shift towards fairness, transparency, and artist empowerment.

By promoting algorithmic accountability, revenue redistribution, alternative business models, and cross-sector partnerships, policymakers can reshape the music industry in ways that prioritize creativity, diversity, and long-term sustainability over short-term engagement metrics.

3 Policy vision

3.1 OBJECTIVES

Building a fair, inclusive, and innovative European music ecosystem requires a multi-faceted policy approach that addresses structural inequalities while fostering sustainable growth and artistic diversity. The dominance of digital platforms, the concentration of market power in the hands of a few major players, and the increasing reliance on algorithm-driven discovery models have created significant barriers for independent artists and smaller industry stakeholders. As outlined in the MME Dialogue: The European Music Ecosystem report (2025) and further reinforced by the Fairness in the EU Music Ecosystem Policy (2024) and Can Online Music Platforms Be Fair? (2023), achieving a more balanced and sustainable music industry requires targeted policy interventions and innovative frameworks.

This section outlines key policy objectives aimed at strengthening the European music ecosystem by addressing economic fairness, digital and market transparency, business model innovation, audience development, and cross-sector collaboration.

1. Ensuring fair compensation and sustainable livelihoods for artists

One of the most pressing issues in the European music industry is the unfair distribution of revenue on streaming platforms, where independent artists often receive disproportionately low payments. The Fair MUSE Policy Brief (2024) highlights the need for regulatory measures that promote equitable remuneration, such as the implementation of user-centric payment systems or alternative revenue-sharing models that provide independent artists with a fairer share of streaming income. The objective is to advocate for transparent and equitable compensation structures that recognize the value of all creators, not just those backed by major labels.

2. Enhancing discoverability and algorithmic transparency

Algorithm-driven platforms have become the primary mode of music discovery, but their design often reinforces industry gatekeeping and limits the visibility of independent and underrepresented artists. There is an urgent need for transparent recommendation systems that do not disproportionately favour major labels (Ranaivoson et al. 2023). The objective is to push for greater accountability and regulatory oversight of streaming algorithms, ensuring that playlisting and recommendation mechanisms are designed to support diversity and fair access for all artists.

3. Supporting alternative business models and reducing platform dependency

The reliance on major streaming platforms has created economic vulnerabilities for many artists and music professionals. As demonstrated by the success of Even, direct-to-fan business models provide alternative revenue streams that empower artists to take control of their distribution and monetization strategies. The Can Online Music Platforms Be Fair? (2023) report calls for the development of new business structures (such as cooperative platforms, decentralized distribution networks, and fair-trade music models) that reduce the excessive dependency on digital monopolies. The objective is to foster a diverse economic landscape in which multiple, artist-led revenue models can thrive.

4. Strengthening audience engagement and cultural sustainability

Sustaining and expanding diverse music audiences is critical to the long-term viability of the European music industry. The Driving a Green, Digital & Innovative European Cultural Heritage (2024) report emphasizes that technological innovation should be leveraged to enhance audience development while maintaining cultural sustainability. The objective is to promote inclusive engagement strategies, such as AI-driven personalization that respects artistic diversity, immersive (VR/AR) music experiences, and fan-based patronage models that create deeper connections between artists and audiences.

5. Encouraging cross-sector collaboration for a resilient ecosystem

A more resilient and innovative music ecosystem requires strategic collaboration between the music industry and sectors such as technology, education, urban development, and cultural policy. The MME Dialogue report and the From Value Networks for Recorded Music to Music Ecosystem (2024) study emphasize the importance of interdisciplinary partnerships that can drive systemic change. The objective is to implement funding schemes, incubators and policy frameworks that facilitate cross-sector initiatives, allowing music to play a central role in digital innovation, social well-being and sustainable urban development. In parallel, it is essential to address the current lack of support for music entrepreneurship and business skills, which are often overlooked in favour of music education and artistic creation (European Commission, 2020b).

3.2 STAKEHOLDER NEEDS

The platformisation of the European music industry has created both opportunities and challenges for stakeholders across the ecosystem. While digital platforms have made music more accessible and enabled new forms of audience engagement, they have also introduced barriers to economic sustainability, visibility, and fair remuneration. Insights from Nextatlas social media monitoring and ekip Policy Corner #9 highlight the key needs of artists, industry professionals, policymakers, and audiences navigating this evolving landscape.

1. Economic sustainability and fair monetization

One of the most pressing concerns for musicians (especially independent and emerging artists) is the financial viability of a music career in the platform economy. Existing streaming models offer low per-stream payouts, making it difficult for most artists to sustain themselves through streaming revenue alone.

Artists need alternative revenue models beyond traditional streaming, such as direct audience support (e.g., Patreon, Bandcamp), cooperative streaming platforms (e.g., Resonate), and blockchain-powered royalty systems.

Access to funding, grants, and innovative business models is crucial to breaking the cycle where exposure is needed to generate income, but financial resources are required to gain exposure.

Live performances remain a key revenue source, but access to venues and festival slots is highly competitive, often favouring established acts over emerging talent.

Policy implications:

To support artists, policies should explore fairer revenue distribution mechanisms, greater transparency in streaming payouts, and funding initiatives that empower independent musicians to diversify income streams.

2. Visibility, algorithmic barriers, and community building

Digital platforms are now the primary means of music discovery, yet opaque algorithms and engagement-driven platform design often limit visibility for emerging and independent artists.

Artists must first build a fan base outside of streaming platforms (through social media, direct engagement, and live performances) before gaining visibility within streaming algorithms (e.g. Prey, 2018; Ranaivoson et al., 2023). While being a common practice, a workaround that some artists use to navigate platform bias, we need to be mindful that social media is also algorithm-driven, meaning the approach can reproduce the same visibility barriers.

The tension between local and global visibility creates challenges, some artists achieve international reach but struggle to book local performances, while others thrive in niche communities but remain undiscovered on major platforms.

Community-driven discovery is growing, with fans playing a bigger role in amplifying artists. However, artists need strategies and tools to nurture these communities beyond passive platform engagement.

Policy implications:

Regulatory discussions should address algorithmic transparency, artist control over content promotion, and the role of human curation in digital music discovery to ensure a more diverse and equitable landscape.

3. Resources, education, and skills development

As digital platforms require musicians to become entrepreneurs, marketers, and content creators, many lack the business, marketing, and strategic skills needed to navigate the industry successfully.

Artists need access to training in branding, audience engagement, financial planning, and digital marketing.

Many musicians remain unaware of emerging business models, such as blockchain royalties, fan-powered funding, or cooperative distribution models, limiting their ability to capitalize on new opportunities.

Mentorship and peer networks could bridge the knowledge gap, providing guidance on career development, funding strategies, and adapting to industry shifts.

Policy implications:

Governments and industry bodies should support educational initiatives, mentorship programs, and resources that equip artists with essential business and strategic skills.

4. Platform experience and algorithmic fairness

The design of streaming services and social media platforms significantly impacts music discovery and engagement. However, platform algorithms remain largely opaque and may be observed to favour major-label content and commercially successful tracks (Prey, 2018; Ranaivoson et al, 2023). Research shows that recommendation systems on platforms tend to amplify music with strong prior engagement signals creating structural advantages for already-visible content.

Artists struggle to understand how their music is discovered, making it difficult to optimize content for platform algorithms.

- Algorithmic visibility prioritizes mainstream hits while limiting exposure for niche, independent, and experimental artists.
- User engagement is optimized for platform profitability, often at the expense of diverse music discovery and cultural representation.

