

IMPALA



**ANNUAL
REPORT**

2022-2023

INTRODUCTION

This year we again had a full agenda to meet our mission to level the playing field for independent music companies across Europe. IMPALA's work to maximise artist revenue and grow the overall market was a top priority. Our new 10 step streaming plan made a big impact, seeking to make streaming fairer and provide a dynamic, compelling, and responsible future for creators and fans. In our other work maximising digital opportunities for independent labels in an ever-changing environment, this saw a major development with the continuation of One Step Ahead with CMU and the introduction of a new project, Strategic Primers with Music Ally, thanks to support from Merlin. The roll out of our carbon calculator continued with training in selected countries and we published our first report on the results. Of course AI has been a key focus, as it has everywhere. We also put the spotlight on inspiring individuals, as well as projects working on equity, diversity and inclusion issues, and of course emerging artists across Europe. This report is an overview of IMPALA's main work over the past fiscal year, to the end of July 2023.



"To maximise streaming revenue for artists, our priority is to increase the economic value of music and reset the conditions in terms of allocation models. We are proud to return to this issue of streaming reform with our 10 step plan to achieve a market that is fair and diverse. IMPALA's Friends also make a vital contribution to IMPALA's work, allowing us to develop deep relationships with key partners".

HELEN SMITH, IMPALA EXECUTIVE CHAIR

"One of the highlights of the year was our deep dive into AI animated by CMU. The independent sector embraces AI applications and is determined to lead the debate about how copyright issues are addressed effectively. As Chair, it's crucial to me that we are ahead of these issues and embrace the opportunities as well as take a stance on copyright."

FRANCESCA TRAININI, IMPALA CHAIR



NEW BOARD STRUCTURE

This year the organisation underwent a structural revamp due to increasing red tape for non-profit structures. We now have a four person technical board of directors to significantly reduce administrative requirements for members. At the same time, the current board became the executive board and is responsible for strategy without the members being directors. In practice the new administrative board will take care of governance and administrative matters, with four people including our Executive Chair Helen Smith, Geert de Blaere (BIMA) our treasurer, plus Silvia Montello (AIM) and Jörg Heidemann (VUT).

IMPALA's committees, working groups and task forces also contribute to IMPALA's work and include:

- **Central and Eastern Europe (CEE) group**
- **Collecting societies committee**
- **Copyright & performer committee**
- **Digital committee**
- **EU projects committee**
- **Equity, diversity and inclusion task force**
- **Friends working group**
- **Emerging tech working group**
- **Management committee**
- **National association network**
- **PR and awards committee**
- **RAAP working group**
- **Streaming reform working group**
- **Sustainability task force**
- **Touring group**
- **Vinyl pressing group**

NEW TEAM MEMBERS

The IMPALA Secretariat has evolved further following Didier Gosset's departure in September 2022 and the arrival of Rory Brown as Communication and Project Assistant. We hired a new Membership and Project Coordinator Nastasja Prevost to take over from Lucie Jacquemet, who left IMPALA at the end of July. We thank Lucie for all her dedication over the past four years and wish her the best of luck in making music professionally while travelling.

OUR VISIBILITY IS GROWING



4,900



2,300



2,000



3,900

FOLLOWERS

THIS YEAR WE FOCUSSED ON

REFORMING OF STREAMING - REVISITED

We released an update of our 10 step streaming plan (see the [full plan](#), [infographic](#) and [statement](#)). This followed a two-month review process launched on the two-year anniversary of our [first plan](#) (released in March 2021), and a [renewed call](#) for industry collaboration to grow the streaming market, address fairness and power investment. The plan builds on our work from 2021 and calls for increased subscription prices, fair digital royalty rates for artists, bespoke deals for fans, as well as other proposals for a fairer, more dynamic market. It also looks at the evidence that we didn't have back then - in particular, the decline of value attached to the master rights.



REMUNERATION - PARABELLUM

Our raison d'être is to maximise revenue for our artists and we continue to call out proposals we believe are counter to this. We oppose requests from performer groups for a "tax for performers" on streaming (also dubbed "equitable remuneration"), which has made its way into some legislations (see for example [Belgium](#)). This remains a key point in our updated streaming plan and we seize every possible opportunity to raise its recommendations. The European Parliament is also discussing a report on this, and we are meeting with the relevant officials to raise our concerns. Alongside this, there is legitimate concern that models like so called equitable remuneration would negatively impact the diversity of the market. As detailed in IMPALA's annual equity, diversity and inclusion report from October 2022 in a section entitled "[Cutting the digital pie – what is equitable?](#)"

TOWARDS GREENER FOOTPRINTS

After having launched our bespoke carbon calculator in April 2022, the summer saw the launch of our latest EU-funded project, IMPACTS. This project built new climate literacy capacity for independent music companies in six countries across Europe to help them lower their carbon footprint. The project ended in April 2023, with the release of a report outlining a framework for sector standards. Throughout the year we continued promoting the uptake of our bespoke Carbon Calculator, including the #WeMeasureTogether campaign ahead of COP27. The data in the calculator allowed us to release the first report with insights from independent labels and set up a trajectory for future reports. Members are invited to sign up to the tool here and start measuring their footprint today if they haven't done so already!



