Development of a Regional Export Strategy for the Creative Industries Services

Value Chain Analysis Report: MUSIC

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Submitted to: CARIBBEAN EXPORT DEVELOPMENT AGENCY

8th July 2015

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List of Acronyms

CARICOM	Caribbean Community – regional institution comprising 15 member states
CARIFORUM	CARICOM plus the Dominican Republic.
Caribbean Export	Caribbean Export Development Agency
CCIs	Cultural and Creative Industries
CDB	Caribbean Development Bank
EC	European Commission
EU	European Union
EU-28	European Union (including 28 Member States)
Eurostat	Statistical Office of the European Union
GDP	Gross Domestic Product
ITC	International Trade Centre (UN)
IDB	Inter-American Development Bank
LAC	Latin America and Caribbean
OECD	Organization for Economic Cooperation and Development
OECS	Organization of Eastern Caribbean States
SME	Small and medium-sized enterprise
UNCTAD	United Nations Conference on Trade and Development
UNDP	United Nations Development Programme
VC	Value Chain
VCA	Value Chain Analysis

Country Abbreviations for EU Member States selected for this project:

DK Denmark
DE Germany
EE Estonia
ES Spain
FI Finland
FR France
IT Italy
NL Netherlands
UK United Kingdom

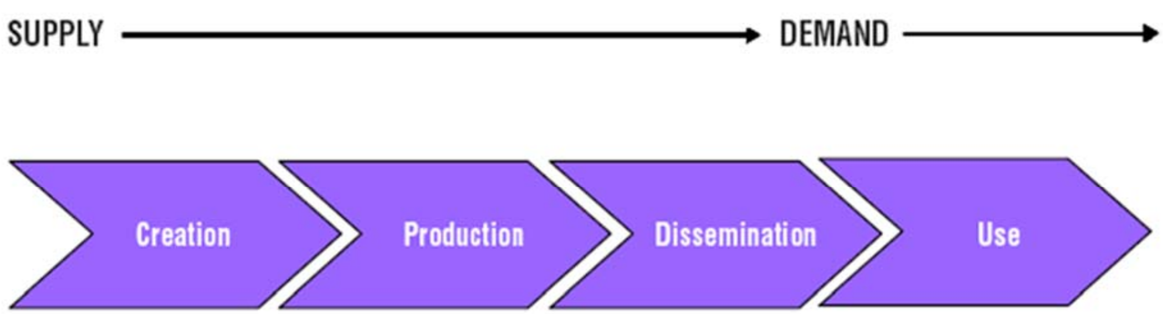
1. Introduction

1.1. Definition of Value Chains

A value chain, also referred in the framework of the Cultural & Creative Industries (CCIs) as a 'creative chain', has been described as *"a sequence of activities during which value is added to a new product or service as it makes its way from invention to final distribution" (Botkin and Matthews 1992, p. 26).*

The **creative chain** consists of an initial creative idea, which is usually combined with other inputs to produce a culture good or service, through a series of interlinked stages between their production and use. A culture product must be created, produced, possibly manufactured or reproduced, and then distributed before it reaches, or is used by, a consumer. This chain of activity includes a number of distinct steps, usually occurring in business establishments.[1] The basic steps of the creative chain are shown in the figure below.

Figure 1: Basic Creative Chain



In this basic chain, "creation" incorporates "concept" & "design", while "dissemination" includes marketing, sales, distribution and the other value-added activities that occur prior to use/consumption. Accordingly, the chains will differ according to the good or service, the targeted markets and other factors. However, in order to collect harmonised and, when possible, comparable data, we are going to use a simple value chain as a framework of analysis (linear value chain). Nevertheless, we consider the local ecosystem as a key factor influencing CCIs' supply chain and their performance. The value chain's analysis will therefore include the analysis of the policy environment, measures and key actors enabling the sector's development and growth.

In elaborating on these chains, special emphasis will be placed on determining the existence of and/or practical scope for integration of complementary inputs at any point along the chain, from differing CARIFORUM member states up to and including the final stage of the chain.

[1] Canadian Framework for Cultural Statistics (2011).

On this basis, this report considers the value chains using a two-fold approach: analysis of the **supply (CARIFORUM) side**, and analysis of the **demand (EU) side**.

With regards to possible business cooperation opportunities in the target EU markets, attention has been given, where possible, to the following *inter alia*: EU distributor or agent (including marketing and promotional activities); joint-ventures and e-commerce platforms - both Business-to-Consumer (B2C) and Business-to-Business (B2B).

1.1. Sectoral Scope: CARIFORUM Music (recorded & live) - Services and Goods

For this consultancy, 6 CIs were selected for study of their value chains reflecting both goods and services: **Music (recorded and live)**, **Film, Fashion**, **Jewellery, Painting**, **and Arts & Craft.**

To determine the goods and services that fall within these sub sectors, the team utilised a combination of the definitions used for the CCIs in UNCTAD Creative Economy Report 2010, the UNESCO Framework for Cultural Statistics (FCS) as well as the KEA report of 2006 on the Economy of Culture.

Table 1: Related Services and Goods for Music

Related Services	**Related Goods** (physical and intangible[2])
<u>Recorded Music</u> Music publishing (composers and lyrics) Recording studios Collective Rights Management (Royalties and license fees) Music radio stations TV music channels <u>Live music</u> Performance management services Booking services Support and technical activities producing live events (including venues) Collective Rights Management (Royalties and license fees)	Recorded music - CDs and digital formats Merchandising

[2] Definition derived from http://en.wikipedia.org/wiki/Intangible_good (accessed on 16.11.14).

1.2. Geographical Scope: CARIFORUM and European Union

The geographical scope of the project includes all 16 CARIFORUM countries: Antigua and Barbuda, The Bahamas, Barbados, Belize, Dominica, Dominican Republic, Haiti, Grenada, Guyana, Jamaica, Montserrat, St. Lucia, St. Kitts and Nevis, St. Vincent and the Grenadines, Suriname, and Trinidad and Tobago.

On the EU side, the Consultancy considers selected markets of the European Union to explore trade opportunities: Denmark, Estonia, Finland, France, Germany, the Netherlands, Spain, Sweden and the United Kingdom (9 Member States).

1.3. Methodology

The methodology employed in this Consultancy combined desk research, face-to-face interaction, online surveys as well as virtual communication in order to achieve the expected results.

This multifaceted approach is summarised below:

- Overview of CCIs locally and examination of export opportunities along the value chain:
  - Desk research to collect preliminary data (quantitative and qualitative) on the export value chains of the selected sub sectors of the CCIs in Caribbean countries, and to gather information on target markets for exports (EU countries).
  - Meetings with stakeholders, where necessary to supplement the desk research.
- Comprehensive mapping of the value chains for the CCIs in selected EU Member States, and identification of opportunities for CARIFORUM CCIs – using a combination of an online survey, desk research and fieldwork.
  - Online questionnaire (survey) was designed in SurveyMonkey for use across the Caribbean by the core team and Local Exports in consultations with creative practitioners.
  - Fieldwork at local level was conducted by the network of Local Experts, under the guidance of VPAJ, each with responsibility for collecting data, assessing the specific situation, engaging with potential stakeholders, and recording their views. This equivalent work in the EU member states was conducted by KEA.
- **Road map** for enhancing the competitiveness of CCIs in entering the value chain which considers export growth potential and existing bottlenecks, with accompanying **strategy and action plan** to address the constraints faced by CARIFORUM CCIs practitioners in their exports. Wherever possible, this references international best practices, and puts forward recommendations for CARIFORUM CCIs, including niche markets, important festivals/trade fairs, key actors for partnerships at international level as well as cooperation arrangements for mutual benefit (e.g. joint ventures, visibility in partners' markets, twinning and exchange programmes etc.). As relevant,

the strategy also provides recommendations on potential clustering opportunities in CARIFORUM countries to e.g. develop joint marketing strategies, lower export costs, and improve the visibility of their products and services in priority markets.

- Through industry validation of this Final VCA Report, the team will make the necessary adjustments to correct for errors or oversights, and to reflect critical additional input.

Survey respondents

The following discussion is based on the results collected through this survey exercise for the 117 professionals who specified 'Music' (live and recorded) as their *main* industry. They are based in 15 of the 16 CARIFORUM countries.

Only in some instances is the full survey dataset discussed: 410 creative professionals involved in the 7 CCIs/sub-sectors, based in 15 CARIFORUM countries (as of 31st May 2015).

Methodological limitations

The most significant methodological limitation has been the varying – and at times, small – numbers of creative professionals who participated in the survey. The resultant sample size at times limited the authors' abilities to reach conclusions for some of the survey questions. The authors therefore hereby acknowledge that this report does not present a *definitive* characterisation of the CARIFORUM CIs, but rather provides a foundation upon which to build.

Reports

An **industry-specific Value Chain Analysis (VCA) Report** like this one has been drawn up for each of the six CIs under review - namely **Music (recorded and live)**, **Film, Fashion**, **Jewellery, Painting**, **and Arts & Craft**. The results from each are aggregated into an overarching report, entitled "Development of a Regional Export Strategy for the Creative Industries Services: **Value Chain Analyses Final Report**". Whilst the latter includes some industry specificity, it is recommended that the relevant industry-specific VCA Reports are read in conjunction with the Final Report.

2. Mapping the Value Chains for CARIFORUM CCIs

As mentioned, this report considers the value chains for the selected CIs using a two-fold approach: analysis of the **supply (CARIFORUM) side**, and analysis of the **demand (EU) side**.

The value chains developed are based on the schematology of Film by Aarhus, Alexandra Institute and High Tech Accelerator Innovation Centre (2011). The industry-specific value chain for Music is discussed in Section 3.3.1, and presented in Figure 2 with the survey respondents mapped to each activity. The actual numbers of respondent involved in each type of activity are given in the tables in Annex 1.

3. Market Opportunities for CARIFORUM's Music Industry

3.1. Overview of Global Music Market

Headline data from *Recording Industry in Numbers 2014*[3]

- Overall global recorded music trade revenues declined by 3.9 per cent in 2013. This was heavily influenced by the 16.7 per cent decline in Japan, a market at the start of its digital transition. Excluding Japan, global revenues were essentially flat, declining by 0.1 per cent. Europe saw growth for the first time in 12 years and the market also increased in value in North America and **Latin America**.
- The US remains at the head of the top 20 markets table and saw consolidation in 2013; the top six markets in Europe - France, Germany, Italy, Netherlands, Sweden and the UK - all saw growth. There was strong digital growth in many emerging markets including Argentina (+68.5%), Peru (+148.5%), South Africa (+106.8%) and Venezuela (+84.9%).
- Revenue from digital channels increased by 4.3 per cent in 2013 and now accounts for **39% of overall industry trade revenues.** Downloads remain the biggest source of digital revenues, accounting for 67 per cent of the digital market in 2013.
- Revenues from subscription services surged by 51.3 per cent in 2013, passing the US$1 billion mark for the first time. Global revenues from subscription and advertising-supported streams now account for 27 per cent of digital revenues, up from 14 per cent in 2011. It is estimated that more than 28 million people worldwide now pay for a music subscription, up from 20 million in 2012 and just eight million in 2010. Music subscription, which has helped transform Sweden and Norway in recent years, is now having a similar positive impact in Denmark and Netherlands.
- **Global performance rights revenue** crossed the US$1 billion threshold in 2013. This income from broadcasts and public performance increased by 19.0 per cent in 2013 to hit US$1.1 billion, now accounting for 7 per cent of total record industry revenue.
- **Emerging markets.** Review of key trends in emerging markets, where digital revenues are growing fast alongside the spread of licensed services and the move to mobile. Latin America is the region with the fastest digital growth in recent years, with revenues up 124% between 2010 and 2013. There are strong growth projections in Africa, analysed in the RIN for the first time.
- **Multiple platforms and new frontiers.** Music going multi-device and multi-platform and music players are integrated into the cars and homes of the future.

[3] http://www.ifpi.org/news/IFPI-publishes-Recording-Industry-in-Numbers-2014

3.2. Music trends in the EU

In the EU the activities of the music industry´s recorded and live music value chain are very wide and diverse. It includes composers, songwriters, lyricists, performers, backing musicians, producers, publishers, sound engineers, recording studio staff, technical workers, managers, and workers at radio stations and TV music channels. The music industry in its broadest sense has a turnover of more than € 25 billion and employs more than 1,168,000 people.

Table 2: Facts and figures on the European Music Industry

Total employment (2012)	**1,168,096 in entire value chain**	
Employment in value chain	44,660	Sound recording and music publishing activities
	650,000	Musicians, song writers
	375,239	Entertainment workers (profit sector)
	81,466	Entertainment workers (non profit sector)
	9,133	Employment in no-specialized stores
	5,714	Employment in radio stations
	1,884	Employment in music TV stations
Total turnover in EU (2012)	€25, 341 million	
Turnover in value chain (€ million)	3,603	Physical sales
	1,686	Digital sales
	439	Exports of recorded music
	7,793	Live music performance revenue (profit sector)
	4,860	Live music performance revenue (Publicly funded/non-profit sector)
	93	Synchronization
	3,175	Music radio stations
	1,722	Music TV channels
	1,880	Copyright/author´s right(background music, other radio and TV)

Source: “Creating growth, Measuring cultural and creative markets in the EU” (EY Report, 2014)

Collective rights organisations play an important role and in the EU they redistribute more than €4.3 billion to their members such as the creators and the publishers that form the first link in the value chain.

Europe has four of the ten biggest music markets in the world (Germany, UK, France and Italy).

There are thousands of music companies, both major record labels and small independent record companies that invest heavily in new talent every year and produce many new releases. In particular the small companies are the key employers in the music sector in the EU and ensure that there is a great diversity in music.

The recorded and live music sectors are very much two sides of the same coin in Europe. There has been an increase in the performance of live music as well as a small increase in the sales of recorded music.

Digital sales grew by 109% in between 2009 and 2013, According to IFPI, the international trade body representing the recording industry worldwide, digital sales accounted for 39% of global recorded music trade revenues in 2013 and 32% of these sales took place in Europe.

3.2.1 Recorded Music

Digital revenues are derived from both downloads and streaming. Europe has witnessed a strong increase in streaming in recent years. In 2013 it accounted for 38% of the digital revenues and its market share it expected to continue to grow in the coming years. The emergence of a wide range of legal music streaming and downloading services has positively impacted the music industry.

Currently Europe is the world leader in streaming services and the two leading companies are Spotify (Sweden) and Deezer (France). According to the EY study, consumers are more willing to pay for music online due to the availability of different packages and prices. In 2013 more than 230 online music services were available in Europe, offering more than 37 million tracks in every country.

Apart from the music delivery services the recording and publishing industry is also being transformed into a global digital business. Europe is home to the world´s leading record company, the Universal Music Group: Both its major and independent record labels have embraced new business models to deal with the shift from the sales of CDs to online music sales. The advent of the Internet in the ´90s had had a dramatic impact of the distribution model of the industry as well as jobs and growth. New models have been developed since to:

- Deliver music through digital channels with a wide catalogue of music, with the greatest diversity of works and music genres.

