



**UNION DES PRODUCTEURS
PHONOGRAPHIQUES FRANÇAIS
INDÉPENDANTS**

**RAPPORT D'ACTIVITÉ DE L'UPFI
2019**

CRÉATION DU CENTRE NATIONAL DE LA MUSIQUE : L'ABOUTISSEMENT DE DIX ANS DE TRAVAUX

Le processus de création d'un établissement public au service de tous les secteurs de la musique avait débuté en 2010. La mission « RIESTER – SELLES » en 2011 n'avait pu déboucher sur un résultat concret faute de volonté politique en 2012. Ce processus a pu être relancé en 2017. La remise à la Ministre de la Culture de l'époque d'un rapport commandé à Roch Olivier Maistre, suivi d'une mission de préfiguration confiée aux députés Emilie Cariou et Pascal Bois, ont préparé le terrain. L'UPFI, le PRODISS et d'autres organisations se sont fortement mobilisés pour que cette « maison commune » voie le jour.

La loi dite Octobre 2019 a créé le CNM, sous forme d'EPIC. Cet établissement public sera doté d'un conseil d'administration dans lequel les OGC et certaines organisations professionnelles seront représentées mais avec une majorité détenue par l'Etat. Le CNL sera doté d'un conseil professionnel qui sera interrogé sur toutes les grandes décisions avec avis consultatif.

Dans le cas du PLF 2020, la dotation budgétaire apportée par l'Etat s'est élevée à 7,5M€.

L'ADOPTION DE LA DIRECTIVE COPYRIGHT AU PLAN EUROPÉEN

Le processus de transposition en droit interne de la Directive dite « Copyright » du Parlement et du Conseil de l'Europe du 17 avril 2019 (dont les principales dispositions sont détaillées dans le précédent rapport annuel pour l'exercice 2018), s'est concrétisé par le dépôt devant l'Assemblée Nationale le 5 décembre 2019 du projet de loi n° 2488 relatif à la communication audiovisuelle et à la souveraineté culturelle à l'ère du numérique. Ce dernier poursuit plusieurs objectifs :

- transposer les dispositions de la directive « Copyright » du 17 avril 2019 sur le droit d'auteur et les droits voisins dans le marché unique numérique (dont les principales dispositions sont détaillées dans le précédent rapport annuel pour l'exercice 2018), qui viennent renforcer en particulier la protection des créateurs, des artistes et des producteurs en responsabilisant les plateformes numériques commerciales dédiées au partage de contenus, et les sites communautaires tels que YouTube, et en renforçant la lutte contre la piraterie numérique ;
- transposer les dispositions de la Directive sur les services de médias audiovisuels « SMA » 2010, telles que modifiées et actualisées par la Directive adoptée en novembre 2018 qui régit la coordination à l'échelle de l'Union Européenne de la législation nationale sur tous les médias audiovisuels, à la fois les émissions de télévision traditionnelles et les services à la demande ;

- renforcer les moyens consacrés à la création par une adaptation de la contribution à la production demandée aux éditeurs établis en France et son extension aux services qui visent la France et alléger certaines contraintes pesant sur les éditeurs de services ;
- la création d’une nouvelle autorité administrative indépendante, l’ARCOM (Autorité de Régulation de la Communication audiovisuelle et numérique), qui résultera de la fusion du CSA (Conseil Supérieur de l’Audiovisuel) avec la HADOPI (Haute Autorité pour la Diffusion des Œuvres et la Protection des Droits sur Internet). Elle devra coopérer avec l’Autorité de Régulation des Communications Électroniques et des Postes (ARCEP) et verra ses attributions renforcées en matière de lutte contre le piratage et élargies à l’égard de certains acteurs du numérique ;
- regrouper sous « France Médias » les sociétés ou établissements de l’audiovisuel public (radio, télévision, archives) et réformer la gouvernance de ces sociétés et leur mode de relation avec l’État.

Les objectifs du projet de loi vont conduire à une modification de la loi n° 86-1067 du 30 septembre 1986 et du Code de la Propriété Intellectuelle.

En amont de ce projet de loi, l’UPFI a été amenée, dans le cadre des travaux qui se sont tenus en 2019 avec le Ministère de la Culture, le CSPLA et les organismes de gestion collective, à formuler ses observations.

Celles-ci ont porté en particulier sur les articles 27 et 28 du projet dont les termes sont critiquables en ce qu’ils méconnaissent la lettre et l’esprit de la Directive.

