ekip Policy Lab

Strengthening open innovation within the European music ecosystem

Scoping paper

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Policy problem

The European music ecosystem finds itself at a pivotal crossroads of opportunities and challenges in the 21st century. Emerging technologies, particularly AI, and the dominance of technology-driven platforms have reshaped the production, distribution, and consumption of music (Music Moves Europe Dialogue Report: The European Music Ecosystem, 2025). While these forces have unlocked new creative and commercial possibilities—offering artists unprecedented access to global audiences and new modes of creation—they have also enabled users to access vast and diverse music catalogues, discover emerging talent across borders, and participate more actively in shaping cultural trends. However, these developments have also led to power consolidation, reduced artistic agency, and inequities in access to resources and audiences. As a result, the need for open, collaborative, and inclusive structures within the European music ecosystem has never been more urgent.

At the heart of this challenge is platformisation, 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). Platformisation has fundamentally altered the music industry's economic structures, shifting control from traditional gatekeepers (such as record labels and radio stations) to algorithm-driven streaming platforms. This shift has had profound implications for artists, especially independent musicians, who struggle to gain visibility and fair compensation in an ecosystem where platforms dictate discoverability, engagement, and monetization (Tuning In: A Comprehensive Analysis of Music Recommender Systems, Playlists, and Algorithmic Fairness, 2023).

Central to this vision are independent artists—music creators who operate outside major label systems, managing their own production, distribution, and rights—who embody the diversity, creativity, and cultural richness of Europe. However, they often find themselves at a structural disadvantage in navigating the complexities of a tech-driven music industry dominated by large platforms (Fairness in the EU Music Ecosystem Policy, 2024). The current revenue-sharing models favour major labels and high-streaming artists, while independent creators receive disproportionately lower earnings (From Value Networks for Recorded Music to Music Ecosystem, 2024). Addressing these imbalances requires equitable digital policies, accessible tools, and alternative business frameworks that support resilience and sustainability in the sector.

Equally important are the networks and open platforms that act as intermediaries between artists and audiences. These entities—including music venues, festivals, digital aggregators, and grassroots organizations—play a critical role in artist development, audience engagement, and innovation. However, many of these intermediaries face financial and operational challenges in a platform-dominated landscape, limiting their ability to support emerging talent and promote diversity. Strengthening their capacity to operate inclusively is essential to ensuring a vibrant and accessible music ecosystem.

To address these issues, the 5th *ekip* Policy Lab will explore strategies to reinforce the European music ecosystem, emphasizing open innovation that:

- Empowers artists by advocating for fair revenue-sharing models and transparent platform policies.
- Strengthens intermediaries by supporting inclusive and sustainable business models.
- Leverages AI and other emerging technologies to increase visibility, accessibility, and collective benefits across the sector.

By prioritizing equity, diversity, and artist autonomy, this policy discussion aims to propose concrete recommendations that will shape a resilient, innovative, and globally competitive European music ecosystem—one that maximizes its cultural, social, and economic impact while ensuring that artists and audiences benefit from technological advancements rather than being disadvantaged by them.

Definition

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 labor, 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 compensation, algorithmic gatekeeping, and revenue concentration.

The European music ecosystem

The European music ecosystem is the network of music sector actors, their environment, plus 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 ecosystem includes artists, labels, streaming platforms, policymakers, music venues, live event organizers, and audiences, among others. Its sustainability depends on fair policies, innovation, and collaborative structures that balance market dynamics with cultural diversity and long-term sectoral resilience.

Short history

As outlined in the "MME Dialogue: The European Music Ecosystem report" (2025), the European music ecosystem has long been a vibrant and diverse cultural landscape shaped by centuries of artistic innovation, technological advancements, and shifting economic models. From the patronage systems of the classical era to the rise of recorded music, the industry has continually adapted to new forms of production, distribution, and audience engagement. However, the past few decades have witnessed an unprecedented transformation driven by digitalization, globalization, and evolving consumer behaviours.

