



worldwide
independent
network

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Annual Report 2022-23



Worldwide Independent Network





Foreward

Zena White, Chair of WIN

In December 2022, the WIN board met in person for the first time since February 2020, due to the pandemic. The destination was Chile, which for many was a long journey and a big commitment but incredibly worthwhile. After three years of navigating the organization's challenges remotely, those who made the journey were truly dedicated to revitalizing the path to a stronger global network for independent music rights holders.

The board met with local collective management organization SCD in Santiago, sharing perspectives on equitable remuneration and learning more about the local challenges for rights holders, before making the journey further south to Valdivia to be hosted by Fluvial conference and music festival. There was something quite compelling about convening to talk about the post-pandemic future in a part of the world which had been devastated by an earthquake in recent history, only to flourish into an area of outstanding natural beauty.

As a result of her excellence leading the organization as general manager, Noemí Planas was deservedly promoted to the CEO position at the beginning of 2023. At the same time, the board designated me to take over as its chair, a position previously held by Maria Amato of AIR. It is a great honor to represent the independent music community on such a global level and I am inspired to support the team to move the agenda forward, increasing the value proposition for members for the remainder of my term. Maria did a wonderful job supporting the secretariat in shoring up the organization and continues to do so as our treasurer: thank you Maria. Thanks also to my fellow board members who gave a considerable amount more time to WIN whilst we reviewed and renewed its funding model.

After great gains in Latin America in 2022, 2023 continues to attract new members with associations from India and Paraguay both joining. Talks to establish a new organization in Mexico have continued, with WIN hosting a summit in Mexico City in March. Continuing to expand the network of members is a major priority for the year ahead, with a particular spotlight on Asia, MENA and Sub-Saharan Africa. There are several exciting proposals for new membership from these regions which we expect to bear fruit in the year ahead.

Another key focus for the year ahead is honing WIN's message. As challenges to our sector become ever more frequent, we must ensure that we are specific and memorable in our purpose to garner support for our work. WIN's purpose is to develop a thriving ecosystem for independent music businesses worldwide, which ultimately leads to more economic options for artists, in turn allowing for more diversity and progress for music as an artform. We do this by nurturing new and existing trade associations the world over, communicating on key issues that affect the industry, and providing a place for members to build business connections.

Special recognition goes to those board members who continue to commit additional time to the executive committee and other special working groups. We strive to ensure that representatives from all continents have a seat at the table and are working to upend any structural bias we may have through the strong Anglo-American-European foundation of our community. In my four years on the board, it has become increasingly proactive and determined to expand its diversity: this is essential to building a better network and a fairer space for independent music rights holders everywhere.

Thank you to you – our members – for your commitment and understanding of WIN’s changing needs, as well as your participation. This is your organization and you will truly get out what you put in. On that note, the report updates on the progress made with the new WINHUB project: a space for members to build new relationships with each other intended to bring real business opportunities.

Finally, I would like to thank and recognize Noemí Planas and Nerea Serrano for their tireless work as a currently two-person team to build and grow this important network. Here’s to an exciting year ahead!

Executive Summary

Noemí Planas, CEO of WIN

The Worldwide Independent Network serves as a global coordination and support body for the independent music sector, promoting its long-term development and sustainability. WIN's main missions include supporting and promoting independent music trade associations, facilitating communication and cooperation between them, and defending the value of music while improving industry standards. The organization comprises 36 trade associations in 40 countries, representing over 8,000 independent music companies.

The organization is committed to developing and empowering emerging markets within the music industry. WIN facilitates the establishment of regional networks, such as the LatAm Network and APAC Alliance, to encourage cooperation, build capacity, and promote the value of independent music. It also provides resources such as the *Roadmap to Starting a Trade Association* to guide the creation of new trade associations in underrepresented territories.

WIN focuses on fostering collaboration and networking within the independent music community. The WINHUB International Networking project aims to connect the global independent community through online and in-person events, fostering business opportunities and export capacity. In addition, WIN participates in international music conferences, providing a platform for industry professionals to network and exchange ideas.

Further, WIN addresses global challenges facing the music industry, such as the impact of generative AI on music creation and the barriers faced by touring musicians, particularly owing to Brexit, COVID-19, inflation, and monopolies.



The organization advocates for policies that support independent artists and venues, aiming to ensure a fair and thriving independent ecosystem.

The core of WIN's activities is building capacity and providing resources. The organization coordinates working groups on various industry affairs, including international performance rights management, public policy, and trade agreements. It also offers resources and benefits to its members, including newsletters, event discounts, and updates on industry-related topics. WIN's publications, such as the *ISRC Factsheet* and *Global Vinyl Directory*, offer valuable insights to music professionals.

WIN acts as a powerful catalyst, uniting like-minded individuals, companies, and associations around the world under a shared vision, addressing industry challenges to create a diverse and vibrant music ecosystem with equal access and opportunities for all independents. As we enter yet another chapter of technological change, we embrace a future where solidarity and cooperation pave the way for outstanding achievements and shape a world where we can all thrive.

Connecting and Developing the Global Independent Music Community

WIN connects and develops the global independent music community. Through transparency, innovation, and cooperation, WIN promotes a diverse and vibrant ecosystem where all independents have equal access and opportunities.

