



Defying Concentration: The Struggle for Independence in Cultural and Media Dynamics



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A Volume from the Reset! Atlas

It is no secret that culture and media are under threat; finances being a daily struggle, buyouts always hang over independent cultural and media organisations. As there is no shortage of big private groups buying several cultural and media structures—from concert halls to newspapers to labels or podcast producers—, it is crucial to alert on these dynamics of concentration to better counter them. Raising awareness on the chaotic impact that these dynamics can have on the diversity and pluralism of the cultural and media voices is the main struggle led by Reset!.

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Editorial

Reset! Network:
An Age of Alliances

Europe's cultural landscape has entered a phase of transition, the harbinger of a new era. This break with the past, which took a tangible hold around the time of the global pandemic, reflects not only the difficulty of leaving behind the codes and social fabric of the 'cultural world as we knew it,' but also the yearning to look ahead to a new horizon in a context marked by accelerating climate change, ultra-violent geopolitical upheavals, and the mounting sense of conflict, even within democratic societies.

A polarised and weakened common perspective

Culture has entered a period of **doubt**, of uncertainty, of feverish introspection about its meaning, its generational misunderstandings, its many tensions, and about the new forms of mistrust that it had previously overlooked.

The pressure weighing down on culture as a result of the paradigm shifts inherent in its day-to-day deployment is just as crippling: **radical transformation of our relationship with work**, new forms of mobility, reassessment of spaces and territories, the evolving role of mediation, upheavals linked to the rapid pace of technological development and the countless ethical questions it spawns.

Culture is confronted with the many issues that are on a head-on collision course with society, fuelling polarisation and the **growing radicalisation of interactions, leading to a breakdown of dialogue, of the shared perspective, and of the collective adventure**, complicating and eroding culture's primary mission, which is to open minds, nurture dialogue, create conditions conducive to listening and interacting with others.

The threat of authoritarianism, the threat of concentration

Culture is under pressure from its social context and from the sense of "permanent crisis" that pervades our age. But it is also, more than ever, intimidated by its economic and political environment. More than ever, culture and the media are victims of **full frontal attacks from authoritarian regimes that**

deny and sometimes flout their artistic, cultural, and editorial independence. More than ever, independent culture and media are struggling to survive in a hyper-concentrated competitive world, where the growing power of the web, publishing, media, or music industry giants means shrinking margins of manoeuvre for pluralism and diversity.

Independent cultural ecosystems are fragile and under threat in many parts of Europe. Yet they are essential to democratic and social vitality, in particular to equip up-and-coming generations for the transformations our world is screaming out for: capacity for action and transformation, social and environmental responsibility, the fight against discrimination, pluralism and diversity, safeguarding freedom of creation and expression, strengthening media education, inclusion, regeneration, equal access to culture and the media, but also access to their production.

Forging new alliances

Confronted with these challenges, the turmoil of our times, authoritarian regimes and the growing concentration of capital in the culture and media sectors, **a strategy of massive cooperation is held up as the only possible response.**

It has become not only strategic, but imperative, to connect the players, foster the sharing of resources, knowledge and tools, promote collective intelligence and the forms of governance that encourage it, **work in networks and join forces.**

The time has come to imagine new ways of forging alliances between cultural players and independent media, but also with **all those working in the general interest**, particularly in the public sector in the fields of education, youth, the media, and health: the public broadcasting service, universities, local authorities.

This is what the Reset! network is all about. It endeavours to adopt a Europe-wide, non-sectoral approach to bring together cultural structures and independent media, but also to bring on board general interest resource hubs (Consentis, Black Artist Database, Observatoire des politiques culturelles, ACT RIGHT, and others), as well as **local authorities willing to support** the movement and serve as testing grounds for new practices (City of Lyon, City of Brussels).

The Reset! network brings together cultural structures and independent media to give them a platform to get better acquainted, enter into dialogue, work, and act together.

Common atlas

The Reset! network is doing just that, working **from Budapest to Lisbon, from Kyiv to Prishtina, from Amsterdam to Naples**, to bring together cultural structures (concert halls, festivals, publishing houses, labels, etc.) and independent media to give them a platform to get better acquainted, enter into dialogue, work, and act together. To build their common approach to transformation, these 85 organisations first focused on their local area and local issues: for just over a year, dozens of workshops were organised across the continent to **take the pulse of independent European cultural**

ecosystems.

Today, the time has come for an initial pooling of this feedback. This is the purpose of this atlas and its volumes, built collectively around eight themes that emerged during the year's meetings: "Independent culture in times of adversity", "Ecological commitment in the independent sector", "Enlarging communities in culture: the need for common spaces rooting in independence", "Imbalances in territories representation: independent structures to counterbalance a hyper-centralised cultural and media field", "Connecting to the youth: maintaining intergenerational links, enhancing emergence", "Creating and preserving safe spaces: diversify, include and raise awareness", "Decentralising digital power in culture: let's talk about MAGMA alternatives", "The concentration or independence antithesis".

This material, which **captures the zeitgeist and the changes taking place in the cultural sector**, will serve as the foundations for our advocacy and transformation tools. A few months away from a high-risk European election, and in a context where it is in serious danger of disappearing from the programme priorities, the Reset! network and its members will take it upon themselves to highlight the essential role of culture, the media, their independent ecosystems, and their artistic and editorial integrity, in this period of essential social and democratic reconstruction that has only just begun.

February 2024

Editorial

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Under their opinion

As economic power becomes increasingly concentrated in the hands of a few mega-corporations, the vibrancy and diversity of our cultural and media landscape are at risk. This column aims at shedding light on the challenges faced by independent entities in an environment dominated by giants, exploring the potential threats to creative autonomy, diverse perspectives, and the very essence of a flourishing cultural and media ecosystem.

Threats and Struggle for Cultural and Media Independence

Across Europe, cultural and media structures are increasingly being concentrated within private groups with a monopoly position. According to Reporters Without Borders, the situation in Spain in 2023 is such that the public service and two private groups share more than 75%¹ of the audiovisual market. In Estonia, “media ownership is concentrated and can be considered an oligopoly.”² In Serbia, “media concentration is a new cause for concern.”³ In Albania, “a large part of the media market is concentrated in the hands of four or five companies.”⁴ The Hungarian market is “highly concentrated” within a foundation “which groups together around 500 national and local media,”⁵ while in France eight billionaires and two millionaires account for 81% of the circulation of national dailies, 12% of that of regional dailies and 95% of that of national general-interest weeklies⁶.

A creeping and insidious dynamic

The phenomenon of concentration at work in the European media sector is being extensively documented. Economists, historians, and sociologists are among the many sounding the alarm bells⁷ over this monopolistic

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trend, one that is already leaving in its wake a trail of devastation on democratic landscapes. The erosion of pluralism and editorial diversity, the extinction of dissenting voices and checks and balances, the breakdown in the bond of trust between the press and the public, interference that runs counter to any vision of the general interest... These capitalist movements have demonstrated their toxicity time

1. <https://rsf.org/en/country/spain> - 2. <https://rsf.org/en/country/estonia> - 3. <https://rsf.org/en/country/serbia>

4. <https://rsf.org/en/country/hungary> - 5. <https://rsf.org/en/country/spain>

6. Mathilde Roche and Marie Thimonnier, « Est-il vrai que “90% des grands médias appartiennent à neuf milliardaires” ? » (Is it true that “90% of the major media outlets are owned by nine billionaires?”), *Libération*, February 27th, 2022.

7. From Julia Cagé in France and Edwin C. Bake in the United States to the NGO Reporters Without Borders world-wide. *Libération*, February 27th, 2022.

and time again. So much so, in some cases, that legislators have been forced to regulate to avert the worst. At European level, this was the case in 2023 with the Media Freedom Act, designed to protect media pluralism and independence within the European Union.

Where does that leave the cultural sector? As a more recent development, it is less well documented⁸, yet the dynamics of concentration are just as worrying. In many ways, it echoes the threats facing independent media. This is what prompted the Reset! network, from the outset, to take up their causes alongside those of independent cultural organisations. After all, there is no real difference between buying a festival or a publishing house and buying a press publication. Often cloaked in good intentions, the act itself adheres to the same economic principles, the same rationale of influence and soft power. In 2023, this predation can be seen across the board. In the festival sector, with five major industrial groups holding capital interests in around 150 festivals according to a study⁹ by Matthieu Barreira and Emmanuel Négrier; in publishing, where “concentration has never been so high”¹⁰ according to historian Jean-Yves Mollier; and in the film industry, where concentration “is causing the balance of power to weigh in favour of the major distribution companies on the one hand, and the major operating companies on the other.”¹¹

While the phenomenon of concentration is frequently analysed in the field of industrial economics – as an instrument of capitalist manoeuvres – it has never been more urgent to highlight the ravages it wreaks on the cultural and media sectors. Homogenisation of supply, standardisation of creation, steamrolling of art... To bow to economic pressures, there is a strong temptation to repeat the same formulas that have proven their worth to sell a particular book, film, or concert. At the same time, this approach hampers the emergence of new voices and emerging talent, whose chances of exposure are effectively limited by the fact that cultural activity is primarily driven by profitability. By applying forms of domination – such as exclusivity clauses in the contemporary music sector – some companies seek to stifle all forms of territorial competition, hindering the development of independent “second-tier” players.

forces

Joining forces and raising the alarm

What can we do about this worrying trend? The first step is to raise awareness. That is what this volume of the Reset! Atlas sets out to do with its focus on the issue of concentration. By giving a platform to a diversity of voices and approaches, it aims, like other existing initiatives¹², to help raise the alarm on a phenomenon that poses real threats to cultural and artistic diversity in Europe.

The second step is to work together and this is also the purpose of this atlas, to serve as a European network, bringing together a diversity of independent structures to join forces in response to what they consider to be dangerous trends. “We do not benefit from the protective tutelage of the State, nor from the financial support of the major groups: we are alone, so we have to act together,”¹³ declared L’Appel des indépendants, the appeal issued by 1600 French independent cultural and media structures of which Reset! is an extension. Today, more than ever, this need to create alliances, to cooperate and to network, at national¹⁴ or transnational level, is emerging as one of the keys to navigating a cultural landscape

that is under pressure from these major groups. Faced with vertical integration strategies controlling the entire cultural and media value chain – from artistic production to tour management, from the ownership of venues to ticketing solutions – the strength and agility of independent structures lies in their ability to cooperate and to acknowledge their interdependence.

Raising the alarm. This is one of Reset!’s advocacy objectives, to ensure that these realities are heard by those in a position to halt a relentless march that appears unstoppable. Our mobilisation can put the spokes in its wheel through the strength of dialogue and our collective ability to rally around this issue. In the face of uniformisation, monopolisation, and standardisation, it is crucial to remember that the independent cultural sector’s response revolves around the diversity of its voices, the pluralism of its approaches, the links it forges, the vision of the general interest it upholds, its ability to “shape the societal value of culture” and the collaborative dimension it defends¹⁵.

joining

8. Even if studies exist, such as that by Matthieu Barreira and Emmanuel Négrier for the festival sector: Matthieu Barreira and Emmanuel Négrier, « Main basse sur les festivals en Europe? » (A stranglehold on Europe’s festivals?), *Nectart*, 2022/2 (N° 15), p. 100-115.

9. Matthieu Barreira and Emmanuel Négrier, « Main basse sur les festivals en Europe? » (A stranglehold on Europe’s festivals?), *Nectart*, 2022/2 (N° 15), p. 100-115.

10. Jean-Yves Mollier, *Brève histoire de la concentration dans le monde du livre* (A brief history of concentration in the book trade), Libertalia, 2022.

11. Damien Rousselière, « Concentration de la diffusion du cinéma et diversité culturelle : quel rôle pour les réseaux indépendants ? » (Concentration of cinema distribution and cultural diversity: what role for independent networks?), *post-scriptum*, 2004.

12. Like L’Appel des indépendants (the Call of the Independents), of which Reset! is an extension, which brought together up to 1,600 independent organisations in France to tackle this issue during the Covid-19 pandemic, or the *Vous n’êtes pas là par hasard* (You are not here by chance) campaign run by the SMA trade union in France.

13. <https://appeldesindependants.fr/appe/>

14. This is the case, for example, in Slovakia with the Anténa network, which brings together “cultural centres and organisations, which operate in the field of independent arts & culture of Slovakia,” or in Moldova with the Coaliția Sectorului Cultural Independent din Republica Moldova.

15. Carlotta Scioldo, « Prospective sur les réseaux culturels : avons-nous tout saisi ? Un aperçu des réseaux européens d’organisations culturelles et créatives » (Prospective on cultural networks: have we got it all? An overview of European networks of cultural and creative organisations), *Association Marcel Hicter pour la Démocratie Culturelle*, 2023.

Under their light

Through a collection of insightful articles, we navigate the intricate landscape where resilience meets creativity, showcasing the inspiring endeavours of those challenging the pervasive threat of economic concentration. From analyses to accounts, this compilation sheds light on the various ways individuals and organisations are forging and maintaining pathways toward independence. This is an exploration of the ongoing struggle for cultural and media autonomy.

Media independence

Fewer independents in the UK and Germany

Whereas in France there are mainly independent music press publishers, most German and British titles have been bought up by media groups. In the UK, publishing majors Mark Hallen, Future Publishing LTD, Metropolis and Anthem Publishing own more than half the music press titles. In Germany, the most widely distributed titles are owned by groups such as Axel Springer SE (Rolling Stone Deutschland, Metal Hammer), Holger Stratmann (Rock Hard) or Piranha Media GMBH (Riddim, Classic Rock), with independent publishers being more present in non-rock or 'niche' aesthetics.