The late 20th century saw the European music industry dominated by physical formats—vinyl, cassettes, and CDs—supported by a network of major record labels, independent producers, live venues, and public broadcasters. The emergence of digital formats in the early 2000s, marked by MP3 downloads and later streaming platforms, disrupted traditional business models, shifting revenue structures and challenging the sustainability of artists and rights holders. As a response, European institutions and industry stakeholders sought new frameworks for licensing, fair remuneration, and market regulation.

The 2010s ushered in a streaming-dominated landscape, with platforms like Spotify, Deezer, and Apple Music reshaping how music is consumed across borders. While these platforms expanded access to music globally, they also intensified debates around fair pay, transparency in revenue distribution, and the power dynamics between major platforms, independent artists, and labels. Concurrently, the live music sector grew into a major economic driver, contributing to local economies and cultural identity while facing challenges such as ticketing monopolies, rising costs, and environmental concerns.

In recent years, the European music ecosystem has been further shaped by the rapid advancement of artificial intelligence (AI), immersive technologies, and data-driven audience engagement. These developments have opened new opportunities for innovation in music creation, curation, and distribution but have also raised questions about intellectual property, ethical AI use, and the future role of human creativity in the industry.

Research about platformisation of the music industry is relatively new. As an emerging field in academic research, it is evolving fast. In particular, two topics emerged: the impact of platformisation for users, and the impact of platformisation on content creators. For this Policy Lab, we focus on the relationship between platforms (and platformisation as a general business and social trend) and content creators

(intended in a broad sense to include musicians, but also small and independent music producers and distributors that do not have enough bargaining power towards platforms).

Challenges & opportunities

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 (UCPS) 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. As documented in Tuning In: A Comprehensive Analysis of Music Recommender Systems, Playlists, and Algorithmic Fairness (2023), streaming algorithms systematically favour high-engagement content, often marginalizing lesser-known creators.
- 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

The dominance of major streaming services and digital monopolies 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 underscores how platform dependency reduces artists' bargaining power, making it necessary to develop alternative business frameworks that support long-term sectoral stability.

Key focus areas:

- Encouraging decentralized 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, decentralization offers a new path for fairer distribution of value.
- 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, 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 in Tuning In (2023) and Bonini & 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 artist-driven solutions that 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.

Policy 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 monetized, concentrating power in the hands of a few dominant players and making artists increasingly dependent on algorithm-driven visibility (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 have become not just intermediaries but gatekeepers, determining which artists gain exposure and which remain invisible (Tuning In: A Comprehensive Analysis of Music Recommender Systems, Playlists, and Algorithmic Fairness, 2023).

1. The visibility paradox: creativity vs. algorithmic control

As highlighted by Bonini and Treré (2024), artists are no longer simply creating music for their audiences but rather producing content for platforms. Unlike previous media infrastructures such as radio or television—where gatekeeping was controlled by human curators—platforms use automated recommendation systems that prioritize engagement 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.

The need for visibility fosters "algorithmic precarity" (Duffy, 2020)—a state where an artist's career is highly dependent on opaque and ever-changing platform rules. 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, as documented in Tuning In (2023). The question arises: should artists adapt to algorithms, or should policies demand algorithmic fairness and accountability?

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 (UCPS) 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 compensation 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' control over their own distribution.

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.

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.

Problem statements

The European music ecosystem is at a critical juncture, shaped by rapid technological changes, shifting economic structures, and evolving audience behaviours. While digital platforms have expanded access to music globally, they have also introduced significant challenges for independent artists and smaller industry players. As highlighted in the MME Dialogue: The European Music Ecosystem report (2025), structural inequalities within streaming-based revenue models, algorithm-driven discoverability issues, and the increasing dependency on digital intermediaries call for urgent solutions to ensure a more sustainable and inclusive ecosystem. These concerns are further reinforced in recent research, including Fairness in the EU Music Ecosystem Policy (2024) and Can Online Music Platforms Be Fair? (2023), which emphasize the need for policy interventions, regulatory oversight, and innovative business models to counteract the growing power asymmetry in the industry. This section outlines key problem areas that must be addressed to foster innovation, equity, and resilience in the European music sector.