- Set up new licensing models for new uses of music such as the global rights agency Merlin for the independent record companies
- Create innovative means to reach a global audience. Digital allows new and sophisticated ways of communication between artists and their fans.

In the value chain the record labels, publishing companies and digital music services play the dominant roles. Although musicians, songwriters, lyricists and composers are at the core of the value chain of the music industry, they are economically less significant, resulting in the fact that many who carry out these roles have little or no job security and often need to have a second job to sustain themselves.

3.2.2 Live Music

According to the previously-cited EY study, concerts and music festivals accounted for more than one-third (37%) of the global performing arts revenues in 2011. Revenues have been growing since 2010 and further increases are expected in the near future.

The competition among festivals has increased and is now a major issue for festival organisers. In the last ten years there has been a 500% increase in the number of local and international open-air music events. Festival organisers have come under pressure to reduce the price of entrance tickets and increase the production costs. More than ever they need to specialize, attract big names and improve their facilities. This has also forced festival organizers to embrace digital technologies to innovate their festivals (communication with audience via social media channels, digital payment systems, live streaming, etc.).

Open-air festivals are significant employers and they tend to hire mainly local, well-trained and educated manpower. In many cases, the host communities derive benefits through provision of goods and services to attendees. In general all types of performances play an important role in attracting tourism in Europe. For example, 9.2% of tourists visiting the UK went to the theatre, a musical, opera or ballet.

The European Forum of Worldwide Music Festivals (EFWMF) is a network of festivals focusing on global music and local cultures. "We cherish urban grooves and traditional expressions; we care for creation and for collective musical heritage. Interaction and collaboration between members is the core activity, but the EFWMF also seeks to facilitate links to non-European festivals and networks within the music community".

EFWMF initiated the worldwide music expos WOMEX and STRICTLY MUNDIAL, and is closely connected to various music markets and events worldwide. The network has 45 festival members, representing a wide variety of European world music festivals. The diversity of these festivals equals this of world music: ranging from a small scale thematic bagpipe-festival in Italy to eclectic mega-festivals of 200,000 visitors. Together the EFWMF-festivals reach more than 3 million people in Europe, and invites hundreds of artists to its festivals all year round.

Membership is for all festival organizers with a worldwide approach, presenting music in the area of world, ethnic, traditional, folk and roots music. A shortlist of such festivals is shown in Table 3.

For more information on festivals in Europe we recommend festival and events managers as well as the public authorities of the CARIFORUM countries reading the new publication entitled "**Focus on Festivals**" launched in February 2015 in the UK.[4] According to the European Festival Association (EFA) it looks at understanding the causes and implications of the current growth in festivals internationally, and the implications for the wider industry and society. The main topics covered are: 1) the politics, programming, impacts, governance and management of festivals, 2) the social, cultural, political, economic and physical contexts in which festivals operate; 3) the potential of festivals to explore and stimulate a more risk-oriented approach to the arts; and 4) key conclusions, trends, forecasts and recommendations for the sector in the future.[5]

[4] The publications can be purchased from www.goodfellowpublishers.com/focusonfestivals.

[5] http://www.efa-aef.eu/en/festivals/news/detail/1697/Focus%20on%20Festivals%253a%20new%20publication%20explores%20festivals%25e2%2580%2599%20implications%20for%20wider%20industry%20and%20society/

Table 3: Selected Listing of EU Festivals

Name & Location	Summary Description	Contact Details
International Afro Music Festival (Wurzburg, Germany)	In operation since 1989, this is among the **largest** and **oldest festivals** for African music and culture **in Europe**. More than 6,000 musicians and artists from 56 countries of Africa and the Caribbean have performed in Würzburg so far and about 2,080,000 visitors have heard, seen and tasted the cultural wealth of the African continent and the African diaspora.	INTERNATIONAL AFRICA FESTIVAL Prog. Dir : Dr. Stefan Oschmann Friedenstrasse 5 97072 Wuerzburg, Germany Tel:+49 931 15 060 Fax: +49 931 15 080 info@africafestival.org www.africafestival.org http://www.africafestival.org/
Babel Med Music (Marseille, France)	The event brings together the major families of world music under one roof in Marseille, in the heart of the monumental Dock des Suds.	http://dock-des-suds.org/babelmedmusic2015/en/about/
Musiques Métisses. (France)	For almost 20 years, Hors Les Murs operations of Mixed Music Festival have emerged as genuine tools for territorial development and audience development. Before and after the festival, musicians, storytellers and authors are invited into the world of Commons Grand Angouleme, Charente and Poitou-Charentes region.	Musiques Métisses Prog. Dir.: Véronique Appel BP 244 16000 Angoulème, France Tel :+33545954342 Fax : +33 545 95 63 87 festival@musiques-metisses.com www.musiques-metisses.com

Music Meeting (Netherlands)	**Music Meeting** presents top music from all over the globe that hardly ever can be enjoyed live in the Netherlands and Europe. The festival initiates and supports projects that open up new horizons of new and still undiscovered talent, or artists that are underexposed. The stage for these projects is the 3-day international music festival which takes place at the beautiful Park Brakkenstein every year in the Pentecost weekend.	Stichting Music Meeting Prog. Dir: Wim Westerveld PO Box 1535 6501 BM Nijmegen, The Netherlands Tel:+31 24 360 88 13 Fax: +31 24 322 26 58 wim@musicmeeting.nl www.musicmeeting.nl
Festival Mundial (Netherlands)	A world full of music, dance, (street) theatre and circus... A world full of music, dance, (street) theatre and circus! Perhaps the most colourful festival in the Netherlands! Over the course of 25 years, this event has become an attractive mini-world trip. Here you will find no big names but talent from village and city crucibles from all over the world...	FESTIVAL MUNDIAL Mundial Productions Prog. Dir.: Erwin Schellekens Noordstraat 111 5038 EH Tilburg, The Netherlands Tel:+31135431335 Fax: +31 13 535 74 89 info@mundialproductions.nl www.mundialproductions.nl
Colours of Ostrava (Czech Republic)	A multi-genre music festival held annually in the city of Ostrava. Since 2012, the event has been held in the impressive surroundings of Dolní Vítkovice – the site of former blast furnaces, mines and ironworks. The first festival took place in 2002. In 2005 and 2006, Colours of Ostrava scooped up the Czech Angel (Anděl) award for Music event of the year. For three consecutive years in 2004, 2005 and 2006, it was also awarded best music event of the year in the category of concert/festival of the year at the ALMA Akropolis Live Music Awards.	COLOURS OF OSTRAVA Colour Production, spol.s.r.o. Prog. Dir.: Zlata Holusova Lomená 349 Dolní Lhota 74766, Czech Republic Tel:+42 06 08 972 908 Fax: +42 05 96 121 342 informace@colours.cz www.colours.cz
Festim Festival Intermunicipal	Mixed music styles including musicians from dozens of countries.	FEST**IM** - Festival Intermunicipal de músicas de mundo d'Orfeu Associação Cultural

de musicas do mundo (Portugal)		Prog. Dir.: Luís Fernandes Rua Engº Julio Portela 6 3750-158 Águeda, Portugal Tel:+351 234603164 Fax: +351 234604842 dorfeu@dorfeu.pt www.dorfeu.pt www.festim.pt
Amsterdam Roots Festival (Netherlands)	The Amsterdam Roots Festival is a festival with a long history of great artists, innovative partnerships and a constantly increasing number of visitors. In 20 years, the festival has become one of the most exciting music festivals in the Netherlands. As a 'festival of passionate music lovers' the first Africa Roots Festival took place in the Melkweg in 1983. The term world music did not exist yet, but in small circles the word got out of exciting and very danceable African pop music. In 1987 the Amsterdam Roots Meeting'87 was part of 'Amsterdam Cultural Capital': a large-scale festival with music from all over the world in many locations. A new audience was won over: the immigrant population of the Netherlands. It became increasingly clear that elsewhere in the world new forms of popular music sprung up that were new to Western ears. This resulted in the first World Roots Festival, a voyage around the world in music.	AMSTERDAM ROOTS FESTIVAL Stichting Amsterdam Roots Prog. Dir.: Frans Goossens Lijnbaansgracht 234a 1017 PH Amsterdam, The Netherlands Tel:+31205318181 Fax: +31 20 531 81 99 info@amsterdamroots.nl www.amsterdamroots.nl
Oslo World Music Festival (Norway)	Annual multi-day festival started in 1994, featuring an eclectic mix of music genres.	Oslo World Music Festival Prog. Dir.: Alexandra Archetti Stølen Mail Boxes Etc. 317 Postboks 1 Youngstorget 0028 Oslo, Norway Tel: +47 9 525 76 42 info@osloworld.no www.osloworld.no

Førde Traditional And World Music Festival (Norway)	Forde traditional and world music festival is an annual festival and was held for the first time in 1990. The festival is always held from Thursday to Sunday in week 27. The Festival is the largest multicultural music event in Norway and the beautiful Western scenery forms an unique setting for the festival. The festival presents ethnic music from all over the world. We want to let the audience get to experience some of the amazing diversity of music, cultures and traditions that exist. The festival offers a varied program of concerts, courses, exhibitions, children's activities and tours. Førdehuset is the main location for many of the concerts, however the festival cooperate with other cultural institutions, hotels and churches about the events during the festival.	Førde Traditional And World Music Festival 1-5 July 2015 Stiftinga Førde Internasjonale Folkemusikkfestival Prog. Dir. : Hilde Bjørkum P.O. Box 395 6802 Førde, Norway Tel:+4757721940 Fax: +47 57 72 19 41 info@fordefestival.no www.fordefestival.no

3.3. Music trends in CARIFORUM

3.3.1 Overview of CARIFORUM Music Industry

Within CARIFORUM, the impact of the creative industries has been most pronounced in the various music forms developed within the region: spread firstly within the diaspora and subsequently popularized in wider markets worldwide. However, the export capabilities of the region's creative industries are highly differentiated across countries and according to the specific industries, with some countries having longer exposure to export markets (e.g. the Dominican Republic, Jamaica, Trinidad and Tobago and Barbados). In other territories, the creative industries' export-readiness remains in embryonic stages (e.g. Guyana, Suriname, and the OECS). Because of small and weak domestic and regional markets, most sub-sectors experience a significant drain of talent to the developed market economies[6]. Still, the fact that the region has considerable and broad-based creative talent cannot seriously be questioned.

It must be conceded though that even where there have been export successes, the region's creative industries are generally disorganized, often informal and typically enjoy little governmental support. Many CARIFORUM countries did not even put in place copyright protection regulations until recently - and where they exist, there are constant complaints that the enforcement provisions are rarely exercised.

Such neglect poses a present danger. The music industry, in particular, has undergone some far-reaching changes in recent years, and in many respects the economics of the industry have been significantly impacted. Some of the very technologies that have enabled the worldwide dissemination of musical forms originating in the Caribbean also constitute a threat to artists whose works have been ruthlessly pirated. In recent years, a number of the region's best-known artists such as Eddy Grant and David Rudder took the decision to eschew the recording studios for extended periods in response to widespread piracy of their works in their domestic and regional markets. Some of the region's musicians now consider the creation of records or CDs less a potential revenue stream and more a tool to expose their works[7] and to make them more marketable at live events. As far as many musical artists are concerned, live events - rather than sales of recorded works - are now their only viable sources of earnings.

At the same time, some creative producers are sensitive to the potential of the new technologies, and an increasing number of musicians are now offering their products for direct sale via the internet or through partnerships with major distribution entities such as Amazon or I-Tunes.

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[6] "The Cultural Industries in CARICOM: Trade and Development Challenges" (CRNM, 2006)

[7] One of the untold stories in the region – perhaps for obvious reasons – concerns what many musicians describe as widespread and unchecked payola in the broadcast industry, where independent programmers are said to guarantee airplay or chart positions for a fee. What with such fees upfront and with pirating thereafter, some musicians indicate that were it not for live performance fees, they would be out of business.

Box 1: Impact of New Business Models in Music Distribution: The Streaming Controversy

Are digital music streaming services – as they now exist - a good business model or do they represent yet another rip-off?

The rapid expansion of streaming services in recent years (in the 1st quarter of 2015, Spotify claimed 60 million users – including 15 million subscribers) has popularized a controversial business model, one that, some creative practitioners assert, is not in their best interest. At the core of the model is a tiered system that permits some listeners to consume music without paying – in exchange for listening to advertising content, while other listeners who want to skip the advertising must pay a subscription fee. Artists (and all other rights-holders including the record labels) are paid in either case – but the payments are at different levels.

The controversy has been such that one of the largest individual earners in the industry worldwide – pop music performer Taylor Swift - created waves in late 2014 when she withdrew her music from Spotify's streaming service, claiming that Spotify and the larger streaming industry was harmful to the creators of music and damaging to the sustainability and growth of the music industry itself.

In a Yahoo interview[8], the singer noted: 'Music is changing so quickly, and the landscape of the music industry itself is changing so quickly, that everything new, like Spotify, all feels to me a bit like a grand experiment. And I'm not willing to contribute my life's work to an experiment that I don't feel fairly compensates the writers, producers, artists, and creators of this music.'

With the quantum of money going to the creators of the music - as against the record labels – at the heart of the dispute, it is arguable that the relative positions (or leverage) of the singers/musicians etc., may be driving the discord. The artistes making the least money from their music may be more inclined to trade-off immediate financial returns for having their works before a wider audience. That this is not necessarily so may be seen in the fact that another of the largest names in music - U2's frontman Bono - responded to Swift's decision stating: "It's an experimental period. Let's experiment. Let's see what works." The singer explained that in his opinion, the enemy was not Spotify, but music-industry standards and practices. "When people pick on Spotify: Spotify are giving up 70 percent of all their revenues to rights owners," he said. "It's just that people don't know where the money is because the record labels haven't been transparent."[9]

Notwithstanding the negative assessment by Swift, a significant grouping of US stars threw their influence and their funding into a new streaming service – Tidal. Its owners/investors

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8 https://www.yahoo.com/music/bp/exclusive--taylor-swift-on-being-pop-s-instantly-platinum-wonder----and-why-she-s-paddling-against-the-streams-085041907.html

9 http://www.rollingstone.com/music/news/bono-defends-spotify-lets-experiment-lets-see-what-works-20141107

comprise a roster of big names – including Jay-Z, Alicia Keys, Rihanna, Madonna and their description of the service is that it represents 'the first-ever artist-owned global music and entertainment platform" – one that eschews a free-music tier, instead offering 'basic' and 'premium' subscription levels[10]

For CARIFORUM musicians, the entire argument may very well be moot: the fact is that given how returns are calculated by the streaming services, none (or at best, only a handful) are likely to be earning anything of significance from those services.