Source: CNM, *Panorama de la presse musicale en France* (Overview of the music press in France), Study January 2023

Media Ecosystem and Plurality of Independence

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While the massification of fake news has already revealed their ability to destabilise democracies, the concept of alternative fact has finished blurring the rules of the game between citizens, the media, and multiple sources of information – in the broadest sense – that have emerged on the web and social networks.

The level of trust that French people have in the media is deteriorating every year, so that today 54% of French people (according to the Kantar - La Croix barometer) believe that “we must be wary of the way in which the major issues of the media are treated”. This figure, which indicates that more than half of our fellow citizens doubt the organisations and people supposed to bring them elements to know what is happening in the world, understand, make decisions, is a disaster for our profession and a major problem for democracy.

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It is also a disappointment for all those who do this job with passion and whose independence is however put in doubt without evidence or discernment. Information is at the heart of what makes our society. This decline in confidence in journalists cannot be analysed outside of a general context of political and social tensions around the world. Relations with the media go wrong when relations with democracy go wrong.

In this particularly dense, fragile and anxious context, how can we try to rebuild trust between the media and citizens? Programs, content, and technologies to combat fake news are multiplying and that's good. However, the return on these colossal investments (given the often-delicate financial health of the media) is marginal compared to the size of the phenomenon. In designing and disseminating these initiatives, they will tend to reach people less likely to be exposed to fake news. Worse, for some people, the fact that it is denied by the media reinforces the credibility of fake news.

It is not only by doing what they know how to do – information, including investigation, reporting or the fight against fake news – that the media will regain the trust of citizens. It is also by explaining better who they are and how they work. The media is most often discredited by suspecting their independence. The same survey indicates that “59% of French people consider that journalists are not independent of political pressure and power”. That is why it is necessary to explain how an editorial board organises its independence.

Media and information **- Independence is one** **of the first criteria** **for reliability**

Let us quickly note that no other form of business is expected to be independent. A company depends on its suppliers to provide it with what is needed to manufacture a product or service that it markets to its customers, sometimes through distributors, of which it depends just as much. It is generally among the regulated professions, in the non-market sector and in the political field that one is interested in the independence of associations, non-governmental organisations as well as the agencies and administrations of the State. We rightly believe that the mission of these families of organisations, which often aim to deliver a public good or provide a public service, must not be distorted or directed by investors with other interests.

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To be interested in the independence of the media is therefore to recognise that the media are not economic actors like the others, that what they produce – information – has a public good value and a social value.



↑ @ Benjamin Sabbah

To be interested in the independence of the media is therefore to recognise that the media are not economic actors like the others, that what they produce – information – has a public good value and a social value since information is the heart and soul of our discussions, that it is the basis of many of our decisions in the personal and professional aspects of our lives. To be interested in the independence of the media is also certainly to be vigilant and demanding in terms of the quality and impartiality of the information broadcast there.

With the term “the media”, we often include all media (television, radio, newspapers and magazines, the web), hundreds of businesses of a very different nature, object and size, and at least 35,000 journalists. The job of a newscaster and a video game journalist has little to do with each other, and yet both can be pressured about the treatment of the information they broadcast. Whether you are a citizen or a consumer, it is obviously legitimate to wonder whether what you are looking at or reading is true. Whether you can trust a face or a signature and the brand of the media that is affixed somewhere on the screen or paper.

In reality, there are many opportunities for a third party to influence editorial staff. We cannot say that all the media are independent in France today. In fact, some media no longer have a newsroom, or almost. Yet, the vast majority of the media have put in place rules that guarantee and require journalists to do their work with ethics. And the overwhelming majority of them do, no doubt.

Media and editorial **independence - Clarifying** **the term to complicate** **the debate**

Given the diversity of models, each case deserves a little attention. In order to try to examine what independence a media must establish in order to protect the quality of its information, it is necessary to ask successively some questions about their legal form, their shareholding structure, their types of financing but also their distribution.

Who owns the media?

What is the link between the shareholder and the editorial staff?

Does the media examined belong to the State, a group of media, an industrial group, its founders – journalists or not – its readers, a fund, an association? Spontaneously, we can say that some form is more protective of the independence of an editorial board, such as membership of an association, a fund or its readers, than another that would be more harmful.

In some cases, the shareholder has a direct influence on the media's editorial policy. When the media is run by its founders, themselves journalists, it seems quite logical. When the media belongs to a group or a State, the independence of editorial staff can a priori raise questions. In some cases, the shareholder (private or public) expresses contractually and organisationally his non-intervention in the editorial policy of his medium, to preserve its value. He may decide in collaboration with the editor to add vigilance tools such as a supervisory board. Or, on the contrary, he can refuse to allow editorial teams to implement a code of ethics and cause entire editorial teams to resign when they no longer feel free to work. To examine more closely the reality of the independence between the shareholder and the editor, one may wonder whether the holder of a media can or has already imposed a subject, had a subject or an article deleted, or dismissed a journalist. We can check whether he has a political agenda by comparing the speaking time allocated to a particular party and his involvement in an election campaign. We can also see if the media covers its shareholder (private or public) and in what terms.

Are the information verification and validation processes clear and respected? Is there a code of ethics? Are there safeguards when errors or breaches are identified? Are there procedures to deal with them? Have they already been applied?

How does the media finance its activities?

Is the media financed by its subscribers or by donors, by its individual sales, by a tax, by advertising only, by a mix of all this, by aids and subsidies, by commercial agreements with platforms, search engines and social networks?

Very few media are profitable only because of their readers or donors. These media are most often media recognised for their investigations, their exclusive information or their specialised subjects who also have shareholder structures to protect the independence of their editorial staff.

The budgets of the public audiovisual media are voted each year and defined in the framework of multi-year contracts with the French State. The election of their CEO is based on a project reviewed by Arcom (formerly CSA) – The Regulatory Authority for Audiovisual and Digital. Even if we do not imagine that the “wise” can choose a candidate who does not have the favour of the government, the State in France is more interested in the budget than in the editorial line of these media.

Most media have adopted a mixed model based on advertising revenues and subscription revenues. When a company or an institution – the advertiser – finances a significant proportion of a media's activities, one may wonder whether the editorial staff will not be self-censored or prevented from being able to investigate. In addition, an advertiser's threats to a medium through the freezing of its advertising budget are regularly revealed in specialised or investigative media. If it is not illogical to expect a company to try to put pressure on a media outlet, we have to ask ourselves whether those media outlets have abandoned their investigation or not to disseminate information. Hence the importance of checking whether the media in question is authorised to cover its advertisers, or not, and in what terms. Hence the importance also of the diversity of securities and especially of their financial health to invest in the survey and possibly to do without the advertiser whose pressures are proven, as was the case for HSBC at the time of the Swissleaks in 2015, or, it seems, for the Vivendi group via its agency Havas after the publication of two investigations in Le Monde in 2014, or again with LVMH joined by other brands after Libération's provocative front page and article on Bernard Arnault in 2012. These reflections continue with diversification activities – particularly in terms of event co-production and the creation of content such as native advertising or brand content for labels – and media partnerships with platforms. In various capacities (launch of new products, financing of the fight against fake news), platforms have become very important actors for the financing of many media. Although GAFAM clearly indicates that it is not involved in the editorial policy of the media, the platforms fund certain media to create news products specifically to meet their needs and those of their users.

How is the media distributed?

We do not necessarily know it, but it is not the news vendor that chooses the titles he presents to his customers in his newsstand. In order to guarantee citizens access to the plurality of views and political, economic and other analyses, the law requires that these newsstands distribute all media in an impartial manner.

These constraints, very strong, for a distributor (not to choose his traffic, not to be able to negotiate with his suppliers) do not exist on the web. Last year, only 23% of a media's online audience was live; and 77% of its audience came from search engines, social networks, and to a lesser extent from aggregators, mobile alerts, and newsletters.

Given this proportion, media dependence on platforms seems vital to draw traffic to their site. As such, the technological and human investments made by the media to be well indexed by search engines and active on social networks are colossal. On a daily basis, the editor of an article for the web cannot ignore Google when he is about to validate his title and click on “publish”. However, platforms remain the only judges of their SEO policy, content visibility, and partnerships can change overnight.

The “neighbouring right” as it is coming into force between platforms and publishers will reinforce this dependence between the world of tech giants and that of press publishers in Europe. Calculated on the basis of the usage performance (audience, clicks, page views) of media content in search engine and social network services, they will pay a fee to publishers called “neighbouring right” of copyright. Logically, it is the media that have been able to invest massively in their technological tool and that best respect the codes defined by the engines and networks to be present on the platforms that will be the most remunerated and that will therefore

be able to reinvest... leaving the plurality of the media (and the diversity of their investment capacity) on the roadside.

Marking independence

Every time we discover a new medium, we have to ask ourselves what measures it has put in place to protect its journalists from attempts to influence. Are the information verification and validation processes clear and respected? Is there a code of ethics? Are there safeguards when errors or breaches are identified? Are there procedures to deal with them? Have they already been applied?

Various projects to certify or label the media have emerged in recent years. Will they be able to help rebuild trust between the media and citizens? All initiatives must be reviewed at a minimum. These few lines are intended to show some elements of the debate on the independence of the media. Information is a subject that generates so much affect that we often tend to confuse quality of information and editorial line; Any article that does not correspond to my vision of the world and its issues is biased or even misleading. The plurality of worldviews is resolved with the diversity of titles. The legislator tries to guarantee it through laws that set thresholds for holding media, direct and indirect aid, inventory of newsstands... All these rules remain largely to be invented on the Internet.

In order to be sure that one cannot be suspected of dependence on third parties, in theory a media company should not belong to a physical personality that is not a journalist or to a group that does not have only media, it should not be able to finance itself other than through subscriptions or donations, not resort to any State aid or subsidy, exclude any commercial contract with the platforms, probably finally refrain from publishing on social networks and proscribe its articles and videos from search engine results.

Media that meet all of these criteria do not exist. Those who meet the majority of these criteria and are beneficiaries can be counted on the fingers of both hands. They have every reason to congratulate themselves on that. Does this mean that all other media provide biased information to their readers? These few reflections may have helped us understand a little better why it is difficult to talk about the media and their independence in general. They do not aim to praise the profession and even less all the media, but to allow them to better orient themselves in the burgeoning panorama of the media, to consider some reasons that justify the differences in quality in the treatment of information of one or the other, and also to spare our expectations. For this reason, it seems to me, it would be interesting to use the term "independences" of the media in the plural to discuss this concept and its realities in a more peaceful way. Or even to propose another criterion, that of "transparency", to establish with our readers a "contract" which is based on more objective, stronger, and finer bases.

Resources

- **Barometer Kantar - La Croix**
<https://www.meta-media.fr/2023/01/28/barometre-kantar-la-croix-la-confiance-des-francais-dans-les-medias-remonte.html>
- **Digital News Report 2022:**
<https://reutersinstitute.politics.ox.ac.uk/digital-news-report/2022>

3 questions to Kajet

Bucharest, Romania

01. Can you introduce your structure to us?

Kajet Journal has operated following a micro-scale infrastructure ever since its inception, back in 2017. It comprises two permanent editors who are joined by a graphic designer for each edition of the magazine. Sometimes, a copy editor joins the editing process for the final proofreading session. In addition to this compact core team, every issue showcases the contributions of approximately 30 to 50 writers and artists, who are brought on board either through commissioned work or via an open call. The magazine is then printed in 2000 copies in Lithuania and distributed worldwide from London.

02. Why did you join the Reset! network?

A notable deficiency we have observed in both the broader cultural sphere and, more specifically, the publishing industry, is a need for a more robust sense of community. Upon learning about Reset!'s idea of a network, we were instantly hooked. In a way, a network aligns with the vision we've been striving to cultivate through our efforts at Kajet Journal and Dispozitiv Books: uniting researchers, writers, and artists hailing from various corners of the globe and spanning diverse disciplines, all united by a shared interest in what we've come to refer to as Eastern Europe. So, we immediately wanted to be a part of a necessary project.

03. How can the independent cultural and media sector present itself as a counterforce when facing massive monopolistic corporates?

The main danger that we seek to fight is the homogenisation of knowledge and art production. The way we try to do this is by producing and documenting alternative local knowledges in the plural, as well as by networking horizontally on a transnational level, against the vertical art canon and beyond the bounds of too much filtering from non-local institutions. Much more than this, it is independent entities like ours that can embrace niche audiences and allegedly fringe interests, as well as the possibility to freely experiment from a creative perspective. This is a privilege that big companies do not necessarily have. In fact, our project started precisely with the intention to counterbalance the way printed matter is scattered across the globe (usually from the West and about the West) and to show new perspectives coming from a both mis- and under-represented area.

KAJET

Podcast Scene

Troubles for the Italian Independent Audio Producers?

Anyone arriving at Rome's Fiumicino airport these days will find themselves standing before a giant whale skeleton. It's not evident from afar, but upon drawing closer, one perceives that around this sculpture by the designer, Marcantonio, there will be an "audioport", a place to listen to and enjoy audio productions. This derives from an agreement between Aeroporti di Roma and Chora Media, an Italian podcast company founded in 2020. On the other hand, anyone who debarks at Milan's central train station will find, on the stairs, in maxi format, advertising for Loud, the first social media app that claims to be based "on collaborative podcasting entirely Made in Italy", launched in February 2023, by Alessandra Faustini, from Brescia.