Our main missions are to promote and assist the network of independent music trade associations, to facilitate communication and cooperation between them, to develop new associations and regional alliances, to promote a level playing field for independents, and to defend the value of music and improve industry standards.



WIN directors are representatives of independent music companies and trade associations in key markets around the world. Three new directors joined the WIN board in 2023—Gee Davy (AIM, UK), Geert De Blaere (N.E.W.S., Belgium), and Tony Kiewel (Sub Pop, USA)—and Jason Peterson stepped up from his previous role as board observer.

Zena White, chief operating officer of Partisan Records (USA) was appointed as WIN’s new chair. Former chair Maria Amato (AIR, Australia) took on the role of treasurer. They continue to sit with Mark Kitcatt (Everlasting Records, Spain), Richard Burgess (A2IM, USA), and Oliver Knust (IMICHILE, Chile) on the executive committee, which oversees the practical aspects of WIN’s governance.

Our People

To enhance the diversity of voices representing different cultures and backgrounds, a third seat has been created for the directors of the Rest of the World block, welcoming Jeffrey Chiang (LIAK, South Korea).

In January 2023, Noemí Planas was promoted to CEO after previously serving as general manager. Nerea Serrano was appointed as community and projects manager.



WIN Board



Francesca Trainini
PMI
Italy



Garry West
Compass Records
USA



Gee Davy
AIM
UK



Geert De Blaere
N.E.W.S.
Belgium



Gord Dimitrieff
Aporia Records
Canada



Jason Peterson
GoDigital Media Group
USA



Jeffrey Chiang
Fluxus Inc
Korea



Jörg Heidemann
VUT
Germany



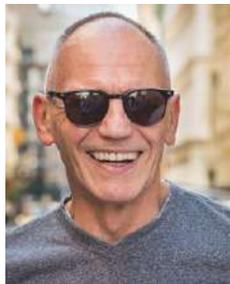
Maria Amato
AIR
Australia



Mark Kitcatt
Everlasting Records
Spain



Oliver Knust
IMICHILE
Chile



Richard Burgess
A2IM
USA



Sandra Rodrigues
ABMI
Brazil



Tak Yamazaki
IMCJ
Japan



Zena White
Partisan Records
USA

Observers



Dylan Pellett
IMNZ
New Zealand



Helen Smith
IMPALA
Europe



Tony Kiewel
Sub Pop Records
USA



Noemí Planas
CEO



Nerea Serrano
Community &
Projects Manager

Secretariat



36 MEMBERS
40 COUNTRIES



Our Members

WIN brings together 36 trade associations in 40 countries throughout Australasia, Asia, Europe, and North and South America, representing over 8,000 independent music companies.

It also helps independent music companies develop new trade associations in territories without collective representation. WIN has recently welcomed the Asociación de la Música Independiente del Paraguay (AMI Paraguay) and the South India Music Companies Association (SIMCA) as members.

The Independents in Numbers

40% market share

AND CONSTANTLY GROWING

80% of new releases

PRODUCED BY INDEPENDENTS

80% of sector jobs

CREATED BY INDEPENDENTS

\$4.1 bn invested

BY INDEPENDENTS IN DISCOVERING AND NURTURING
NEW ARTISTS



Celebrating Independent Success

Independent music awards serve as a platform to honor and recognize the exceptional quality and diversity within the realm of independent music on a global scale. Awards provide artists and musicians the opportunity to showcase their unique talents and artistic expressions. They also showcase the immense creativity and innovation of independent record labels beyond the mainstream music industry.

Libera Awards (A2IM, US)

- Record of the Year: Wet Leg by Wet Leg (Domino Recordings)
- Breakthrough Artist: Sudan Archives (Stones Throw Records)
- Labels of the Year: Partisan Records, Captured Tracks, & Innovative Leisure

AIM Awards (UK)

- Best Independent Album & UK Independent Breakthrough: Mother by Cleo Sol (Forever Living Originals) & Wet Leg (Domino Recording)
- Best Independent & Boutique Labels: Rough Trade Records & Local Action
- Diversity Champion: Stormyz
- Music Entrepreneur of the Year: Corey Johnson

AIR Awards (Australia)

- Independent Album of the Year: Smiling With No Teeth by Genesis Owusu (House Anxiety/Ourness)
- Breakthrough Independent Artist: King Stingray
- Best Independent Label: Chapter Music

Premios Índigo (IMICHILE, Chile)

- Record of the Year: Perreo Post-Punk by FrioLento (SurPop Records)
- Best Artist: Quique Neira
- Breakthrough Artist: Duran
- Best Independent Label: Red Poncho

Taite Music Prize (IMNZ, New Zealand)

- Record of the Year: Everything Is Going To Be Alright by Princess Chelsea (Lil' Chief Records)
- Best Independent Debut: Te Kaahu O Rangi by Te Kaahu (Theia/DRM NZ)
- Classic Record: Inside A Quiet Mind by Micronism (Kog Transmissions)





Indie Awards (IndieCo, Finland)

- Album of the Year: Kaikki Talot Huojuu by Antti Autio (Soit Se Silti)
- Best Independent Artist & Band: Ege Zulu & Litku Klemetti
- Breakthrough Artist: Stoned Statutes