David McCandless, a journalist and data designer, recently published an updated version his 2010 Infographic showing how much musicians earned online from sales and streams of their music.[11] It provides information from various digital music companies, such as Bandcamp, iTunes and Amazon that sell music for downloading, to streaming services such as Spotify, Deezer, Apple's Beats Music, Rhapsody, and YouTube.

The Infographic shows how much an artist can expect to earn from a single sale or stream as well as how many units need to sold or streamed to reach the US monthly minimum wage of $1,260. According to McCandless, today an artist signed to a label can expect to receive an average payment of $0.001128 each time his/her music is streamed. (This figure does not include publishing royalties for songwriting).

The Infographic is stirring a new debate in Europe regarding the benefits of the new business models for artists in particular, now that the European Commission has started to review the copyright law to adapt it to the new digital era.

<u>Is there a Fair Trade Music Model?</u>

One development worth watching, are the efforts being undertaken by music 'activists' in a number of countries in response to the specific issues surrounding compensation for creators in this industry. Their proposal: the implementation of a "fair trade music" model.

Borrowing some concepts initially derived from 'fair trade coffee' campaigns, the thrust is articulated in and supported by a 2014 study[12]. As the Executive Summary of the study notes:

This study uses financial and economic data to explore the current structure of the digital streaming market for music, comparing it to other sectors that distribute creative content to determine an appropriate valuation of musical works as well as an equitable split of revenues.

[10] http:/www.fortune.com/2015/04/09/will-jay-z-tidal-pay-out/

[11] http://www.informationisbeautiful.net/visualizations/how-much-do-music-artists-earn-online-2015-remix/

[12] http://www.ciamcreators.org/wp-content/uploads/2014/11/CIAM14-1172_Study_fair_compensation_2014-05-01_EN.pdf

The findings reveal that, as they are currently structured, digital streaming services are built on an exploitative value chain that undervalues the musical works which drive their business. Furthermore, regulatory constraints, market imbalances and labels negotiating with services for all types of rights holders has led to the preferential treatment of major record labels at the expense of individual creators and performers.

Our study determines that the market rate for use of music by streaming services should be 80% of gross revenue, paid to all rights holders, with a 50/50 split between record labels/performing artists on the one hand and music publishers/songwriters on the other. Currently, services are paying 60-70% of gross revenue to rights holders with an average 94/6 split in favour of record labels.

To combat these obstacles to the long-term sustainability of these services and encourage the equitable distribution of revenues, a 'fair trade' approach based on a transparent, easy-to-understand set of ethical business standards that gives consumers a choice at the point of purchase is worth considering.

While much visibility has been given to the recording and performance aspects of the music businesses, similar attention has not been consistently paid to the business side which has driven earnings from the industry in the developed economies (e.g. memorabilia, video or film sound-track placement, or exploration of the cross-industry fertilization that may exist with other niches such as fashion, dance productions etc.)

The skills and networks developed in music production and staging can be exported within and outside of the Caribbean either through mode 2 (artistes coming in to work with well-known Producers/Arrangers or mode 4 (Producers and Managers going outside of the region to work with new acts).

- **Music**

Regional statistics are difficult to verify, but research of recent years has indicated that the total value of this segment is considerable. For instance, Gill,[13] referencing research conducted in 1995, suggested that Jamaican reggae music is a US$ billion industry. In 2009[14], Fortune Magazine, in a report on a branding/merchandising deal between the Marley family and Hilco, estimated that the value of the late artiste's estate was itself over US$1 billion. Caribbean Export's TradeWins had earlier pegged annual revenues from the Dominican Republic's *merengue* at about US$600 million in 1999[15]. In many respects, the situation is summed up succinctly by Keith Nurse[16], who suggested that "(T)he economic value of the cultural industries is largely unmapped, unmonitored and undocumented".

The impact of the newer technologies on future earnings in the music industry is uncertain. Many of the world's largest recording companies have folded in recent years, and industry revenues in some of the major markets (including the USA and Japan) have been in virtual free-fall for years. In the USA, for instance, the well-respected Forrester Research points out that music sales and licensing revenues had fallen to US$6.3 billion in 2009 from US$14.6 billion in 1999. Some in the industry find it significant that 1999 was the debut year of the file-sharing site Napster. At the same time, the value of legal music downloads via iTunes, the worldwide market leader, grew in that company's fiscal Q3 (to June 2010) to just over US$1 billion, a 25% growth over the same period in the previous year[17]. While the percentage of revenues that are returned to artists from such sales is fractional (a track downloaded from iTunes for US$0.66, returns approximately U$0.09 to the performer – excluding publishing royalties), many artists

[13] *The Entertainment Services with Special Reference to Music, Mas, and the Film & Video Segments*: Henry Gill, 2001. Gill notes "The commercial achievements of Jamaican music surpass that of any other Caribbean sound or that of any other non-Western or World Music genre (Nurse, 2000). Although there are no precise figures on the market value of Jamaican music, it has been estimated that Reggae generates in the region of US$1.2 billion per annum (Bourne and Allgrove, 1995).

[14] Bob Marley to become richest dead celebrity: CNN/Money.com November 20, 2009.

[15] Juan Luis Guerra alone has sold upwards of 20 million records worldwide.

[16] *The Creative Sector in CARICOM: The Economic and Trade Policy Dimensions*. Keith Nurse. CARICOM Secretariat Regional Symposium on Services, Antigua & Barbuda, *July 2009.*

[17] *iTunes sales to $1 billion as Apple beats expectations.* www.fiercemobliecontent.com , July 21, 2010.

have resigned themselves to working with this model as an alternative to or in tandem with, their own e-commerce-enabled sites.

Notwithstanding the many uncertainties, many in the region's music industry point to the fact that there are still a number of bright spots. One such, they assert, is the staging of music festivals and other music-themed events.

- **Festivals and other Music-driven Special Events**

In the midst of otherwise gloomy forecasts for the worldwide music industry, the UK-based Performing Rights Society (PRS) indicated in 2009 that spending on live music grew some 4% during that year[18]. The body reported that UK fans continue to display an "insatiable appetite" for live shows and music festivals.

CARIFORUM countries, with their tourism infrastructure, are ideally suited for the development and staging of festivals and similar events, and have a long track record of staging such, even as it is acknowledged that their role as potentially major visitor attractions is only belatedly being acknowledged. Thus, Trinidad & Tobago's Carnival, which is justifiably proud of a history that dates back over 170 years, has evolved into an international spectacle that annually results in visitor expenditure of an estimated $150 million by other CARIFORUM nationals, T&T nationals resident overseas, and from tourists from outside of the region. Offshoots of this event have sprung up throughout the Caribbean and have in turn enriched the regional tourism offering. The Dominican Republic's Santiago Carnival, in existence since 1867, attracts many nationals from the diaspora and increasing numbers of visitors. Haiti's Jacmel festival, before the political turmoil and earthquake devastation of recent years, annually attracted in excess of 100,000 visitors, again, largely from the diaspora.

The culture of Caribbean festivals has gone on to influence other parts of the world with strong diaspora concentrations. T&T's Carnival is the parent of what has been described as Europe's largest street festival, the Notting Hill Carnival, and one of Canada's most successful street events, the Caribana Festival. The Notting Hill event was reported as having attracted some 1.5 million attendees in 2000 even though 2009 figures had been estimated at a much lower 720,000. In 2002, the London Development Agency estimated that the Carnival contributed some £93 million to the London and UK economy. Similarly significant, Toronto's Caribana festival is estimated to pull over 1.3 million participants and onlookers annually and pumps over $400 million into the economy of Ontario. Other similar events in New York, Atlanta, Boston and a score of other North American cities have been important components in the earnings for Caribbean performing artists[19]. It is important to note that these also have the

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[18] *Adding up the Music Industry Report*: (UK) Performing Rights Society, 2009.

[19] At the same time it is important to caution, that there may be less and less need for the presence of regional musical performers as virtually all European countries, for instance, have generated their own home-grown reggae/ska/soca performers and while there appears to be a significant market for "authentic" performers, the jury is out as to whether there is sufficient innovation taking place in the region, for audiences to demand

potential to be useful springboards for the introduction of CARIFORUM goods and services (although there is no clear evidence, to this point, that Caribbean providers of goods and services have devised and implemented the appropriate strategies to do so).

Newer festivals have surfaced *within* the region and have gone on to become strong brands. These include Jamaica's Reggae Sunsplash (1978-1998), its successor Reggae Sumfest (in operation since 1993), and St. Lucian (since 1991) and Jamaican (since 1996) Jazz and Blues events.

In terms of the development of a successful regional festival, CARIFORUM already has the basis for this: **Carifesta**. Its basic concept - that of providing a meeting ground for artists, performers and audiences across a range of disciplines - is an admirable one. However, its execution over its 10 stagings thus, has been less than impactful. It is hardly known and poorly supported within the region and almost unheard of outside of the region, even within the diaspora. Yet, it is arguable that an event that showcases the best of the creative output of the entire CARIFORUM region and which is supported by the entire region, could take its place among the world's premier festival events. An excellent strategic plan developed by Dr. Keith Nurse outlining a way forward[20] for Carifesta deserves to be implemented.

performers from the region. The biggest sellers, in many cases, date back to two, three or four decades and as the artistes responsible for those creations pass away, there may be less and less interest in the current forms.

[20] "Reinventing CARIFESTA: A Strategic Plan" (Dr Keith Nurse, June 2004).

3.3.2 Characteristics of CARIFORUM Music professionals

- Of the 117 respondents, more are involved in 'live Music' (69) as compared to 'recorded Music' (48); although most indicated their involvement in both sub-sectors. Most are involved in the "creation" stage; this is followed by certain activities in the "production" and "distribution" stages as well as in some of the "value chain support activities". Their distribution along the CARIFORUM Music value chains is illustrated in Figure 2; and the actual numbers involved in each type of activity are given in the tables in Annex 1.
- Many of these music professionals also work in the other CCIs under review – most notably 'Film' (in "creation", "production", and in PR, Marketing, Advertising).
- > 70% of respondents fully own their business; and almost 75% have their business registered under their country's national law.
- Equal numbers of respondents work in their business part-time as compared to full-time (50%, in both cases).
- < 35% have full-time (FT) employees, of whom the majority had 1-4 FT employees (approx. 65%) followed by 5-9 FT employees (approx. 20%). By contrast, 55% had part-time (PT) employees; and of these, > 50% had 1-4 PT employees, > 20% had 5-9 PT employees, and almost 15% had 10-15 PT employees. Of note is that almost 10% had 21+ PT employees.
- Almost 60% of respondents provide both music-related services and goods (whether physical or 'intangible' (virtual, digital); 26% provide only music-related service(s); and 16% only music-related goods.

Figure 2: Mapping of respondents along Value Chain for CARIFORUM Music (recorded & live)

	Creation	Production	Distribution	Consumption
Music - recorded	Songwriter (composer &/or lyricist) Arranger Producer Musician Other performer etc.	Music recording – incl. producer, studio manager, studio engineer & other recording staff, artist manager, graphic artist/design/IT etc. Manager/provider of rehearsal facilities Music publisher Manufacture of music-related merchandise Manufacture of music instruments (e.g. steelpan) Manufacture of CDs, DVDs, & other digital formats	Music radio stations Music TV stations Music-related (trade) fairs Retail outlets - physical premises Online sales platforms / services – incl. music streaming, digital downloads etc.	Individual buyers
Music - live	Songwriter (composer &/or lyricist) Arranger Producer Choreographer Performing artist – musician, dancer	Music production – producer, director, technicians/experts (lighting, sound, make-up, hair, costume etc.) Location, transport/travel, catering, security, accommodation, insurance services Manager/provider of rehearsal facilities Manufacture of music-related merchandise	Booking agent Promoter Event organiser Event publicist Manager/provider of venues for live performances, concerts, festivals, carnivals Ticket vendors - physical premises Online sales platform/services	Individual buyers

Agent, A&R services

Teaching (at any level) - incl. classes, lectures, workshops etc.

PR, Marketing, Advertising (incl. publicist, sponsorship events)

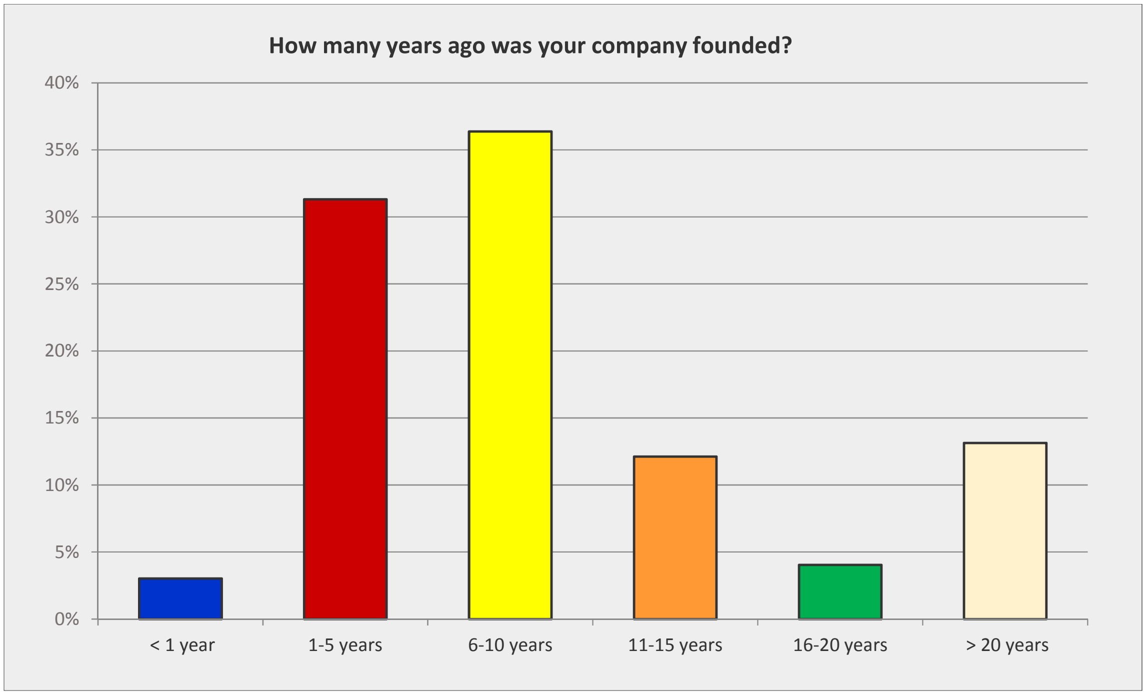
Shipping / freight forwarding, incl. packaging & insurance services

Financing & Investment; Accounting services; Legal services; IP registration / management; Collective Rights Management services

= Value-adding Activities
= Value Network (Actors & Relations)
= Value Chain Support Activities
= Highest nos. of respondents
= Mid-range nos. of respondents
= Lower nos. of respondents

- There is considerable variation in the longevity of Music respondents' businesses, from < 1 year to 50+ years. The majority however fall within the 1-5 year and 6-10 year ranges.