That may be why "bubble" is the word most often associated with the world of podcasting today in Italy. In financial terms, a "bubble" is when the value of a sector grows exponentially and becomes ever more fragile until it bursts. Maybe the Italian "bubble" of podcasting won't burst, but the state of euphoria surrounding the world of audio production is similar to the high after an evening sipping champagne. With lots of fizz.

Federica Manzitti

journalist specialising in culture and entertainment, after working for many years in radio she now devotes herself to print media and, in parallel, to podcast production.

Sticking with that metaphor, recent statistics suggest there's good reason to drink up. The Ipsos Digital Audio Survey found there were 11.1 million listeners in Italy in 2022, a good 1.8 million more than the previous year, with the most substantial increase ever recorded since monitoring of this sector began in 2019. Other countries already experienced this phenomenon three or four years ago, or even more, as in the U.S. But here, in this country of mild weather, where Vitamin D is bestowed naturally, and where one can choose from 8,300 km of Mediterranean coast and 11.4 million hectares of forests, the habit of finding entertainment via a pair of headphones took root only during the lockdown imposed by the pandemic.

Nevertheless, the Italian ecosystem of audio production was already in existence. A straggling group of impassioned pioneers and obstinate researchers, those now known as independent audio producers, lived and thrived amid almost total indifference. It is thanks to them that we now have what is called podcasting, that is, the enormous opportunity to package content

without the grids imposed by an editor (e.g., at a radio station), and to have it easily reach a potentially limitless audience of listeners. Those craftsmen of sound had few places to peddle their wares, which were initially called radio-phonics originals, audio stories or documentary radio. On RAI (the Italian national broadcasting network), minimal spaces were found for audio writing and creations that didn't fit into the traditional slots. The liveliest one was Pinotto Fava's Audiobox which, starting in the 1980's, spurred on independent productions even when it ventured into linguistic extremes. Then came smallish spaces for audio documentaries: Cento Lire and its heir, Tre Soldi, which has been on the air since 2010. Outside the confines of "Mother RAI", there was little more than Radio 24, a broadcaster linked to the financial newspaper Il Sole 24 ore, and Swiss Radio in Italian, abroad. A mouse of a world that has now become a pachyderm.

The lesson so often learned from capitalist enterprises has again come home to roost: big industry steps in where artisans lovingly planted the right seeds and want to hog the whole pie. It is not yet clear that it will succeed in doing so. Other voices have gathered round the straggling group of artisans: the listening public has grown hundredfold and modest media companies are sprouting like mushrooms after rain. For many independent audio producers, now is the time to reap the fruits of many years of hard labour, finally seeing the shekels roll in and a schedule bursting with consulting requests, engineering orders, financial proposals from name brands and government calls for bids nearing deadline. It's a prosperous and heady season, both for the old guard and for those suddenly discovering podcasting as a vocation. In 2021, there were more than 25,000 podcasts in Italy, and that number is exploding. Major audio companies, such as Audible, Storytel, and Spotify, have set up shop in Italy, and others are flocking in. The major names in print news media have opened their own media factories, such as One Podcast at GEDI – publisher of the dailies Repubblica and La Stampa – which claimed 14 million in streaming per month in 2022, or Il Post, which is broadening the community around its audio products. RAI has set up a web site for digital listening, RAI Play Sound, with the goal of "becoming a leader in the production and

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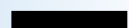


↑ Podcaster. Credits: Severine Queyras



↑ Johnny Faina during a live of the Villamara tour for the podcast C'è vita nel grande nulla agricolo?. © Federica Manzitti

“MIRP is an international network of independent producers that was born in 2015.”



distribution of original, totally audio content.” In the meantime, a few true independents, such as Radio Papesse, and its Lucia Festival, are expanding. All of these grand initiatives need producers. And that’s where the party comes in.

As at any party, however, there’s someone who is dancing but wondering if everything is as fun as it seems. “For an independent author, this is when a choice has to be made: whether to go for the money or work on a high-quality project,” said Jonathan Zenti, a twenty-something audio and podcast designer, a prize-winner in the U.S. with a Third Coast and the creator, among other things, of the felicitous series Problemi. “We have fought like lions for years to make audio popular, and never imagined that industry would come round to take advantage of it. I am thinking, for example, about design, and trying to come up with worthwhile content in an industrial context. I ask myself how to produce something that people will want to listen to ten or twenty years from now.” That topic is even discussed in an episode of his Problemi, an independent podcast that, in each edition, deals ironically but analytically with a subject that its author deems complex, ranging from how hard it is to say “no”, to how hard it is to find a parking space and, finally, with the difficulties of independent production.

Another producer in Italy who invented himself a new job is Carlo Annese, founder in 2016 of the Piano P Italian news podcast platform. He sees the “bubble” in a glass half full: “The number of listeners has grown, but there are few cases of dedicated listening because no one wants to hear something unappetising twice. If the first episode is not first rate, the audience goes elsewhere. Let’s take branded podcasts: In Italy, lots of companies went that route to say they’d done so, but without believing in it. Even the blog effect is wearing thin,” says Annese, “and in the news sector, there is little besides piece-meal reconstructions, with very few original investigations.”

“Patience” is the key word for Francesco Baschieri, CEO of Spreaker, a platform based in New York, with 4 million single listeners per month and a reach of 200 million, at the heart of which is his start-up that sprouted in Bologna in 2010. “Italy needs to learn the ropes, was the case in the U.S., and I estimate that it is about five years behind the curve, so there’s no big hurry. On our hosting app, during the pandemic, independent contents increased, and now we are getting advertisers and editors”, said Baschieri who, in March 2023, made subscriptions free for all creators. “It’s true that the business mindset in Europe is more conservative, but the consumer dynamics are comparable. High-quality productions will survive because the success of a podcast depends on

one’s engagement, and thus on the niche, not on a mass market.” Milan is surging ahead as the capital of Italian digital audio. This is patently evident to someone who, during the pandemic, left video production for audio work, such as Amedeo Berta, the creator of Strano Podcast and Pane e fantasmì: “We can see things really starting to happen here,” he says, “but I have no idea where they will end up.” This is also confirmed by those who have been in radio in Milan for decades, such as the producer, Fabrizia Brunati, co-author with Sara Zambrotti of A microfono spento, a handbook on radio broadcast producers’ careers in Italy: “We found in our research that, in Italy, there is no such thing as a set contract figure for a producer, not even in radio broadcasting.” Daria Corrias, in Rome, a writer for Tre Soldi, echoes that sentiment: “Our impression is that everybody is throwing themselves into podcasts but without really having their bearings. In this context, an independent audio producer can survive if crowd-funding (such as Patreon) takes root here. What’s missing is a long-term perspective and relevant training.”

au-

Given that, there are those who got training elsewhere, but who use the medium with uninhibited talent. In 2020, Johnny Faina, the pseudonym of Nicolò Valandro, launched two podcasts, Decameron and C’è vita nel Grande Nulla Agricolo?, a radio drama with strong hints of surrealism where curiosities such as lost dogs, mysterious lights in the sky, a ghost car and many other unexplainable events in the hinterland of Romagna take on a legendary dimension. “We had

started out in the theatre, and it was no accident that our first episode was live,” recounts Valandro, “and the project went round all of Italy with The Villamara Drive-in Tour. The feedback is really good, and some brands have shown up to jump on the bandwagon. They want to learn how to make money, but we are still UFO’s. We would obviously like to expand, but we have a truly unique product that doesn’t easily fit into the traditional moulds.”

Maintaining quality for success should be a natural tendency, but it’s not. Not in Italy. “For the time being,” says Faina, “we’re doing merchandising and making a go with live productions.” Italy’s situation, however, is not so unusual. In other European countries, the pluses and minuses are similar. This was discussed at the latest edition of MIRP in Leuven, Belgium, the meeting of audio creatives of which Zenti is one of the founders: “It’s an international network of independent producers that was born in 2015. We met in June after the break imposed by the pandemic, but the feeling is that 25 years have gone swiftly by. Things in this sector have changed greatly. You even find competitiveness and envy. The audio industry on a local basis has picked up the creative spirits. What we now need is a perspicacious sense of observation.”

In the meantime, there are things emerging that can serve as an intermediate stage between producers and sponsors. Such is the case of Podmaker, a platform that promises to “create connections between brands and podcasters to produce high-value content.” Curiously, the company, founded in early 2023, operates out of Naples, farther south in the country, and well away from what’s happening in Milan.



dio

Music Industry Giants

Live Entertainment, a Cash Machine

Nephtys Zwer

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Today, streaming has replaced recorded music as a source of income for creative people in the music industry¹⁶. Performing live at festivals and concerts is almost compulsory. In Germany, live music has become the locomotive of the music market, and online ticketing has grown accordingly.

Selling tickets online is a strategic advantage for those wishing to conquer this market, as is the case with CTS Eventim¹⁷. The example of the German ticketing and live entertainment giant gives us an idea of the dynamics of economic concentration in the music industry worldwide. Small players and independents find themselves powerless in the face of large private groups that use their financial clout to establish a monopoly position. The live music industry is becoming their cash machine.

Anyone interested in the phenomenon of concentration in the music business will find themselves lost in an inextricable network of subsidiaries and partners with related or competing activities, diverse and changing statuses and headquarters, and cross-shareholding models. Our infographic shows, in simplified terms, three facets of Eventim's strategy: its stranglehold on festivals, its policy of buying out or taking over competitors, and how, from its online ticketing business, it can roll out its services to players in the sector. This horizontal concentration (by absorbing the competition) is therefore coupled with vertical integration (with control of the value production chain) and diversification, with the management of artists and the support and marketing services offered to market partners and consumers (booking, marketing, sponsorship, etc.).

A discreet ubiquity

Today, the lucrative festival market is gradually recovering from the Covid crisis, which saw a mass cancellation of performances in 2020 and 2021. Although each festival has its own identity, there may be a single player behind this variety: in Germany, it's mainly Eventim. The group not only produces festivals, but also operates two major venues and expands all over Europe and the world.

The diversity of its activities means that it can easily absorb market risks and make economies of scale and organisation, for example by offering twin festivals or using the same venues for several festivals, such as the Weissenhäuser Strand on the Baltic Sea (Plage Noire, Metall Hammer Paradise, Rolling Stone Beach).

Following a similar logic of absorbing competitors, Eventim has bought out or taken a majority stake in several concert agencies, some of them renowned, such as Marek Lieberberg Konzertagentur. It has absorbed their portfolio of artists as well as their customers. This allows it to cover the field of classical music for example. Some of these agencies are dedicated to a single event, while others, like FKP Scorpio, manage dozens. In a veritable game of musical chairs, the same live music professionals can be found in all the arrangements, with no hesitation in moving from one competitor to another. This stranglehold not only stifles competition from players with less financial clout by preventing them from entering the market, but also has effects at all levels of artistic production. Among artists, the stars are treated better because they guarantee full venues, but all artists have to accept exclusive contracts for their tours and performances. Because they attract 'rising stars', the majors pre-empt innovations. The diversity of musical aesthetics is diminishing, as productions must satisfy as many people as possible. In a system designed to maximise profitability, seasonal staff are just

another cost factor, condemned to insecurity. At the other end of the scale, rising ticket prices are forcing consumers to give up small festivals. In the space of just a few years, Eventim has become the music industry's 'bouncer', leaving no room for independent creatives and distributors who don't want to join forces with this major. In a never-ending spiral, the group is consolidating its profitability and competitiveness. The only competition to be feared is that of large holding companies such as the American Live Nation, which also combines ticketing and live shows, and deploys exactly the same monopolistic tactics.

The winning ticket

Eventim has been able to build its empire on a technological advantage: online ticketing. While live entertainment generates its biggest turnover, it is ticketing that gives it the biggest profits, with over 200,000 events put on sale every year. Its ticketing system is even used by its main competitor, Live Nation.

Today Eventim is Germany's first and Europe's third-largest ticketing and live entertainment company. In 1996, the Konzertagentur Klaus-Peter Schulenberg bought the Munich CTS company. In 2000, it was introduced into the stock exchange. Today, its market capitalisation is close to € 6 billion. The group is also present in 15 countries through 34 companies. In 2022, it will have achieved sales of €1,924 billion, an increase of 372% compared to 2021¹⁸.

Eventim has also bought out its competitors in the ticketing sector. Its Frankfurt am Main computer centre manages all online orders, but the company also subcontracts from consumer distribution outlets. Here too, the platform, because it automates commercial operations, is killing jobs.

To be at the source of the value chain through a platform is to have control over the market. This explains the success of Uber, AirBnB, Booking, etc. Consumers,

16. Music is the second largest sector in the media industry, with live music accounting for a third of sales: <https://www.goethe.de/ins/mx/de/kul/mus/22407160.html>

17. The companies in this holding company operate under similar names, and we are keeping Eventim's name for the sake of simplicity.