Ces dispositions portent sur :

- la juste rémunération des artistes-interprètes dans le cadre des contrats d’exploitation ;
- sur le principe de rémunération appropriée et proportionnelle à la valeur économique qui doit respecter le principe de liberté contractuelle ;
- sur l’obligation annuelle de transparence des producteurs à l’égard des artistes sur les exploitations de leurs prestations, sur l’ensemble des sources de revenus générés et sur la rémunération qui leur est due ;
- sur le mécanisme d’adaptation des contrats et le droit de résiliation et ses modalités d’exercice.

L’ALLIANCE DES ENTREPRISES DE LA MUSIQUE

Cette association informelle réunissant l’UPFI, la CSDEM, le SNEP et le PRODISS s’est réunie à plusieurs reprises en 2019 pour exercer un travail de lobbying afin d’assurer la réussite de la création du CNM. Une tribune avait été ainsi publiée dans la presse écrite.

USER CENTRIC : POURSUITE DES TRAVAUX ET CAMPAGNE DE SENSIBILISATION AUPRÈS DES PROFESSIONNELS ET DES POUVOIRS PUBLICS

En 2019, l'UPFI a poursuivi sa campagne de sensibilisation en faveur d'un autre modèle de partage des revenus issus du streaming par voie d'abonnement. Des discussions se sont poursuivies au sein d'IMPALA. Une réunion de concertation a eu lieu à l'automne avec la SACEM et le SNEP. L'UPFI a organisé en Novembre dernier une réunion d'échange avec une soixantaine de managers d'artistes afin qu'ils informent et sensibilisent leurs artistes des problématiques liées au partage des revenus pour le streaming.

Un certain nombre d'études mesurant l'impact d'un modèle de partage dit user centric ont été publiées ou fait l'objet d'échanges entre professionnels : Merlin, Deezer en Juin 2019, la SACEM, Spotify. Le résultat de ces études dont certaines sont confidentielles n'a pas permis à ce stade de créer un consensus fort en faveur d'un nouveau modèle.

CRÉDIT D'IMPÔT À LA CRÉATION PHONOGRAPHIQUE

2018 avait été marquée par toute une série d'évaluations portant à la fois sur notre dispositif fiscal et sur les crédits d'impôts « culture », qui avait aboutie à la prorogation du CIPP jusqu'à fin 2022. Cette prorogation avait été assortie d'une révision du seuil de prise en compte des ventes dans le cadre de la définition des nouveaux talents, par voie de décret. Au terme d'une concertation menée par la DGMIC avec les professionnels, le décret publié a pris en compte le seuil de deux fois 100 000 ventes pour deux albums distincts au cours de la carrière de l'artiste, ce seuil étant calculé en y intégrant les équivalents stream-albums selon la méthodologie retenue par les organisations professionnelles de producteurs de phonogrammes.

Le CIPP a également fait l'objet d'une légère adaptation en ce qui concerne la clause dite de francophonie. Dans le cadre du PLF, la règle du un-pour-un a été adoptée (un projet francophone pour un projet non francophone) mais exclusivement pour les TPE.

ÉCHANGES INFORMELS AVEC LES RADIOS PRIVÉES CONCERNANT LE BILAN D'APPLICATION DU PLAFONNEMENT DES ROTATIONS DE TITRES

L'UPFI a rencontré les principaux dirigeants des radios privées qui ont réitéré leur critique à l'égard de la limitation des rotations des titres. Les représentants de l'UPFI partagent ce constat et ont formulé une proposition d'aménagement qui ne nécessiterait pas de modification législative : à savoir, de calculer cette limitation sur une durée de trois mois au lieu d'un mois actuellement, afin d'introduire plus de souplesse dans la programmation des radios.

BILAN ANNUEL DES ACTIVITÉS D'IMPALA

Accessible sur demande.



IMPALA ANNUAL ACTIVITY REPORT July 2019 to end June 2020

As usual, IMPALA's focus this year remained building more value for independent labels and artists on various commercial, financial, promotional and political fronts. The year was marked in particular by the coronavirus crisis striking Europe and the world, freezing the global economy. The role of music in health and well-being really stood out, as did the capacity of the music sector to act as a catalyst for change. 2020 is a year of historical challenges and new initiatives.

Below is an overview of IMPALA's main work between July 2019 and end of June 2020.

1. Membership, structure

Membership

IMPALA welcomed five new members this year, with our total membership (including members of national associations) now quickly closing in on 5,000 record labels. Part of this growth is linked to our structuring work in central and eastern Europe, with more developments expected in the near future in territories such as Russia, Turkey, Estonia and Armenia.