Policy implications:

Advocating for greater transparency in recommendation algorithms, fairer promotion systems, and artist agency over content visibility could create a more balanced and diverse digital music ecosystem.

5. Access to live performance opportunities

Live music remains one of the most reliable income streams for musicians, yet securing performance opportunities is increasingly difficult due to:

- Limited venue availability, with many spaces prioritizing well-known artists or commercial acts.
- Algorithmic promotion failing to translate into real-world bookings, some artists are popular online but struggle to secure live gigs, while others thrive in live settings but lack digital reach.
- The financial risk of touring, as independent artists often struggle to cover costs associated with travel, promotion, and production.

Policy implications:

Support for live music venues, touring subsidies, and policies that facilitate performance opportunities for independent musicians would strengthen artist sustainability.

6. The burden of self-management

The platformized music economy forces artists to take on multiple roles (marketer, content creator, and business manager) on top of their creative work. This self-management burden often leads to:

- Burnout and reduced time for creative work, as artists must constantly engage on social media, track analytics, and strategize content promotion.
- Financial instability, as many artists struggle to transition from music as a side job to a full-time career.
- A lack of structured career pathways, with few clear guidelines on how to scale a sustainable music career in the digital age.

Policy implications:

Artists need more structured career support, including financial stability mechanisms, digital marketing training, and access to support networks

that ease the administrative burden. Importantly, artists should not be expected to manage all aspects of their careers alone. There is a need to strengthen the role of intermediaries such as bookers, managers and labels in providing tailored and direct support.

7. Ethical and sustainable industry development

The music industry's future must balance technological innovation with ethical and sustainable business practices. This includes:

- Sustainability in live music: eco-friendly touring models, carbon footprint reduction, and festival policies that prioritize environmental responsibility.
- Fair AI integration: ensuring that AI-generated music does not undermine human creativity and protecting artists from exploitative content generation practices.
- Diversity in the digital music ecosystem: ensuring that underrepresented voices and experimental genres are given fair opportunities for exposure.

Policy implications:

Policymakers and industry leaders must prioritize sustainability, ethical AI regulations, and diversity-driven policies to ensure a fair and inclusive future for music.

The platformisation of music presents both challenges and opportunities, requiring strategic interventions to support artists, promote fair revenue distribution, and enhance transparency in platform operations. Insights from ekip Policy Corner #9 and Nextatlas trend monitoring emphasize the need for structural reforms, stronger community networks, and industry-wide collaboration to create a more equitable and sustainable music ecosystem. Addressing these stakeholder needs through policy innovation and industry support will be crucial in shaping the future of European music.

In addition, there is a growing need to adapt the European copyright regime considering rapid developments in artificial intelligence. As AI technologies become increasingly involved in music creation, distribution and recommendation, current copyright frameworks face significant challenges in defining authorship, ownership and fair remuneration. The European Union's AI Act acknowledges the transformative impact of AI across sectors, underscoring the urgency of ensuring that copyright law keeps pace with technological change.

4 Policy and project mapping

4.1 CURRENT POLICY STRATEGIES AND MEASURES

4.1.1 EU LEGISLATIVE AND REGULATORY MEASURES

Copyright and AI regulation

In 2019 the **EU Copyright Directive** (2019/790) was adopted which introduced an opt-out mechanism for text and data mining (TDM) by AI systems. The directive was designed to modernize copyright rules for the digital era, ensuring that rightsholders can prevent unauthorized use of their works for AI training and other automated processes. Organisations such as the European Composer and Songwriter Alliance (ECSA) argue that this framework has been misinterpreted, allowing AI companies to use copyrighted material without authorization, calling for stronger enforcement mechanisms, highlighting that the legal uncertainty surrounding the opt-out provision makes it nearly impossible for creators to exercise their rights effectively.

The **EU AI Act** (2024) further strengthens transparency requirements for AI-generated content, compelling digital platforms to disclose when AI is used in content creation and distribution. This act ensures compliance with copyright regulations, mandating that music platforms and AI developers provide mechanisms to track and compensate original creators. ECSA has advocated for stronger protections, arguing that AI-generated works should be subject to clear rights attribution and remuneration frameworks.

Regulating digital markets and streaming platforms

In 2020, the **Digital Services Act** (DSA) and the **Digital Markets Act** (DMA) were proposed as part of the Europe Fit for the Digital Age strategy. These acts aim to increase transparency and competition in digital markets, including music streaming platforms, by ensuring that large digital platforms act responsibly and do not impose unfair conditions on artists and businesses.

The DSA regulates online intermediaries and platforms, setting specific rules for very large online platforms and search engines with more than 45 million users per month in the EU. These platforms must comply with strict transparency requirements, ensuring fair content moderation and preventing algorithmic discrimination that could disadvantage smaller or independent artists. The DMA, on the other hand, targets gatekeeper platforms that control key access points to digital markets, ensuring that they do not engage in anti-competitive practices that limit consumer choice or exploit content creators.

In 2021, the European Commission adopted the **Media and Audiovisual Action Plan** to support the media and creative sectors' digital transformation, including measures relevant to music streaming. This plan introduced initiatives to help European content creators compete in the evolving digital landscape, with a particular focus on music streaming platforms, ensuring fair access to audiences and revenues.

In 2024, the **European Parliament adopted a resolution** condemning unfair payola practices in streaming and calling for greater transparency in revenue distribution. The resolution recognizes the increasing market power of dominant streaming platforms and the urgent need for regulatory interventions to prevent exploitative contracts and revenue imbalances.

The **Council Resolution on the EU Work Plan for Culture 2023–2026** does not explicitly mention the platformisation of the music industry, however it addresses broader issues related to digital transformation, fair remuneration, and the working conditions of cultural and creative professionals. The resolution also recognizes how large platforms influence content discoverability, raising concerns over algorithmic curation and its effect on European musical diversity.

EU funding and support mechanisms

The **Creative Europe Programme (2021–2027)** is the primary EU funding mechanism for the cultural and creative sectors. It provides financial support to music projects focused on cooperation, mobility, and digital innovation. Under the previous programme (2014–2020), over 130 music projects received a total of €98 million in funding.

A notable initiative within Creative Europe is **Music Moves Europe** (MME), which serves as the framework for EU actions in the music sector. Between 2018 and 2020, a Preparatory Action allocated €7 million to over 60 small-scale music projects, focusing on:

- The impact of streaming platforms on music distribution,
- Revenue-sharing models and alternative business structures,
- The role of AI and algorithmic curation in shaping music consumption patterns.

MME was also included in the **Council Work Plan for Culture (2019–2022).** Another significant initiative is **Liveurope,** a Creative Europe-supported platform that connects live music venues across the continent to promote emerging European artists and strengthen circulation.

In response to the COVID-19 pandemic, the MusicAIRE (Music – An Innovative Recovery for Europe) initiative was launched in 2021 under the broader Music Moves Europe framework. Funded with €2.5 million, MusicAIRE aimed to support the music sector's green, digital, and just recovery. Through two calls, 51 projects were funded, testing new funding distribution models and strengthening the resilience of music businesses in adapting to digitalisation. MusicAIRE laid the groundwork for future EU cultural support programmes, particularly influencing discussions on fair remuneration and sustainability in the industry.

Beyond Creative Europe, **Horizon Europe** supports research and policy development in the music sector. One project supported by Horizon Europe is Fair Muse, which brings together stakeholders from different sectors, advocating for improved regulation and support systems to ensure a fairer, more sustainable music industry. Fair Muse has produced research on the impact of platformisation on music creators focusing mainly on how algorithms and digital platforms shape music consumption, revenue distribution, and artist visibility.