REPORTS

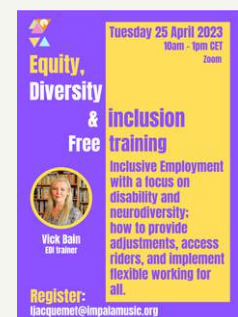


TRAINING



STEPPING UP ON EQUITY, DIVERSITY AND INCLUSION

Our work to promote a more equitable independent music sector continues with trainings on inclusive recruitment and inclusive employment, and the publication of our second EDI annual report, in which a special contribution by Ben Wynter looks at the issue of so-called “equitable remuneration” in the music sector. IMPALA honoured Women in CTRL with our Changemaker Award and as part of the European Diversity Month, we spotlighted the work of our members and friends, including the launch of MEWEM Germany, which inspires other members. This year was also marked by the sad loss of the great Juliana Koranteng, journalist and media specialist, host and curator of our 20MinutesWith podcast series. Her life and legacy were honoured by IMPALA on International Women's Day.



REINFORCING EUROPEAN COPYRIGHT

In 2019, the EU adopted its copyright directive, to strengthen and harmonise copyright across the region, with support from IMPALA. Fast forward 4 years later, there are three countries left to implement the directive. We're monitoring that closely, and where it has been implemented, we also need to make sure it's being done in the right way. Coordination with members on the ground remains crucial for that (see for example our reaction to last year's Belgium's proposal to include ER into the law [here](#) and [here](#)).



LICENCE TO GEO-BLOCK

Geo-blocking, in human terms, is basically the system that allows music (and other) services to direct users to the platform corresponding to their country of residence. This is important for labels given the territorial nature of exclusive licences. The topic was back on the EU agenda this year and although music is not the main target so far, we are actively working to contain any push in this direction.

REGULATING DIGITAL

We also contributed to the development of the EU's new digital rules through the Digital Services Act (DSA), a horizontal regulation applying across the online world. As part of coalitions, we looked to ensure the legislation went in the right direction for rightholders. The DSA creates additional obligations for digital services and will start applying in 2024. A separate piece of legislation, the Digital Markets Act (DMA) specifically regulates large online platforms, and will be fully applicable by early 2024.

RAAP — FIXING AN ANOMALY

When it comes to unintended consequences, the EU RAAP ruling wins the prize (see our statement [here](#)). We've been working hard all year long to try and get the anomaly created by this ruling fixed, while also making sure countries like Germany and Spain can continue their current practice, as well as France. Things are progressing, although not as fast as we'd hope, but you can count on us to keep up the pressure.





Another big topic at EU level is AI, where we have the honour of entangling 4 proposals: an AI Act, an AI Pact, a Code of Practice including AI, and an AI Code of Conduct – EU lingo at its finest! In parallel, we joined a coalition calling for meaningful transparency obligations on AI systems in the framework of the AI Act. AI was also the focus of our brainstorming session with the IMPALA board in June, animated by CMU.

MAXIMISING DIGITAL OPPORTUNITIES

Our digital committee continues to work hard to help us stay ahead in the digital market. As well as meeting services, we pilot the One Step Ahead project with CMU ([sign in or create an account](#) on our platform to access our reports etc) as well as our brand new Strategic Primers project in partnership with Music Ally, which helps labels maximise streaming opportunities (see our first primer on Spotify [here](#)).

We're of course working on AI ourselves. We joined the Human Artistry campaign initiated by our sister organisation A2IM, which calls for seven core AI principles to be respected. Our digital committee coordinated the preparation of a briefing by CMU ahead of our brainstorming session at our last board which was dedicated to this topic, as is our latest One Step Ahead report.



FROM METAVERSES TO EMERGING TECH

AI is just one example of fast-evolving technologies which independents need to be able to identify, research and discuss way before they break out, to remain in control and maximise opportunities. This is why IMPALA's Metaverse group evolved into an "Emerging Tech" group, looking more broadly into technological developments and related opportunities that are coming into fruition, before they are widely used.

MAKING FRIENDS

IMPALA welcomed new friends this year on top of YouTube and Spotify, including the tech company [AudioSalad](#), trade association for the film and music sector in Austria [FAMA](#), and rights management expert [Reprtoir](#). Our newest friend is [Lissen IS](#) an interactive all-in-one interactive music platform.