Following a mandate given to the management board at the June board meeting, an agreement was reached with ANPM, the Polish association of independent record labels and also FELIN, representing close to 400 small record labels in France, who joined with the agreement of UPFI. This was also the opportunity to clarify IMPALA's membership policy as regards dual association territories and applications by companies for whom label business is not the main focus.

Labels are also joining with direct membership agreements concluded with GMI, making it IMPALA's very first member in Georgia, SCL Lusitanian (Portugal) and The State 51 Conspiracy (United Kingdom).

Kobalt Music Group decided to stop its direct membership effective 30th June to focus more on AIM membership. We would like to thank Paul Hitchman for his input as a board member of IMPALA.

We also take this opportunity to thank Jerome Roger from UPFI, who will be stepping down in September. Jerome is one of very few board members to have attended right from the very beginning of IMPALA and we thank him for his insight and support for nearly 20 years. We are delighted that he will continue as chair of our collecting society committee and welcome the new head of UPFI, Guilhem Cottet.

Secretariat

Lucie Jacquemet joined the IMPALA secretariat in September as network & project assistant. Matthieu Philibert continues to work for IMPALA as Public Affairs Director on a freelance basis.

Finances

The financial year 2019-2020 closed with a significant saving in secretariat overheads. Most of these savings come from the covid-19 situation. We travelled less of course, two board meetings moved to video conferences and trade fair partnerships were cancelled. These savings will be rolled into fiscal year 2020-2021.

The management board also decided, in light of the covid-19 pandemic, to freeze the planned increase of membership fees for fiscal year 2020-2021. Practically, this means that membership fees for fiscal year 2019-2020 will also apply in 2020-2021.

A new board

A 32-strong board was elected in Hamburg on 23rd September for a term of two years. This is by far the largest and most diverse board so far. Francesca Trainini, from Italian association PMI, became the new chair of the board, with Kees van Weijen (from Dutch association STOMP), Geert De Blaere (from Belgian association BIMA) and Helen Smith all confirmed in their respective positions of president, treasurer and executive chair.

The elected board members are:

- !K7 (represented by Horst Weidenmüller)
- 8Ball Music (represented by Floris Janssen)
- AIM (represented by Paul Pacifico)
- AMAEI (represented by Ana Rita Feijao)
- Beggars Group (represented by Martin Mills)
- Better Noise Music (represented by Dan Waite)
- BIMA (represented by Geert de Blaere)
- Cooking Vinyl (represented by Martin Goldschmidt)
- Cosmos Music Group (represented by Robert Litsen)
- DUP (represented by Kristoffer Rom)
- Edel (represented by Jonas Haentjes)
- Epitaph (represented by Roger Dorresteyn)
- Everlasting Records (represented by Mark Kitcatt)
- FONO (represented by Larry Bringsjord)
- HAIL (represented by Zsolt Jeges)
- IndieCo (represented by Tapio Korjus)
- INDIERO (represented by Dan Muraru)
- IndieSuisse (represented by Andreas Ryser)
- Kobalt (represented by Paul Hitchman) – resigning on 30/6/20
- [PIAS] Music Group (represented by Michel Lambot)
- Playground Music Scandinavia (represented by Jonas Sjöström)
- PMI (represented by Francesca Trainini)
- RUNDA (represented by Dario Drastata)
- SCL / Lusitanian (represented by Nuno Saraiva)
- SOM (represented by Eva Karman Reinhold)
- STOMP (represented by Kees van Weijen)
- Sugar Music (represented by Andrea Cotromano)
- UFI (represented by Sonia Duran)
- UPFI (represented by Jérôme Roger)
- VTMÖ (represented by Alexander Hirschenhauser)
- VUT (represented by Jörg Heidemann)
- Wagram Music (represented by Stephan Bourdoiseau)

Board meetings

The board agreed in late 2019 to reduce the number of board meetings per year from five to four and go paper-free to reduce our carbon footprint. The covid crisis was the opportunity for a further review, leading the board to agree in June that two of our four board meetings each year would be by video conference instead of in person.

The board also agreed that, based on the current situation, no in person meetings would take place before spring 2021.

Brainstorming sessions

Our board meetings' brainstorming sessions continued to be a great forum to address a wide

range of topics. The sessions hosted during our first two board meetings of the year (Hamburg and Paris) focused on catalogue transfer issues (led by Paul Pacifico from AIM) and the user-centric model (with Charles Caldas), following a presentation from Deezer. The fact that none of the first two meetings of 2020 could take place in person led us to cancel some of the brainstorming sessions, which will be rescheduled. As usual, all members are of course welcome to make suggestions for these sessions.