IndieSuisse Album of the Year (Switzerland)

- Album of the Year: Hello Future Me by Emilie Zoé (Hummus Records)
- Album with a Futuristic Perspective: Chagrin Bleu by Citron Citron (Les Disques Bongo Joe)
- Special Achievement Award: Music Declares Emergency Schweiz

IMPALA 100 Artists to Watch (IMPALA, Europe)

RUNDA Awards (Balkans)

- Album of the Year: Agrikultura by Dubioza Kolektiv (Menart)
- Artist of the Year: Koikoi
- Breakthrough Artist: A.N.D.R

Manifestgalan (SOM, Sweden)

- Album of the Year: Love by Slowgold (Playground Music)
- Breakthrough Artist: Jacob Öhrvall
- Label of the Year: YEAR0001

Premios MIN (UFI, Spain)

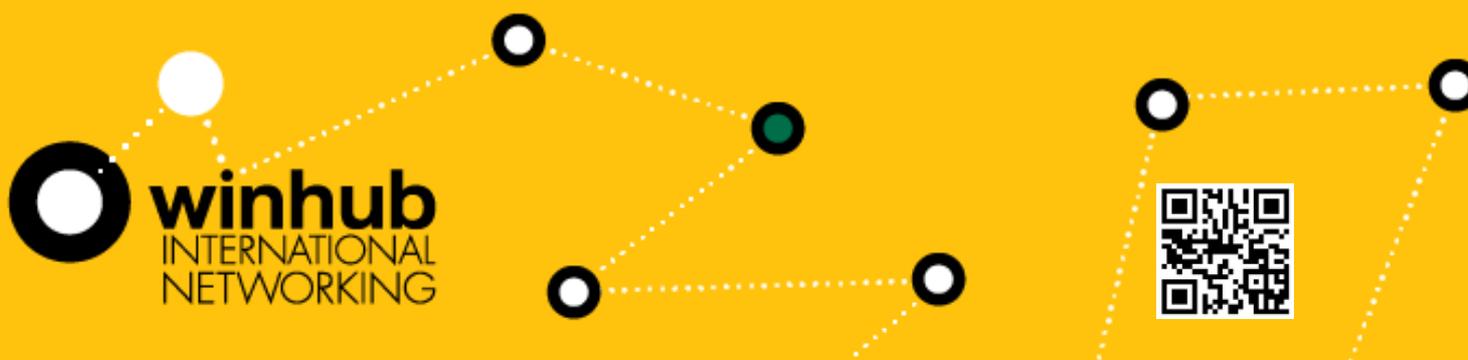
- Record of the Year: Burbuja Cómoda y Elefante Inesperado by Los Estanques y Anni B Sweet (Inbophonic Records)
- Best Artist: Los Estanques y Anni B Sweet
- Breakthrough Artist: shego

VIA Awards (VUT, Germany)

- Album of the Year: Monsters by Sophia Kennedy (City Slang)
- Breakthrough Artist: Nashi44
- Label of the Year: Bureau B

Fostering Collaboration and Networking

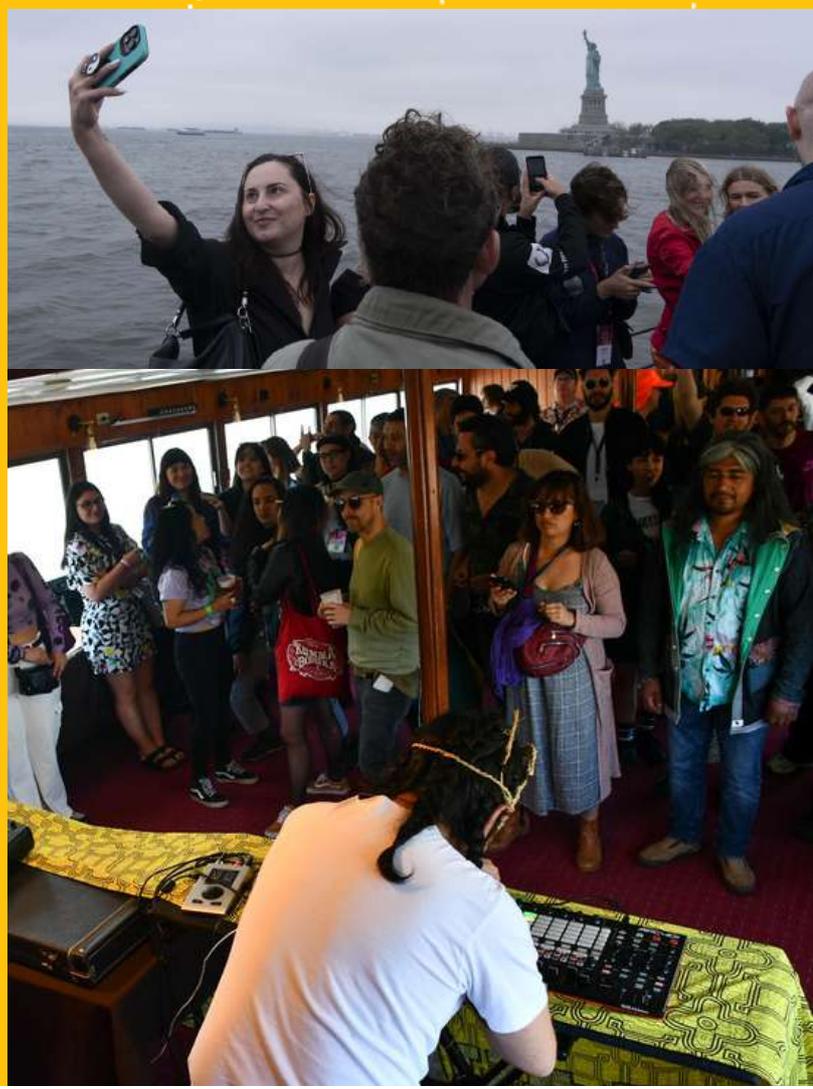
In a fiercely competitive music industry, independent music companies rely on partnerships and connections to expand their reach and unlock new business opportunities. Networking provides them invaluable access to industry professionals and music executives, who can help secure distribution deals, licensing agreements, and performance opportunities. By actively engaging in collaborations and building a strong network, independent music companies can enhance their visibility abroad, foster meaningful relationships, and ultimately thrive in an ever-evolving sector.