1. Restructuring revenue-sharing models for fairer artist compensation

The dominance of streaming platforms has fundamentally altered the way music generates revenue, but existing models often leave independent artists at a financial disadvantage. The MME Dialogue report highlights the growing concern over inequitable royalty distribution, where the majority of streaming revenue flows to major labels and top-tier artists, leaving smaller and independent musicians with unsustainable earnings. The Fairness in the EU Music Ecosystem Policy report (2024) stresses that the economic power of major platforms often results in unfair remuneration structures, disproportionately benefiting the largest players while sidelining those without major label backing. Similarly, From Value Networks for Recorded Music to Music Ecosystem (2024) analyzes the transformation of industry revenue flows, illustrating how value extraction has increasingly shifted away from artists.

Given this backdrop, a pressing question arises: **How can revenue-sharing models be redesigned to ensure fairer compensation, particularly for independent artists?** Innovative approaches, such as user-centric payment systems (UCPS), blockchain-based microtransactions, and artist-controlled digital storefronts, could provide more transparent and equitable alternatives.

2. Enhancing discoverability in algorithm-driven environments

Music discovery is increasingly shaped by recommendation algorithms that prioritize commercially successful content, often making it difficult for independent artists to gain visibility. As noted in the MME Dialogue report, algorithmic curation tends to reinforce existing market dominance rather than fostering diversity. The Tuning In: A Comprehensive Analysis of Music Recommender Systems, Playlists, and Algorithmic Fairness (2023) report provides an in-depth examination of how recommendation algorithms operate and the ways they may introduce biases that systematically disadvantage emerging and underrepresented artists. The report suggests that without transparency and intervention, algorithmic systems will continue to favour major label-backed content, further reducing the chances of independent artists reaching new audiences.

What policies or industry initiatives can be implemented to promote more equitable discoverability? Potential solutions include regulatory frameworks for platform accountability, transparent algorithmic design, alternative curatorial models that prioritize artistic diversity, and independent playlisting mechanisms that provide exposure for smaller artists.

3. Reducing dependency on digital platforms through innovative business models

While digital platforms provide essential access to global audiences, their dominance has also created a fragile dependency for artists and industry professionals. The case of Even—a direct-to-fan platform—demonstrates the potential of alternative business models that empower artists to monetize their work more effectively. The Can Online Music Platforms Be Fair? (2023) report explores how current digital platforms extract value from artists, highlighting the necessity of alternative models that allow for more equitable revenue distribution. Additionally, the Fair MUSE Policy Brief (2024) suggests that new business strategies—such as cooperative platforms, crowdfunding-based label alternatives, and decentralized music distribution networks—could provide a counterbalance to platform dependency.

How can such innovations be scaled and integrated within the European music ecosystem? The key lies in developing business models that prioritize artist autonomy, fan engagement, and collective ownership structures, reducing reliance on corporate-controlled distribution channels.

4. Leveraging innovation for audience development and engagement

Sustaining and expanding diverse audiences requires more than just distribution—it demands deeper engagement and meaningful connections between artists and listeners. Emerging technologies such as AI-driven personalization, immersive experiences (VR/AR), and community-driven models (e.g., fan subscriptions and patronage systems) offer new ways to cultivate loyal and inclusive audiences. However, the Driving a Green, Digital & Innovative European Cultural Heritage report (2024) highlights that while digital innovation can enhance audience engagement, it must be approached with an emphasis on cultural diversity, accessibility, and long-term sustainability.

How can innovative business models and technological advancements be leveraged to foster audience engagement while ensuring inclusivity and sustainability? Possible strategies include AI-enhanced community engagement, fan-supported ecosystems, and cross-platform experiences that provide richer and more interactive ways for audiences to connect with artists.