Capacity building – keyword: sustainability

The second round of capacity building donations to European national associations is ongoing and now in its second year. 17 national associations are supported by these funds, 8 of which requested to receive their funding over two years instead of three. Building sustainability remains the focus of this second round of capacity building donations.

All IMPALA members attending IMPALA board meetings or other meetings in the interest of the association (including WIN meetings) are entitled to the reimbursement of their travel expenses. The board agreed that, as of 1st January 2020, IMPALA would recommend to the trust that the flat fee should be reduced to 500€ per meeting attended, in order to ensure the sustainability of the trust's travel fund. This decision has not had an impact yet because of the cancellation of the first two in-person meetings of 2020.

20th anniversary

IMPALA will turn 20 later in 2020, with planning starting already at the end of 2019. We will mark the occasion with multiple projects and activities spread over one year, as we did for the 15th anniversary celebrations.

2. Commercial and other issues

COVID-19 – helping the independent sector weather the crisis

Music was one of the first sectors to be hit by the covid crisis and will be one of the last to come out. On IMPALA's side, helping independents address the effects of the crisis immediately became a top priority. On 20th March, we set up a [Covid Task Force](#) which has been meeting every week to coordinate IMPALA's work on the subject.

One week later, the Task Force [published a Crisis Plan](#), a package of recommended measures at national, European and sector level to promote a co-ordinated approach across Europe and ensure the music ecosystem is shielded from long term harm.

We then [launched a mapping tool](#) on 9th April, a new website to map support for the independent music sector at EU, national and sector level.

IMPALA's focus then turned to the [ten-step recovery roadmap](#) published on 29th April, setting out financial and non-financial tools to ensure the cultural sectors recover in a sustainable way. Work on this continues, and all national associations are key in ensuring it gets implemented nationally.

Many great campaigns were launched across Europe in reaction to the crisis. In particular we supported the [#LoveRecordStores campaign](#) and urged governments to include record stores in the first wave of shops to re-open across Europe as part of our de-confinement recommendations. This was crucial for IMPALA members. We also promoted Sound Diplomacy's [#BetterMusicCities](#) campaign along the way - a call to action to ensure music is at the heart of recovery in cities around the world.

Aside from policy recommendations and supporting various campaigns, IMPALA also created a relief fund for the European sector which had to do a lot of heavy lifting as the first continent affected by the crisis after China. We will allocate the fund to national association members of IMPALA to contribute to their emergency relief work during the peak of the crisis from February to end of June 2020.

No music on a dead planet

IMPALA decided to give its 2019 Outstanding Contribution Award to [Music Declares Emergency \(MDE\)](#), a movement where artists, music industry professionals and organisations stand together under the motto “no music on a dead planet”. Declaring a climate and ecological emergency, an immediate governmental response is called for to protect all life on Earth.

IMPALA helped organise meetings with top EU leaders for MDE, including so far [a meeting](#) with the EC’s executive vice president in charge of climate change, Frans Timmermans and [a video call](#) with the commissioner for innovation and culture, Mariya Gabriel. We are currently following up to see how we can build on this momentum.

As mentioned above, IMPALA seeks to reduce its own footprint and encourage greener business practices. We have reduced the number of in person board meetings which are also paper-free. We also limit all single-purpose flights to only those considered essential. We also aim to work with local, ethical and ecological providers. A brainstorming session with the board to review what the sector can do was planned for June and had to be rescheduled due to the crisis.

#TheShowMustBePaused – supporting diversity in the music industry

Like many others in the music sector, IMPALA respected #BlackOutTuesday by stopping all activities on 2st June 2020. This level of solidarity across the music sector was a first.

At our June board meeting (which was postponed one week to respect #BlackOutTuesday), we held a brainstorming session on diversity. It was decided that IMPALA should have a specific committee dedicated to this question. The committee in question is off to a very dynamic start with meetings every week, becoming IMPALA’s second task force of the year. A diversity charter and other initiatives are in the works.

Structuring work in central and eastern Europe

Work in both central and Eastern Europe continued during the year. After RUNDA (ex-Yugoslavia territories and Albania), HAIL (Hungary), Platforma (Czech Republic) and INDIERO (Romania) joined IMPALA in the last couple of years, newly established Polish association ANPM became a member of IMPALA in 2020.

As mentioned above, Tbilissi-based company GMI also became IMPALA’s very first member in Georgia. Initial contacts are ongoing in both Russia and Turkey that will probably lead to new independent groups being set up in the near future. Potential members are also showing interest in IMPALA in smaller territories such as Estonia and Armenia.