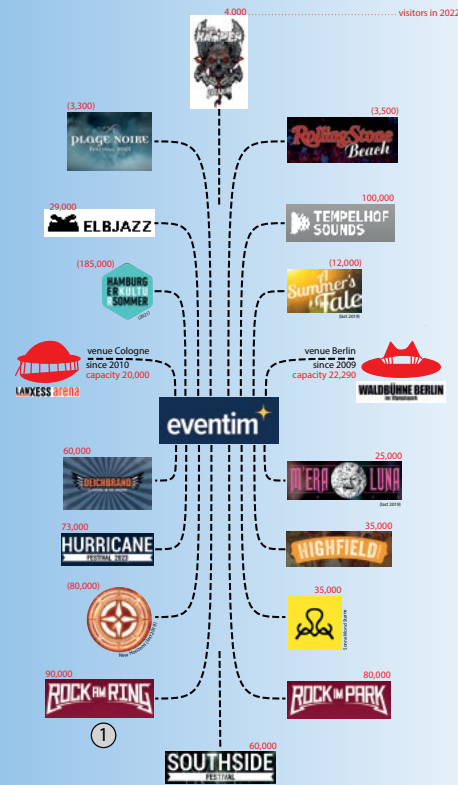
Cash machine

Concentration in the German music industry

The example of Eventim (live entertainment and ticketing)

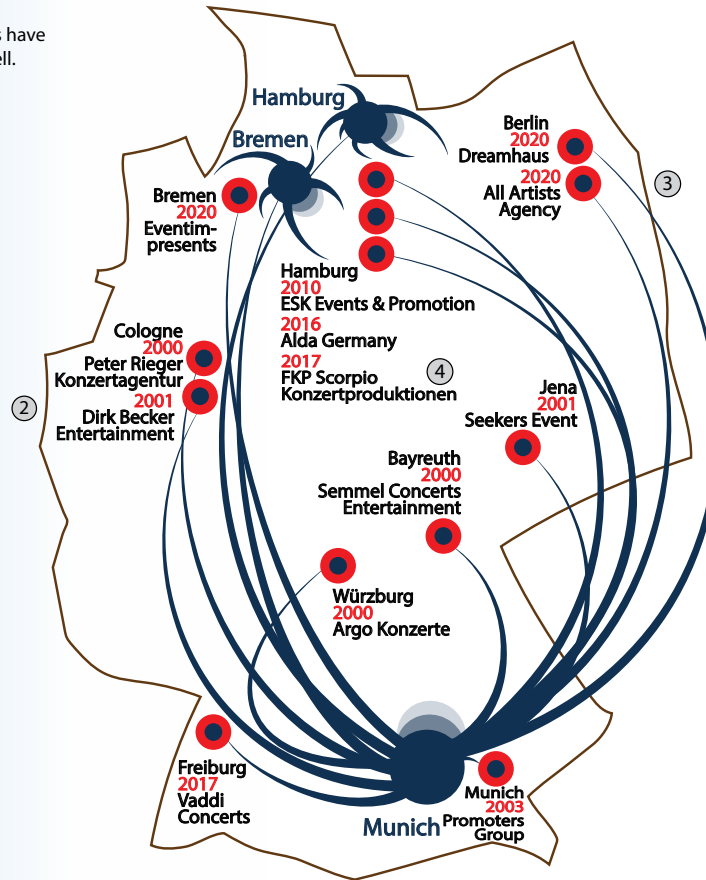
Germany has music festivals to suit all tastes, from rock and heavy metal to family events. Some of its more than 1000 festivals have been around for decades and you may know their names very well. You may think you're dealing with independent organisers, but a large part of them are run by holding companies, like CTS EVENTIM AG & Co. KGaA.

Fancy a festival?
You name it, we've got it!



sources: Eventim homepage and festival websites, figures 2022 by Festival Alarm (except those in brackets)
graphic inspiration: Matthieu Barreix and Victor Thebaud

1 Rock am Ring and Rock am Park are twin festivals: artists perform alternately at the two venues. Rock am Ring is the second biggest festival in Germany. The first is the Lollapalooza festival in Berlin (100,000 visitors), belonging to Live Nation Entertainment. The third is the Wacken Open Air (83,400 visitors) controlled by Superstruct. A regular weekend ticket for these festivals costs between €189 and €299. (source: Galileo.tv 2023)



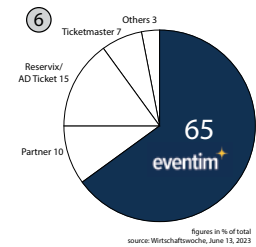
A purchasing offensive

CTS Eventim is a partnership limited by shares with its registered office in Munich and general partners in Bremen and Hamburg. Its activities are divided into a number of specific businesses. From the 2000s onwards, Eventim launched an offensive of acquisitions and takeovers of live entertainment companies. These companies operate festivals, tours and concerts. Today the network of Eventim Live, the entertainment division, extends across the world. This horizontal concentration eliminates competition. Independent operators are disappearing. For consumers, prices are going up.

2 In addition to their expertise and reputation, elder concert promoters (sometimes dating back thirty years or more like Dirk Becker Entertainment or Peter Rieger Konzertagentur in Cologne) have brought with them an impressive portfolio of international stars.
3 When antitrust regulations prevent a takeover, Eventim creates a new company and takes on the staff of the old one. This has happened to Four Artists Booking, a company founded in 2017 by the hip hop group Die Fantastischen Vier; in 2020, Eventim launched All Artists Agency with a majority of the agency's employees.
4 In other cases, the acquisition of a majority stake is authorised, as was the case with FKP Scorpio (turnover 2015: over €100 million) which organises the festivals Hurricane, Southside, Highfield, Chiemsee Summer, Mera Luna, Deichbrand, Metal Hammer Paradise, Elbjazz...

Ticketing powered by...

CTS Eventim started with its online ticketing service. It continues to buy up its competitors in Germany (getgo, ticket online, etc.) and Europe. The company sold the tickets for the 2006 FIFA World Cup, the 2014 Sochi Olympics, the 2016 Rio Olympics. Today this leader sells around 250 million tickets each year. Its market share represents nearly two thirds of the German ticketing:



Only a small part of the ticket price goes to the creatives:

Local promoter	36	Artist	32	Online-ticket retailer	11	Booking agency	10,5
				Artist management		10,5	

figures in % of total
example of a concert ticket for self-employed artists sold in advance for €30,000
source: Holger Schwette, Gesellschaft für Musikwirtschafts- und Musikforschungsforschung, January 28, 2019

All-inclusive services

Not only is Eventim being placed at the source of the value chain, but it also launched services around live entertainment. The group offers companies ticketing and marketing service packages in the fields of sport, classical music, cinema and related bookings (travel, accommodation, catering, etc.), as well as ticket resale. The availability of its huge network of customers is of course a strong argument. This vertical concentration enables Eventim to make economies of scale and scope, and to consolidate its dominant position in the market.

5 At the 2006 FIFA World Cup, Eventim was accused of selling 52,000 tickets on the black market. The procedure was discontinued after an out-of-court settlement.
6 Ticketmaster belongs to the US giant Live Nation Entertainment.
7 In 2008, the Popular Music course at the Hamburg University of Music and Theatre became Eventim Popkurs.

HORIZONTAL CONCENTRATION

VERTICAL CONCENTRATION

this information is not exhaustive
infographics by Nepthty's Zwer/imagomundi.fr 2023

because the tool is so practical, end up destroying the alternative offers themselves. At the same time, Eventim has a huge database of user behaviour at its disposal for marketing purposes¹⁹. Data mining is unstoppable when it comes to understanding and capturing the market.

This horizontal concentration is coupled with vertical integration. Eventim has gradually diversified its products and is now present across the entire value chain in the fields of culture (music, cinema, museums) and sport. It sells companies, clubs, and associations its expertise and software solutions for business-to-business services: ticketing (including self-printing), event security, customer relationship management, merchandising and marketing, and can provide its own distribution and communication channels. Customers can use a secondary market platform (fansale) for fan-to-fan resale and use its one-stop-shopping services to buy tickets, travel, and accommodation. This diversification makes it possible to spread the risks between the various activities and gives Eventim particular flexibility and responsiveness. As a result, Eventim is able to establish itself even more widely in the music industry.

David against Goliath

The music industry generated sales of €2 billion in Germany in 2021. The phenomenon of the concentration of culture among a few majors also applies to other branches like labels. The 3 world-majors dominate national markets through their local subsidiaries. In Germany, these are Universal Music Group Deutschland, Sony Music Entertainment Germany, and Warner Music Germany. Smaller labels are attached to them. The independents must make do with crumbs.

In the music sector, competition is now played out at international level, even between players from outside the sector, such as the media.

As far as live music is concerned, Live Nation set foot in Germany in 2015 and Eventim (100% German) is happy to raise this threat with the authorities. In a globalised market, the company is a valuable economic player for the country. This explains why the German government generously subsidised this giant of the sector during the pandemic with substantial aid of €272 million. This also explains the European and national tax policies that are so advantageous for these groups. The company therefore has all the cards it needs to pursue its growth with complete peace of mind. The Bundeskartellamt is powerless to intervene in its strategy of creating new companies when it is refused a merger (for example, in Berlin, when it created All Artists Agency only to 'absorb' Four Artists Agentur). Scandals (such as under-the-table ticket sales during the football World Cup) are settled by litigation. Revelations such as those by comedian Böhmermann in his programme "Magazin Royale"²⁰ or those in the investigative journalism series "Dirty Little Secrets"²¹ may have caused the holding company's share price to fall, but they are unlikely to change the situation. What is left for the other players in the market to do in spite of everything? The State clearly has a role to play, for example through a policy of subsidising small festivals. But it is certainly the self-organisation of independent players, as enabled by the VUT (Verband Unabhängiger Musikunternehmer) or Reset! network that will make it possible to alert the public to the situation, unite forces, and bring about a dynamic that defends the independence of culture.

The Association of Independent Festivals

The Association of Independent Festivals (AIF), since 2008, is the UK's leading non-profit festival trade association. It provides a collective voice for the independent festival sector to government, media, and wider industry, representing and empowering independent festivals by making them part of a unique network of promoters, as well as providing business support, access to training and experts, in addition to a free legal helpline and accountancy advice. AIF has planned and executed many hugely impactful media campaigns, positioning independent festivals at the forefront of industry by covering issues such as single use plastics, sexual safety at festivals, economic impact, and concentration in the music industry.

The 'Fair Play For Festivals' agreement was launched at the Festival Congress 2015 in partnership with The MU (Musicians Union). It involved 26 festivals and gained national media from the likes of BBC, Sky News, and The Guardian, reaching 9 million people through websites and Twitter. 'First Festival' is a pioneering new campaign and fund that will enable access to festivals for hundreds of thousands of people aged 18+. Working with expert drug charities and services, the AIF planned and organised a coordinated blackout of festival websites to raise awareness of legal highs.

Leading on key issues gives festivals a better chance of survival in the face of the impact of buy-outs, Covid, which they've researched, the cost-of-living crisis affecting audiences, and increased supply chain costs.



18. <https://corporate.eventim.de/en/>

19. <https://www.capital.de/wirtschaft-politik/eventim--von-der-musik-zur-maut-31095082.html>

20. https://www.youtube.com/watch?v=GLS_FhdYBmY

21. <https://www.ardmediathek.de/video/dirty-little-secrets/folge-3-die-verschwundene-firma-s01-e03/br-fernsehen/Y3JpZDovL2JyLmRIL3pZpGVvL2NjODEyYUcZLWRRiNjMtNGJkZC0iMmY2LTQ1NGU4ZTc0MWEzZA>

Live Nation, a 360° European Strategy

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It only took a few years for Live Nation to get its hands on large swathes of the European music scene. Not that the spectators have even really noticed, as few are truly aware that their favourite festival is owned by the American giant, or that the ticketing platform they use is also in the grips of this multinational. After all, Live Nation itself is never the headliner. This behind-the-scenes presence may be calculated, but the curtain is gradually being lifted on this strategy of concentration in the United States, where the company is currently getting some very bad press for its performances. In November 2022, an antitrust investigation was launched by the US Department of Justice into the dominant position of Ticketmaster, the world's number one ticketing company and a subsidiary of Live Nation since 2010. The debate also came to a head when tickets were released for a concert by singer

Taylor Swift, which turned into a nightmare scenario. When pre-sales opened in November 2022, the Ticketmaster site was instantly flooded with bots (computer robots). As a result, many of the tickets were then resold on the black market at exorbitant prices, up to more than €90,000. Fans cried foul. Live Nation argued its corner by claiming that part of Ticketmaster's website had broken down, but this was not really enough to put out the fire, which took on a political dimension. One of the most outspoken critics of the giant is Democrat Alexandria Ocasio-Cortez. In her view, the merger between Ticketmaster and Live Nation should never have been authorised.

Ticketing and competition

Live Nation doesn't just have its work cut out in the United States. "Anti-trust laws are similar in Europe. So if the monopoly is broken in the United States and the company has to be split up, that will also apply here," explains Fabien Miclet, a consultant specialising in music-related issues at European level and a contributor to the European Commission's Music Moves Europe initiative²², before adding: "Competition issues fall within the exclusive remit of the European Union, so Member States cannot overturn a decision taken in Brussels." To our knowledge, no disputes relating to the music sector have been brought before the European courts. Not that this is stopping some countries from taking a closer look at what's going on. In France, the Competition

Authority is investigating concert ticketing. "The aim of ticketing platforms is to sell out shows as quickly as possible, with the risk of resale on the black market. In addition, the advantage of ticketing for a group is that it allows access to customer data, which has a market value and which Live Nation can then resell to service providers, for example. This enables them in turn to carry out targeted advertising," explains Matthieu Barreira, cultural structure administrator, who has produced several maps on the phenomenon of concentration in the music sector²³. But why is this subject causing so much tension today? "The health crisis brought tours to a standstill for two or even three years. Touring has made a spectacular comeback and artists are more dependent than ever on live shows. But these ticketing scandals are starting to bother them enormously, and the public, in turn, is no longer willing to be party to them," Fabien Miclet points out. The director of Live Nation France, Angelo Goppe, brushes the subject aside, and employs a diversionary tactic to try to change the direction the conversation is taking: "Who cares about ticketing problems? No one, not the artists, not the customers. Instead of focusing on that, we should be looking at the real issues in the music world, starting with diversity. At Live Nation France, 45% of my team is made up of people from diverse backgrounds. Can you really say the same for subsidised structures?"