5. Strengthening cross-sector collaboration for a more resilient ecosystem

The future of the European music ecosystem depends on its ability to integrate knowledge, resources, and innovation from multiple sectors—including technology, education, policy, and urban development. The MME Dialogue report emphasizes the need for cross-sector partnerships that go beyond the traditional music industry framework. The Driving a Green, Digital & Innovative European Cultural Heritage report (2024) further reinforces this, arguing that cross-sector innovation can strengthen cultural sustainability and economic resilience. Meanwhile, From Value Networks for Recorded Music to Music Ecosystem (2024) suggests that new alliances between music, academia, and the tech sector could create alternative models of value creation that reduce dependency on extractive platform economies.

What strategies can be implemented to foster such collaborations? Key approaches include the development of music-tech incubators, funding schemes that encourage interdisciplinary partnerships, and policy incentives for collaborative projects that bring together music, technology, and social impact initiatives.

Policy vision

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 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 (UCPS) 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. As discussed in Tuning In: A Comprehensive Analysis of Music Recommender Systems, Playlists, and Algorithmic Fairness (2023), there is an urgent need for transparent recommendation systems that do not disproportionately favour major labels. 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 where 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.

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.
- 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, their algorithms remain opaque, favouring major-label artists and commercially driven 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.

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.

Policy landscape & trend analysis

Policy context

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.[1] 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.[2]

The **EU AI Act** (2024)[3] 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.[4]

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.[5] 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.[6] The DMA[7], 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. [8] 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.

[1] https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:32019L0790

[2] https://composeralliance.org/media/1651-joint-letter-to-members-of-the-european-parliament-on-the-impact-of-artific.pdf

[3] https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX%3A32024R1689

[4] https://composeralliance.org/media/1651-joint-letter-to-members-of-the-european-parliament-on-the-impact-of-artific.pdf

[5] https://digital-strategy.ec.europa.eu/en/policies/digital-services-act-package#:~:text=The%20Digital%20Services%20Act%20and,level%20playing%20field%20for%20businesses.&text=The%20Digital%20Services%20Act%20(DSA,apply%20across%20the%20whole%20EU.

[6] https://commission.europa.eu/strategy-and-policy/priorities-2019-2024/europe-fit-digital-age/digital-services-act_en

[7] https://digital-markets-act.ec.europa.eu/index_en

[8] https://digital-strategy.ec.europa.eu/en/policies/media-and-audiovisual-action-plan

In 2024, the **European Parliament adopted a resolution** condemning unfair payola practices in streaming and calling for greater transparency in revenue distribution.[9] 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**[10] 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.[11]

A notable initiative within Creative Europe is **Music Moves Europe (MME)**,[12] 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).**[13]

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** support 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)**[14], which aims to make the European music industry more competitive, fairer, more sustainable, and transparent by developing open data tools for

[9] https://www.europarl.europa.eu/news/en/press-room/20240112IPR16773/music-streaming-sector-eu-must-ensure-just-pay-for-artists-and-fair-algorithms

[10] https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:32022G1207(01)

[11] https://culture.ec.europa.eu/creative-europe

[12] https://eufundingoverview.be/funding/music-moves-europe-mme#:~:text=Music%20Moves%20Europe%20(MME)%20is,support%20of%20Europe's%20music%20sector.

[13] https://data.consilium.europa.eu/doc/document/ST-13948-2018-INIT/en/pdf

[14] https://cordis.europa.eu/project/id/101095295#:~:text=OpenMusE%20brings%20together%20music%20industry,%2C%20business%20planning%2C%20and%20accuracy.

stakeholders. OpenMusE seeks to address biases in algorithmic music recommendations and promote equitable remuneration practices. Another initiative is **DAFNE+**[15], 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.

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.[16]
- **Germany** has expanded **collective bargaining rights** for musicians, strengthening the role of collecting societies in negotiating fairer revenue distribution.[17]

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.

[15] https://cordis.europa.eu/project/id/101061548/fr

[16] https://www.fim-musicians.org/french-streaming-agreement-2022/#:~:text=The%20agreement%20guarantees%20all%20artists,recordings%20are%20exploited%20as%20streaming.

[17] https://horakmusiclaw.com/germany/fair-compensation/

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 (CMOs), 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 endeavors 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.