WIN launched the **WINHUB International Networking** project in 2022 to achieve its aim of connecting the global independent music community and fostering collaboration between associations and independent music companies across our network. The main objectives are to bridge the gap between territories, promote business opportunities, and increase export capacity.

WINHUB combines online events with face-to-face activities in existing conferences, organized in partnership with local trade associations. Since launch, **two in-person social events and three online sessions have been hosted.**

Results have been positive, with almost **100% of the participants indicating that they would like to join future events;** excellent metrics for connections and business have also been achieved, which can be found on the official project website: <https://winhub.winformusic.org/>



Social Events



WINHUB x Fluvial December 2022

The first WINHUB event was held in December 2022 and consisted of a social gathering on a boat cruising along the rivers of Valdivia, Chile. At the gathering, **64 professionals from 15 countries**, including WIN and IMICHILE board members, WIN's LatAm Network, First Nations, and delegates from all over the world had the chance to connect and network while enjoying local food and wine and listening to Mapuche and Chilean bands.



The second social event took place in New York in June 2023 during A2IM Indie Week. Sponsored by Groovelist and Bandcamp, the boat party brought together **164 delegates from 18 countries**, who networked while enjoying views of the New York skyline. Live music was provided by collaborator Partisan Records.

WINHUB x A2IM Indie Week June 2023



Online Events



WINHUB AU/IE/NZ/UK

January 2023

The first online event took place in January 2023. It consisted of presentations of the recorded music markets of **Australia, Ireland, New Zealand**, and the **United Kingdom** as well as networking speed-meetings among 59 companies from these four territories based on common interests.

The second online event was held in April 2023, bringing together companies from our Spanish-speaking associations in **Argentina, Chile**, and **Spain**. Following the market presentations, 49 professionals participated in the networking speed-meeting session to connect and generate business.

WINHUB AR/CL/ES

April 2023

WINHUB Get Ready to Export!

June 2022

The third online event in June 2023 concluded the first year of the WINHUB project. It comprised business learning and networking sessions that brought together companies interested in taking the **first steps toward music export**. Participants pitched their projects, and speakers Fran Sandoval (IMICHILE/Fluvial, Chile), Gee Davy (AIM, UK), Kees van Weijen (STOMP/IMPALA, the Netherlands), Nuno Saraiva (AMAEI/WHY Portugal, Portugal), Rachel Buswell (Domino Recording Company, UK), Toby Egekwu aka TK (Finesse Foreva, UK), Trisha Carter (CIMA, Canada), and Noemí Planas (WIN) provided invaluable tips and advice.

International Music Conferences

Music conferences play a pivotal role in the music industry, providing a platform for record labels, artists, and other industry professionals to meet, network, and exchange ideas. They serve as a knowledge hub, offering insightful panels, workshops, and keynotes from industry experts and thought leaders. These events also foster connections among stakeholders, facilitating the growth of relationships that can lead to career opportunities and creative partnerships as well as contributing to the development and evolution of the music industry.

WIN members organize international music conferences and events throughout the year:

FEBRUARY

Rio Music Market
(Rio de Janeiro, Brazil)

AIM Sync
(Online)



MARCH

AIM Connected
(London, UK)



APRIL

Make It Music
(Toronto, Canada)

SEPTEMBER

Going Global
(Auckland, NZ)

Independent Label
Fair Budapest
(Budapest, Hungary)



AUGUST

Indie-Con
(Adelaide, Australia)



JUNE

A2IM Indie Week
(New York, USA)

Future Independents
(Online)

Record Lab
(Paris, France)



OCTOBER

APAC Music Summit
(Tokyo, Japan)

Digital Music Days
(Lisbon, Portugal)



NOVEMBER

Independent Music Days
(Istanbul, Turkey)

PLATFORMA Music Day
(Prague, Czechia)

RUNDA Digital Days
(Balkans)

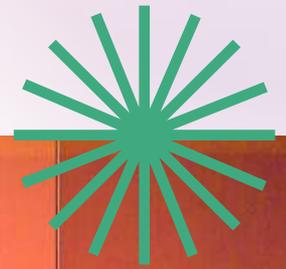
DECEMBER

Fluvia
(Valdivia, Chile)



Developing and Empowering Emerging Markets

Building strong networks is essential for fostering growth and cooperation within the music industry. Independent music companies in emerging markets face unique challenges, and supporting them in building local structures and establishing and maintaining relationships with their neighbors and the international community is crucial. WIN's commitment to supporting these markets and expanding the global independent network is evident in its activities, such as the coordination of networks in Latin America and the Asia-Pacific regions, the launch of new collaborative projects such as the Southern Cone's Independents Forum (FICS), and the publication of resources to help independent music companies establish their own trade associations.