Transformation of the sector

The director of Live Nation France also points out that the Competition Authority's previous opinion on concentration in the music sector²⁴, referred to it by the National Assembly's Committee on Cultural Affairs and Education, concluded that, despite the presence of large groups, the music market remained diversified. "The Competition Authority's economic criteria are too stringent for the music sector," explains Matthieu Barreira. There are no two ways about it, the battle is on between the large groups and the independents, who in France join forces under the umbrella of the SMA (Syndicat des Musiques Actuelles). This trade union has launched a campaign entitled "You're not here by chance" to denounce the effects of concentration on the sector. Live Nation pools all the links in the industry: artist management, festivals, concert halls, ticketing, etc. A 360-degree

Few spectators are truly aware (...). After all, Live Nation itself is never the headliner.

anti-trust

22. <https://culture.ec.europa.eu/cultural-and-creative-sectors/music/music-moves-europe>

23. <https://www.vousnetespaslaparhasard.com/festivals-de-musiques-actuelles-en-europe-qui-possede-quoi/>
24. Opinion 21-A-08 of 27 May 2021

ex-

concentration that impacts the entire sector. “This phenomenon of concentration is relatively recent. About fifteen years ago, the sector was totally independent, in the hands of associations, commercial companies, and the like. Companies run by enthusiasts,” recalls Aurélie Hannedouche, General Secretary of the SMA. The model has changed: groups such as Live Nation and AEG have expanded into this niche to capitalise on economies of scale. An event is profitable if it is duplicated. With a programme that gives the priority to mainstream artists. “In the space of a few years, we’ve seen the transformation from a segmented economy, where each person did their own thing (tour manager, ticket sales, festival management, and so on) to an octopus that has taken over the entire sector,” says Fabien Miclet. Angelo Groppe, however, steers away from the message at hand to drive his own message home, “To each his own! We’re in business to entertain and sell tickets. On the other hand, the sector should focus on the real issues: we need to help young artists, who have been hard hit by the health crisis and who will be headlining in five years’ time, and make sure that the music on offer hits the right note among the public. By focusing on the issue of concentration, we’re missing the point.”

Spectacular results

There is no denying that the large groups have emerged stronger from the health crisis. Live Nation’s 2022 results are historic, outstripping those of 2019. Worldwide, the American group generated sales of €16 billion, ramping up its revenues by 44% compared with 2019. All the Group’s businesses are booming. Concert production is worth almost €12.6 billion. The

group’s star artists include Lady Gaga, Madonna, and Shakira. Ticket sales are also enjoying historic growth, with revenues of two billion euros – a figure that has doubled in one year! Superlatives abound. In 2022, 550 million tickets were sold, with a 24% increase in attendance compared with 2019. Live Nation’s venues welcomed almost 50 million spectators. Its operating profit stood at 691 million euros, with a net profit of 386 million euros. Clearly, the group is not about to lose its position as world number one. “While many structures were weakened by the crisis, Live Nation saw it as an opportunity, allowing it to pose as a saviour by buying up events,” notes Matthieu Barreira. A cash machine? Live Nation retorts that it is the primary source of remuneration for artists. At the end of the day, however, the big winner is businessman John C. Malone, head of Liberty Media, Live Nation’s majority shareholder. A situation that allows this entrepreneur to be generous with his political friends: he donated more than 500,000 dollars to support Donald Trump’s campaign in 2019. The same commitment to the conservative cause can be found at AEG, Live Nation’s main competitor. Its owner, Philip Anschutz, has made a name for himself with his anti-abortion and pro-gun stances, while denying global warming.

Public money

On a European scale, Live Nation has astutely adapted to economic realities that are sometimes extremely different from one country to another. In France, the group has taken advantage of the tradition of strong public

pan-

interventionism. “In France, it was the public authorities who, via the Centre national de la musique, bailed out Live Nation and allowed it to grow rich during the health crisis,” denounces Bertrand Burgalat, President of the French trade union representing music companies, the SNEP (Syndicat National de l’Edition Phonographique). “These big groups have got used to this windfall. And they have now become aggressive. But it’s just take-take. When tour organisers work with Anglo-Saxon artists, they don’t pay any charges here, everything is on invoice, whereas French artists who want to work in the United States have to pay sky-high sums for work permits.” Concentration in the live performance industry seems to be going down the same road as the record market, where today three majors (Universal, Sony, and Warner) hog the stage. So is the recording industry in any situation to criticise live entertainment companies? Bertrand Burgalat angrily points out that: “The role of record producers is to put the spotlight on up-and-coming artists. The large groups focus only on the mainstream. They talk about ‘live’ music, but most of the time it’s recorded music that you hear on stage, with lots of electronics and playback.” Clearly, there is no hope of a truce in the war between the world of recorded music and the world of live music.

“The role of record producers is to put the spotlight on up-and-coming artists. The large groups focus only on the mainstream.”

Territorial differences

“In France, large groups still coexist with independent operators. But in other European countries, the music sector is almost entirely in the hands of the majors,” notes Fabien Miclet. Today, Live Nation holds a dominant position in several countries, festivals being a case in point. In Belgium, almost all the country’s major events come within the fold of the American giant: Graspop, Core, Hear Hear! Rock Werchter, Dour... The same is true in the Netherlands, where Bospop and the North Sea Jazz Festival, among others, are owned by Live Nation. However, the country where the group is most deeply anchored is undoubtedly the UK, from Latitude to Creamfields. The Association of Independent English Festivals reported that 46% of box-office revenues went into Live Nation’s pocket. “Most of the time, spectators don’t know who owns the festival when attending a concert,” laments Matthieu Barreira, who produced his maps based on the one published by Le Monde diplomatique on the Israeli occupation of the West Bank, before adding: “We’ve noticed that the large groups, like Live Nation, thrive in particular in countries where there is no public policy in the field of culture and where the music sector is dictated by purely commercial considerations, which allows them to resort to alcohol or tobacco sponsors.” According to Live Nation’s 2022 results, partnerships account for 558 million euros. Today, France is at a crossroads, between a largely subsidised

sion

historical model and the ever-encroaching Anglo-Saxon model. In addition to the State, local authorities are not hesitating to pave the way for Live Nation's arrival, even if not necessarily with direct financial support. "In Arras, for the Main Square festival, the town is providing barricades and communications...", continues Matthieu Barreira. "It's territorial marketing," observes Aurélie Hannedouche. The risk, according to these players, is that independent operators will be squeezed out.

European rules

What are the current obstacles to such dominant positions? In 2004, the European Union adopted a Merger Regulation, which has been applied in a number of cases affecting the recorded music industry, creating a body of case law. Lawyer Isabelle Wekstein, who specialises in intellectual property and competition law, is very familiar with these mechanisms, which could in future be applied to live performances. "When the Commission examined the Lagardère/Vivendi merger in 2003-2004, as part of its competitive analysis, it looked at the issue of cultural diversity," Isabelle Wekstein reminds us. "Overproduction, in this case of books but the reasoning applies to all cultural products and in particular live performance, induced by the financial overcapacity of merging companies, does not mean that diversity of supply is guaranteed. In fact, the opposite is true. Overproduction leads to an impoverishment of cultural diversity and of the supply for the end consumer. The Commission therefore makes a qualitative and not just a quantitative analysis when assessing whether a merger is likely to hinder competition on the market".

In this type of case, one of the difficulties remains the burden of proof, with case law being increasingly demanding in this respect. The question is, how can

this be reconciled with the need for confidentiality? Third parties opposing a merger have the option of keeping the information they provide to the Commission confidential. They benefit from this advantage, as they are competitors of the merging parties. In the music sector, for example, it is in the interests of independent operators, who are competitors of the major groups, that information they pass on (particularly contracts) remains secret, otherwise they run the risk of their assets being attacked or of retaliatory measures being taken if they denounce certain practices. At the same time, however, the Commission must be able to base its decision on tangible evidence to which the merging parties have access. The difficulty lies in

It is in the interests of independent operators that information they pass on remains secret, otherwise they run the risk of their assets being attacked or of retaliatory measures being taken if they denounce certain practices.

strategy

striking this balance between two contradictory imperatives. With regard to the procedure, Isabelle Wekstein regrets that "the parties have access to all the information, whereas interested third parties (customers, suppliers, etc.) have access to virtually nothing". Except for the European level, is it also possible to bring cases before the courts of member countries? "In principle, European Union law and the Commission have exclusive competence to deal with mergers with a Community dimension and to assess the possible harm to competition that such operations could entail. However, Article 21(4) of the Merger Regulation recognises the right of Member States to invoke certain legitimate national interests which are jeopardised by the operation and therefore deserve protection despite the fact that the concentration is authorised at EU level. The Regulation explicitly recognises three legitimate interests: public safety, prudential standards and media plurality.

The Council of Europe adopts a broad interpretation of the notion of media," explains Isabelle Wekstein.

In its report on music²⁵, the European Commission writes that "new forms of concentration are emerging in the live performance industry." The text nevertheless notes that, since Brexit, the European Union can no longer act on the UK market, which has been heavily impacted by Live Nation's dominance. More than ever, Europe is playing its strategic autonomy card. The fact that an American group has such a stranglehold on the music sector is bound to be a provocation for Thierry Breton,

Commissioner for the Internal Market, and Margrethe Vestager, Commissioner for Competition. For Angelo Goppe, these criticisms are due to "anti-American racism"—and not to Live Nation's near-monopolistic position in the music and live performance sector.

Artistic diversity and independence

Managers of cultural structures are unanimous: since the health crisis, filling cultural venues has become a much more difficult and uncertain task. The few remaining sell-outs concern the mainstream headliners. In this context, Live Nation is doing extremely well. As a result, its artists have become safe investments, sending their fees rocketing sky-high. At the end of the day, the only people who can afford these artists are the venues or festivals owned by the large groups, which have sufficiently solid financial resources. "The shareholders can bail them out if necessary. A festival owned by a group can afford to lose money in the early days, unlike an independent operator," notes Aurélie Hannedouche. And then there are the increasingly stringent exclusivity clauses. Independent programmers are often unable to book an artist programmed by Live Nation for several months. These same exclusivity clauses restrict the organisation of tours, and often prevent artists from performing within a close geographical radius—an ecological aberration. Moreover, independents do not have the financial capacity to impose this kind of exclusivity on artists. The match is inevitably one-sided. And in the end, the bill is extremely high for the spectator, who is faced with spiralling ticket prices. UK festivals owned by Live Nation have no qualms about charging 400 euros for a weekend of concerts.

25. Analysis of market trends and gaps in funding needs for the music sector, European Commission, 2020

fight

The upshot of this concentration is that artistic programming is increasingly limited to the Anglo-Saxon repertoire. Apart from the legal rules, what is the European Union doing to address this diversity issue? The Live Europe scheme, set up in 2014 with European funding, is one solution, as its general coordinator Elise Phamgia explains: "Our network brings together 22 concert halls in 22 European countries. And when these venues want to programme a European artist, we provide them with financial assistance." In 2022, 600 concerts were supported in this way. This aid is limited, amounting to around 1,000 euros per concert, but it can help to offset any drop in attendance and therefore revenue. This scheme has boosted the programming of European artists in this network of venues by 63%. Elise Phamgia is aware, however, that the net needs to be thrown wider. "A number of venues want to join our network, but due to a lack of resources we can't accommodate them." Creative Europe has increased funding for Live Europe from 500,000 euros for the period 2014-2021 to 700,000 euros for the period 2021-2027 (European budgets are part of a seven-year multiannual framework). However, this is a far cry from the announcements of Music Moves Europe, which promised to invest more and on a massive scale in the music sector – Creative Europe, the EU's cultural arm, still focuses

primarily on the audiovisual sector. "I took part in a feasibility study for a European music observatory. It's vital that we have a place like this where we can obtain data on the sector and understand the problems involved in the movement of European artists," explains Fabien Miclet. Will this project ever come to fruition? "We need political will," says the consultant, pointing out that there is a European Audiovisual Observatory. "But unfortunately, while Europe has strong competence in competition matters, this is not the case when it comes to purely cultural issues²⁶. But here we are falling between two stools."

Live Nation has recently added another string to its strategic bow. The group is now taking its first steps in the field of training. In Nantes, for example, a Master's degree in music industry management has opened, the fruit of collaboration between the Audencia business school and Live Nation. "The aim is to open up the sector to greater diversity," says Angelo Goppe. The independent operators see it above all as a way of training an army of soldiers loyal to concentration, at the service of the world number one in the matter.

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"We need political will."

back

3 questions to Magma

Brussels, Belgium

01. _____

Can you introduce your structure to us?