Thanks to our members’ efforts, the profile of local trade fairs and showcase festivals such as BUSH (Budapest), Nouvelle Prague, MENT (Ljubljana), MMB (Bucharest) and PIN (Skopje) is on the rise, firmly putting the region on the map.

Both HAIL and RUNDA received support from Merlin to launch their “digital days” sessions which took place with a very good turnout in Budapest for Hungary and as a road show in Ljubljana, Zagreb and Belgrade for the Balkans.

The launch of Spotify in no less than 13 countries of Eastern Europe (mainly ex-Yugoslavia and ex-Soviet Union) will be a significant step in the digital development of these rapidly emerging markets.

Keeping independents one step ahead in the digital market

IMPALA’s brand-new digital committee has had a very busy year since being established. Formed in November, it has the task of ensuring independents are proactive when it comes to digital issues. Meeting monthly, the committee has already doubled in size and also holds monthly meetings with Merlin to exchange information and relay questions from committee members.

On top of that, the committee’s representatives initiated contact with several leading digital

platforms. Discussions mainly revolve around streaming manipulation so far, as we are following up on last year's [industry code and because a](#) charter for independent labels on this topic is in the works, but communication channels are open to other topics. The committee is also setting up an intelligence facility for IMPALA members known as "One Step Ahead", thanks to a digital capacity grant from Merlin. The project will focus on national and pan-European digital trends with the objective of literally keeping independents one step ahead.

Discussions on streaming distribution models remained high on IMPALA's agenda throughout the year. Instead of looking at this as a choice between two models, IMPALA's focus is to work on an optimal model which would include pro-temporis and other elements. A further brainstorming session is in the pipeline. Other issues being discussed by the committee include streaming manipulation, Spotify rolling Spotify Analytics into Spotify for artists, the impact of podcast and audiobooks on streaming, YouTube, TikTok, .music domains, etc.

Live-streaming's big boom

Live streaming has boomed this year, and the lockdown measures linked to the covid crisis obviously played a big role in this. Although not a new development, members wanted some guidance and also raised concerns about certain operators trying to secure more rights. IMPALA set up a working group led by Gee Davy from AIM and prepared guidance for members including a checklist of what to look out for in live streaming agreements. A webinar was also held in collaboration with AIM.

Boosting our collecting society work

IMPALA's committee last met in person in November in Paris and continues its work with video meetings. This has been a very productive year with several meetings with IFPI, a strategic meeting with VUT and GVL in Berlin, redrafting IMPALA's collecting society code of conduct and proposing modifications to IFPI's own guidance. This is also in preparation for the upcoming review of the EU collective rights management directive.

As with every year, we continued to participate in meetings of IFPI's performance rights group (known as PRC meetings), and in the joint committee with WIN. We also continued our participation in the distribution meetings for the MTV pan-European video agreement with VPL. On top of this, we produce regular reports for PPL with AIM summarising the IMPALA projects supported by PPL via its annual donation to AIM. This is the kind of model we would like to see in other collecting societies.

Majors – more changes ahead of us

Last year's rumours were true: UMG has started selling shares to Chinese tech giant Tencent. Tencent already bought 10% of UMG's shares, with the option to buy 10% more by 15 January 2021. As part of the deal, Tencent Music Entertainment also took a stake in UMG's China operations. We understand negotiations continue with both Tencent and other potential purchasers as UMG's owner Vivendi announced it was looking to sell up to 50% of the world's largest music company. UMG also announced its plan to IPO within the next three years.

IMPALA confirmed its position on the deal with Tencent ([here](#) and [here](#)), and [warned](#) of its impact on the music sector. We also raised our concerns with the relevant competition authorities in China and Europe, including the EU and national regulators, as well as with other jurisdictions around the world. We will continue to monitor the situation and liaise with our members and regulators.

Warner Music Group was also in evolution mode this year, going on the stock market in June after a delay due to the covid crisis, attracting a lot of interest from many organisations inside and outside of the music sector. Among the confirmed buyers? Tencent, with a \$200m+ stake.

Before floating on the stock market, Warner was rumoured to be considering selling to Saudi

Arabia's Public Investment Fund, which bought a 5.7% stake in Live Nation earlier this year. The deal was not confirmed but shows one thing: music is the new oil.

Awards

Our Album of the Year Award went back to Germany after a trip to Sweden. Succeeding last year's winner Swedish band Viagra Boys, [Apparat](#) landed the award after fighting off stiff competition from a [shortlist](#) of 22 albums from across Europe.

IMPALA's [Outstanding Contribution Award](#) went to Music Declares Emergency as mentioned above. Through this award, IMPALA recognises the importance of this campaign and echoes the call on decision makers to act now to address climate change.