Other EU projects include **Open Music Europe (OpenMusE),** which aims to make the European music industry more competitive, fairer, more sustainable, and transparent by developing open data tools for stakeholders. OpenMusE seeks to address biases in algorithmic music recommendations and promote equitable remuneration practices. Another initiative is **DAFNE+,** which explores decentralized blockchain-based models for fair creative content distribution. It enables artists to co-create and monetize their work using blockchain and NFTs, supporting new business models that empower content creators.

Funding opportunities also exist under programmes such as **Erasmus+,** which supports skills development and international collaborations in the creative industries. At the same time, national-level initiatives within EU Member States have introduced targeted policies to supplement EU-level funding and regulation.

4.1.2 NATIONAL-LEVEL MEASURES

Several EU Member States have implemented national policies to address platformisation challenges in the music industry:

- France has introduced minimum streaming royalties and legal protections against exploitative contracts to safeguard musicians' earnings.
- Germany has expanded collective bargaining rights for musicians, strengthening the role of collecting societies in negotiating fairer revenue distribution.

4.1.3 QUICK OVERVIEW OF CURRENT POLICY MEASURES & R&I PORTFOLIO

Fair Muse | EU

Fair Muse is a European project dedicated to promoting fairness in the music sector, focusing on the impact of algorithms and digital platforms on music creators. By fostering discussions and policy initiatives, it aims to enhance transparency, equity in revenue distribution, and better rights protection for independent artists. The project brings together stakeholders from different sectors, advocating for improved regulation and support systems to ensure a fairer, more sustainable music industry.

Resonate | Germany

Resonate is a decentralized music streaming platform that uses a "stream-to-own" model. Listeners pay per stream, and with each payment, they gain ownership of the music, benefiting artists directly. This model promotes fair compensation for creators and ensures a more sustainable and equitable relationship between artists and fans. Resonate is a co-op, democratically governed by its members, and activated through Community Credentials, which enable creatives to partner, exchange, sell, collaborate, engage and sustain relationships with trust and privacy.

Dafne+| EU

DAFNE+ is a European project that empowers digital content creators by offering decentralized tools for creating, distributing, and monetizing their works through blockchain technology. By facilitating intuitive use of blockchain and NFTs, DAFNE+ supports the creation of new business models and fosters community-driven decision-making through decentralized organizations (DAOs). The project focuses on enhancing creative content distribution and involving new actors to ensure fair compensation and engagement for artists.

Even

Even is a direct-to-fan music platform that empowers artists by enabling them to sell their music directly to listeners before it becomes available on streaming services. By prioritizing artist-first revenue models, Even allows musicians to retain greater control over their work

while fostering a more sustainable income stream. Unlike traditional streaming platforms that often result in low per-stream payouts, Even provides a marketplace where fans can purchase exclusive access to new releases, creating a more equitable value exchange.

Music360

The Music360 project, funded by the European Union's Horizon Europe programme, aims to redefine how the value of music is understood and measured across Europe. Recognizing that background music in venues like shops, restaurants, and bars significantly contributes to customer experience and revenue, the project seeks to develop a digital platform that captures both the economic and non-economic value of music. Utilizing advanced fingerprinting technology and data from Collective Management Organizations, the platform will provide stakeholders, including creators, venues, and policymakers, with transparent insights into music usage and its impact. By addressing current challenges in royalty distribution and acknowledging the societal and therapeutic benefits of music, Music360 endeavours to foster a fairer, more sustainable European music ecosystem.

PlatforMuse

PlatforMuse is a European Research Council-funded project (2023–2028) that investigates how streaming and social media platforms are transforming the working conditions, creative practices, and identities of musicians globally. Focusing on case studies in the Netherlands, Nigeria, and South Korea, each representing distinct stages and models of platformisation, the project examines how artists navigate opportunities and challenges in the digital music economy. By integrating perspectives from media studies, ethnomusicology, platform studies, and cultural industries research, PlatforMuse aims to develop a global, interdisciplinary framework for understanding cultural production in the platform era.

5 Current challenges

While rich in diversity and cultural capital, the European music ecosystem is facing a complex and systemic set of challenges as it adapts to the realities of the platform economy. As identified with the experts during the 5th ekip Policy Lab (see participant list in the Annex), these challenges span legal, technological, economic, and cultural dimensions. Addressing them requires coordinated policy responses, institutional support, and structural innovation.

1. Fragmentation and inconsistency across the ecosystem

A persistent lack of standardisation, particularly around metadata, terminology, rights management, and regulatory interpretation, undermines efficiency and fairness across the music ecosystem. Territories apply EU directives differently, and rights clearance processes vary, creating unnecessary complexity and barriers for artists and producers operating across borders.

Large volumes of music tracks lack proper metadata or universal identifiers. Many independent artists are not affiliated with collective management organisations, further complicating tracking and remuneration. Inconsistent data infrastructures across performance and publishing domains prevent the seamless linking of revenue sources and undermine accurate royalty distribution.

2. Market concentration, platform dominance, and power asymmetries

Platformisation has deepened power imbalances in the music industry. Major platforms and a few dominant labels control the infrastructure of discovery, distribution, and monetisation. This results in a "dysfunctional market" defined not by public interest or cultural diversity, but by opaque algorithmic systems and commercial optimisation.

Stakeholders noted the growing concentration of value and control in the hands of a few players(platforms, aggregators, and multinational labels) while the broader ecosystem remains fragmented and underfunded. There is limited competition between platforms, and alternative models (e.g. artist-owned or cooperative structures) face significant structural barriers to entry and scale.

3. Knowledge gaps and deficits in education and professionalisation

There is a systemic lack of digital, legal, and entrepreneurial literacy across the music sector, particularly among independent artists, small labels, and emerging professionals. Participants highlighted that most artists lack understanding of how platforms operate, how algorithms impact revenue and visibility, and how to protect their rights in digital environments.

Formal education in music and creative fields still fails to address platformisation, remuneration systems, and the implications of emerging technologies such as AI. Without significant investment in professional development and knowledge transfer, these gaps will continue to reinforce existing inequalities.

4. Ineffective and uneven regulatory frameworks

Although regulatory tools such as the Digital Services Act (DSA) and Digital Markets Act (DMA) offer new possibilities, their implementation remains uneven, vague, and difficult to enforce. Policymakers often lack understanding of platform dynamics or are heavily lobbied by dominant actors.

Policy Lab participants noted a lack of coherent oversight for CMOs, tax policy inconsistencies, and confusion over revenue sharing rules, especially for international digital income. More fundamentally, many felt the sector lacks leverage to hold platforms accountable or to push for reforms, especially in the absence of pan-European mechanisms for coordination and enforcement

5. Cultural and linguistic inequality

Streaming platforms may prioritise content that can scale globally, typically English-language mainstream genres, undermining cultural diversity and disadvantaging artists working in minority languages or niche scenes (e.g. see Legrand, 2022). Because success on global platforms depends on algorithmic optimisation and mass engagement, many regional, grassroots, and experimental forms of music struggle to gain visibility or sustainability.

As a result, the diversity of European music risks being flattened by market forces that reward virality over cultural value.

6. Disconnection between stakeholders and limited dialogue

Stakeholders across the music ecosystem, from artists and venues to platforms and policymakers, often operate in silos. Platforms are rarely engaged in open, multi-stakeholder dialogue, and many important conversations exclude the very institutions shaping distribution and monetisation.

There is also a lack of coordination between national and EU-level policy responses, and between market-driven and culturally oriented stakeholders. Participants stressed

the need for inclusive, ongoing, and trust-based collaboration structures that move beyond isolated consultations.