Magma is a collective, record label, and management agency based in Brussels. Founded in 2021 by Bon Public & Umbra (Sébastien Desprez & Julien Gathy), we have organised or programmed over 30 events in two years (La Cabane, C12, Club Open Air, Circle Park, Kultura, Face B, See U, etc.). From concerts to club nights or both combined, Magma puts forward a wide alternative musical spectrum with the ambition to offer a new platform for creative, innovative, and eclectic artists.

02. _____

Why did you join the Reset! network?

To be part of a European network and be able to discuss with link-minded independent structures abroad. We usually face the same kind of challenges (or sometimes not) and it's so interesting to exchange and share ideas. We also joined Reset! to stay tuned about where we can act & defend our vision of a plural independent cultural sector. We think that's it's important to gather and stand up for our values.

03. _____

How can the independent cultural and media sector present itself as a counterforce when facing massive monopolistic corporates?

I would say 3 things:
- Gather as a strong network/cooperative to be bigger and have more leverage.
- Continue to build and propose alternative cultural proposition with strong impact and unique ideas. We see how the market is changing in Belgium with midsize cultural events and great creative ideas.
- Talk with these massive corporations and find angles to defend our work.
- Find more public and private fundings.

Under their words

In these interviews, we explore the stories, struggles, and triumphs of passionate individuals committed to preserving the authenticity and diversity of their cultural narrative. Each interview offers a unique perspective on the challenges posed by economic concentration and the innovative strategies employed to defy its impact. We delve into the personal journeys of these inspiring cultural advocates, unravelling their insights and experiences that contribute to the collective resistance against the homogenising forces threatening the very fabric of independent culture and media.

With Ľudovít Nápoký
from A4 – Anténa*
(Bratislava, SK)



↑ Anténa members meeting, 2023. © Petra K. Adamková

What are the main obstacles currently faced by independent venues and creative actors in the Slovak cultural scene?

Ľudovít Nápoký: Independent venues and creative individuals often struggle with limited financial resources. In Slovakia we have the main national funding body for cultural organisations – Slovak Arts Council. Its budget has not been increased for years. Together with high inflation, more organisations applying and higher energy costs, this means that the financial pressure has only increased. Local government funding (at regional and city level) is very limited and unstable due to populist political decisions by the national government and parliament. Cities and regions are forced to cut funding, including for culture. This means that cultural organisations are very dependent on national funding, although the Slovak Arts Council encourages them to diversify their income. The latest threat to culture is the result of the general election, which brought in a nationalist and populist government. Their agenda is a threat to the independence of the sector. There are attempts to decide and influence what can be programmed and what content is financially supported. International funding is one way to diversify sources of income. However, this means that smaller organisations in particular are vulnerable because they do not have the capacity to manage and work on international projects funded by, for example, Erasmus+ or Creative Europe. Slovak public funding brings with it a lot of bureaucracy. The administration is very heavy. A lot of resources in the organisations have to be dedicated to it. In addition, Slovakia does not really have a system, tradition, or legislation for involving the private sector in funding.

* This interview was conducted in mid-November 2023.

Another related obstacle is that independent culture is often not taken seriously by local governments. It is seen as a leisure activity or a hobby, not as a professional activity and organisation that enriches the cultural ecosystem of the city. Only cultural organisations established by the State or local government are seen as professional.

The challenge is to appeal to an audience whose cultural preferences are influenced by many factors, one of which is the Slovak education system. In general, the educational

resi- stance

system does not promote critical thinking, creativity, and cultural appreciation among students. More specifically, the focus of art education tends to be on classical art, rather than the education and exploration of contemporary and experimental forms of art. There is a large brain drain of young people leaving the country in search of better education, opportunities and justice. Due to low salaries, people often work a lot and do not have enough free time to attend events.

As a member of Anténa, a network of independent cultural venues, did you and your fellow members share a unified understanding of what it means to be 'independent'?

In the Slovak context, an independent cultural venue means that the organisation is not established and run by the State, local government, or a commercial party. All Anténa members started as civil and non-profit initiatives and work on a professional basis. This is the consensus within the network.

Why did you find it essential to collaborate with like-minded cultural centres and organisations, which operate in the field of independent arts and culture in Slovakia?

Anténa began as a small-scale collaboration between a few cultural centres to share knowledge and experience. This small initiative has grown into a network of 33 organisations. The importance of this collaboration is to have a stronger voice when communicating with government institutions responsible for funding and cultural policy. It also continues to be a hub of expertise, inspiration, and exchange.

“The latest threat to culture is a new nationalist and populist government. Their agenda is a threat to the independence of the sector.”

Could you shed light on the specific initiatives undertaken by Anténa to address the diverse challenges faced by Slovak independent cultural spaces?

Anténa gathers all the needs and challenges of its members through regular meetings throughout the year. These needs are then communicated to policy makers and funds. For example, during the COVID-19 pandemic, Anténa advised the ministries on emergency funding mechanisms. These advocacy efforts have been fruitful in linking the needs of members with those of the funds.

Within the network itself, Anténa facilitates the exchange of knowledge through educational activities and workshops, and offers capacity building programmes. Each year, Anténa organises a conference that brings together different stakeholders –the independent cultural sector with academia, State institutions and State-funded cultural organisations.

How does the ongoing trend of consolidation/concentration/monopoly movement in the cultural and music industry, where smaller entities are being acquired by larger players, influence your viewpoint and strategies as a network of independent players?

The most obvious way in which the Slovak independent cultural scene is affected by this trend is that international artists are more and more often represented by management agencies. These agencies are very powerful and they raise the prices. They also demand the same fee in Slovakia as in other (Western) countries, and it is almost impossible for Slovak cultural organisations to book these international artists. It is then very difficult to keep up and compete with the festivals and cultural organisations in Europe that can afford it. When a Slovak organisation books an artist through their agency, there is an additional cost of VAT, which can be up to 40% of the artist's fee. These costs can be avoided if the fee is paid directly to the artist.

With the dynamic nature of the cultural landscape, how do independent cultural venues in Slovakia adapt to evolving trends to thrive in today's environment?

The fact that the venues are independent makes them quite free, flexible, and responsive. We can be creative in programming, and informal team structures allow us to respond to what is happening in society. This was particularly evident during the closure when we moved to hybrid or online production and presentation of artworks.

“Independent culture is often not taken seriously by local governments. It is seen as a leisure activity or a hobby, not as a professional activity and organisation that enriches the cultural ecosystem of the city.”

In the quest to promote independence in the cultural sector, how does Anténa contribute to advocating for fairness and equity within the Slovak cultural landscape towards policy makers?

Anténa tries to approach advocacy with State institutions in a collaborative way. Instead of just asking and criticising, we initiate a two-way dialogue. This leads to understanding on both sides and creates solutions that work well for everyone. We have initiated a long-term dialogue with the main State institutions for cultural policy and funding, with the aim of being strategic partners who can benefit from each other. As a network, we amplify the voices of small organisations in this dialogue. On their own, they often do not have the capacity, resources and experience to achieve such results. This collaborative approach may be complicated by the current political situation, as the new government has very different values and expectations of what the cultural scene should look like. To strengthen the sector, there are initiatives to create a cultural workers' union and a federation of associations representing different types of independent cultural institutions.

As a network of independent cultural venues, what is your vision for the future of this field, and what measures can be implemented to ensure its vibrancy and diversity?

At the moment it is very difficult to plan because it seems that the next few years will be about defending the status quo. So for now, the main priority is to unite the organisations within the independent cultural sector and stand together behind our values and not let the current populist government negatively influence our work, our independence, and public funding. The vision is to reduce the gap between the independent and State cultural sectors and to initiate cooperation between institutions. Another big issue now is audience development. We try to address this by strengthening the voice of the younger generation and involving them as cultural workers, creators, and audiences. We are also making programmes and venues more inclusive for all kinds of disadvantaged groups.

Anténa serves as a nationwide network for independent creators. What advantages do you see in collaborating with networks abroad that also share a commitment to fostering independent culture?

International cooperation brings many opportunities for developing and sharing knowledge, networking, and inspiration. The Slovak independent cultural scene is rather specific and this brings the opportunity to promote it internationally. This provides opportunities for Slovak artists to collaborate with artists from other countries and to perform abroad. For organisations, this international cooperation leads to the professionalisation of their staff and processes.

Dutch Independent Art Book Publishers

Dutch Independent Art Book Publishers is a collective of seven artists who publish their books independently, in order to exhibit their work. The collective was founded in 2016 in Amsterdam. By logistically taking turns to bring each other's books to art fairs in one go, the members collaborate in an optimised, pragmatic way, saving a lot of time, costs, and energy.

DIABP's main aim is to operate democratically, with members free to express themselves in their own way, to choose their own paper size and quality for their books, to initiate and organise everything without restrictions and with maximum returns for the producers.

Internationally, the collective has opened many doors; individual makers that were previously rejected for the New York Art Book Fair, could participate in this world-leading event after DIABP's first application. The members continue to educate other independent publishers, giving talks and masterclasses on their DIY approach. With the proceeds from these events, they make their travels more sustainable, thus strengthening and nurturing the independent publishing scene.

Keeping things going is DIABP's biggest challenge. Despite its innovative and diversified content, they're commercially unattractive compared to the general publishing sector. In a small country like The Netherlands, there isn't much room for the avant-garde, and local funds aren't cooperative. But the collective's ever-growing network manages to create a strong force and stay far away from concentrated economics and buy-outs.



With Agnès Salson from La Forêt Électrique (Toulouse, FR)

How do you see the role of independent cinemas in Europe evolving, and what unique contributions do they make to the cultural landscape, given the dominance of major exhibitors?

Agnès Salson: The role of cinemas is unique, because in essence, they are a place for exchange, for audiences to meet, and for creativity to flourish. Since the rise of streaming in particular, the role of independent cinemas has become increasingly important. Today, these cinemas are more than just projection spaces, they are living and creative spaces: they offer plural programming, support local creation, and audiences.

How has the recent wave of concentration and monopolisation within the European film industry affected independent cinema, and what strategies could be used to navigate these changes?

Independent cinemas are rich in the diversity of their venues, the films they share with audiences and the relations they have with their audiences. Concentration weakens all this by standardising programmes and venues, and diminishing audience involvement. To counter this, we need to support access to land for cinemas, support talent development in all regions, and strengthen collaboration between cinemas.

Given the concentration of power in the hands of a few major players in the European cinema sector, have you observed any challenges or opportunities for cooperation between independent cinemas in order to maintain a competitive edge and promote diversity, alternative, and new voices in the sector?

In response to the fragility of an often fragmented independent sector, collaborative models allow the most isolated actors to find synergy and strength that would otherwise be unattainable. They can join forces to collaborate locally, nationally, or internationally, to share best practice and to celebrate the cinema-going experience. A concrete example of cooperation between independent cinemas is the Cineville card launched in the Netherlands and Belgium: this card gives unlimited access to independent and art-house cinemas in these countries and is accompanied by online film reviews written by a young editorial team in a more informal style, making the reviews accessible to a



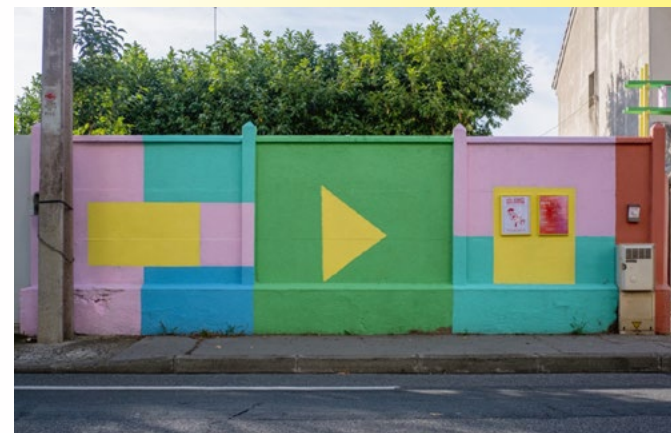
↑ Screening at La Forêt Électrique. © Thibault de Senneville

“Community and audience engagement is key.”

wider audience. With this shared tool, we're seeing a drop in the average age of cinema-goers, an increase in attendance, and the screening of more intimate films. It also allows cinemas to meet regularly to talk about this common tool, leading to more informal collaborations.

In the face of increasing competition from larger chains, how do you maintain strong relationships with your audiences, and what role does community involvement play in the success of your independent cinema?

Community and audience engagement is key. We involved audiences even before the opening of our cinema, through participatory build weeks and a crowdfunding campaign to support the project. This is not only a way to raise funds, but also to build an active community around the project. Many cinemas in Europe are developing in this way, using crowdfunding or community cinemas that build the cinema with volunteers, co-programming, etc. Of course, this is developing both on site and online. Digital tools and the growing importance of the Internet have increased the opportunities for audiences to interact with their venue.



↑ La Forêt Électrique. © Thibault de Senneville

With the rise of streaming services and the concentration of content production, how do you see the future of independent cinemas in Europe and what steps are you taking to adapt to these changing dynamics?

The cinema is no longer the only place where films are discovered; it has become a hybrid place, with the development of living and creative spaces. We believe that the key is to develop talent and support local creation from the cinema. Film programming is still essential, but it's more about re-contextualising films in a desirable environment. We live in a world that has changed, where practices are constantly evolving, where cinema participates in an extended cultural environment. The cinema, now a multifaceted space adapted to social and cultural upheavals, draws on its historical role as a place of socialisation and discovery. By embracing other forms of animated images and creating spaces for news, each cinema is forging an identity that is now expressed in an inclusive and playful way between prescriptions and audience participation.