Future trends

Insights from social media listening conducted by *ekip* partner Nextatlas highlight emerging trends shaping the future of music, driven by changes in artist independence, revenue models, AI integration, and audience engagement. These trends reflect broader discussions on fairness, sustainability, and new business models within the digital music economy.

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 regulatory frameworks 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 emerging 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**

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.

Literature review

Research about platformisation of the music industry is relatively new. As an emerging field in academic research, it is evolving fast. In particular, two topics emerged: the impact of platformisation for users, and the impact of platformisation on content creators. For this Policy Lab, we focus on the relationship between platforms (and platformisation as a general business and social trend) and content creators (intended in a broad sense to include musicians, but also small and independent music producers and distributors that do not have enough bargaining power towards platforms).

From a more holistic perspective, however, the impact of platformisation on users and on content creators are two sides of the same coin. The content suggested or presented by platforms to users has a direct impact on how users experience the platforms, and on how artists have their music distributed to and accessed by users (and thus on how much they earn from their creations). In general, several authors recognize that platforms have the power to bring local, independent artists to a global audience. As such, they opened possibilities that were simply unthinkable until a few years ago. This applies, of course, also to established artists in specific countries that now have the possibility to be known and listened to everywhere in the world.

However, research shows that opportunities brought also challenges. These challenges, in particular, affect content creators. We build our review upon a recent book by Tiziano Bonini and Emiliano Treré (2024) about algorithms, platform powers, and the mechanism of reaction and resistance developed by workers, including content creators across several sectors. These scholars recognise that "creators who have shaped cultural artifacts through their own creativity must necessarily make the artifacts suitable for the platform that will provide the infrastructure to connect them with a potential audience." (Bonini, Treré, 2024, p. 110) However, this phenomenon is not completely new. The idea that creative people are completely independent from technological constraints is, of course, unrealistic—e.g., sculptors need to consider the challenges and limitations of the material they work with, being it metal or concrete, and the same applies to all artists). Provided that "when the infrastructure provided by platforms becomes the main gatekeeper of their visibility, then content creators have to adapt their creative ideas to the technological affordances of the platform", and "content creators always had to adapt to previous media infrastructure, such as radio and television." (Bonini, Treré, 2024, p. 110)

Platforms are not simply mediums for the distribution of creative content; creative content is produced for platforms. However, unlike radio and television, platform allow a massive, global, and continuous distribution of creative content governed by algorithms. Platforms permit also the multiplication of creative content, which, however, becomes more and more a "platform-dependent commodity." (Bonini, Treré, 2024, p. 108)

Other scholars who developed interesting and consistent research about the "platformisation of cultural production" identify it as "the penetration of digital platforms' economic, infrastructural, and governmental extensions into the cultural industries, as well as the organization of cultural practices of labor, creativity, and democracy." (Poell et al, 2022, p. 5). More poignantly, scholars identify this process as the real "reorganization of cultural practices and imaginations around platforms." (Poell et al., 2019, p. 5-6)

It is therefore an undisputable fact that "platforms decide the ways in which the audience discovers cultural artifacts and the rule that govern the process of cultural distribution." (Bonini, Treré, 2024, p. 109) Hence, one can say that the main aim for artists is not (only) that of being creative, but (also, and perhaps primarily) that of being visible. In the age of platforms, creativity and cultural endeavour are a "visibility labour" (Abidin, 2016) or a "visibility game" (Cotter, 2019). However, visibility is not controlled by artists, but by algorithms. And often, the strive for visibility goes together with precarity (Duffy, 2020): precarity of working conditions, but also algorithmic precarity, because the algorithm has the power to increase or decrease visibility without control by artists.

Therefore, content creators (often in collaboration with their audience) developed mechanisms and strategies to cheat the algorithm and boost their visibility. It goes beyond the scope of this section of the Policy Lab to assess whether these strategies are ethical. However, we identify a very interesting research topic to explore: is it ethical to mislead algorithms? Very briefly, one can probably say no, because algorithms do not have moral agency. However, boosting the visibility of some artists may reduce the visibility of other artists, and thus the answer to our question could also be yes.

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