By providing practical guidance and sharing best practices, WIN empowers independent music companies to establish trade associations and strengthen the music sector in their respective markets, thus contributing to a more inclusive, collaborative, and thriving music industry worldwide.

Regional Networks

Regional networks serve as collaborative platforms to exchange knowledge, generate strategies, and design solutions that contribute to the development of the music sector in local markets and across the region. The main objectives of these groups are to build bridges of understanding and cooperation between territories, establish new associations in underrepresented countries, promote professionalization and capacity building, and highlight the value of independent music companies.

In Europe, IMPALA is a non-profit making organisation with a scientific and artistic purpose, dedicated to small, micro and medium sized music companies and self-releasing artists.



LatAm Network



The LatAm Network promotes capacity building in the Latin American region and contributes to the growth and integration of independent music companies into international value chains. It comprises existing trade associations ASIAR (Argentina), ABMI (Brazil), IMICHILE (Chile), and UFi (Spain) as well as individual companies from Mexico, Colombia, Peru, Uruguay, Ecuador, and more. Newly established AMI PY (Paraguay) has also joined the network, which meets twice a year to discuss challenges, foster dialogue, and create opportunities for sound recording rights holders in Latin America.

The LatAm Network met in person in Valdivia, Chile, in December 2022. The WINHUB x Fluvial event offered them the opportunity to network with the WIN board members and other delegates. An online meeting was held in May 2023 to further advance the agenda.

The APAC Alliance, driven by WIN and independent music trade associations IMCJ (Japan), LIAK (South Korea), IMNZ (NZ), and AIR (Australia), works to unlock the potential of the Asia-Pacific region. The group meets twice a year to facilitate dialogue among stakeholders, emphasizing the importance of connecting the Asia-Pacific music industry with the rest of the world and demonstrating the region's potential through increased knowledge and cooperation. Independent music companies from territories not currently represented at WIN, such as China, India, and Singapore, are also engaging.

The APAC Alliance held a virtual meeting in April 2023 to reassess its goals and strategies for the post-pandemic era and welcomed a new WIN member association, SIMCA (South India). A face-to-face meeting of the group is scheduled for late October in Tokyo during the Asia Pacific Music Summit.



APAC Alliance

The Roadmap to Starting a Trade Association

WIN provides valuable resources to support independent music companies interested in forming new trade associations. Available in English, Spanish, and French, the *Roadmap to Starting a Trade Association* offers practical guidance based on the experiences of WIN member associations around the world.

This guide, published in October 2022, also serves as a template for other WIN activities, such as webinars and workshops, aimed at promoting the creation of new associations.

AMI PY was established in 2023 as the first Paraguayan independent music trade association, representing 13 local music companies. WIN was directly involved in its creation, organizing an online webinar in September 2022, and visiting Asunción as part of the first instalment of FICS in November.



Cross-Regional Projects

In November 2022, WIN launched the inaugural FICS, an itinerant summit promoting cultural exchange and the economic development of the music industry in Argentina, Paraguay, Uruguay, and Chile. The event ran from November 17 to December 3, with activities organized in collaboration with local partners within existing conferences (BAFIM, Cranea Música, Montevideo Sound City, and Fluvial).

Cooperation among the involved music professionals, including representatives of member associations ASIAR, IMICHILE, and UFi, was key to the subsequent establishment of an independent music trade association in Paraguay in May 2023.



A WIN delegation visited Mexico in March 2023 to promote the establishment of a trade association in the country. A series of activities were held, including a workshop to provide guidance to interested Mexican record companies on key aspects to consider and next steps. The event featured speakers from WIN member associations in Argentina, Chile, Spain, and the United States, who shared best practices and success stories.

In September 2023, an online workshop for Paraguayan companies was held prior to the FICS visit.

The CEO of WIN and representatives of the LatAm Network hosted a panel discussion at BIME Bilbao in October 2023.

Workshops and Other Events



Addressing Global Challenges and Opportunities

WIN's role as an international organization is pivotal in addressing global challenges and opportunities in the music industry. WIN empowers the network of independent music companies to navigate the ever-changing landscape by bringing together the key players from various regions; facilitating discussions; coordinating global responses; and promoting transparency, best practices, and a level playing field.

WIN and its local and regional member trade associations serve as a valuable resource, sourcing examples and data to ensure that independent music companies are well-informed and equipped to respond to the challenges that arise from new technologies and can thrive in this environment.

The Rise of Generative AI and its Impact on the Recording Music Industry

Artificial intelligence (AI) has emerged as a transformative force in many fields, revolutionizing the way we create, innovate, and interact with technology. Over the past few months, generative AI, a subset of AI that focuses on the creation of new content, has made significant strides in the music industry, enabling creators to explore new frontiers in composition, production, and performance.