Under their reports

In this section, we amplify voices from decentralised workshops, providing a platform for those on the front lines of the struggle against concentration. From local initiatives to community-driven projects, each report serves as a unique lens through which we examine the multifaceted challenges faced by independent entities in the shadow of economic giants. As we gather insights from diverse workshops, we aim to foster a collective understanding of the nuanced issues, share innovative solutions, and amplify the collective call for limitation in buy-outs and concentration threats.

Music streaming: What are the prospects in terms of revenues and transparency?

– by Bandswith

Brussels, Belgium
March 2023



Historical and political context

We are now entering the third decade of music dematerialisation. In the early 2000s, the record industry, as we were still calling it at that time, had to deal with a new arrival, the mp3. All you could do then was convert a CD into a set of smallish files. The technology developed quickly, and soon there were devices that could read mp3s, readers for burned CDs, mp3 players, iPods and other digital media players. At the turn of the 2010s, smartphones gradually began to replace mp3 players, with the advent of 3G and then 4G mobile coverage meaning we could take our music with us wherever we were going thanks to new platforms like Deezer, Apple Music, and Spotify. Today, these platforms are an integral part of the way we consume music. Spotify, the most

well-known streaming platform, is now a “unicorn” company, valued at over US \$33 billion. Yet with many artists receiving barely €0.004/stream and billions of streams each year deemed to be fake, it is worth taking a look at the current situation, practices and operation of this sector that is lucrative for some and offers little reward for others.

Current situation

Today, some organisations like Play Right in Belgium are struggling to put the case to government bodies, labels and platforms for all artists to receive a fair share. It appears that only €0.5 of a €9 Spotify subscription goes to the artists and that 1% of artists receive 99% of royalties. It's a situation that is completely unbalanced.

Workshop's discussions

• Capitalist platforms

Today, these platforms are owned by huge groups like Apple or hedge funds and investors like BlackRock. The vast majority of artists are the big losers when it comes to distribution of revenues, which is divided as follows:

- 55% goes to the labels (a small part of this goes back to the artist)
- 30% to the platforms
- 15% to the publishers

The labels redistribute royalties to their artists on the basis of contracts but many of these contracts should be revised in favour of the artists since the methods of promotion and the formats have changed. There is now not much call for long promotional tours or the logistics of dispatching CDs or records.

• Major labels and platforms

Artists are paid based on the number of streams. More streams means more royalties and the major labels (the biggest record companies in the world) have understood the need to increase the number of plays their artists receive. To do this, major labels, hand in hand with the streaming platforms, have used a very simple strategy: playlists. Playlists mean that selected artists, with the agreement of streaming platforms, are foregrounded at the expense of other, lesser-known artists. It is estimated that today only 5% of plays are the result of spontaneous searches and that 95% of songs are played from playlists

created by the major labels and the platforms. This practice means that a significant chunk of musical creation is rendered almost invisible since it doesn't feature on these playlists. Changing this deal is proving to be very complicated in a world where, for example, the record labels Sony and Warner Music are also Spotify shareholders.

Workshop's challenges

• The concept of a virtuous platform and the right to fair pay

Given that artists are the source of creation and they are receiving a fraction of enormous global revenues, the discussion consisted of participants sharing their experiences and day to day actions. In addition to equitable division of revenues, the discussion also covered where to seek neighbouring rights and copyrights in third countries so that they return to those who created the content.

Needs of the participants

• Greater transparency

The figures for division of revenue between artists, labels, distributors, and platforms are no secret. What remains unclear, as with the majority of tech industries, is the algorithm that these platforms use to decide who will be the next artist to pop up in your listening suggestions. These suggestions, as mentioned earlier, affect artists' revenues. It is independent artists and music organisations who lose out the most with these playlists, as they will almost never be recommended since they are not part of a big record company or influential label.

• Appropriate regulation

Some countries, such as Spain, have already started to regulate music streaming. Belgium is following in its tracks in terms of collection of neighbouring rights and copyrights – a sizeable portion of revenue that is crucial for artists.

At a European level

• Alignment with the most proactive countries

The most proactive countries must lead the way in terms of fair taxation and legislation. The most forward-thinking countries in this respect are Spain, Belgium, France, and Germany.

parency

Workshop's proposals

At a national level

• Consider streaming platforms as an entirely separate medium

Playlists are generated by publishers and suggestions by algorithms, and all of the opaque recommendations favour major labels and disadvantage lesser-known artists, or those that don't have a record company behind them. One solution could be to consider these platforms as an entirely separate medium, as this would force them de facto to be submitted to stricter and more transparent legislation.

• Proactive legislation and appropriate taxation

It is possible to change the legislation, but this requires strong political will and an understanding of the music industry and the digital sector. Political decision-makers must work together and listen to the organisations that support artists. A mix of politicians and the third sector could determine the outline of the laws and taxes together, to build a virtuous musical and digital ecosystem.

• Pressure on the platforms

The participants in this workshop demand regular audits by European experts of the algorithms that these platforms use and an end to the concentration of these mega-groups. The labels must also play ball by improving the division of royalties.

• Could Belgium be the trigger for these changes?

Belgium will take over the presidency of the Council of the European Union on January 1st, 2024. In view of its progressive position on issues of copyright, neighbouring rights, and improving the division of royalties, for example through a flat tax, it could be the driver behind an overhaul of the music streaming landscape. Belgium has a genuine card to play at a European level. It could change the deal for the music industry.

Resources to go further

→ **Play Right:** An organisation that collects and manages the rights of content creators everywhere in the world

<https://playright.be/en/neighbouring-rights/>

→ **Editorial on music streaming**

<https://www.beyeah.net/longues/musique-streaming-synchro-live/>

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Concentration in the Live Music Sector

– by Arty Farty Brussels

Brussels, Belgium
February 2023



State of the situation

Concentration in the live music sector in Belgium has arisen from a confluence of factors, including globalisation and market forces. One key driver to this enduring trend has been the entry and growth of large multinational corporations and event organisers in the country's music scene. These companies (such as Live Nation, and more recently FKP Scorpio, Fimalac and All Things Live) often have significant financial resources and extensive networks, enabling them to outcompete smaller local promoters and venues, thus leading to increased concentration.

Much of the workshop's discussions specifically revolved around Live Nation's hegemonic position in the Belgian market, as well as the effects of some of its business practices that most workshop participants considered to be detrimental to the independent sector. Other rather big, concentrated players were mentioned during the discussions; these include Greenhouse, FKP

Scorpio, TomorrowLand, and Back In The Dayz (a.o). However, none of them seemed to crystallise as much of the participants' grievance as market leader Live Nation. For this reason, we will start by giving a short introduction on how this enduring concentration trend came to be, before delving more deeply into our discussion points.

In 2000, Live Nation's first incarnation SFX Entertainment was sold to American mass media firm Clear Channel, becoming Clear Channel Entertainment. Following this purchase, Clear Channel Entertainment entered an aggressive global expansion strategy, methodically acquiring leading local promoters throughout the world. In the Belgian market, this notably resulted in the acquisition in 2001 of leading festival Rock Werchter, as well as other concert promotion companies. In 2005, Clear Channel Entertainment spun off from the group and became Live Nation.

Since then, Live Nation Belgium has expanded its vertical integration in the live music industry, effectively controlling most stages of the live music value chain. Today, the company promotes their own events (through venue-based shows and festivals alike) and manages bookings for other promoters. It also handles its own ticketing through Ticketmaster, with which it merged in 2010, becoming Live Nation Entertainment. Ever since the merger, the company has fully controlled ticket sales, distribution, and pricing for the events that they promote. Furthermore, Live Nation Belgium owns and/or manages venues (such as the Sportpaleis and the Lotto Arena in Antwerp, or Forest National in Brussels), allowing them to secure preferential dates, times, and terms for their events. Finally, Live Nation's strong market position enables them to secure lucrative sponsorship and advertising deals for their events, further consolidating their control over the value chain of live music.

What's more, Belgium's relatively small size, coupled with the language divide between the French and Flemish-speaking regions, have created a segmented market that can exacerbate the effects of concentration. The limited size of the domestic audience makes it challenging for smaller independent actors to achieve economies of scale, making it harder for them to compete against those larger, more established companies.

As in much of the rest of the world, the digital revolution and the rise of streaming platforms have also played a role in shaping the live music landscape in Belgium. As music consumption has shifted towards digital formats, live performances have become an increasingly important source of revenue for artists and the industry at large. This shift has led to increased competition for high-profile live events and further entrenched the positions of dominant market players.

Lastly, the limited support for independent live actors has also contributed to concentration in the sector. With limited resources available to counterbalance the effects of market concentration, smaller independent live actors are often left struggling to compete and secure their place in the live music sector. This concentration has indeed created barriers of entry and development for smaller independent players, as larger companies have greater control over access to resources, venues, and talent.

Given this general context, we will now explore the Belgian independent sector's tricky position dealing with these dominant mastodons.

Workshop's discussions and challenges

• Defining Independence

The first topic of interest was the challenge of defining the very notion of being an independent organisation. Upon the workshop participants' request to explicit the network's own take on it, Reset's representatives Dorian and Laurent explained that the term was intentionally loosely defined as to best accommodate their members' wide-ranging domestic realities throughout Europe. However, the gist of it is to not belong to concentrated groups (which oftentimes display monopolistic behaviours and that we will refer to as majors), nor be fully controlled by local subsidising powers. Participants cited the example of the newcomer Core Festival, which is a joint venture between TomorrowLand and Live Nation's Werchter. Although Core Festival aims to appeal to independent-leaning audiences, it is not an independent organisation, because its parent organisations belong to the majors' group.

• The Dangers of Dependence

Some participants believed that an organisation is detrimentally dependent on majors, if it can frankly be bullied or blackmailed into accepting the rules dictated by them. In our situation, this kind of dependence is caused by unchecked market distortions, leveraged specifically by Live Nation. Many of the participants agreed to these premises, and confirmed that their organisations depend more or less extensively on the market leader; in short, this signifies that their very independence is threatened by this forced dependence on the market leader.

• Independence and Subsidies

Many of the non-profit independent actors are subsidised in Belgium—at least to a certain extent. Through them, they remain able to operate despite the commercial pressures applied by the majors. In many instances, these subsidies are the very reason why some organisations are able to stay in business while competing with “big predators that tend to annihilate the competition” (in the words of a workshop participant).

• An Unchecked Concentrated Booking Agency

Participants were asked to ponder on a few sector trends that have become commonplace in the concentrated Belgian live music market. By far the one that most crystallised some of the participants’ vocal grievances, is the overbearing presence of Live Nation as a powerful and unchecked concentrated booking agency. Participants described Live Nation’s ability to enforce its own commission fees to promoters, on top of the international agencies’, sometimes simply for connecting both parties. In this digital age where promoters and international agents can so easily connect without the need for a third party, participants deemed that their forced intermediation is oftentimes unnecessary, and does not offer any added value to the contracting parties’ interactions. Furthermore,

most participants strongly criticised Live Nation’s unchecked ability to distort the market and impose such commissions onto promoters, with the ability to “annihilate” [sic] whoever dares straying from its yoke.

Retaliatory measures have included cutting promoters off from Live Nation’s access to some of the most commercially successful talents (more or less slowly suffocating their naysayers in the race to always secure bigger and bigger artists). Some participants deemed these practices to be “mafia-like”: pay up or suffer.

• The Predominance of Local Agents

Beyond the influence of Live Nation, one promoter participant particularly invested in curating one-off, creation-based events with international artists, complained of the general prevalence of the local booking agents in the Belgian market. He said that they oftentimes end up blocking his creation projects that necessitate to reach out the international artists’ close entourage directly. Other participants confirmed this too. Most of them happily recognised that these local agents’ commissions could be legitimately earned, if the local agent brings added value to the promoter by making line-up suggestions and providing a real service. However, the line is crossed when local agents merely invoice a commission fee and take no further part in the interaction (as is often the case for Live Nation).

• Exclusivity Clauses

The conversation also touched the subject of the exclusivity clauses imposed by promoters for booked artists. Although mostly unpractised by the promoters participants, the clauses of exclusivity were widely accepted as an understandable practice in case promoters book artists at a premium. In such cases, they want to ensure that their investment is not diverged by the same artist booked in competing events, happening soon before or after their own event. Some

participants insisted that even some of the majors do not always resort to exclusivities (such as TomorrowLand), praising them for it, as it sometimes helps smaller, independent promoters secure interesting acts on their tour’s days off.

• The Role of Public Authorities in Facilitating Concentration

The question of the role of public authorities in facilitating concentration was raised. However, participants mostly understood what the majors’ big events represented in terms of economical stakes for the public authorities. It is obvious that cities can be put in competition to attract the sorts of events that increases international visibility and revenues. Even they are influenced by the majors’ strike forces and economical power.

• The Lack of Local Collectives

The last discussed subject concerned the observation that there are fewer and fewer young collectives on the electronic scene. Participants exchanged their impressions on the reasons having led to the current situation; most of them agreed that the current, post-Covid market pressures have forced venues and festivals to limit the chances taken, thereby reducing the ability of collectives to find suitable venues to host their parties and develop their projects. The difficulties for youngsters to fill in convincing subsidies applications was also cited as an obstacle.