Figure 3: Company age range for CARIFORUM Music (recorded & live) respondents

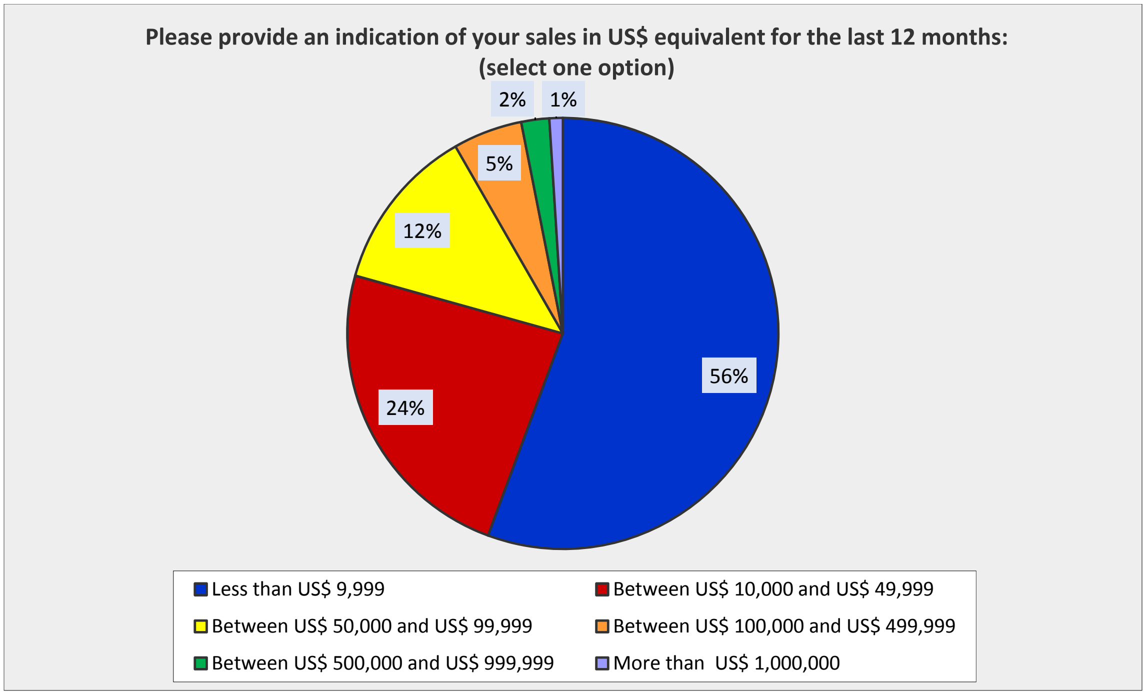


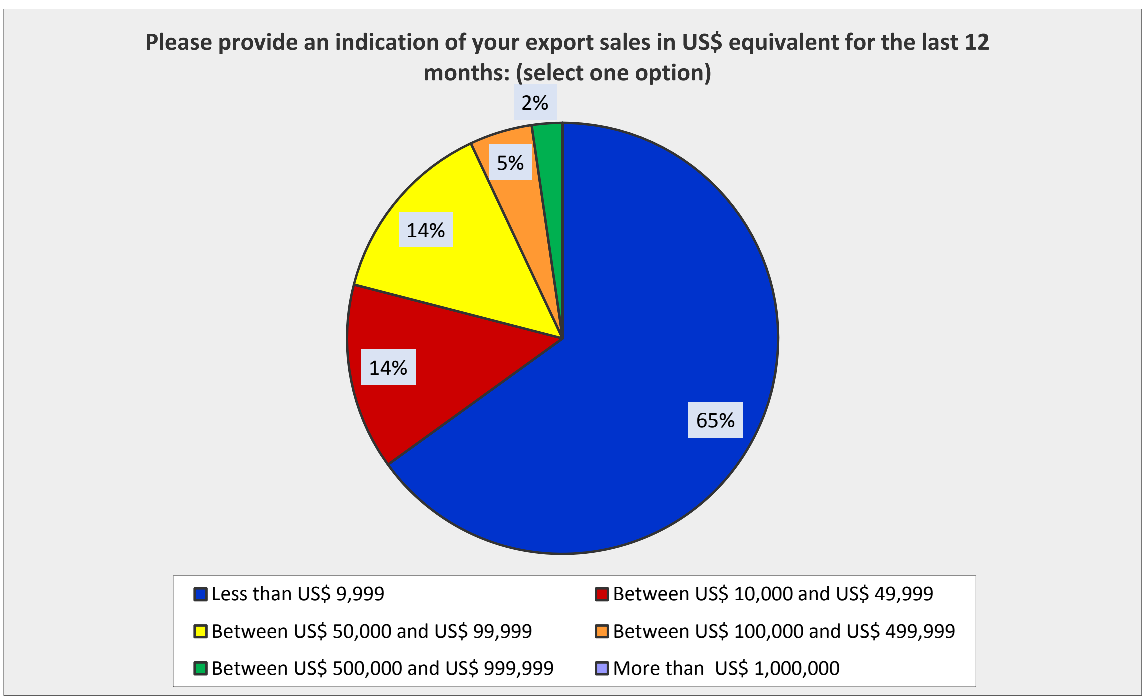
- In terms of their last 12 months, 55% recorded sales of < US$ 9,999; 24% of US$ 10,000 - US$ 49,999; and 12% of US$ 50,000 - US$ 99,999. The remainder (approx. 8% of respondents) noted sales of > US$ 100,000 (- one respondent indicated sales of > US$ 1 million). This is illustrated in Figure 4, along with the export sales of Music.

3.3.3 Current export activities of CARIFORUM Music professionals

- Considering their *exports* for the last 12 months, 65% of respondents indicated sales of < US$ 9,999; 14% of US$ 10,000 - US$ 49,999; and another 14% of US$ 50,000 - US$ 99,999. Only 3 individuals reported export sales of ≥ US$ 100,000. As such, it can be seen that exports already constitute a significant component of sales for the Music professionals who responded to this survey exercise.

Figure 4: Comparison of total and export sales for CARIFORUM Music respondents

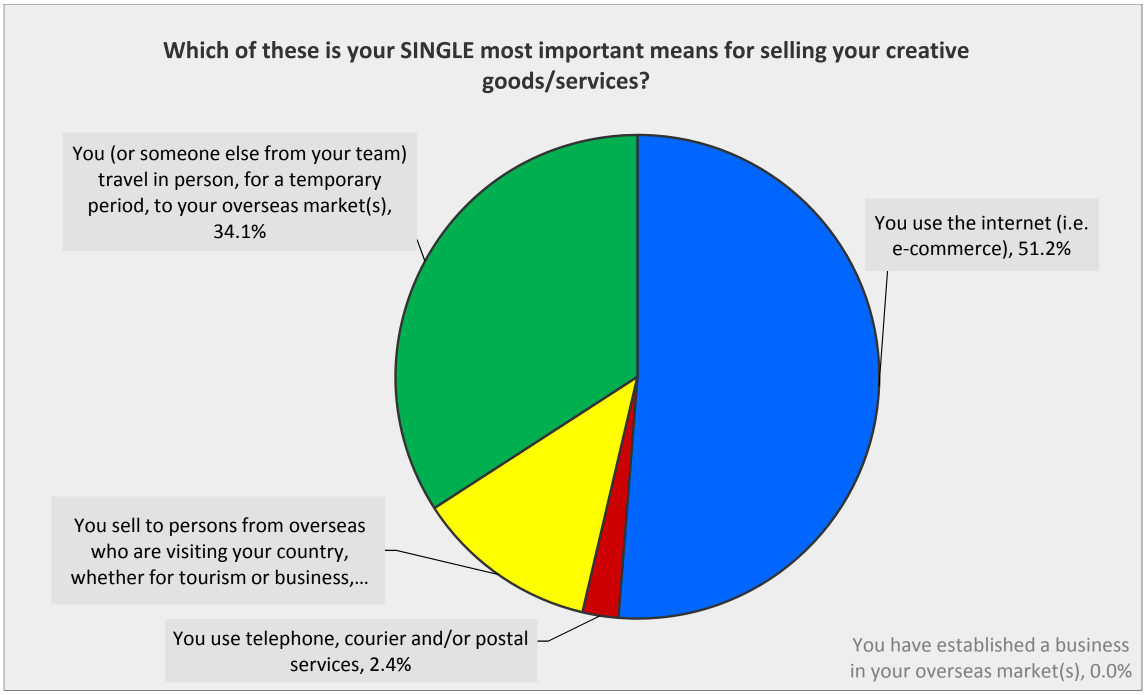




- Almost 65% do not have an Export Strategy for their business, the other 35% do.
- > 45% of respondents are currently exporting; and they use all export modalities to deliver/sell their creative goods/services, promote and otherwise transact business.

  The following Figure 5 indicates the relative use of the four export modes considered most important by CARIFORUM's Music professionals to sell their goods/services.

Figure 5: Most important export modes for CARIFORUM Music professionals

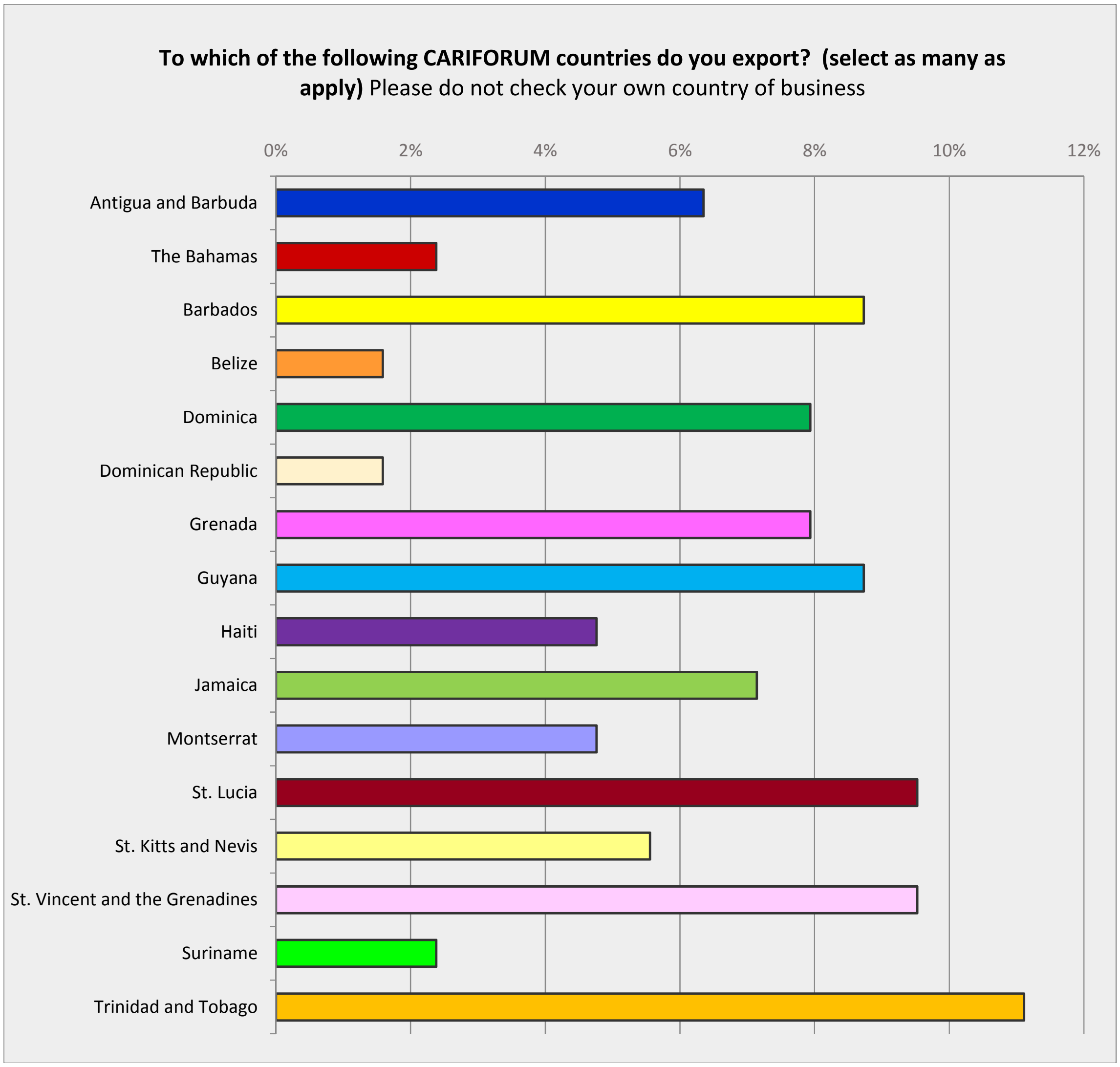


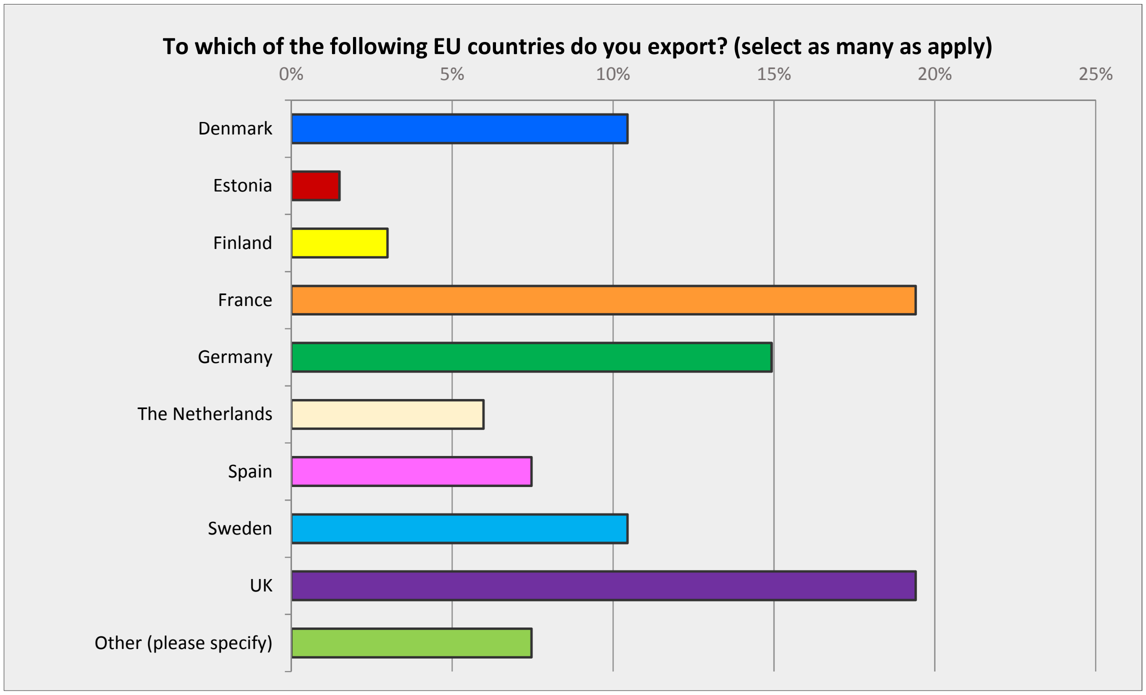
- Specific to their e-commerce activities, respondents listed the following as online platforms/services they employ:
  - Email, websites (with dedicated with e-commerce links)
  - Social media: overall, there is widespread use of social media: in particular, Facebook (>75% of respondents), Twitter (31%), and LinkedIn (21%).
  - Online music stores, platforms and services - such as www.cdbaby.com, ITunes, Youtube, www.believedigital.ca, www.cuesongs.com, www.musicsupervisor.com, https://soundcloud.com, www.extrememusic.com, www.tunecore.com, and www.vprecords.com.