7. Declining youth engagement and passive audiences

Policy Lab participants expressed concern over younger audiences drifting away from active musical engagement, possibly due to over-reliance on platform algorithms, distraction from other media, or limited exposure to local and diverse content. Simultaneously, audiences are disempowered: most are unaware of how their listening habits impact artist revenue or cultural visibility.

Without transparency and agency, users remain passive consumers, unable to contribute meaningfully to shaping the cultural value system of the music ecosystem.

8. The growing pressure to prioritise commercial value over artistic intent

A key concern raised during the Policy Lab was the increasing treatment of music as a product optimised for data-driven revenue generation. While digital platforms and market actors have opened new avenues for artists to reach global audiences and monetise their work, their focus on metrics such as streams, engagement, and monetisation potential can also shape artistic choices. This emphasis tends to favour content that aligns with platform-friendly formats or audience expectations, placing subtle but growing pressure on artists to adapt their work to algorithmic trends and data-driven performance benchmarks. As a result, some artists report tensions between creative freedom and commercial visibility, particularly when working outside mainstream genres. This dynamic raises concerns about the long-term impact on musical diversity, experimentation, and the role of music as a form of cultural and social expression.

> *"Goal is the inclusive, sustainable, and creative European music ecosystem."*

These challenges underline the need for coordinated action across cultural policy, platform governance, funding mechanisms, and infrastructure investment. A fair, innovative, and artist-centred European music ecosystem cannot emerge without bold and inclusive responses to these systemic issues.

6 Policy recommendations

Based on the insights from the 5th ekip Policy Lab and group discussions with key stakeholders, the following policy recommendations aim to strengthen the infrastructure, innovation potential, governance, and equity of the music sector across Europe. These proposals respond directly to the systemic issues identified, ranging from data standardisation and artist empowerment to platform regulation and cultural diversity.

These policy recommendations reflect a collective call for action from stakeholders across the European music ecosystem. To build a resilient, inclusive, and innovative music industry, Europe must move beyond reactive regulation and toward proactive, participatory policymaking. Doing so will not only ensure fairer outcomes for creators and audiences but also strengthen the sector's global competitiveness and cultural leadership in the platform age.

6.1 OPEN INNOVATION BUILDING BLOCK: SUSTAINABLE COMPETITIVENESS

6.1.1 STRENGTHEN CREATOR ORGANISATIONS AS OPEN-INNOVATION AND BARGAINING HUBS

Why: Many artists and small music actors do not have the collective power or support to influence platform rules, copyright policy or cultural funding. Big industry players have strong lobbying teams, while independent creators are often missing from key discussions. Backing unions, collectives and advocacy platforms helps make sure diverse creator interests are heard in local, national and EU policy. This reduces duplication, helps small actors learn from each other faster, and creates a solid base for investment and experimentation.

How this builds an open innovation ecosystem: Open innovation needs joined-up work across creators, SMEs, platforms, tech partners, researchers and public bodies. In a sector made up mostly of very small, independent players, single voices get lost and good ideas do not scale. Strong creator organisations do the coordinating and speak clearly for the sector. They create a common space where artists, businesses, the tech sector, researchers and policymakers design solutions together, agree shared standards and keep a steady feedback loop from practice to policy. This turns scattered efforts into solutions the whole ecosystem can use.

What to do:

- Provide institutional and financial support to artist unions, collectives and independent representative bodies to build negotiation, advocacy and coalition capacity.
- Create structured dialogue mechanisms between artist organisations and policymakers at local, national and EU levels, including participation in platform governance and cultural and creative industries policy reforms.
- Develop shared negotiation platforms so fragmented actors can coordinate positions and press for fair terms and representation.
- Encourage cross-disciplinary and cross-border collaboration to build a pan-European advocacy voice for artists and cultural workers in the platform economy.

6.1.2 TACKLE PLATFORM AND LABEL CONFLICTS TO UNLOCK INNOVATION AND FAIR COMPETITION

Why: When platforms and labels are tied together, sign exclusive deals, or favour their own catalogues, access, visibility and payments get skewed. This makes it harder for independent creators and SMEs to reach audiences or fund experiments. Fewer new services come through, and music-tech innovation slows. Clear rules to prevent conflicts of interest bring back fair competition, build trust and encourage investors to back European innovation.

How this builds an open innovation ecosystem: With fair access to discovery, licensing and data, independents can join pilots and standards work on equal terms. Clear market rules give investors and public funders the confidence to support open, shared solutions rather than one-off, closed deals.

What to do:

6.1.3 Mandate **disclosure of ownership links and preferential agreements** between DSPs, labels and publishers.

6.1.4 **Prohibit anti-competitive prioritisation** of in-house or affiliated catalogues and require functional separation where conflicts cannot be avoided.

6.1.5 Strengthen **independent oversight** to monitor catalogue prioritisation, deal terms and market outcomes, with regular public reporting.

6.1.6 Require **practical interoperability and data portability** to reduce lock-in and enable multi-home participation in innovation pilots.

6.2 OPEN INNOVATION BUILDING BLOCK: REGULATION AND GOVERNANCE

6.2.1 ESTABLISH A EUROPEAN FRAMEWORK FOR DATA STANDARDISATION AND RIGHTS MANAGEMENT TO POWER INTEROPERABLE INNOVATION

Why: Fragmented and incomplete metadata, inconsistent use of identifiers, and unclear rights information create inefficiencies and limit fair remuneration for artists. Without trusted, shared data, it is hard to use AI responsibly, track provenance or develop new discovery and payment tools.

How this builds an open innovation ecosystem: A common European data and rights layer sets shared fields, identifiers and rules everyone can rely on. Creators, SMEs, platforms, researchers and public bodies can then build services that work together from day one. Clear attribution and licensing reduce risk, improve confidence for investment and make cross-border pilots faster and easier to scale.

What to do:

- Develop and enforce **EU-wide standards for music metadata,** digital identifiers, and rights registration.
- Create or expand a **public infrastructure,** such as a Universal Creator Identifier System, to ensure transparent tracking of music usage and royalties across borders and platforms.
- Provide **long-term support for coordination, applied research, and expert advisory mechanisms** on music data governance, ensuring that evolving standards, tools, and regulatory approaches are aligned with the needs of artists, independent stakeholders, and public interest goals. This should include cross-sector collaboration between music, tech, and policy actors to improve data interoperability and fairness in rights management.

6.2.2 HARMONISE LEGAL TERMINOLOGY TO ENHANCE CROSS-BORDER COLLABORATION AND INNOVATION CAPACITY

Why: Different meanings for rights, licences, data use and contract terms across countries make it hard for artists and start-ups to work together across borders. People struggle to see who owns what, what permissions are needed and what their obligations are in each territory. This slows co-creation, creates disputes and delays payments. Many small actors give up because they cannot clear rights in time or afford legal help, so they miss chances to monetise their work.

How this builds an open innovation ecosystem: A shared EU-wide language and clear guidance give everyone the same map for rights and obligations. With consistent definitions and standard paths to clear permissions, creators and SMEs can team up across borders, release faster and get paid correctly wherever their music is used. Labels, CMOs, platforms and tech partners can plug in more easily, which means fewer disagreements and more cross-border projects that carry their revenue splits and creditswith them. The result is smoother collaboration, quicker deals and more room for new ideas to reach audiences.