During the year, IMPALA also remained an active member of the steering committee for the EU's music prize, the Music Moves Europe Talents Awards. The second edition was held at [Eurosonic 2020](#) where [the room was full](#) for the award ceremony. Again, congratulations to all winners!

Storytelling

Remember that IMPALA is here to promote its members' stories and successes, so please send in news or other items that help us send positive messages about what the sector is doing.

Brexit

IMPALA continues to follow the discussions on Brexit and uncertainty remains king. As the UK formally left the EU on 31st January 2020, both parties are now in the process of negotiating a trade agreement.

IMPALA continues to work with AIM to try and ensure the interests of the independents are taken into account. A few days before the actual Brexit date, IMPALA released a [statement](#) calling on the UK to align its copyright legislation even if it doesn't adopt the EU copyright directive as such. On the same day, Helen spoke to Music Week about the expected impact of Brexit on the independent music sector. You can read the full interview [here](#). The trade agreement being negotiated will answer all questions related to the participation of the UK to EU funds, movement of goods and persons, visas for artists etc.

IMPALA Campus - Training the next generation of music professionals

IMPALA successfully applied for EU funding for its IMPALA Campus project, a business-oriented training programme for young artists and recorded music professionals. The EU's decision was delayed due to the crisis and the project will have to be reconfigured, so we are aiming to start after the summer.

EU projects

On top of the IMPALA Campus project, IMPALA started touching base informally with other music organisations ahead of the publication of the EU's 2020 Music Moves Europe call. For its 3rd edition, the commission decided to reconfigure the EU's music pilot project to help the sector address the consequences of the covid crisis and is expected to issue a single €2.5m call which outsources the management of a support scheme for the music sector.

We are also holding initial discussions with a consortium planning to apply for an EU innovation call focused on creative industries which - if successful - would be launching in 2022. The 7 to 15 year long project would start with €150m seed funding and be based on partnerships across Europe between businesses, universities and research centres.

IMPALA was also involved, as part of an advisory body, in an EC commissioned study on the feasibility of setting up a European Music Observatory. The publication of this study has been much delayed and we are now hoping to see it published after the summer break.

3. Political overview

Work on the EU copyright directive continued this year, even though the text was already fully adopted in spring 2019, after more than three years of discussions and a lot of blood, sweat and tears. We opened 2020 with two interviews ([here](#) and [here](#)). We're halfway through the implementation period as member states have till June 2021 to adopt the new rules nationally and part of our covid recovery package was a call for faster implementation to help the sector get out of the crisis. We also took an active part in the European Commission copyright stakeholder dialogue which started in the autumn. The commission will launch a targeted consultation over the summer as the final step of the dialogue before issuing its guidance on the application of article 17 of the directive on the value gap. We will of course reply to the consultation and in the meantime we have already reached out to various parts of the commission to raise our concerns with the general direction of travel of the dialogue as we understand the commission's plans could effectively weaken the value gap provisions. We have shared our own guidelines on how to implement the directive with members and are in regular contact to stay abreast of local discussions.

Shaping Europe's digital future continued to be a big part of IMPALA's work this year. In the second half of 2019, IMPALA and members contributed to an EU study on geo-blocking. So far it seems the EU's plan is not to force music services to lift geo-blocking, which would be great news if confirmed. IMPALA has also provided input on artificial intelligence, copyright, and transparency of algorithms.

Earlier this year, IMPALA [welcomed](#) the commission's new strategy to shape Europe's digital future. In particular, we called on the commission to move quickly with its planned review of competition rules announced in the digital plan. We also inputted to the European parliament's annual report on competition policy.

We are also working on the Digital Services Act, a horizontal review of the legal framework for digital services which the commission aims to publish towards the end of the year. We need to remain vigilant as some tech organisations are trying to use this review to push for more favourable accountability rules for platforms, but it is also an opportunity for us to share our views on the general responsibility of platforms, transparency obligations, broader competition rules, etc. The commission launched several public consultations around this topic in June, to which IMPALA will contribute.

Last but certainly not least, IMPALA is one of the leading organisations calling for increased EU funding for culture and music. We were already active on this before the crisis and redoubled our efforts as the first measures to contain the virus started impacting the sector.

IMPALA coordinated several sector letters on top of our own work on Covid (see [here](#) and [here](#)). We also asked for guarantees that the sector would be able to benefit appropriately from the EU's recovery plan (see [here](#) and [here](#)).