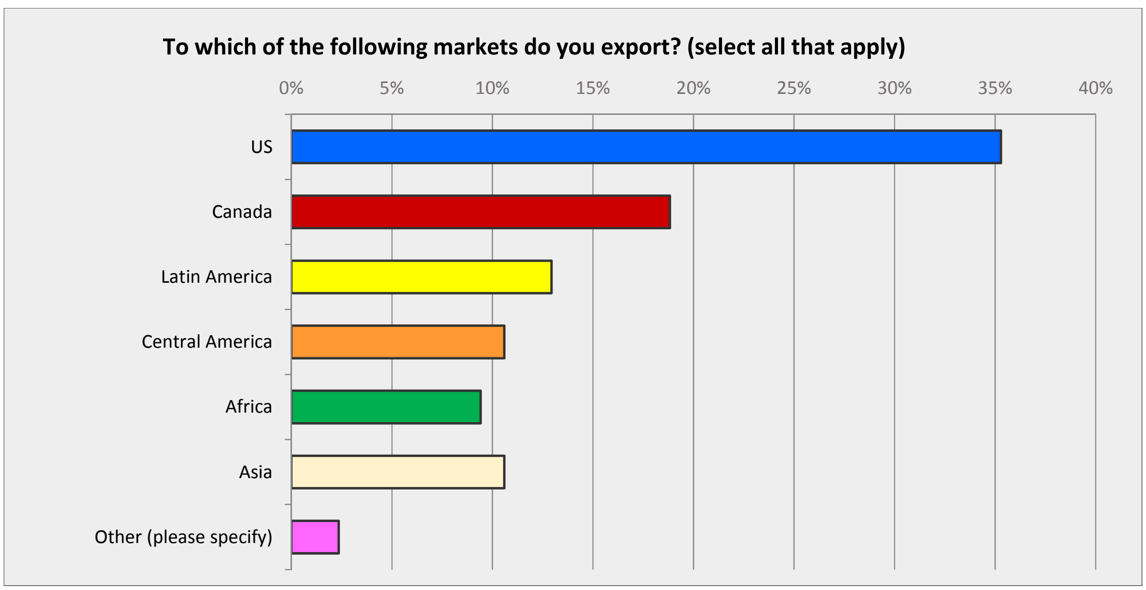
  As noted by one respondent, "in person communication is crucial for closing the deal, but internet/social media is the most important for capturing clients."
- For those who export: (*countries listed in decreasing order of popularity*)
  - >55% do so to another country in CARIFORUM; with Trinidad & Tobago being the most popular, followed by St. Vincent & the Grenadines and St. Lucia; and then Barbados and Guyana.
  - > 55% export to a country in the EU, with the UK and France being the most popular markets, followed by Germany, and then Denmark and Sweden.
  - 75% export elsewhere in the world, with the US being the most popular followed by Canada, and then by countries in Latin America.

The popularity of the individual countries for export is given in the bar charts in Figure 6. The % is the number of respondents exporting to the country as a proportion of the total number exporting to that region. As some of the absolute values are small, only the relative ranking of countries is discussed above.

Figure 6: Prevalence of exports to CARIFORUM, EU and other markets by CARIFORUM Music professionals





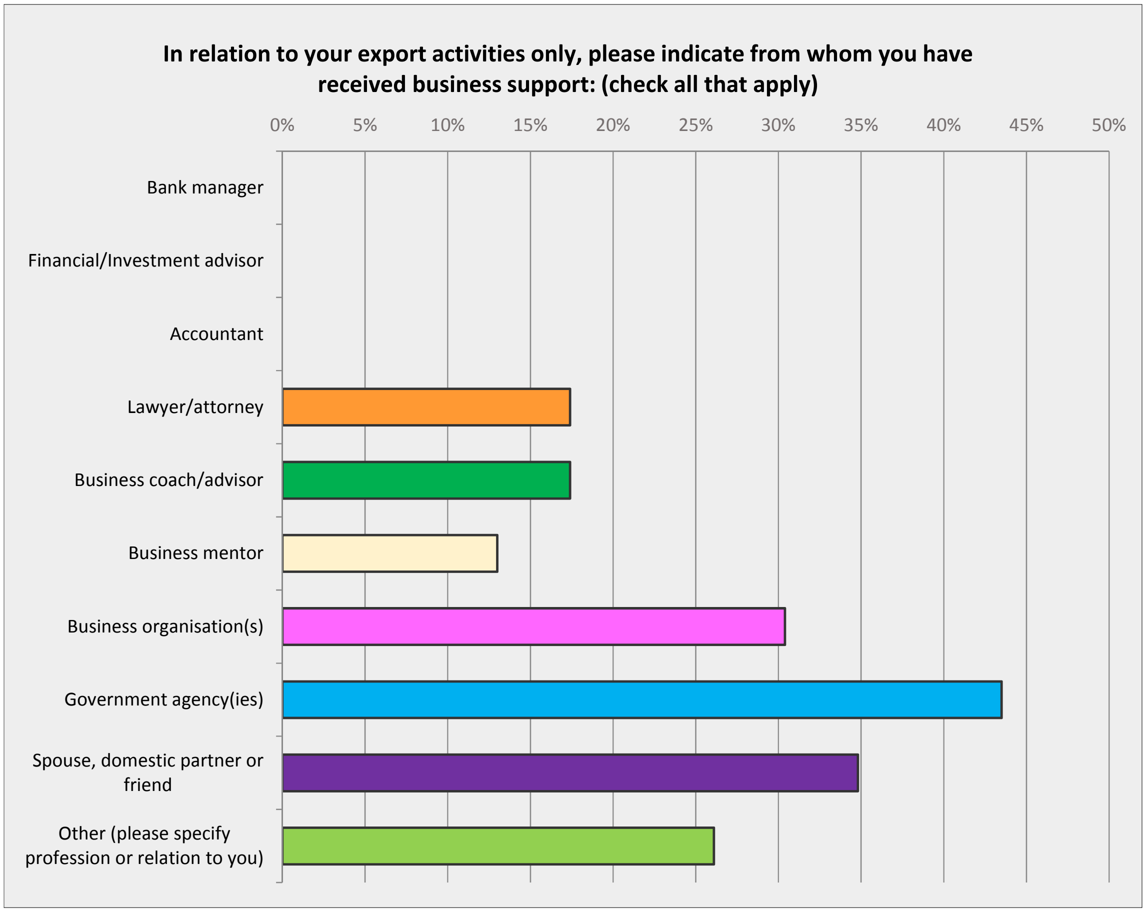


- Of the almost 55% respondents who are not currently exporting, the majority have never tried (almost 80%); and the remainder, in equal numbers, have 'tried but stopped' or 'tried without much (any) success'.
- Of note, almost 70% of respondents who are not currently exporting would be interested in starting (or resuming) their exports. 13% stated that they are not interested; the rest (28%) are not yet interested.

3.3.4 Export support framework for CARIFORUM Music professionals

- \> 70% of Music respondents noted that they do not receive business support from anyone specific for their export efforts. For those who have, support has come predominantly from government agencies followed by a business organisation as well as spouse/domestic partner or friend. This is indicated in Figure 7.

Figure 7: Sources of support used by CARIFORUM Music professionals for their export activities



- Almost 40% of CARIFORUM Music respondents belong to a business organisation, whether local/national, regional or international. For most, this is an 'industry-specific association, network, alliance, or group'; although a wide range of other organisations was listed (including collective management organisations, chambers of commerce, and entrepreneurs/business owners' organisations). For most, this membership has boosted their export efforts through support including exposure/visibility, networking opportunities, and direct promotion/selling of their goods/services overseas.

4. Bottlenecks along the Music Value Chain

Due to the small size of the domestic markets in nearly all CARIFORUM countries as well as the persistent decrease in local demand, there is need for considerable expansion of foreign markets. Whilst there is scope for the increase of creative exports to the EU, numerous challenges are noted.

4.1. Export challenges facing CARIFORUM Music professionals

- 66% of respondents have experienced challenge(s) to their creative exports, to greater or lesser extent. As indicated in the table below, the challenge considered most severe by CARIFORUM Music professionals is 'Lack of access to financing for export activities'.

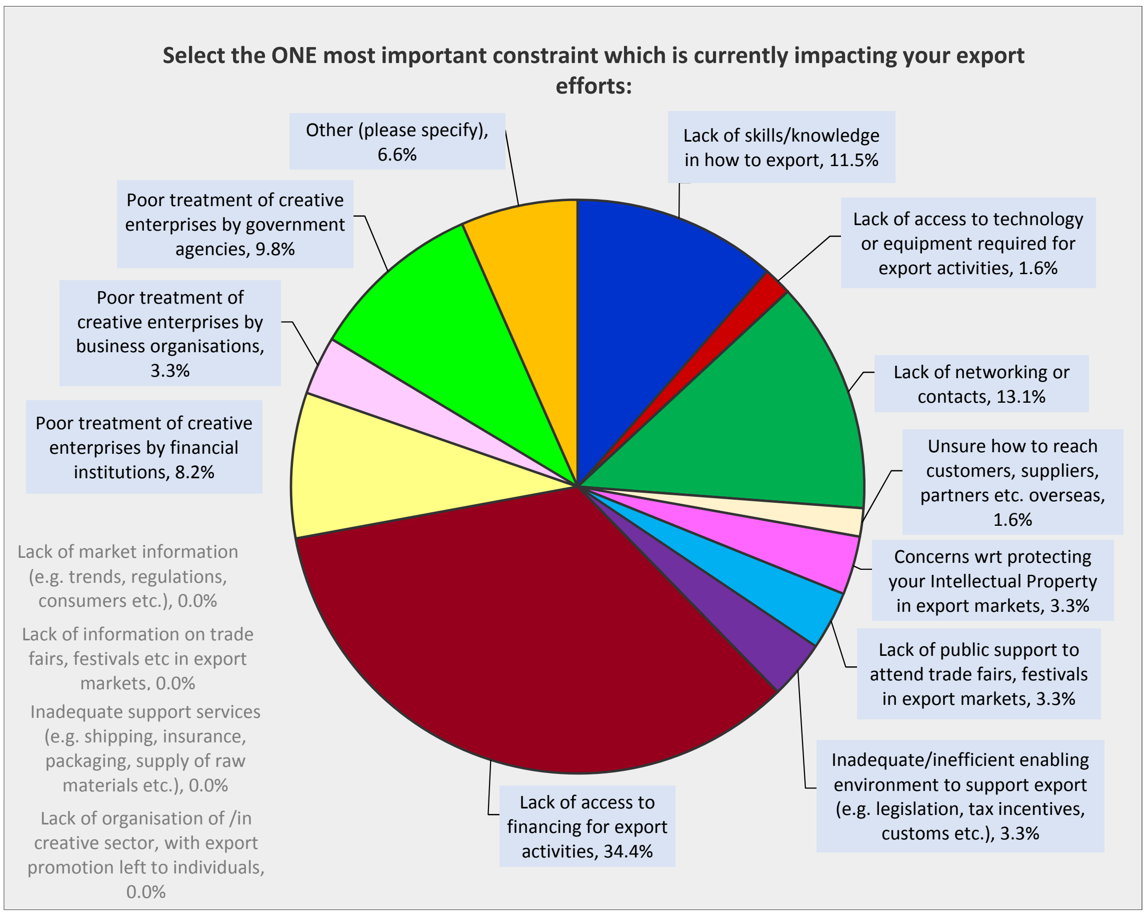
Table 4: Rating of export challenges by CARIFORUM Music professionals (no. of respondents)

From your own experiences, how would you rate the following challenges to your export efforts?					
Answer Options	**Not very important**	**Quite important**	**Very important**	**N/A**	**Rating Average**
Lack of skills/knowledge in how to export	13	13	25	10	2.24
Lack of access to technology or equipment required for export activities	17	8	23	13	2.13
Lack of market information (e.g. trends, regulations, consumers etc.)	7	18	30	6	2.42
Lack of information on trade fairs, festivals etc in export markets	9	9	37	6	2.51
Lack of networking or contacts	6	11	37	7	2.57
Unsure how to reach customers, suppliers, partners etc. overseas	9	12	35	5	2.46
Concerns wrt protecting your Intellectual Property in export markets	13	11	31	6	2.33
Lack of public support to attend trade fairs, festivals in export markets	6	10	39	6	2.60
Inadequate/inefficient enabling environment to support export (e.g. legislation, tax incentives, customs etc.)	8	14	35	4	2.47
Inadequate support services (e.g. shipping, insurance, packaging, supply of raw materials etc.)	14	11	26	10	2.24
Lack of organisation of /in creative sector, with export promotion left to individuals	4	14	38	5	2.61
Lack of access to financing for export activities	0	11	47	3	2.81
Poor treatment of creative enterprises by financial institutions	6	12	39	4	2.58

Poor treatment of creative enterprises by business organisations	4	16	36	5	2.57
Poor treatment of creative enterprises by government agencies	3	14	39	5	2.64
					No. respondents = 61

- As shown in Figure 8, the single most important export challenge facing CARIFORUM Music professionals is 'Lack of financing for export activities" (noted by 34% of respondents), followed by 'Lack of networking or contacts" (by 13%) and 'Lack of skills/knowledge in how to export' (by 12%).