What to do:

- Develop a **shared legal vocabulary and taxonomy** for the music sector in collaboration with legal experts, rights organisations, and sector stakeholders.
- Host an **EU repository of standardised terms,** contract templates and guidance, updated regularly and referenced in grants, procurement and programme guidelines.
- Promote **harmonisation of terms and definitions** in rights clearance, licensing, and data management across EU policy and national legislation.
- Support the development of **training resources and legal toolkits** that translate complex legal frameworks into accessible language for artists and small organisations.

6.3 OPEN INNOVATION BUILDING BLOCK: SOCIAL DIMENSION

6.3.1 EMBED MULTI-STAKEHOLDER GOVERNANCE FOR OPEN INNOVATION

Why: When platform and policy rules are made without real input from creators, SMEs and researchers, they fall behind what happens in practice and keep power with a few big players. Policymakers often lack sector know-how and can be too influenced by dominant lobbies. The result is a fragmented system with duplicated effort, tools that do not work together and low trust, which slows learning and uptake. Clear, inclusive governance brings missing voices to the table, spots needs early and turns scattered pilots into a coordinated plan.

How this builds an open innovation ecosystem: Multi-stakeholder governance provides the coordination open innovation needs. It brings everyone's needs together, sets shared priorities and lines up funding, standards and rules around them. With clear roles, transparent processes and regular feedback loops, ideas move faster from pilot to policy. Admin and legal burdens for SMEs go down, and results are easier to use across countries. By including co-design, evidence sharing and accountability into one process, it turns isolated efforts into solutions the whole sector can adopt.

What to do:

- Establish **advisory bodies** composed of independent artists, grassroots organisations, and researchers to inform EU and national policies.
- Make **platforms and digital gatekeepers** regular participants in policy dialogues, while requiring them to **respond to stakeholder feedback and public interest concerns.**
- Foster more inclusive and regular forums for multi-stakeholder engagement, focusing on innovation, equity, and diversity.

6.3.2 MAKE CULTURAL AND LINGUISTIC DIVERSITY AN INNOVATION ADVANTAGE

Why: Algorithmic homogenisation and market concentration often push English-language, US hits to the top. Minority-language and regional scenes get less space and less investment. That shrinks the range of ideas and testbeds for new services, and it weakens Europe's unique voice in global markets. Europe's many languages are a strength. If we support them, we can grow audiences, spark local entrepreneurship and improve competitiveness.

How this builds an open innovation ecosystem: Building diversity into design widens the pool of ideas, partners and pilots. It makes the data behind recommendations and AI more balanced and fairer, supports learning across borders and creates more niches where new business models can be tried and scaled. When artists in different languages are easy to find and worth backing, more creators and SMEs can take part in the open innovation ecosystem.

What to do:

- Develop **discoverability quotas** for European and minority-language music within algorithmic recommendation systems, with regular public reporting by platforms.
- Fund **playlisting initiatives, translation tools, and cross-border collaborations** that promote non-dominant languages and regional genres.
- Encourage the inclusion of cultural diversity considerations (such as language, regional representation, and genre variety) in **public funding** criteria and media policy evaluation frameworks, while recognising the need for flexibility across different contexts.

6.3.3 EMPOWER AUDIENCES AS CO-INNOVATORS

Why: Listeners are not passive consumers. Platform design and algorithms shape discovery, attention and remuneration, yet users often lack clear information or meaningful control. Without informed and engaged audiences, promising features fail to gain traction, trust remains low and incentives favour short-term, homogenised content. When audiences understand how their behaviour affects visibility and earnings, they reward fairer services, support diverse repertoires and provide the real-world feedback that innovation needs.

How this builds an open innovation ecosystem: Engaged audiences create market pull for transparent and diverse services, which encourages platforms and SMEs to co-design new tools. They supply continuous, privacy-respecting feedback and usage data that shorten learning cycles, de-risk experimentation and make successful pilots portable across borders. Audience participation also surfaces edge cases early, improves accessibility and ensures that innovation outcomes reflect societal needs rather than only the interests of dominant intermediaries.

What to do:

- Promote platform transparency tools that help users understand how their listening patterns affect artist remuneration and discoverability.
- Support digital literacy campaigns to empower listeners to make informed choices, discover diverse music, and actively engage with independent artists.
- Encourage platforms to offer customisation and ethical recommendation settings, enabling audiences to prioritise cultural diversity, locality, or artistic merit.

6.4 OPEN INNOVATION BUILDING BLOCK: RESEARCH AND INNOVATION

6.4.1 INVEST IN ALTERNATIVE INNOVATION MODELS TO REDUCE DEPENDENCY AND DIVERSIFY THE MUSIC ECOSYSTEM

Why: Relying on a few dominant platforms creates single points of failure and leaves little room for different business models. It discourages trying new ideas and leaves creators and SMEs exposed to sudden policy changes, shaky incomes and restrictive terms. Co-operative, artist-led and public-interest models can keep more value in local scenes and let people test new ways to run platforms, share money and manage data that big incumbents may overlook. A healthy mix of ownership and funding makes the system more resilient, builds long-term capability and increases the number of ideas that become market-ready.

How this builds an open innovation ecosystem: Alternative and public-interest platforms can act as living labs where governance choices, payout rules and recommendation settings are tested in the open and turned into simple frameworks others can reuse. By reducing dependence on a few gatekeepers, they give more creators and SMEs a way to join pilots and standards work. Clear, transparent rules about who decides what and where the money goes make these models easier to fund and grow, and the collaboration habits they build between creators, tech partners, researchers and public bodies create benefits across Member States. Most importantly, models that claim to put artists first must prove it in design and practice: show the money flows, set real accountability and avoid recreating the same problems as the platforms they aim to replace or complement.

What to do:

- Provide **public support (financial, legal, and technical)** for the development and adoption of alternative business models, including artist-led, cooperative, and non-profit digital platforms.
- Promote **regulatory environments** that enable experimentation with fair remuneration systems, collective governance, and open innovation in music technology.
- Fund **pilot projects and scaling efforts** that test and validate new models of distribution, rights management, or monetisation that prioritise artistic and community benefit.
- Facilitate **knowledge exchange and peer learning** between actors experimenting with platform alternatives to amplify their reach and policy relevance.

6.5 OPEN INNOVATION BUILDING BLOCK: INFRASTRUCTURES

6.5.1 RECOGNISE DIGITAL PLATFORMS AS CORE INFRASTRUCTURE IN THE MUSIC ECOSYSTEM

Why: Platforms are no longer just tools for promotion, they function as essential infrastructure for music distribution, access, and income generation. Streaming, discovery and distribution platforms function as the foundation of the music economy. Reliance on restrictive and monopolistic platforms can disrupt livelihoods, constrain experimentation and weaken Europe's capacity to compete. Recognising platforms as cultural and creative infrastructure justifies proportionate public-interest obligations on transparency, interoperability and fair access.

How this builds an open innovation ecosystem: Infrastructure status clarifies roles and responsibilities, allowing baseline rules on access, data, and standards to be set across the ecosystem. This lowers entry barriers for creators and start-ups. Secure, well-governed data access supports research and evidence-led policy, while clear service obligations and due process increase trust. It reduces lock-in, levels the playing field for SMEs and independents, and creates predictable conditions for long-term investment in open, shared solutions.

What to do:

- Officially recognise streaming platforms and algorithmic services as **critical cultural and creative infrastructure** with transparency and fairness duties.
- Integrate platform governance into national and EU **cultural and creative infrastructure strategies,** alongside venues, education, and public broadcasters.
- Create secure **research access pathways** to anonymised platform data with robust privacy, competition and ethics safeguards.
- Encourage public investment in **alternative, public-interest digital infrastructure** to diversify access and reduce monopolistic dependence.