AWARDING TALENT



IMPALA's [100 Artists to Watch](#) in partnership with YouTube returned on the 21st March 2023 covering 30 countries and over 35 genres. Check out our [webpage](#) with a card on each artist and the playlists. You can also listen to a playlist of all 100 [here](#). IMPALA also continues to be part of the steering committee of the Music Moves Europe awards – the EU prize for music. The winners were announced at ESNS (Groningen) on January 19th. You can find the [full press release](#) on our website.

CREDIT WHERE CREDIT'S DUE

In September 2022 we honoured both Norwegian national association [FONO](#) for their [40th anniversary](#) and ex-IMPALA Communication and Network Director [Didier Gosset](#) for 14 years of [dedicated work](#). In April 2023, IMPALA also paid tribute to the late [Tony Duckworth](#) at [MENT festival and conference in Ljubljana](#) for his remarkable career in music developing the independent label network in the Central and Eastern European region. Our last Outstanding Contribution award was given to [\[PIAS\] Co-founders Michel Lambot and Kenny Gates](#) for the group's 40th anniversary in July 2023. As mentioned above, we honoured [Women in CTRL](#) with our [Changemaker Award](#) as part of European Diversity Month.



A NEW EUROPEAN VISION FOR TOURING

A NEW EUROPEAN VISION FOR TOURING



We've been coordinating the work of a coalition with other European music stakeholders representing musicians, artists, independent labels, managers, music venues and export offices to release a joint letter to member states. Entitled "A New European Vision for Touring", we raise specific concerns around the issue of mobility, consequences of covid and increased costs of living. Back in February, IMPALA also joined a coalition of cultural organisations in a call against an increase of US visas for artists.

GETTING VINYL BACK ON THE RIGHT TRACK



We continue to build our understanding of the manufacturing sector and are working on developing a broad vision to promote vinyl. We have also been talking to the Vinyl Alliance which represents both retail and manufacturing groups.

UNITED WITH UKRAINE



The war in Ukraine continues, and so does our support to important initiatives that help with the situation, which we keep on promoting. We also released a podcast dedicated to Music Saves UA (available here).

COLLECTING SOCIETIES



Our collecting society committee continues discussing local developments, court cases and important industry initiatives such as RDx and DDEX. We are currently refining the results of our collecting society survey, for which we received 150+ responses.

IMPALA — NOW PRESENT IN 32 TERRITORIES

As of June 2023, IMPALA is officially present in 32 European countries, representing close to 6,000 music companies. Our delegates are working closely with key local representatives in the territories where a national trade association is yet to be established (Baltics, Greece) – a process we are hoping to see finalised in the next couple of years. See [here](#) for an overview of IMPALA's presence across Europe, which we are also expanding with another new association to join shortly. Watch this space!

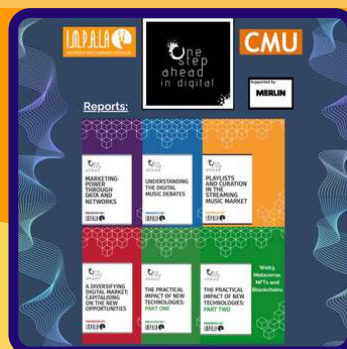


GROWING THE COMMUNITY WORLDWIDE

WIN's work is indispensable to grow the sector internationally and make sure IMPALA can cooperate effectively with other regions. IMPALA is represented by Geert de Blaere, Gee Davy, Francesca Trainini, Mark Kitcatt and Jörg Heidemann, as well as Helen Smith as observer. Under the spotlight: news that our community keeps growing continues as we welcome [two new national associations](#) in Paraguay and India!

15 YEARS OF MERLIN

2023 was the year Merlin [celebrated its 15th birthday](#). The organisation is going strong and so is our relationship. Our board members Michel Lambot, Horst Weidenmueller and Martin Mills help steer its strategy via Merlin's own board and Jim Mahoney continues to meet frequently with our digital committee to discuss all things digital. Last but definitely not least, Merlin sponsors key IMPALA projects including [One Step Ahead](#) and [Strategic Primers](#), with news of a third collaboration to be announced soon. A big thank you for all their support.



THANK YOU

We would like to thank all our members, friends and partners for their ongoing support during the year. This is what makes our work possible. Thanks also to all of our board, committee and task force members who help the organisation to lead on key issues across the music sector in Europe.

We look forward to dealing with the new priorities at our September AGM and board meetings at the WAVES festival and conference in Vienna. A special thank you goes to Alexander Hirschenhauser and Paulina Parvanov from VTMÖ along with WAVES for organising and hosting this great opportunity.

OUR MEMBERS



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