Figure 8: Most important export challenges facing CARIFORUM Music professionals

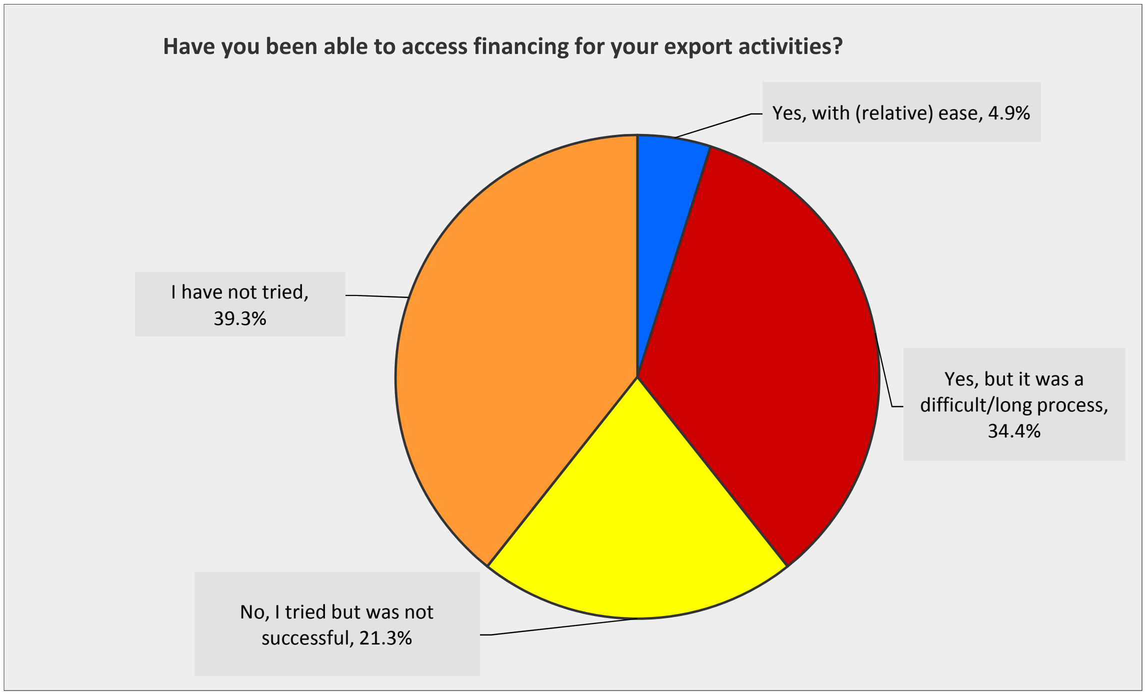


- The following four factors were <u>not</u> noted by any of these Music professionals as their *single* most important export constraint:
    - Lack of market information (e.g. trends, regulations, consumers etc.)
    - Lack of information on trade fairs, festivals etc in export markets
    - Inadequate support services (e.g. shipping, insurance, packaging, supply of raw materials etc.)

- Lack of organisation of/in creative sector, with export promotion left to individuals.

- As relates to accessing financing for export, only 5% of respondents have been successful, with (relative) ease as depicted in Figure 9. By contrast, almost 34% were successful but after a difficult/long process; 21% tried but were not successful; and 39% have not tried.

Figure 9: Experience of CARIFORUM Music professionals to access export financing



- The most important challenges in terms of export-related financing are 'Lack of suitable options available' followed by 'You were unable to meet the lender's security/collateral requirements'. The ratings of the various export financing challenges are presented in Table 5 below.

Table 5: Rating of export financing challenges by CARIFORUM Music professionals (no. of respondents)

Specific to finance for exports, how would you rate the following in terms of their importance?					
Answer Options	**Not very important**	**Quite important**	**Very important**	**N/A**	**Rating Average**
Lack of suitable financing options available to you	0	4	9	0	2.69
You were unable to meet the lender's security/collateral requirements	2	1	6	4	2.44
Lender was not satisfied with the state/quality of your business documentation	4	3	3	3	1.90
Lender approved a loan but the amount was too low	2	0	4	7	2.33
Lender approved a loan but the term was too short	2	0	4	7	2.33
Lender approved a loan where the conditions were otherwise unacceptable	1	0	4	8	2.60
					No. respondents = 13

- 65% of respondents do not have to access to venture capital as an option to finance their business's export growth efforts, and a further 31% were unsure. [Only 2 respondents did have access to venture capital]

4.2. Challenges within EU for CARIFORUM Music

The consultants initiated contact with a wide range of European stakeholders, including trade associations in the music sector, record companies, music publishers, music export offices and trade fairs. The list of organisations and companies consulted can be found in Annex 2.

The aim of the survey was to test possible interest from European music actors in developing business with Caribbean actors and to know whether there might be a demand from potential European companies. Possible activities tested were:

1. Setting up joint ventures with European record labels to enter the European market (both signing up new artists and the promotion and distribution of Caribbean recordings in niche markets).
2. Development of new business models to deliver Caribbean music through digital channels.
3. Creation of innovate means to reach the European/global audience.
4. Joining international networks.
5. Collaboration with organizers of live music events and festivals to promote performances of Caribbean artists or the organisation of joint events or festivals in one or more Caribbean countries.

The overall result of the survey has been disappointing. More than 50 organisations were contacted, but their response rate has been low to date and no real interest was shown to increase business cooperation. There is a general lack of knowledge at what the Caribbean music sector has to offer, who are the top selling artists (no official charts), what are the new music trends etc. A positive response was however received from MIDEM, the most important trade fair for music. They were interested in making inroads in the CARIFORUM countries.[21]

National trade association representing the major record labels[22] as well as the national trade associations taking care of the interest of the independent record labels[23] indicated that their company members were in general interested in expanding internationally. However at this moment the Caribbean music market was not one of their target markets.[24] They are currently more focused on entering the emerging markets such as China, Brazil, India and South Africa.

This was also the case for the publishers in Europe, who referred the question to their USA counterpart to investigate the interest of their members in collaborating with the Caribbean music sector.[25]

The Caribbean artists are, in general, often seen as local and not global and European record companies are less interested in investing in local music. The Caribbean, the consultants were told, has the image of being a region of a multiplicity of parochial music forms and with the exception of certain legacy acts (e.g. ska musicians or reggae artists with numbers that were first popularized two or three decades ago) the opportunities to do business in the "world music" scene are limited. Outside of the diaspora communities of the UK, small markets of die-hard fans exist for a few forms such as dancehall – but these are considered too insignificant for many in the industry to take much of an interest.

One key issue, these European stakeholders assert, is that the marketing efforts of the Caribbean music industry are not up to speed. They suggest that there is no structured approach to marketing music internationally - resulting in limited international mainstream airplay for Caribbean music. Also digital download/streaming opportunities in the CARIFORUM countries are relatively small. Finally a number of people feel that the local media is not focused on building local talent preferring to play international music and thus few 'home grown stories' are being created. The existence of 'stories' to support cultural exports (not only in reference to the music industry), they advise, is a crucial factor to succeed on the international market.

Thus, the combination of undeveloped local markets and low international exposure means that industry stakeholders in the EU are at best neutral regarding collaborating with local artists/producers, as they believe that their returns on investments will be low.

[21] Exchanges with Alex Mallett, sales representative of the Reedmidem

[22] Red Bullet, an independent record label and music publisher (NL).

[23] UPFI (Union des producteurs phonographiques français indépendants), VUT (Verband unabhängiger Musikunternehmen) in Germany.

[24] BPI (British Phonographic Industry) (UK), IFPI Denmark, SNEP (Syndicat National de l'Edition Phonographique) (FR), BVMI (Bundesverbandmusikindustrie) (DE), PROMUSICAE (Productores de Musica de España) (ES).

[25] NMPA (National Music Publishers Association)

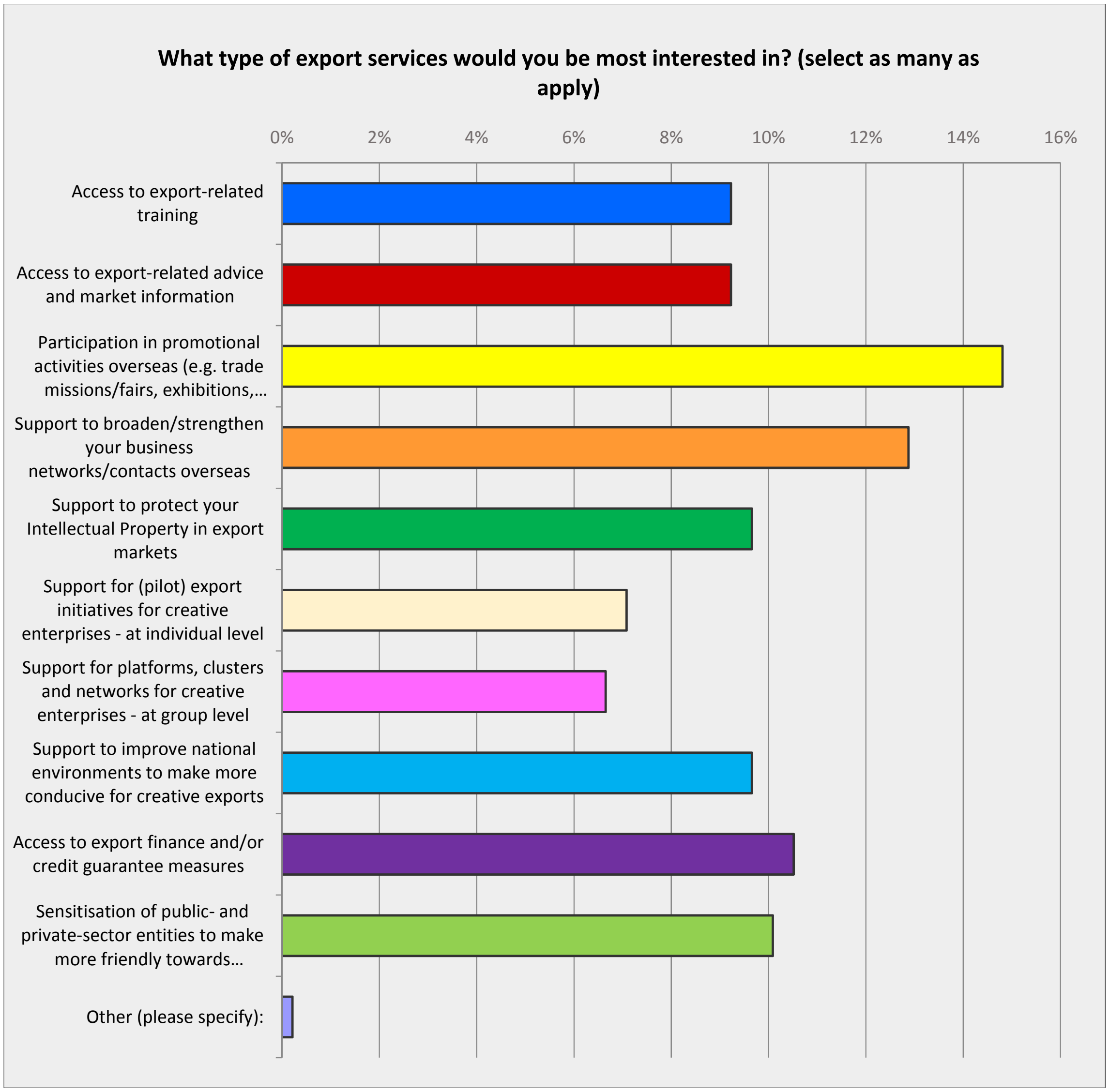
5. Recommendations to boost Music exports

Indications are that outside of the UK, the only CARIFORUM music forms that are known elsewhere in the EU are those emanating from Jamaica (primarily ska, reggae & dancehall) and the Dominican Republic (primarily meringue). If the music exports of CARIFORUM are to be expanded, the musical variety of the member states must be promoted.

5.1. Improving export support for CARIFORUM Music professionals

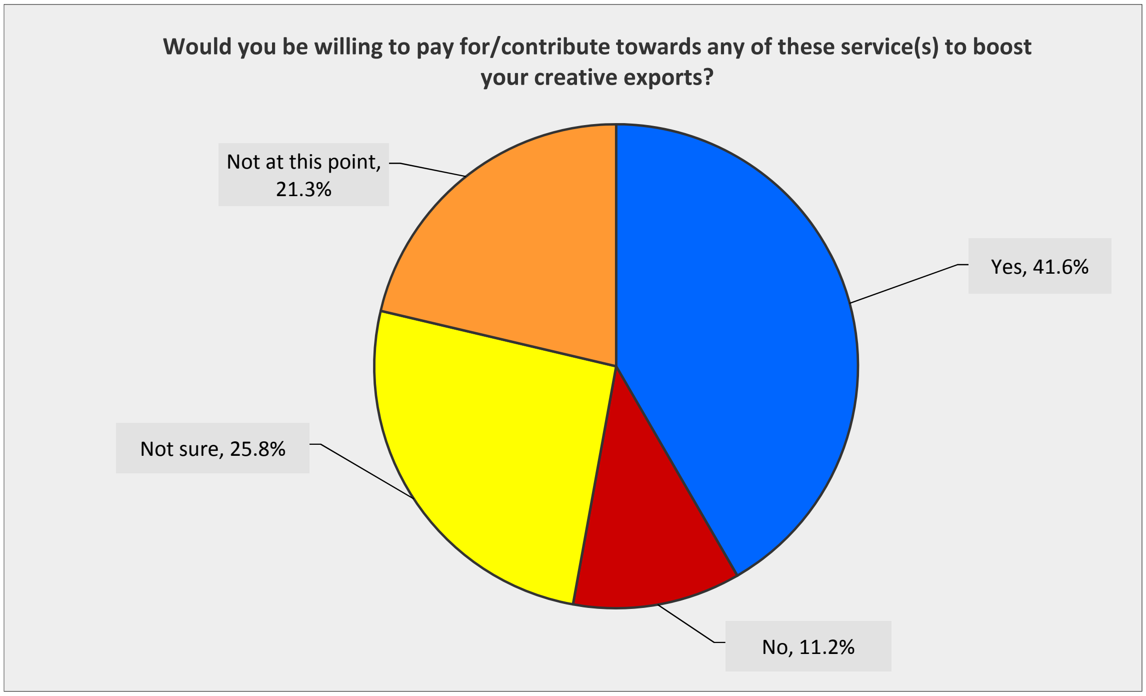
- As previously noted, almost 70% of respondents who are not currently exporting would be interested in starting (or resuming) their exports.
- > 95% of respondents noted their interest in accessing support services to boost their creative exports. As illustrated in Figure 10, when given a selection of possible export-related services:
    - The most popular were: 'Participation in promotional activities overseas e.g. trade missions/fairs, exhibitions, festivals etc.' (selected by almost 15% respondents) and 'Support to broaden/strengthen your business networks/contacts overseas' (selected by 13% respondents).
    - These were followed by 'Access to export finance and/or credit guarantee measures', 'Support to improve national environments to make more conducive for creative exports', 'Sensitisation of public- and private-sector entities to make more friendly towards creative enterprises', 'Support to protect your Intellectual Property in export markets' and 'Support to improve national environments to make more conducive for creative exports' (each selected by 9-11% of respondents).