6.5.2 REQUIRE MORE TRANSPARENCY AND FAIRNESS IN PLATFORM OPERATIONS

Why: Recommendation systems, editorial choices and royalty flows are often unclear. Artists and audiences may lack clarity on how algorithms and payment systems work, which lowers trust and slows new product development. Unclear rules also raise the risk of unfair outcomes and discourage investment in diverse catalogues and tools.

How this builds an open innovation ecosystem: Clear information and independent checks give everyone a shared picture of how platforms work. When people can see how content is recommended, surfaced and paid, creators and SMEs can design better services, test ideas quickly and compare results. Standard, easy-to-read reporting lowers entry barriers, helps tools work together and lets funders and regulators target support where it matters.

What to do:

- Mandate **algorithmic transparency and accountability** from digital service providers (DSPs), with independent audits and user access to explanation tools.
- Require platforms to **publish clear royalty distribution models,** including the share going to rights holders and intermediaries.
- Encourage the implementation of **user-centric payment models** as alternatives to pro-rata models, to better align financial flows with actual listener engagement.

6.5.3 REPLACE PRO-RATA WITH FAIRER MODELS TO ALIGN INCENTIVES FOR INNOVATION

Why: The pro-rata model pools all revenue and pays out by total share of streams. This rewards volume over depth and favours large catalogues and background or noise content. Many niche and emerging artists, including minority-language and regional scenes, see little return even when they have loyal listeners. The fast growth of AI-generated music can also flood catalogues and skew both payouts and discovery unless it is clearly labelled and handled in model design. This weakens the position of new and diverse music and discourages investment in fresh services and tools.

How this builds an open innovation ecosystem: Fairer payout models, such as user-centric or hybrid approaches, tie money more closely to real listener choices. That makes a wider range of creators viable. Clearer links between listening and payment also help platforms and SMEs design better features for fan support, discovery and attribution. With more balanced returns, funders and investors are more likely to back open, interoperable solutions.

What to do:

- Acknowledge the structural flaws of the pro-rata model in EU policy discussions and call for its gradual phase-out.
- Support the development and testing of alternative models, including user-centric payment systems and hybrid schemes that better reflect individual user engagement.
- Develop a clear labelling system for AI-generated works, and test payout rules that stop synthetic content from distorting results.
- Provide regulatory and funding incentives for platforms willing to pilot and transition to fairer remuneration models.

6.6 OPEN INNOVATION BUILDING BLOCK: SKILLS

6.6.1 BUILD TECHNOLOGY, DATA AND BUSINESS SKILLS ACROSS THE ECOSYSTEM

Why: Many creators and small organisations lack digital literacy and the skills needed to work with platforms, data, contracts and new tools and business models. This increases dependence on intermediaries, slows adoption of better practices and weakens bargaining power. Gaps in digital, legal and business know-how also make it harder to join pilots, meet compliance needs and benefit from new revenue options, including AI tools.

How this builds an open innovation ecosystem: A skilled ecosystem, with strong digital literacy, can take part in co-design and build a better-working ecosystem for the platform era. When artists, SMEs and public bodies understand platforms, metadata, rights and basic business models, they can test ideas faster, share learning and scale what works. Better skills also raise data quality across the system, which improves attribution, payouts and research, and makes cross-border collaboration easier.

What to do:

- Add digital literacy, platform literacy, metadata practice, contracts and basic finance to **higher education and VET programmes** for music and cultural management.
- Provide short, stackable **micro-credentials** for creators and SMEs on digital literacy, rights, data pipelines, dashboards, AI basics and audience growth.
- Provide **publicly funded workshops and toolkits** for artists and small labels on how to work with algorithms, contracts, metadata, and legal frameworks.
- Create a **mentor and advisor network** pairing artists and small labels with legal, data and product experts, including digital literacy coaching.

6.7 OPEN INNOVATION BUILDING BLOCK: INVESTMENT & FUNDING

6.7.1 INTRODUCE PLATFORM TAXATION TO FINANCE INNOVATION CAPACITY AND ECOSYSTEM DEVELOPMENT

Why: Large platforms capture significant value from European music. A small number of dominant platforms generate significant revenues while contributing little to the development of local music ecosystems. Meanwhile, current royalty models do not adequately support diverse or emerging talent. Markets often underfund shared needs such as data standards, skills, early-stage pilots and public-interest digital tools. A well-designed tax mechanism on the biggest platforms can fill these gaps without hurting innovation, if it is targeted, transparent and coordinated. Comparable schemes already exist in the audiovisual sector, where streaming services are required in some EU Member States either to invest a share of revenues in local production or to pay levies into national funds that support the domestic ecosystem.

How this builds an open innovation ecosystem: Dedicated funds can pay for the basics that open innovation needs: common data and rights infrastructure, open tools, training and digital literacy, living labs, and diversity and discoverability programmes. Matching rules can pull in private co-investment. Clear, multi-stakeholder governance keeps the focus on outcomes for artists and small actors. The mechanism can mirror film-sector models by giving platforms a choice to invest directly in approved local music projects and infrastructure or to contribute through taxes, ensuring money flows back into the ecosystem in a predictable, accountable way.

What to do:

- Introduce **taxation mechanisms** for large digital platforms operating in Europe and redirect revenues to **music sector development,** including funding for artist development, small and mid-scale venues, music education, and innovation.
- Ensure taxation schemes are **aligned with existing cultural policy goals** and designed to strengthen the broader infrastructure that supports emerging artists and music professionals.
- Recognise that supporting **diverse talent pipelines** and inclusive sectoral development will, in turn, **enhance cultural diversity** across Europe's music ecosystem.

6.7.2 DESIGN FUNDING THAT REWARDS CULTURAL CONTRIBUTION, DIVERSITY AND SUSTAINABILITY AS DRIVERS OF INNOVATION

Why: The music ecosystem encompasses a wide spectrum of actors and outputs, from commercially driven enterprises to culturally and socially oriented initiatives. The current funding and policy frameworks often prioritise market performance, while overlooking the broader societal, artistic, and community value of music. A resilient music ecosystem requires both entrepreneurship support and sustained public investment in cultural infrastructure and non-market-driven creation. Many grant and investment schemes still favour short-term economic returns and low-risk projects. This pushes money toward established players and repeat formats, and leaves less room for artistic risk, community work, or language diversity. As a result, promising ideas and teams struggle to pilot and scale. Clear funding rules that value cultural outcomes and diversity build a stronger pool of ideas and more resilient organisations.

How this builds an open innovation ecosystem:

Funding mechanisms that rewards cultural contribution, diversity and sustainability creates demand for open practices, shared learning and innovation. It brings more creators and SMEs into co-design, improves the quality of data and evaluation, and increases the number of places where new models can be tested and reused. By linking cultural value with viable business models, it strengthens resilience and improves Europe's competitiveness.

What to do:

- Design tailored funding schemes that support diverse roles within the music ecosystem, including market-oriented, socially engaged, and culturally significant music actors.
- Apply evaluation criteria that go beyond economic metrics, recognising contributions to artistic innovation, cultural heritage, local community building, and language diversity.
- Ensure cross-policy coordination between cultural and business support frameworks, so that both creative entrepreneurship and cultural expression are adequately resourced.
- Integrate long-term sustainability and ecosystem health as core funding principles, fostering conditions where different types of music practices can coexist and thrive, not only survive on market terms.