In parallel, IMPALA is also one of the main voices calling for increased EU funding for music. With other music organisations we [encouraged](#) the European Parliament to adopt a strong budget for the 3rd edition of Music Moves Europe. We also keep [pushing](#) for a stronger focus on music within the next Creative Europe programme.

This seems to have partly paid off, as culture has rightly been identified by the commission as a priority sector. EU leaders will try to reach a deal in July, which will then need to be approved by the European Parliament. Since the main decisions on how to allocate the recovery money at national level will be left to individual member states, we encourage members to call on their respective governments to earmark an appropriate share of the EU recovery money for culture.

4. International

WIN – Worldwide Independent Network

IMPALA continues to play a key role in WIN, organising the European bloc on the board and helping devise the association's strategy for co-ordination within the sector on a global level. A [new WIN board was elected](#) in January in London. In the European bloc representing IMPALA, Martin Mills and Horst Weidenmüller stepped down, with Francesca Trainini and Jörg Heidemann replacing them.

WINCON, the WIN conference for national associations took place online this year, because of the covid-19 situation. Helen and Angel took part and Angel presented IMPALA's Covid-19 Recovery Roadmap.

In October, both WIN and IFPI announced a cross-industry collaboration to create Repertoire Data Exchange (RDx), a centralised industry data exchange service. RDx will enable record companies and music licensing companies, which collectively manage recording rights, to submit and access authoritative recording data via a single point.

Merlin

A year after the record of one billion dollars distributed to the independent sector [in only 18 months](#), Merlin kept up with the good work this year again. The highlight of 2020 so far is a landmark global licensing [partnership with TikTok](#).

Charles Caldas left Merlin at the end of 2019 after 12 years at its helm. Helen thanked Charles at IMPALA's board in November and handed over an award to him at the very first edition of AMAEI's digital days in Lisbon.

Jeremy Sirota was [announced](#) as Merlin's new CEO in January and Charlie Lexton was appointed COO a few months later. We are in regular contact and wish both of them the best of luck!

A2IM

Helen represented IMPALA at the online edition of A2IM Indie Week in June. Various IMPALA members also joined panels during the three-day online conference.

WIPO

IMPALA remains a WIPO observer, and continues to monitor their work, as well as to encourage more action around world intellectual property day.

UNESCO

IMPALA continues to follow the work of UNESCO and to promote "world cultural diversity day". We remain a member of UNESCO's global alliance on cultural diversity.

5. IMPALA profile and trade fairs

Press

The press and PR roles of the secretariat remain key, with results covering a wide range of issues. In total, 38 statements and press releases were issued during the year - all of which can be viewed on <http://www.impalamusic.org/node/183> and are listed in Annex of this report (in reverse date order).

New website

Work on a new website was one of the main behind the scene communication tasks for the secretariat during the fiscal year. With content still being uploaded and tested, the new website will be unveiled in time for our 20th birthday.

Social media presence

IMPALA continued to develop its social media presence, with an increased activity on Twitter

(around 300 direct posts to now close to 4,000 followers) and Facebook (around 110 direct posts to now more than 3,000 followers). In early 2020, IMPALA also launched its own Instagram and LinkedIn accounts, which have already attracted a few hundred followers each.

Due to the sheer volume of posts, we have not included all of them in this report, but all can be consulted directly on:

- Twitter: [@IMPALAMusic](https://twitter.com/IMPALAMusic)
- Facebook: [@IMPALAindie](https://www.facebook.com/IMPALAindie)
- Instagram: [@impalamusic](https://www.instagram.com/impalamusic)
- LinkedIn: <https://www.linkedin.com/company/36084335>

IMPALA online

The IMPALA secretariat continues to circulate its IMPALA online newsletter on a quarterly basis. It aims at keeping members informed about the association's current activities as well as the latest developments in Brussels.

Reeperbahn festival (Hamburg)

Reeperbahn was, as usual, our first stop of the fiscal year, as Hamburg was the venue for both our AGM and our board meeting. Helen also participated on a panel on the copyright directive, while both Kees and Angel attended the Music Moves Europe Talent Awards ceremony during which the names of the award nominees were unveiled.

Polish Culture Days

The Polish government hosted a full week of workshops focusing on all aspects of culture. Two days were dedicated to the music sector and Didier was invited to attend the discussions as well as join a panel also featuring representatives from WIN, Merlin and ANPM.

MAMA

At MAMA in Paris in October, Helen joined a very large panel on the copyright directive which gathered most of the industry's key players.

RUNDA digital days

Both Helen and Didier, respectively in Ljubljana and Zagreb, joined the RUNDA digital days, a brand-new roadshow organised by RUNDA all over ex-Yugoslavia. Supported by Merlin, the three events in Belgrade, Ljubljana and Zagreb were very well attended and proved a success.