Independents are early adopters by nature and embrace new, legitimate technological advances. However, they also defend creators' freedom to decide if and how their music may be used. Although AI technologies bring immense potential for innovation, the rights of music creators and professionals must be safeguarded.

In 2023, WIN and some of its members joined the [Human Artistry Campaign](#), a seven-point set of principles advocating for AI use that empowers and supports human creativity and accomplishment.



Streaming Plan Revisited

Two years ago, IMPALA announced a groundbreaking 10-point plan to reform streaming. Its goal was to make streaming fairer and provide a dynamic, compelling and responsible future for artists, labels and fans. The global independent community unanimously endorsed the proposal, and the plan has been used as a template for strategic discussions within our working groups in Latin America and Asia-Pacific.

Countries around the world continue to be inspired by this initiative and keep advocating for the implementation of regulations and policies that prioritize fair compensation for artists, promote diversity and transparency, and ensure copyright protection.

After a review process to mark the second anniversary of its release, the European organization for independent music companies and national associations has issued a new call to action. The revised *It's Time to Challenge the Flow #2, Revisiting how to make the most of streaming* amplifies the call to grow the overall market, including through subscription price increases (which have experienced no significant changes for 15 years).

There is a new emphasis on changing how revenue is allocated, so it is more in line with fan experience and engagement. The plan also advocates using artificial intelligence to combat streaming manipulation and other unlawful activities and opposes the introduction of new so-called equitable remuneration rights.

IMPALA - 10 POINTS TO MAKE THE MOST OF STREAMING #2

- ◇ GETTING MORE MONEY INTO THE MARKET AND STOPPING DILUTION
- ◇ CHANGING HOW REVENUE IS SHARED
- ◇ BOOSTING DIVERSITY, TRANSPARENCY AND CLIMATE ACTION

- 1 GROW OVERALL STREAMING REVENUES AND END DILUTION**
 - UNLOCK SUBSCRIPTIONS (PRICES TO FOLLOW INFLATION)
 - PROMOTE DIFFERENTIATION
 - END ALL VALUE GAPS AND OTHER FORMS OF REVENUE DILUTION
 - NO TAKE IT OR LEAVE IT NEGOTIATION TACTICS
- 2 NO ROYALTY REDUCTION**
 - NO PAY FOR PLAY
 - OR OTHER INITIATIVES RECREATING ELEMENTS OF PAYOLA
- 3 APPLY REVENUE ENHANCEMENT MECHANISMS IN MARKETS WHERE SERVICES ARE FAILING TO CONVERT USERS TO PAID MODELS**
- 4 USE SOPHISTICATED TOOLS SUCH AS AI TO ADDRESS UNLAWFUL ACTIVITY THAT REMOVES VALUE FROM CREATORS**
 - INCLUDING STREAMING MANIPULATION, AD-BLOCKING, STREAM-RIPPING AND AI RIP OFFS
- 5 LABELS TO PAY ARTISTS A FAIR CONTEMPORARY DIGITAL ROYALTY RATE**
 - NO "EQUITABLE REMUNERATION" (STREAMING IS NOT RADIO)
 - SUPPORT INDUSTRY AGREEMENTS AS IN FRANCE INSTEAD
- 6 REFORM ALLOCATION OF STREAMING REVENUE**
 - DIFFERENTIATION OF RATES (ACTIVE ENGAGEMENT, ARTIST GROWTH, FAN PARTICIPATION, PRO-RATA TEMPORIS)
 - INCREASE MASTER RIGHTS SHARE OF DIGITAL PIE (FOR LABELS AND ARTISTS) TO COVER RISK & INVESTMENT
 - THRESHOLDS TO ACCESS MONETISATION MECHANISMS SHOULD NOT HARM SMALL LABELS OR SMALL MARKETS
- 7 ENABLE SEARCH BY**
 - LABELS
 - PERFORMERS
 - PRODUCERS
 - COMPOSERS
 - MUSICIANS
 - AUTHORS
 - PUBLISHERS
- 8 BOOST LOCAL REPERTOIRE AND LANGUAGES**
 - BETTER PROFILING IN PLAYLISTS AND OTHER FEATURES
 - HAVING TRACK TITLES IN MORE THAN ONE LANGUAGE
 - SPECIFIC RINGFENCED FUNDING MECHANISMS ALLOCATED TO INVESTMENT IN NEW, LOCAL RECORDINGS
- 9 COLLABORATE WITH LABELS/MERLIN TO ENSURE EDITORIAL ALGORITHM DEVELOPMENTS DON'T NEGATIVELY AFFECT DIVERSITY, LOCAL REPERTOIRE OR OPPORTUNITIES FOR ARTIST DISCOVERY**
- 10 HELP OUR DIGITAL PARTNERS ASSESS AND REDUCE THEIR CARBON FOOTPRINT FOR DIGITAL MUSIC**



The Show Must Go On: How Touring Barriers Impact the Music Sector

For years, during rampant piracy and plummeting record sales, artists were told to make a living by touring. Further, when they complained that digital platforms were not paying them fair royalties, they were told to use streaming as a promotional tool to get gigs. These were fallacies then (not all recording musicians are touring musicians to begin with), and they are becoming less valid with time.