6.8 COMPLEMENTARITY WITH THE EUROPEAN MUSIC ECOSYSTEM REPORT

The policy recommendations presented in this report directly support and extend the vision laid out in the Music Moves Europe Dialogue Report: The European Music Ecosystem (2025). Both documents are grounded in an ecosystem-based approach, which recognises the interdependencies between artists, intermediaries, platforms, institutions, and audiences, and calls for system-wide strategies to address structural challenges in the music sector.

The report highlights the crucial importance of innovation as a foundation for the sector's growth, resilience, and societal impact. Innovation is presented as a key force that shapes the future of music in Europe and strengthens its global position, and this focus aligns directly with the EKIP emphasis on developing open innovation ecosystems.

Innovation is a central driving force within the European music ecosystem, playing a key role in addressing societal challenges and advancing the sector's competitiveness. The emergence of new co-organised structures, open networks, and collaborative models demonstrates how the music sector increasingly relies on cooperation, innovation, and diversity to thrive.

As one of the most dynamic cultural sectors, music is often at the forefront of adopting new digital technologies and media, serving as a forerunner and inspiration for innovation across the broader cultural and creative industries. This capacity for rapid social and technological innovation not only strengthens the sector itself but also generates positive spill-over effects for society at large, including contributions to wellbeing, urban development, and social cohesion.

A holistic approach to music policy is essential to fully leverage this innovative potential. Better coordination across EU policies, particularly those related to entrepreneurship, innovation, research, and social programmes, can maximise impact and foster synergies with other sectors such as healthcare and urban development.

Moreover, fostering a culture of experimentation and continuous learning is vital. Supporting experimental venues, music and tech labs, and lifelong learning opportunities for musicians helps the ecosystem adapt, evolve, and stay resilient in a rapidly changing world.

Our recommendations echo and substantiate the MME report's call for a resilient, diverse, and sustainable music ecosystem. Key areas of alignment include:

Artist empowerment: Both reports highlight the need to improve the socio-economic conditions of creators. This report advances that vision through concrete proposals for fairer remuneration models (e.g. user-centric payment systems), stronger artist unions and collectives, and enhanced access to digital and legal literacy.

- **Open innovation and decentralised infrastructure:** Where the MME report advocates for openness and innovation, this report proposes practical actions (such as funding for cooperative platforms, public investment in metadata and rights infrastructure, and support for alternative business models) to reduce reliance on dominant digital intermediaries.
- **Audience engagement and community building:** This report strengthens the ecosystem perspective by explicitly including the role of audiences, not merely as consumers but as active cultural participants. Recommendations to improve platform transparency and user empowerment reinforce the MME report's emphasis on public engagement and access.
- **Governance and fairness:** This report expands on the MME agenda by introducing detailed proposals to improve transparency, regulate platform power, and address conflicts of interest between digital service providers and major labels, areas that are acknowledged but less developed in the MME report.

Moreover, the proposals to **harmonise legal terminology,** treat **platforms as critical infrastructure,** and support **ecosystem-wide coordination mechanisms** offer essential tools for implementing MME's high-level goals across EU member states.

In summary, this report provides a **policy toolbox** that reinforces the European Commission's strategic direction while offering **targeted, implementable measures.** It contributes a shared voice from across the ecosystem and ensures that the policy discussion around platformisation is grounded in the lived realities of artists, intermediaries, and audiences alike.

Methodological note

The policy recommendations were co-created using the ekip Policy Lab methodology. The methodology designed for the development of policy recommendations as part of a Policy Lab is divided in two consecutive steps:

1. **Scoping and identification of the problem:** the first step is the identification of the problem and its scoping. The topic is identified and scoped via desk research, interviews with stakeholders and the input from the different consortium partners. As part of the Policy Lab preparatory work, a scoping document is shared with the participants to prepare them ahead of the day and to ensure a common understanding among participants. The scoping documents for this policy are available at https://ekipengine.eu/knowledge-category/policy-labs-platformisation-of-the-music-industry-scoping-documents/
2. **Policy formulation as part of the Policy Lab:** The Policy Lab is a moment of co-creation with the participating stakeholders. The goal of the policy formulation session is to develop, refine and propose together with the participants different policies for the challenges at hand. More information on this Policy Lab is available at https://ekipengine.eu/knowledge-category/policy-labs-platformisation-of-the-music-industry/

The creation of this document was assisted by OpenAI's GPT-4.0 model (2025) for data processing and text editing.

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Appendixes

AGENDA OF THE #5 POLICY LAB

Agenda

09:30-10:00	Registration and welcome coffee
10:00-10:15	*Opening words* **Helen Sildna, Founder of Tallinn Music Week** and Member of the Music Moves Europe dialogue consortium **Introduction Session** Ragnar Siil, CEO of Creativity Lab and Member of ekip consortium *Introduction to ekip - European Cultural and Creative Industries Innovation Policy Platform. The scope of the workshop is to discuss the impact of the platform economy on the music industry.*
10:15-12:00	**Setting the scene** How the platform economy has impacted the music industry? What are the key challenges and opportunities for the music industry? How can the European music industry survive and thrive in the global competition? Inputs for 360 view from: ***Industry insights*** (15 min) • **Virgo Sillamaa,** EMEE - European Music Exporters Exchange ***Technological insights*** (15 min) • **Reigo Ahven,** Founder, Fairmus ***Music producers' insights*** (10 min) • Thea Zaitsev, Artist Manager and Publisher ***Platform and project insights*** • **Jaap Gordijn,** Associate Professor, UNESCO chair, Project Lead. Horizon Europe project **Music360.** (10 min project intro+ 10 min demo) • **Jesper Larsson,** Project Manager, Lund University. **Kalaudioscope – personalised digital concerts.** (15 minutes) • **Aurelija Lukoseviciene,** Faculty of Law, Postdoctoral Researcher, Lund University. **ConcertX: How does the law need to be adapted when concerts go digital?** (15 min)
12:00-12:30	**Session 1: Current landscape** Breakout sessions (2-3 groups) *Breakout brainstorming mapping of challenges along the music industry value chains, including good practices. The strengths and weaknesses of the existing music industry ecosystem in Europe.*

12:30-13:30	**Session 2: Key policy challenges on local, regional and the EU level** Plenary session, moderated by Ragnar Siil *Structuring and prioritising key challenges and key enablers for the music industry in the platform economy.*
13:30-14:15	*Lunch on the venue*
14:15-15:00	**Session 3: Identifying key action areas** Breakout sessions (2-3 groups) *Breakout brainstorming identifying actions needed to strengthen the European music ecosystem and support the key players in the music sector on local, regional and EU-level.*
15:00-16:00	**Session 4: Formulating and prioritising policy recommendations** Plenary session, moderated by Ragnar Siil *Structuring and prioritising key actions and developing impactful policy recommendations for the local, regional and EU-level policymakers to support the innovative and resilient European music ecosystem.*
16:00-16:30	**Conclusions and next steps**