Fifty Fifty Lab

Fifty Fifty Lab is a new showcase festival and conference launched in Brussels in November. Didier was the moderator of the very first panel of the event, a keynote interview with Martin Elbourne (Glastonbury).

BUSH – Budapest

Didier attended the BUSH – Budapest Showcase Hub conference in November and moderated a panel on national associations and their impact on local record labels. BUSH was also the venue used by HAIL for its first Members' Day, which hosted a set of panels on various topics including the copyright directive.

Linecheck (Milan)

Just like we did in 2018, IMPALA partnered with Italian national association PMI to coordinate a series of panels during this key event. Matthieu was invited to speak about the copyright directive on a panel moderated by Francesca Trainini on behalf of PMI.

AMAEI's Digital Days (Lisbon)

Helen joined the first edition of AMAEI's Digital Music Days in Lisbon. As mentioned above, at this event Helen handed out an award to Charles Caldas, Merlin's outgoing CEO, in recognition of his outstanding work for the independent music sector over the past decade.

Eurosonic (Groningen)

Angel attended ESNS in Groningen and took part in a public discussion on the EMEE music export study. Angel also took part in an interview conducted by Live DMA and attended the Music Moves Europe Talent Awards ceremony, the EC sponsored awards scheme of which IMPALA is a partner.

MENT (Ljubljana)

Didier once again travelled to Ljubljana to participate in the MENT festival and meet with RUNDA representatives. RUNDA hosted three panels during the conference, which also proved an opportunity to meet with local stakeholders.

Russia Trade Mission

Didier joined the trade mission to Moscow organised by AIM. This proved an excellent opportunity to meet with a large number of Russian representatives from the music sector and to initiate discussions around a possible Russian national association.

MMB (Bucharest)

The MMB – Mastering the Music Business conference in Bucharest was set to be the venue for our March board meeting. The event, which had more than 10 IMPALA members involved in its conference schedule, got cancelled at the very last minute because of the covid-19 pandemic. This did not stop the organisation team, which quickly organised a lighter online version of the conference which took place early in the summer. Both Kees and Didier joined it by video conference to discuss... the impact of the pandemic on the music sector.

Online workshop with Turkish labels

Both IMPALA and WIN organised a video conference with the representatives of a group of 25 Turkish labels currently considering establishing a new trade association in Turkey. This is of course still a work in progress but we expect to see significant progress in the coming months.

Yerevan Music Week

The IMPALA secretariat was invited to send a representative to the first Yerevan Music Week, scheduled to take place in May. The purpose of this visit would have been to meet with local record labels and participate in the conference to discuss both the EU copyright directive and the work of national associations across Europe. Angel was ready to fly to Georgia but the event unfortunately had to be postponed, with new dates still being discussed.

MIDEM (Cannes)

IMPALA, together with Merlin, A2IM, WIN, Spotify and IMPF had been working hard on the largest ever set of panels for MIDEM's Global Indie Voices conference. The covid-19 pandemic ruined these plans, with MIDEM moving to a digital edition and a much lighter planning which only featured two of the original nine sessions scheduled.

A2IM Indie Week (New-York)

Helen represented IMPALA at the online edition of A2IM Indie Week in June. Various IMPALA members also joined panels during the three-day online conference.

Athens Music Week

Didier was invited to join a panel for the “phygital” edition of Athens Music Week. No surprise, covid-19 and IMPALA's work on the issue was the topic of the day.

6. New material

Useful material IMPALA produced during the year includes:

- Various documents relating to the covid-19 crisis, including a crisis plan, a recovery roadmap and a full online mapping tool.
- Guidance for members on livestreaming.
- Webinar on livestreaming (in collaboration with AIM).
- New collecting societies code of conduct, proposal to update IFPI's code, distribution principles and key performance indicators.
- Best practices note by collecting societies on crisis measures for members.
- Infographics, tweet visuals, logos, FAQs, template letters on the copyright directive, value gap and other EC related topics
- Implementation guidelines on the copyright directive and updated summaries.
- IMPALA's position on the Tencent deal, with summary and talking points.
- List of EU funding opportunities for IMPALA members.
- Website updates, including 2019-2020 EU developments and update of the music industry in numbers.
- Online media presence (Facebook, Twitter, Spotify, Instagram and LinkedIn).
- Regular IMPALA updates and IMPALA online newsletters.
- Various submissions to the European commission and other EU institutions.

Should you wish to receive further copies of any of the above, please contact the IMPALA Secretariat.

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