The COVID-19 pandemic was eye-opening. Its impact on touring musicians was significant and far-reaching. Travel restrictions and social distancing measures forced the cancellation of concerts and other live events around the world, and many musicians saw this source of income disappear almost overnight. The pandemic also had a knock-on effect on other related jobs, such as those of sound engineers, lighting technicians, and merchandisers, some of whom opted to switch professions.

The United Kingdom left the European Union just weeks before lockdowns were enforced. Brexit has introduced a new set of regulations and red tape for musicians touring the European continent. These include requirements to obtain visas, work permits, and instrument carnets as well as a host of other paperwork that is expensive and takes weeks to process. Despite numerous [calls](#) and campaigns, Brexit continues to make touring particularly difficult for smaller, independent artists, limiting their ability to reach new audiences and generate income.

Barriers Over Troubled Water

Anti-competitive behavior from bad actors in the live sector also puts a strain on the ability of independent artists to operate in a fair environment. Music fans face inflated ticket prices, exorbitant fees, and restrictions on ticket transferability. Antitrust practices also limit opportunities for independent promoters and venues and hinder artists' ability to negotiate favorable contract terms. As the Future of Music Coalition put it, "monopolies make it harder for businesses to be run in artist-friendly and fan-friendly ways".

Earlier this year, the US Department of Homeland Security proposed a significant increase in the cost for obtaining touring visas, raising the base price from \$460 to \$1,655 and the processing time from 15 calendar days to 15 business days. Visa applications are already complex, consistently backlogged, and unaffordable for smaller acts. In March 2023, [WIN](#), [A2IM](#), [CIMA](#), [IMPALA](#), and other organizations issued calls to oppose the proposed increases. During A2IM Indie Week in June 2023, WIN convened an international stakeholder meeting, and a task force was created to work with US lobbyists on strategy related to artist mobility. Amid pressure from local and international stakeholders, implementation has been postponed until at least March 2024.



The Effect on the Independent Ecosystem

In addition to these challenges, the music sector must deal with the effects of inflation. The costs of manufacturing and shipping records, t-shirts, posters, and other merchandise all tend to rise as the value of money decreases, putting additional financial pressure on artists and their teams. The costs of fuel and transportation also skyrocket, making it even more challenging for artists to tour and perform at different locations and make a living from their craft.

The obstacles not only impact musicians' revenue but also dramatically affect their mental health. Santigold and Animal Collective were among the first to announce tour cancellations last fall owing to logistic, financial, and emotional hurdles. Most artists will not be able to tour as they did before COVID-19 and Brexit. Fewer windows for collaboration with foreign colleagues will be available. Artists will lose contact with their fan bases. Cultural exchange between territories and regions will decline.



Artists being unable to perform not only affects the live music sector but also has a rippling effect on the entire industry value chain and hinders the growth of the independent recorded music scene. As Dr. David C. Lowery explained in an insightful 2016 article, “the main reason lower level artists tour is that it is the most reliable way to stimulate sales of recordings.” Direct-to-fan sales at concerts, record signings, and promotional showcases—a huge percentage of physical sales is lost if bands cannot travel to other countries.

Moreover, touring exposes artists to new audiences that may be unfamiliar with their music. By performing in front of live audiences, musicians can gain new fans who are likely to listen to their music on streaming platforms. Announcing concerts is also a great way to generate buzz on social media and increase artists' chances of being included in playlists. Live music is key to streaming discovery, and touring barriers negatively impact digital revenue.

Governments Must Implement Support Measures

Brexit, COVID-19, inflation, monopolies, visas, and more—touring barriers affect all revenue streams across the music value chain, hinder economic growth, and stifle cooperation and cultural exchange. The global independent community will continue to call for all governments to implement support measures for the live music sector with a focus on SMEs and independent artists and venues.

Building Capacity and Providing Resources

WIN plays an essential role in coordinating action to address key industry affairs when they require a global response. The organization acts as the nexus between the continents and voices the issues that affect the independent sector on a global scale. This includes facilitating forums for discussion and exchange to ensure that the sector is well-informed and can respond to the challenges that may arise; promoting best practices and advocating for transparency, fairness, and a level playing field to ensure equal access and opportunity for all independents; and collecting and sharing market data and insights at the global, regional, and local levels, with a focus on emerging markets.

Working Groups



WIN assists the independent sector to navigate the world of international performance rights management. This includes facilitating working groups to monitor and promote best practices within collective management organizations (CMOs), participating in stakeholders groups, and developing tools such as the *Repertoire Data Exchange (RDx)* to deliver repertoire.

This year, Warner Music Group and BMG joined Beggars Group, Universal Music Group, and Sony Music Entertainment in delivering their rights data via RDx. GVL (Germany) joined as a recipient, and workshops were organized to assist CMOs in providing metadata on behalf of their local members.

WIN coordinates groups on public policy, trade agreements, and communication of the value of music; the organization also participates in IMPALA's copyright and collecting societies committees. In 2023, the organization launched dedicated task forces to address AI and artist mobility to the United States.