Participant list

	Name	Country	Organisation	Positition
1	Ave Sophia Demelemester (Tölpt)	Estonia	Music Estonia, Director	Production and marketing (e.g., producers, music companies, etc.)
2	James Edwards	Germany	Senior Researcher, SINUS Market and Sozial Research GmbH	Research and education (e.g., universities)
3	Thea Zaitsev	Estonia	Tier Music OÜ	Production and marketing (e.g., producers, music companies, etc.)
4	Toomas Olljum	Estonia	Made in Baltics, CEO/owner	Production and marketing (e.g., producers, music companies, etc.)
5	Virgo Sillamaa	Belgium	EMEE, research coordinator	Policy making and advocacy (e.g., clusters, intermediaries, ministries, etc.,)
6	Per Dehlin	Norway	Creative Europe desk Norway - Kulturdirektoratet/Arts & Culture Norway	Other
7	Kristin Bolgård	Norway	Arts and Culture Norway, Senior Advisor	Other
8	Jaap Gordijn	Netherlands	Associate Professor, UNESCO chair	Research and education (e.g., universities)
9	Alessandro Giulianelli	Italy	FIMI - Federazione Industria Musicale Italiana / Marketing Communication & Insight Manager	Production and marketing (e.g., producers, music companies, etc.)
10	Aurelija Lukoseviciene	Sweden	Lund University, Faculty of Law, Postdoctoral Researcher	Research and education (e.g., universities)
11	Jesper Larsson	Sweden	Lund University Project Manager Kalaudioscop innovation portfolio	Distribution and dissemination (e.g., platforms, festivals, networks etc.)
12	Chantal Epp	England	ClicknClear, Founder & CEO	Distribution and dissemination (e.g., platforms, festivals, networks etc.)
13	Lennart Stoy	Belgium	Technopolis Group	Other
14	Britte Meinema	Netherlands	Make Waves - Marketing Manager	Distribution and dissemination (e.g., platforms, festivals, networks etc.)

	Name	Country	Organisation	Positition
15	Guillaume Warmerdam	Netherlands	Make Waves - Co-founder / CEO	Distribution and dissemination (e.g., platforms, festivals, networks etc.)
16	Marie Savoie-Levac	Canada	In Tempo Musique	Production and marketing (e.g., producers, music companies, etc.)
17	Jacynthe Plamondon-Emond	Canada	InTempo Musique - President	Music creator (e.g., independent artist)
18	Anastasija Konkina	Latvia	Creative Europe Desk Latvia / Ministry of Culture of the Republic of Latvia	Policy making and advocacy (e.g., clusters, intermediaries, ministries, etc.,)
19	Riikka Koivula	Finland	Creative Europe Desk Finland, Senior Programme Adviser	Other
20	Hanna Hietaluoma-Hanin	Finland	Creative Europe Desk Finland, Programme Manager	Other
21	Neil Grant	Germany	Neil Grant Media & Promotion	Production and marketing (e.g., producers, music companies, etc.)
22	Kristin Bolgård	Norway	Arts and Culture Norway, senior adviser	Other
23	Kamile Celutkaite	Lithuania	Head of Creative Europe Desk Lithuania (Lithuaniac Culture Institute)	Policy making and advocacy (e.g., clusters, intermediaries, ministries, etc.,)
24	Nicoline Joy Haas	Denmark	Creative Europe Desk Denmark, EU advisor	Policy making and advocacy (e.g., clusters, intermediaries, ministries, etc.,)
25	LigitaZariņa	Latvia	Pārdaugava Culture Association	Production and marketing (e.g., producers, music companies, etc.)
26	Ida Muhonen	Finland	Aalto University, Research coordinator	Research and education (e.g., universities)
27	Bodil Malmström	Sweden	Lund University	Research and education (e.g., universities)
28	Hannes Tschürtz	Austria	Ink Music, CEO / IFPI Austria, Board Member (Austria) / Austrian Music Fund, Advisory Board Member	Production and marketing (e.g., producers, music companies, etc.)
29	Detlef Schwarte	Germany	Reeperbahn Festival, Director	Distribution and dissemination (e.g., platforms, festivals, networks etc.)
30	Jani Jalonen	Finland	Music x Media, CEO	Other
31	Elin Rosenström	Sweden	Creative Europe Desk Sweden/Swedish Arts Council	Policy making and advocacy (e.g., clusters, intermediaries, ministries, etc.,)
32	Hannes Tschürtz	Austria	Ink Music, CEO / IFPI Austria, Board Member (Austria) / Austrian Music Fund, Advisory Board Member	Production and marketing (e.g., producers, music companies, etc.)
33	Kertu Aksiim	Estonia	Estonian Ministry of Culture, advisor (music)	Policy making and advocacy (e.g., clusters, intermediaries, ministries, etc.,)
34	Ida Muhonen	Finland	Aalto University, Research coordinator	Research and education (e.g., universities)
35	Andrea Valeri	Austria	University of Innsbruck - External PhD student	Research and education (e.g., universities)
36	Oleksandr Khodakivskyi	Ukraine	Creative Europe Desk Ukraine, project manager	Other
37	Guna Zucika	Latvia	Every Little Thing, managing director	Production and marketing (e.g., producers, music companies, etc.)
38	Brian de Sa	Estonia	Business Analyst	Research and education (e.g., universities)
39	Carlotta Villa	Italy and United Kingdom	University of Chester - Events Management student	Other

	Name	Country	Organisation	Positition
40	Andrea Patron	Estonia	Improvisation & creativity Academy, founder	Music creator (e.g., independent artist)
41	Akvile Svidraite	Lithuania	Legal assistant @ Gabne.Gabnys Law Firm	Policy making and advocacy (e.g., clusters, intermediaries, ministries, etc.,)
42	Carsten Winter	Germany	University professor for media and music management at the Hanover University of Music, Drama and Media	Research and education (e.g., universities)
43	Anna Hildur Hildibrandsdottir	Iceland	Assistant Professor for Creative Industries, Bifröst University	Research and education (e.g., universities)
44	Elies Delgado	Spain	SONY MUSIC (Data Analyst) // RADIO PATI (Concert Organiser) // HIGH FIVE IF YOU READ THIS (Passionate High Fiver)	Distribution and dissemination (e.g., platforms, festivals, networks etc.)
45	Eva Cozar	France	TrueMotion - Fundraising consultnt	Other
46	Dino Lupelli	Italy	Federation of Music Conferences	Distribution and dissemination (e.g., platforms, festivals, networks etc.)
47	Mykola Ulianov	Ukraine	Head of Creative Europe Desk Ukraine	Policy making and advocacy (e.g., clusters, intermediaries, ministries, etc.,)
48	Reigo Ahven	Estonia	Fairmus Technologies / founder & CEO	Distribution and dissemination (e.g., platforms, festivals, networks etc.)
49	Anastasiia	Ukraine	Creative Europe Desk Ukraine Communication manager	
50	Monique van Wijngaarden	Netherlands	CCM Consultancy & Channel Management B.V. CEO	
51	Lindsey White	Germany	Soundcloud	
52	Mickael Matz	Sweden	Swedish Art Council	
53	Lori Ethier	Canada	Cartel Music	
54	Mykole Uliknov	Ukraine	Creative Europe Desk Ukraine	
55	Anastasia Stepanchenko	Ukraine	Creative Europe Desk Ukraine	
56	Ragnhildur Zoega	Iceland	Rannis	
57	Ragnar Siil	Estonia	Creativity Lab	Director
58	Kristiina Urb	Estonia	Creativity Lab	Researcher
59	Grete Kodi	Estonia	Creativity Lab	Founder, Project Coordinator

Agenda of the Community Review Workshop May 27th, 2025 (Zoom)

1. Welcome and introduction of participants

- Brief introductions and background of participants
- Overview of the aims of the workshop

2. Presentation of draft policy recommendations

- Summary of the report's objectives, structure, and key findings
- Recap of Policy Lab process and sources

3. Collaborative discussion and thematic deep dive

- Open discussion on reactions to the draft policy recommendations
- Identification of areas requiring further detail, clarification, or prioritisation

4. Wrap-up and next steps

- Summary of key feedback and discussion points
- Outline of how input will be integrated into the final version of the policy recommendations
- Closing remarks