Figure 10: Prioritisation of export services by CARIFORUM Music professionals



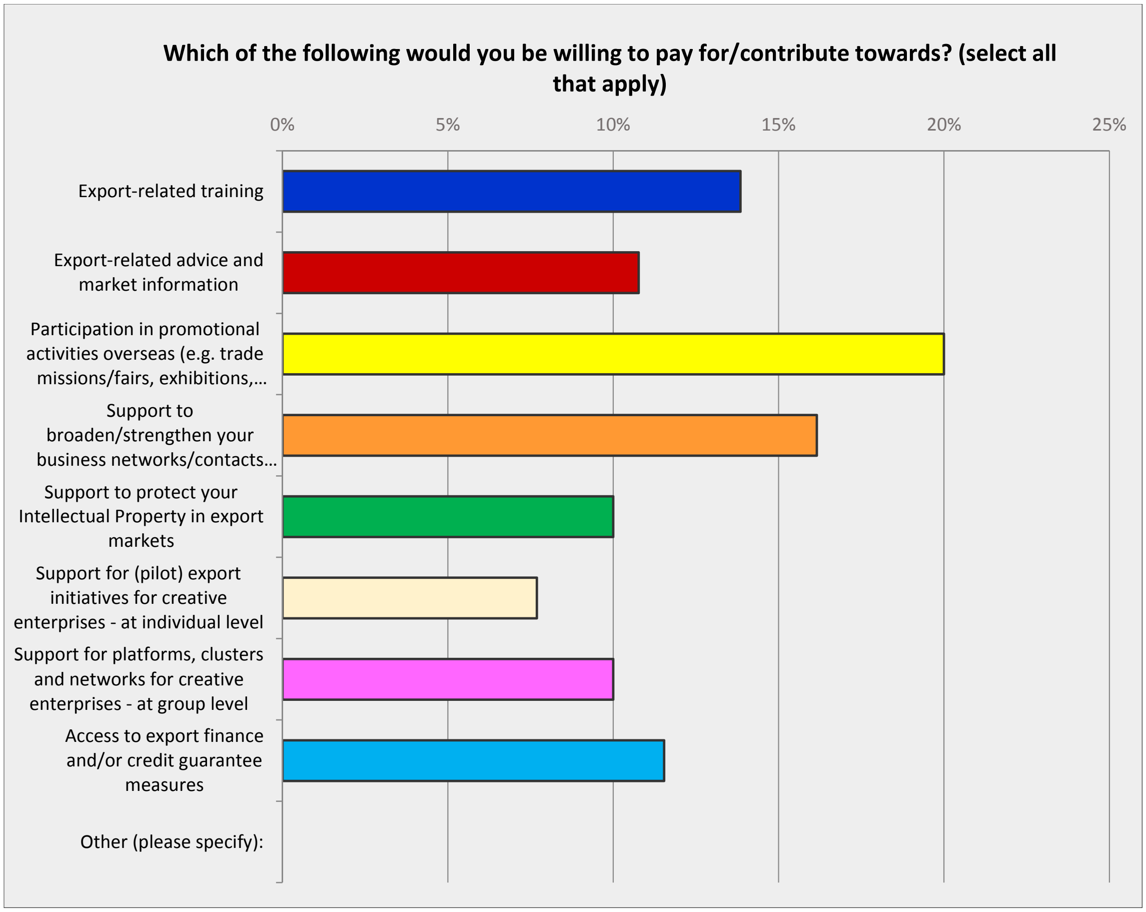
- As shown in the following Figure 11, > 41% of respondents stated that they would be willing to pay for/contribute towards such services at this point in time.

Figure 11: Willingness of CARIFORUM Music professionals to pay for export-related services



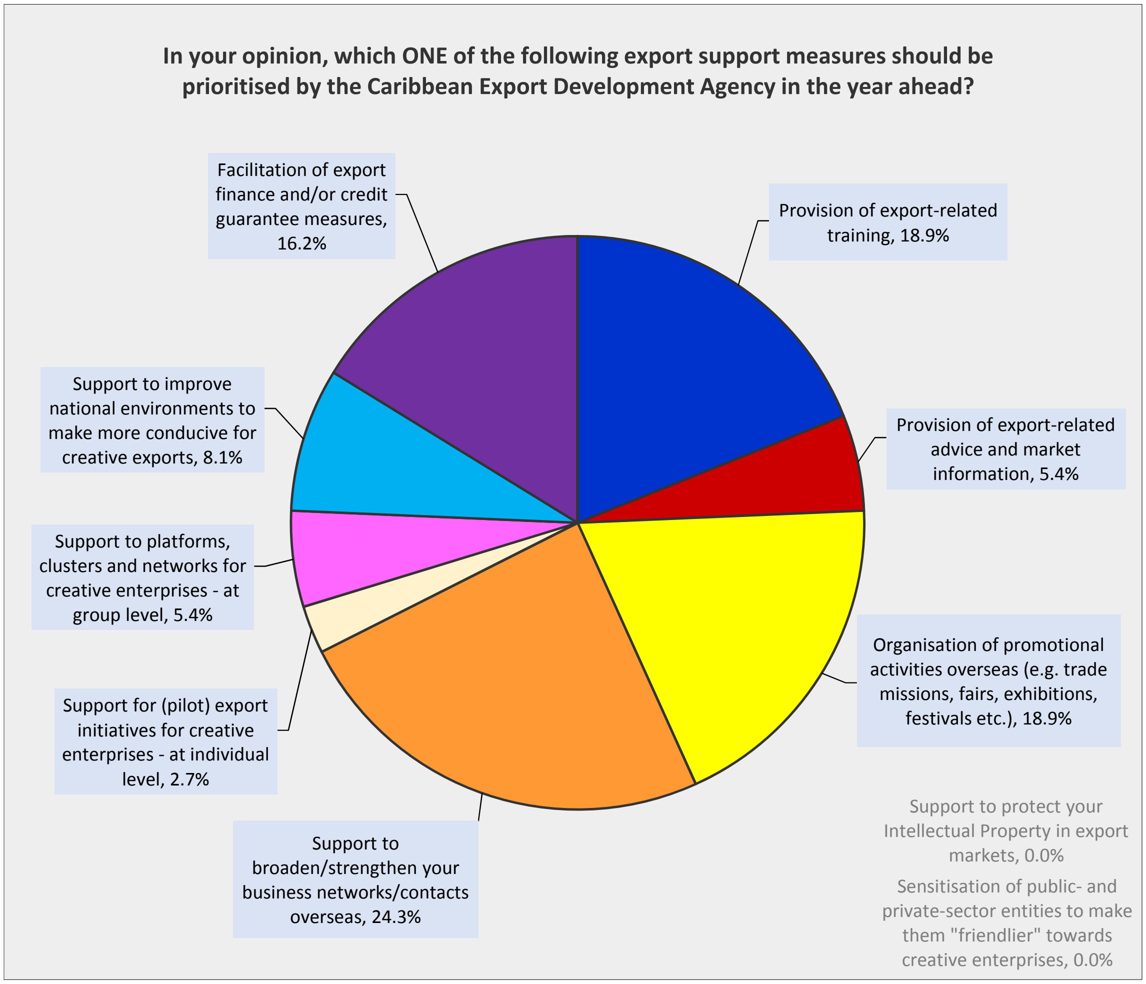
- Of these export-related services, respondents indicated that they would be willing to pay for/contribute towards ‘Participation in promotional activities overseas e.g. trade missions/fairs, exhibitions, festivals etc.’ (selected by 20% of respondents) and ‘Support to broaden/strengthen your business networks/contacts overseas’ (16% of respondents). These were followed by ‘Export-related training’ (14% of respondents) and ‘Access to export finance and/or credit guarantee measures’ (12% of respondents). This prioritisation is indicated in Figure 12 below.

Figure 12: Export services for which CARIFORUM Music professionals would pay



- When asked whether they reserve a budget to support their exports, 11% responded affirmatively (with 2 persons indicating US$ 5000-6000 as their budget); approx. 50% did not; and the remainder responded "not yet".
- As illustrated in the following Figure 13, when asked which export-related service(s) should be prioritised by Caribbean Export:
  - The most popular was 'Support to broaden/strengthen your business networks/contacts overseas' (selected by almost 25% of respondents).
  - This was followed by: 'Provision of export-related training', 'Organisation of promotional activities overseas (e.g. trade missions, fairs, exhibitions, festivals etc.)' and 'Facilitation of export finance and/or credit guarantee measures' (each selected by 16-19% of respondents).

Figure 13: Export services to be prioritised by Caribbean Export for CARIFORUM Music professionals



- The following two services were not noted by any of these Music professionals as priorities for Caribbean Export:
    - Support to protect your Intellectual Property in export markets.
    - Sensitisation of public- and private-sector entities to make them "friendlier" towards creative enterprises.

5.2. Good practices in the EU Member States for Music

Export Promotion Programmes

The EU's recognition of the economic importance of the cultural and creative industries has led to the establishment, across many of its member states, of sector & industry-specific institutions – including music export offices - to support the internationalisation of the sector[26]. For example, NOMEX Music Export Programme is a collaborative organisation for the Nordic Music Export offices in Finland, Sweden, Norway, Denmark and Iceland for international promotion. France has established bureauexport – the music export bureau for the French music industry, with its headquarters in Paris operates through a global network with offices in Berlin, London, New York, Tokyo and Sao Paulo. Many other member states have either established - or are now piloting – comparable initiatives.

NOMEX - the Nordic Music Export Programme[27] - brings together the five music export offices of the listed Nordic states with the objective of facilitating the growth and development of the Nordic music sector. It focuses on expanding networks and increasing audiences outside each member country's home market. NOMEX tools include among others the Nordic Playlist and the Nordic Travel Pass. The Nordic Playlist was launched in 2014 and is a platform to promote Nordic music to the Nordic as well as the international public.[28] It provides easy access to music that is popular in the Nordic region at any given time. It aims to establish and grow the Nordic music brand and image and increase its consumption worldwide. The Nordic Travel Pass helps up-and-coming artists to develop their careers across borders by providing information on opportunities in Nordic countries, discount schemes on travel and access to practical information.

Apart from NOMEX, the Finnish Ministry of Education and Culture also operates four support schemes for the entire culture and creative sector, which are based on open calls for projects. These schemes also include support for artists to tour in markets where they have released a record. The Ministry for Employment and Economy supports CCI exports by providing grants to participate in trade fairs. This ministry also finances a cluster programme for the CCIs to support companies in realising their international ambitions. It is called **Luovimo** and coordinated by Finpro, the Finnish trade promotion organisation. Participating companies of the CCS have to pay a fee and get low barrier access to public financing. Luovimo offers music companies a shared learning programme (workshops on sales pitches, business models canvases, intellectual property rights and international negotiations, branding, social media, crowd funding etc.) and company specific consulting (planning international growth, internationalisation plan, testing products and services in desired markets, choosing the right market to enter, etc.).

The Welsh government provides support for CCS to develop and exploit commercial export opportunities in international markets. Their trade and export assistance is aimed at being market-led and responsive. This allows companies to take advantage of opportunities as they arise. For example the government worked with partners of the music sector to attract the

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[26] http://eng.theapro.kr/?sub_num=59&state=view&idx=346

[27] www.nordicmusicexport.com

[28] http://nordicplaylist.com/

WOMEX festival to Cardiff in October 2013. Support is subject to the approval of a business case.

In Germany the Federal Ministry of Economics and the Federal government commissioner for Culture and the Media have pilot projects for the music sector. These projects focus on their priority regions such as China (“Germany and China together in motion”) during the Expo in Shanghai and the USA (“Presentations of Germany at South by Southwest”) - SXSW- in Austin, Texas. It promotes guest performances of German ensembles and the Goethe Institute helps the artists pay their travel expenses.

5.3. Scope for business cooperation between the EU and CARIFORUM for Music

In recent years there have been efforts to address some of the grievances of the past with respect to royalties and other remuneration (derived from recorded music) due to CARIFORUM performers, musicians and lyricists and which have accumulated in a range of jurisdictions – particularly in the EU. The disposition of these sums have been problematic in some cases because of the inattention paid to IPR by the regions’ creative producers over many decades, but aggressive action by various rights bodies in the region has begun to make an impact. Many in CARIFORUM and in the EU are becoming more optimistic that this trend will continue and that the identified backlog of settlements will clear up in a timely manner.

With respect to live musical performances, it is self-evident that CARIFORUM countries, with their tourism infrastructure, are ideally suited for the development and staging of festivals and similar events, and have a long track record of staging such. The culture of Caribbean festivals has gone on to influence other parts of the world with strong diaspora concentrations. T&T’s Carnival is the parent of what has been described as Europe’s largest street festival, the Notting Hill Carnival. That event, which has a source of income for some CARIFORUM performers over the years, was reported as having attracted some 1.5 million attendees in 2000 even though 2009 figures had been estimated at a much lower 720,000. In 2002, the London Development Agency estimated that the Carnival contributed some £93 million to the London and UK economy.

At the same time, it is important to caution that there may be less and less need for the presence of regional musical performers as virtually all European countries, for instance, have generated their own home-grown reggae/ska/soca performers and while there appears to be a significant market for “authentic” performers, the jury is out as to whether there is sufficient innovation taking place in the region, for audiences to demand performers from the region. Where performers from the region appear in EU markets, often the biggest draws are what are considered “nostalgia” acts back in CARIFORUM members states, with repertoires dating back to two, three or four decades. As the artistes responsible for those creations pass away, it is feared that there may be less and less interest in the current forms.

5.4. Image and Reputation of CARIFORUM CCIs

The music industry should be part of an overall strategy to improve the image and branding of the cultural and creative industries in the Caribbean region. This strategy should include specific measures and pilot projects for the music sector.

To increase the visibility and music brand of the Caribbean artists and bands to reach an international audience we recommend a pilot project to set up a digital platform similar to the Nordic Playlist run by NOMEX (see point 3.3). This platform should provide easy access to music that is popular in the Caribbean region at any given time.

5.5. Structural relations and networks

The cultural and creative industries are developing themselves globally through structural relations and sustainable networks. This is also the case for the music sector. Currently the Caribbean music sector is not well represented in international networks.

As a first step to expand the membership of the Caribbean music sector, we would recommend that the national music trade associations (where such exist) and their members affiliate themselves with the following two international organisations:

- **WIN** - The Worldwide Independent Music Industry Network is a global forum for the professional independent music industry. It was launched in 2006 in response to business, creative and market access issues faced by the independent sector everywhere. For independent music companies and their national trade associations worldwide, WIN is a collective voice. It also acts as an advocate, instigator and facilitator for its membership (see www.winformusic.org).