In addition, WIN liaises with other industry stakeholders such as the International Federation of the Phonographic Industry (IFPI); Merlin, the digital music licensing body for independents; and DDEX, the international standards-setting organization for the digital value chain.

Resources and Benefits



WIN builds capacity within its global network, helping independent music trade associations thrive and be more sustainable by providing ongoing support, resources, and benefits. Direct member benefits include a monthly newsletter, access to a dedicated member section on the website with event discounts and other opportunities, and regular updates on industry-related topics.

In June 2023, WIN published the *ISRC Factsheet*. Available in six languages, this easy-to-understand, two-page resource aims to educate and empower record labels, music professionals, artists, and other stakeholders by providing valuable insights into the importance of the ISRC code and how to properly implement it.

WIN has partnered with the Latin American Independent Music Observatory ([OLMI](#)), to undertake a characterization of the digital value chain of the Latin American region and develop data-driven efficiency strategies.

The *Global Vinyl Directory* is regularly updated to provide details of vinyl pressing plants and related services by companies operating all over the world.

The organization further endorses and amplifies the initiatives promoted by its member associations and distributes the resources they generate, including translations when relevant.

In this way, associations and companies outside of Europe have access to IMPALA's revised *Streaming Plan* as well as the ongoing *One Step Ahead* training workshops and reports.

WIN negotiates discounted rates for the associations and their members to attend international music industry events and conferences. Notably, this year saw remarkable opportunities to attend A2IM Indie Week, AIM Connected, BIME, Fluvial, Primavera Pro, Rio Music Market, Westway Lab, and more.



[Discover the ISRC Factsheet](#)



Access the [OLMI](#) website



Browse the [Global Vinyl Directory](#)

Sustainability

The independent music sector recognizes and embraces in its capacity the importance of sustainability and education on the subject. Trade associations and their members take action in different ways and develop projects to create a positive impact.

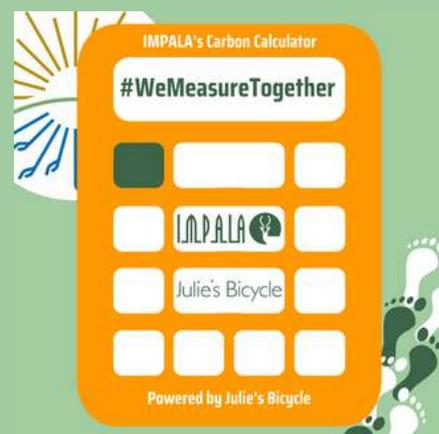
IMPALA plays a central role in promoting sustainability projects within the European music community. Notable among its initiatives this year is the launch of the IMPACTS project, which aims to assess and reduce the environmental footprint of music companies. In June 2023, IMPALA released its first membership Carbon Calculator report.

Work has been ongoing in the background on the United Nations (UN)-supported Global Music Climate Pact initiated by AIM's Climate Action Group. It was launched in 2021 alongside BPI as a response to COP26 and the urgent call for collective action to combat the climate crisis and was developed with the support of the UN Environment Programme (UNEP). The Pact sets out a series of high-level commitments that will serve as a declaration of intent for the global music sector, and further announcements are expected in the coming year.

National associations have been proactive in implementing their own sustainability projects. For instance, the RE-DISCO project, spearheaded by UPFI and FÉLIN in France, showcases their commitment to sustainability through innovative approaches. UPFI also participates in REC, an initiative to build a low carbon roadmap for recorded music in France. In Korea, LIAK collaborates with an ongoing instrument donation and sharing program and repair shop that organizes activities such as workshops to repurpose discarded or waste instruments and create interior props. UFi worked with a consultant to develop a sustainable plan to improve the environmental impact of their Premios MIN awards ceremony.

Several companies and associations have joined the global initiative known as Music Declares Emergency, signaling their dedication to addressing climate change and environmental issues. In December 2023, the Chilean branch La Música Declara Emergencia launched the first Latin American carbon calculator with the participation of IMICHILE.

Recognizing the need for internal change, WIN and its members have implemented various environmentally conscious practices within their office spaces and operations. These include initiatives such as composting and recycling to reduce waste, online and hybrid meetings to minimize air travel, replacing printed materials with digital files, and transitioning to recycled materials for items used at events.



Equity, Diversity, and Inclusion

Commitment to equity, diversity, and inclusion permeates various aspects of the activities of WIN and its member associations, including representation on boards and committees, participation at events such as awards ceremonies, panel discussions at conferences, and training programs.

Diversity- and inclusion-focused mentoring programs and initiatives are widely embraced. IMPALA announced its second Changemaker Award this year as part of its comprehensive EDI program with training, guidance, and business cases for members. Noteworthy initiatives include CIMA's Breaking Down Racial Barriers and A2IM's Black Independent Music Accelerator (BIMA) programs. AIR has taken the lead in Australia by creating and hosting the Women in Music Mentor program. AIM runs the Amplify Apprentice program, participates in the Women in CTRL mentorship program, and is a key supporter for the PowerUP Participation Programme and the Women in Music Awards. A2IM, AIM, AMAEI, FÉLIN, IMNZ, and VUT are proud supporters of the Keychange initiative, promoting diversity and gender balance at their conferences. FÉLIN, VUT, AMAEI, and other European associations are partners of the MEWEM program.