- **MERLIN** - Merlin is the global rights agency for the independent label sector, representing over 20,000 labels from 39 countries. The organisation acts to ensure its members have effective access to new and emerging revenue streams and that their rights are appropriately valued and protected in the digital realm. Merlin represents the most commercially valuable single basket of rights outside of those held by the three "major" labels. It offers Digital Services the opportunity to efficiently and globally license - via a single deal, instead of hundreds of individual local deals – the world's most important and commercially successful music labels. Since its launch Merlin has established itself as a key partner to the world's leading new-generation digital music services including Google Play, Spotify, Deezer, Beats Music, Sony Music Unlimited, Rdio, rara.com, YouTube and Muve Music. For more information see www.merlinnetwork.org

5.6. Expand commercial activities

For artists and record labels to develop and exploit commercial export opportunities in international markets support and grants should be given to participate in trade fairs and festivals. The assistance should be market-led and responsive to allow artists and companies to take advantage of opportunities as they arise. Grants to cover travel and accommodation expenses should be subject to the approval of a business case. See Tables 3 & A3-1 for an indicative listing.

At a later stage it could be useful to carry out a feasibility study to identify the festivals in the EU with which a twinning festival could be set up in the Caribbean region.

EUROPEAN AFFAIRS

Annexes

Annex 1: Details of Survey Respondents – Music (recorded & live)

Table A1-1: Breakdown of respondents in CARIFORUM Music (recorded) value chain

If in 'Music - recorded', please identify what area(s) you work in: (select as many as apply)		
Answer Options	**Response Percent**	**Response Count**
Creation – incl. songwriter (composer &/or lyricist), arranger, producer, musician, other performer etc.	84.9%	79
Music recording – incl. producer, studio manager, studio engineer & other recording staff, artist manager, graphic artist/design/IT etc.	63.4%	59
Manager/provider of rehearsal facilities	25.8%	24
Music publisher	24.7%	23
Manufacture of music-related merchandise	9.7%	9
Manufacture of music instruments (e.g. steelpan)	0.0%	0
Manufacture of CDs, DVDs, & other digital formats	10.8%	10
Agent	15.1%	14
A&R services	15.1%	14
Music radio stations	15.1%	14
Music TV stations	7.5%	7
Music-related (trade) fairs	11.8%	11
Retail outlets - physical premises	2.2%	2
Online sales platforms / services – incl. music streaming, digital downloads etc.	15.1%	14
PR, Marketing, Advertising (incl. publicist)	23.7%	22
Financing & Investment	5.4%	5
Accounting services	1.1%	1
Legal services	2.2%	2
IP registration / management	6.5%	6
Collective Rights Management services	6.5%	6
Shipping / freight forwarding, incl. packaging & insurance services	2.2%	2
Teaching (at any level) - incl. classes, lectures, workshops etc.	18.3%	17
Other (please specify)	4.3%	4
	answered question	**93**

Table A1-2: Breakdown of respondents in CARIFORUM Music (live) value chain

If in 'Music - live', please identify what area(s) you work in: (select as many as apply)		
Answer Options	**Response Percent**	**Response Count**
Creation – incl. songwriter (composer &/or lyricist), arranger, producer, choreographer, performing artist, musician, dancer	79.2%	76
Music production – producer, director, technicians/experts (lighting, sound, make-up, hair, costume etc.)	50.0%	48
Location, transport/travel, catering, security, accommodation, insurance services	10.4%	10
Manager/provider of rehearsal facilities	22.9%	22
Manufacture of music-related merchandise	6.3%	6
Booking agent	17.7%	17
Promoter	28.1%	27
Event organiser	34.4%	33
Event publicist	16.7%	16
Manager/provider of venues for live performances, concerts, festivals, carnivals	12.5%	12
Ticket vendors - physical premises	5.2%	5
Online sales platform/services	5.2%	5
PR, Marketing, Advertising (incl. sponsorship events)	20.8%	20
Financing & Investment (incl. sponsors)	5.2%	5
Accounting services	1.0%	1
Legal services	0.0%	0
IP registration / management	4.2%	4
Collective Rights Management services	4.2%	4
Teaching (at any level) - incl. classes, lectures, workshops etc.	17.7%	17
Other (please specify)	3.1%	3
	answered question	**96**

Annex 2: List of Stakeholders Consulted for Music in EU Member States

Table A2-1: List of stakeholders consulted for Music in the EU

Companies / Trade Associations	Activity(ies) of VCA	Country
European Music Council	creation, distribution and consumption	EU
European Composer and Songwriter Alliance	creation	EU
Alliance of Popular Music Composers of Europe	Creation	
European Union of Music Competitions for Youth	distribution	
IFPI	production	
International Confederation of Music Publishers	production, distribution	
Universal Music Group	production, distribution	France
Deezer / music streaming service	distribution	France
Spotify	distribution	
Midem	Trade fair	France
Popkomm	distribution, consumption	Germany
Musica nova Helsinki	consumption	Finland
NOMEX	distribution	North countries
JazzDenmark	consumption	Denmark
Music export Denmark	distribution, consumption	Denmark
World Music Denmark	creation, production	Denmark
Estonian Music Development center	distribution	Estonia
Music Finland	Creation, production	Finland
bureauexport	distribution, consumption	France
Creative city berlin	creation	Germany
German Music Export Office	distribution	Germany
Initiative Musik	creation, distribution	Germany
CLICKNL	creation	NL
Music Centre of the Netherlands	distribution, consumption	NL
Export Music Sweden	distribution, consumption	Sweden
The great escape	distribution	UK
Association of Caribbean copyright societies	creation	Trinidad

Companies / Trade Associations	Activity(ies) of VCA	Country
UPFI	production, distribution	France
UFIMUSICA	production, distribution	Spain
VUT	production, distribution	Germany
Beggars Group UK	production, distribution	UK
Wagram	production, distribution	France
!K7	production, distribution	Germany
Red Bullet	production	NL
8ballmusic	production, distribution	NL
Performing Arts Employers Associations League Europe	consumption	Europe
European Festivals Association	distribution	Europe
European Conference of Promoters of New Music	distribution	Europe
Réseau Européen de Musique Ancienne	distribution	Europe
Opera Europe	distribution, consumption	Europe
La Scala	consumption	Italy
Opéra de Paris / asso pour le rayonnement de l'OdP	consumption	France
Avignon Festival	distribution, consumption	France
Edinburg International Festival	consumption	UK
The Helsinki Festival	consumption	Finland
Dance Info Finland	consumption	Finland
BPI	production, distribution	UK
Promusica	production	Spain
IFPI Denmark	production	Denmark
Snep	production	France
BVMI	production	Germany

Annex 3: Key EU Stakeholders for CARIFORUM's Music Industry

To identify the market opportunities for the CARIFORUM CCIs in the EU, a list of the key stakeholders were selected on the basis of the following three criteria:

- **International**: they must have an evident interest in developing relationships with the CARIFORUM region or with experience with international markets.
- **Geographical**: they can be either European or national organisations with a clear international profile.
- **Practical**: they must have a practical approach to international cooperation, and be willing to organise and take part in practical initiatives such as events, seminars, training, B2B development activities, etc.

The stakeholders were grouped per CCI sub-sector and EU Member State in the following six categories:

- **Main European trade bodies**: Trade bodies are the main stakeholders responsible for increasing business opportunities of European companies and improving their visibility at international level. This section includes European trade bodies and the main national trade bodies active at European/international level.
- **Europe-wide rights management associations**: Europe is the world region where the practice of collective rights management is most established, especially for some sub-sectors such as music. Collective management organisations, however, exist also for many other sectors and now European associations of national collective management organisations have been established to further support copyright and related rights. This category encompasses the European collective rights management association (where they exist) as well as the main national rights management bodies that are members (if particularly active at international level).
- **Main industrial stakeholders in Europe**: Although SMEs are predominant across the European cultural and creative industries, Europe also counts internationally-known companies or industrial groups in almost all cultural and creative sub-sectors. These are listed in this third group.
- **Relevant trade fairs and festivals**: Some of the world's largest trade fairs of relevance to CCIs take place in Europe, from visual arts, to cinema, music, fashion and design.
- **Main public institutions and bodies** supporting internationalisation of CCIs in the EU Member States.
- **Programmes of EU Member States** to support the internationalisation of their CCIs.

These stakeholders for CARIFORUM's Music Industry are listed in the following table.

Table A3-1: List of stakeholders for Music in the selected EU Member States

CCIs sub-sector	Type of stakeholder	Name	Website
Music - recorded	*Main European Trade Bodies*	European Music Council	http://www.emc-imc.org/
		European Composer and Songwriter Alliance (ECSA)	http://www.composeralliance.org/
		European Composer Forum (ECF)	http://www.composersforum.eu/
		Alliance of Popular Music Composers of Europe (APCOE)	http://www.composeralliance.org/
		European Union of Music Competitions for Youth	http://www.emcy.org
		Independent Music Company Association – IMPALA (EU)	http://www.impalamusic.org
		IFPI representing the recording Industry worldwide	http://www.ifpi.org/
		International Confederation of Music Publishers (ICMP)	http://www.icmp-ciem.org/
	Europe-wide Right Holder Associations	GESAC – European Group of Societies of Authors and Composers	http://www.gesac.org/
	Main industrial stakeholders in Europe	Universal Music Group (F) Deezer (F) – music streaming service Spotify (SE) – music streaming service	http://www.universalmusic.com/ www.deezer.com
	Trade fairs and festivals	Midem, Cannes (FR)	http://www.midem.com/en/
		Popkomm, Berlin (D)	http://www.popkomm.de/en/
		Sónar Festival, Barcelona (ES)	http://sonar.es/en/2015/
		Musica nova Helsinki (Fi)	http://musicanova.fi/en/
	Public bodies	L'Institut de recherche et coordination acoustique/musique (INCAM) (FR)	http://www.ircam.fr/ircam.html

CCIs sub-sector	Type of stakeholder	Name	Website
	Public programmes	Nordic Music Export Programme (NOMEX) - collaborative promotional programme for national music export offices in Finland, Sweden, Norway, Denmark and Iceland.	
Music - live	*Main European Trade Bodies*	Performing Arts Employers Associations League Europe (Pearle)	http://www.pearle.ws/
		European Festivals Association (EFA)	http://www.efa-aef.eu/
		European Conference of Promoters of New Music (ECPNM)	http://www.ecpnm.com/
		Réseau Européen de Musique Ancienne (REMA)	http://www.rema-eemn.net
	Europe-wide Right Holder Associations	AEPO-ARTIS - Association of European performers' collective management societies	http://www.aepo-artis.org/
		GIART (Spanish, Italian, Dutch and Portuguese collective management societies of performing artists rights)	http://www.giart.org/
		GRAMEX (FI)	http://www.gramex.fi/en/what_is_gramex
	Main industrial stakeholders in Europe	Opera Europe	http://www.opera-europa.org/
		La Scala (IT)	
		Opéra de Paris (FR)	
		The Cologne Opera (DE)	http://www.operkoeln.com/home/
	Music festivals that also line up world music[29] (see also table 4 for festivals	Rock Werchter (BE) Audience: 85.000 Line up 2015: 21.2% world/folk/jazz	http://www.rockwerchter.be/en
		Hurricane Festival (DE) Audience : 75, 000 Line up 2015 : 16.6% world/folk/jazz	http://www.hurricane.de/

[29] http://www.festivalsearcher.com/festivallists.aspx?region=europe&genre=world

CCIs sub-sector	Type of stakeholder	Name	Website
	specialised in world music)	Northside 2015 (DK) Audience : 15.000 Line up : 21.4% world/folk/jazz	http://www.northside.dk/
		Bilbao BBK Live 2015 (ES) Audience : 40. 000 Line up : 18.8% world/folk/jazz	http://www.bilbaobbklive.com/2015/fr/
		Latitude festival 2015 (UK) Audience : 35 000 Line up : 22.1% world/folk/jazz	http://www.latitudefestival.com/news
		Roskilde 2015 (DK) Audience : 130.000 Line up : 19.2% world/folk/jazz	http://www.roskilde-festival.dk/
		Colours of Ostrava 2015 (CZ) Audience : 35.000 Line up : 28.5% world/folk/jazz	http://www.colours.cz/
		Sziget Festival 2015 (HU) Audience : 70.000 Line up : 16.1% world/folk/jazz	http://szigetfestival.com/
		Lowlands 2015 (NL) Audience : 55.000 Line up : 23.4% world/folk/jazz	http://lowlands.nl/
		End of the Road 2015 (UK) Audience : 5.000 Line up : 24.7% world/folk/jazz	http://endoftheroadfestival.com/
		Eurockéennes de Belfort 2015 (FR) Audience : 35. 000 Line up : 20.4% world/folk/jazz	http://www.eurockeennes.fr/
		PinkPop 2015 (NL) Audience : 60 000 Line up : 18.3% world/folk/jazz	http://www.pinkpop.nl/2015/
		Rock en Seine 2015 (FR)	http://www.rockenseine.com/

CCIs sub-sector	Type of stakeholder	Name	Website
		Audience : 30,000 Line up : 20.7% world/folk/jazz	
		Printemps de Bourges 2015 (FR) Audience : 50.000 Line up : 26.9% world/folk/jazz	http://www.printemps-bourges.com/fr/accueil/bienvenue.php
		Main Square Festival 2015 (FR) Audience : 40.000 Line up : 23.8% world/folk/jazz	http://mainsquarefestival.fr/
		Garorock 2015 (Fr) Audience : 20 000 Line up : 18.3% world/folk/jazz	http://www.festivalsearcher.com/festivals.aspx?festival_id=garorock
		INmusic festival 2015 (Cr) Audience : 25 000 Line up :18.8% world/folk/jazz	http://www.festivalsearcher.com/festivals.aspx?festival_id=inmusic_festival
		Glastonbury Festival 2015 (UK) Audience : 180 000 Line up : 38.3% world/folk/jazz	http://www.glastonburyfestivals.co.uk/
		Woodstock Festival Poland 2015 (PL) Audience : 700.000 Line up : 19.5% world/folk/jazz	http://woodstockfestival.pl/en/woodstock_festival/woodstock_life
		Vieilles Charrues Festival 2015 (FR) Audience : 55 000 Line up : 21.1% world/folk/jazz	http://www.vieillescharrues.asso.fr/2015/
		Off Festival 2015 (Pl) Audience : 12.000 Line up : 21.1% world/folk/jazz	http://off-festival.pl/
		Couleur Cafe 2015 (BE) Audience : 80 000 Line up : 40% world/folk/jazz	http://www.couleurcafe.be/
		Storsjöyran 2015 (SE) Audience : 30 000	http://storsjoyran.se/

CCIs sub-sector	Type of stakeholder	Name	Website
		Line up : 18.2% world/folk/jazz	
		Paredes de Coura Festival 2015 (PL) Audience : 22 000 Line up : 30% world/folk/jazz	http://www.paredesdecoura.com/
		Camp Bestival 2015 (UK) Audience : 15 000 Line up : 16.2% world/folk/jazz	
	Public bodies	Finnish Music Foundation (FI)	http://www.musiikinedistamissaatio.fi/en
		Maison de la radio de Radio France (FR)	http://www.maisondelaradio.fr/lauditorium