Workshop’s proposals

At a national level

• Uniting the Independent Sector Around Common Business Practices

Participants suggested that the independent sector was in a position to unite around common business practices, which should not include the possibility for local agents to benefit from commission fees if they do not bring added value to the promoter. A participant suggested making common statements to international agencies, indicating that they refuse to work with dispensable local intermediaries. This idea, which is less of a boycott than a way to simply emancipate from a forced, monopolistic influence, is getting traction in Flemish circles.

• On Supporting the Emergence of Young Collectives

To support the emergence of young, forward-thinking collectives, participants suggested that the local authorities should organise fewer events themselves, and give their chances to these local collectives, so they can learn to put on events with limited financial risks. Others suggested that application procedures to receive subsidies should be simplified, and that small dedicated venues should be equipped to allow collectives to form and organise events.

At a European level

• Looking Into the Case of Live Nation’s Dominance Abuse

Participants thought that in the case the situation did not improve as far as Live Nation’s dominance abuse, the Belgian independent sector should unite and push for an investigation into Live Nation’s mafia-like practices at the federal and European levels.

The independent sector is in a position to unite around common business practices, which should not include the possibility for local agents to benefit from commission fees if they do not bring added value to the promoter.

3 questions to EBB Music

Amsterdam,
The Netherlands



01. Can you introduce your structure to us?

EBB Music is a booking and artist management agency specialised in forward thinking music from all over the world, representing the very best established artists and upcoming talents across genres such as, (afro) jazz, psychedelic pop and electronic music in all its forms and – especially – anything that crosses the borders between these styles. Formerly known as Earth Beat and BLIP, the companies join forces from July 2022 onwards in order to serve their artists even better across Europe, Benelux, and rest of the world. The extended expertise and network enable the newly found company to organise even more shows than in the past. We operate as a flat organisation that facilitates the careers of the artists in our roster through a well-coordinated team structure. Our organisation consists of a management team,

a team of bookers, an artist management department and a team of producers and assistants. In addition to our internal teams, EBB Music collaborates with external partners to further the international success of our clients. This includes working with: Labels: We partner with record labels to release and promote our artists' music to a wider audience. Sub agents: We work with sub agents who assist in securing opportunities and expanding our clients' reach in specific regions or markets. Publicists: Publicists play an important role in managing the public image of our clients, helping to build and maintain their reputation and presence in the media. Publishers: We work with publishers to ensure that our clients' music is properly licensed and distributed. With our collaborative approach, combined with our structure, EBB Music aims to help our clients achieve international success in the music industry.

02. Why did you join the Reset! network?

Back in 2021, when we joined Reset! in the covid-aftermath. For us, Reset! was a vehicle to connect with counterparts in Europe with the same values: equality, social inclusion, and sustainability. Together we can create a new generation network where relevant cultural actors can share ideas, build new models, and shape new narratives in today's Europe. EBB Music was built on the realisation that in Europe, artists from the US and the UK were historically over represented, whilst incredible artists from other continents hardly ever played in Europe. It is part of EBB Music's goal to change the world's live music landscape by making it more diverse: by giving non-European artists a chance to build a career in Europe, but also the other way around; EBB Music has enabled many European artists to play shows and build their careers in

overseas continents. We recognise that the music industry has not always been an equal playing field. Our commitment to equality means providing equal opportunities to all artists, and supporting initiatives that promote diversity and representation within the industry. This all translates to our pay-off: 'Borderless music deserves worldwide representation'. By joining Reset! we can forge connections that advance the cause of equality and diversity in the global music scene.

Another core value of EBB Music is sustainability. We acknowledge the environmental impact of the music industry, from touring to production. Internationalisation comes with responsibility. As a company EBB Music realises that where travel is involved, there is always the challenge to keep footprints at a minimum. By being part of Reset!, we not only connect with organisations that share our values, but

also find opportunities to collectively address the environmental challenges associated with the music industry. In essence, joining Reset! was a strategic move to contribute to a more vibrant and inclusive cultural landscape.

03. How can the independent cultural and media sector present itself as a counterforce when facing massive monopolistic corporates?

We can only speak on our behalf. When we decided to merge and establish the company as a European-focused management and agency, our approach was rooted in providing a unique and artist-centred perspective. At EBB Music, we pride ourselves on being an artist-focused agency. This means that we work collaboratively with artists and their teams to develop their careers.

One of the key factors that enables us to serve as a counterforce to massive monopolistic corporates is our strong international network. Through strategic partnerships with subagents, labels, and publishers, we have firmly established ourselves in the music scene. Since we don't feel the need to develop our own festival(s), we are not competitors for the big agents and monopolists of this world. Instead, we focus on collaboration and cooperation, ensuring that artists find a supportive and welcoming home at EBB Music. In this way, our artist-centred, collaborative approach distinguishes us from the big agents and monopolists and positions us as a counterforce in the independent cultural sector. We believe that our genuine commitment to the artists we represent offers a refreshing alternative in an industry often dominated by corporate interests.

The notion of owner- ship

In the realm of culture and media, the stakes have never been higher. The pervasive threat of economic concentration looms over the landscape, casting a shadow on the vibrancy and diversity that form the bedrock of these essential domains. The daily struggle for financial viability and the constant spectre of buyouts are grim realities faced by independent cultural and media organisations. As this narrative unfolds, it becomes increasingly evident that these entities are not merely battling for survival, but are the frontline defenders of a cultural landscape at risk of being homogenised.

In times where conglomerates and mega-corporations extend their reach into every facet of cultural and media production, the dangers of consolidation cannot be overstated. Concert halls, newspapers, record labels, podcast producers –no corner of the cultural and media landscape remains untouched by the voracious appetite of large private groups. The alarming frequency with which these acquisitions occur demands urgent attention and action.

This volume serves as a compelling appeal to the sector, urging readers to recognise the far-reaching implications of economic consolidation in these vital sectors. At the heart of this advocacy is the recognition that the very essence of culture –its richness, diversity, and ability to reflect the myriad facets of human experience– is under threat.

What is at stake is not merely the financial health of independent cultural and media organisations, but the integrity of the narratives they bring to the public. These entities, often fuelled by passion and a commitment to artistic and journalistic integrity, find themselves ensnared in a battle

against forces that prioritise profit and ideology –usually a very conservative one– over the profound impact of diverse voices.

The threat to diversity and pluralism is not a hypothetical concern; it is a tangible and imminent risk. As *Reset!* underscores, the dominance of a few conglomerates can lead to a cultural monoculture where only a narrow range of perspectives and stories find representation. This not only stifles creativity, but erodes the very foundations of a democratic society that thrives on the free exchange of ideas.

Independent cultural and media organisations while enhancing creativity, emerging talent, and often-marginalised perspectives, are the most vulnerable to the encroachment of economic consolidation. The financial challenges they face are exacerbated by the constant spectre of being subsumed by larger entities, erasing the distinctive character that makes them indispensable.

The urgency to address these challenges is not just a matter of preserving individual organisations; it is a collective endeavour to safeguard the cultural and media landscape at the European scale. *Reset!* underscores the need for a collective awakening to the precarious situation and a commitment to preserving the plurality that defines our shared cultural experience. It is a call to action, urging policymakers, consumers, and industry players to reevaluate their roles in sustaining the delicate ecosystem of creativity and expression.

Manon Moulin is the editorial coordinator of all European projects for the non-profit organisation *Arty Farty*. She specifically works on the European network of independent cultural and media organisations *Reset!*, as well as media cross border collaboration project *The Circle*, and aggregation media *We are Europe*.

Reset! work- shops

2022, February

↘ Budapest, Hungary

Aurora – Resistant and Resilient: Perspectives for Independent Culture in Hungary

2022, September

↘ Tallin, Estonia

Palanga Street Radio – Sustainable Future(s) for Community Radio

2022, October

↘ Budapest, Hungary

Lahmacun Radio – Independent Music Journalism in Hungary

↘ Batumi, Georgia

Mutant Radio – Urban Cultural Physical Spaces in Batumi

↘ Barcelona, Spain

Whisper Not Agency – The Management of Artistic Independence

↘ Brussels, Belgium Arty Farty

Brussels – How to Support Artists with Disabilities

↘ Tromsø, Norway

Insomnia – New Audiences and Next Generation: How to Stay Connected to the Youth, Be Relevant, Become a Platform for New Generations and Support Emerging Talents and Artists

↘ Lisbon, Portugal

Canal 180 – History and Diversity: The Role of Independent Creative Actors in Post-Colonial Cultural Environments

↘ Tbilisi, Georgia

Mutant Radio – Independent Creative Platforms and Urban Changes in Tbilisi

↘ Porto, Portugal

Canal 180 – New Audiences and Next Generation: How to Stay Connected to the Youth, Be Relevant, Become a Platform for New Generations and Support Emerging Talents and Artists

↘ Berlin, Germany

Consentis – Diversity & Awareness

↘ Munich, Germany

Safe The Dance – Diversity & Inclusion

↘ Budapest, Hungary

Lazy Women – New Audiences and Next Generation: How to Stay Connected to the Youth, Be Relevant, Become a Platform for New Generations and Support Emerging Talents and Artists

2022, November

↘ Milan, Italy

Terraforma – The Relationship Between Independent Music Scene and Cultural Institutions

2022, December

↘ Leipzig, Germany

Sphere Radio – Decentralised Resources

↘ Skopje, North Macedonia

Skala – Audiences & New Generations

2023, January

↘ Istanbul, Turkiye

Garp Sessions – Intergenerational Cooperations: How to Share and Collaborate Between Independent Cultural Venues

↘ Malmö, Sweden

Inkonst / Intonal – Spaces for Emerging Culture

↘ Kirkenes, Norway

Insomnia – Cultural Collaborations in times of war and conflict

↘ Leeds, UK

Come Play With Me – Parents and Carers in the Music Industry

↘ Prishtina, Kosovo

Bijat – Prishtina Nightlife Behind the Scene

2023, February

↘ Brussels, Belgium

Arty Farty Brussels – Concentration in the Live Music Sector

↘ Helsinki, Finland

Pixelache – The Structures We Build: On Models and Practices Towards Sustainability of Independent Artistic Associations

↘ Vienna, Austria

Sounds Queer – Trouble in Paradise: The Current Struggles of Vienna's Independent Cultural Scene to Reach New Audiences and the Need for International Collaborations

↘ Krakow, Poland

Oramics – New audiences and next generation: How to Draw Them in?

↘ Podgorica, Montenegro

Nikola Delibasic – Building Relations between the Independent Scene in Montenegro and European Cooperations

↘ Krakow, Poland

Unsound – Sustainability in Organisation of Cultural Events

↘ Tbilisi, Georgia

Mutant Radio – The Decentralisation of the Independent Local Cultural Scene

↘ Kirkenes, Norway

Insomnia – International Cultural Cooperation in the Barents Region

2023, March

↘ Tbilisi, Georgia

Mutant Radio – Northern Propaganda, Hybrid War, and a Role of the Independent Platforms in Georgia

↘ Brussels, Belgium

Bandswith – Music Streaming: What Are the Prospects in Terms of Revenues and Transparency?

↘ Rome, Italy

Terraforma – Current Italian Clubbing Scene

↘ Turin, Italy

Terraforma – Independent Media

↘ Belgrade, Serbia

Drugstore – Belgrade Scene: Independent Cultural Players on the EU Periphery

↘ Vilnius, Lithuania

Palanga Street Radio – Solidarity Action and Support for Ukraine

↘ Lisbon, Portugal

Radio Quantica – Portuguese Independent Venues Challenges

↘ Tallinn, Estonia

De Structura – How Can Emerging Talents and Artists Be Supported and Nurtured?

↘ Leipzig, Germany

Seanaps – Interfaces: About Sustainability

↘ Prague, Czech Republic

Ankali – Reaching across the Velvet Rope: The Disparities between Electronic Music Scenes of Eastern and Western Europe

↘ London, UK

Sister midnight – Future Proofing London's Grassroots Music Culture: Ideas Towards a Blueprint for Sustainable Music Futures

↘ Sofia, Bulgaria

Hip Hip Library – The Culture Scene and the Next Generation

↘ Prishtina, Kosovo

Kosovo 2.0 – Tired Tropes and Reductionist Narratives: Kosovo, the Balkans, and the International Media

↘ Utrecht, Netherlands

COSMOS/The Guess Who? – How Can We Create a System to Directly Support Local Artists, Local Scenes, and Underrepresented Artists?

↘ Brussels, Belgium

Are We Europe – Transmedia Storytelling

2023, April

↳ Budapest, Hungary

JazzaJ – What Do We Do Well?
Why and How Do We Operate?
Best Practices by Independent
Cultural Actors

↳ Naples, Italy

Vinylbox – Generational Gap:
Promoter-Clubber

↳ Warsaw, Poland

Girls* to the Front – Change:
Towards Accessible and Inclusive
Independent Culture

↳ Utrecht, Netherlands

COSMOS/The Guess Who? –
Decentralised Platforms

↳ Pécs, Hungary

Cooperation and Networking
Opportunities for Civil and
Independent Cultural Organisations
in Pécs

2023, May

↳ Kyiv, Ukraine

De Structura – Empowering
Ukrainian Art and Culture:
Strengthening Collaboration
with Europe

↳ Tbilisi, Georgia

Mutant Radio – Importance of The
Professional Communities on The
Georgian Independent Art Scene

↳ Utrecht, Netherlands

COSMOS/The Guess Who? – New
Audiences and Next Generations

2023, June

↳ The Hague, Netherlands

PIP – Solidarity and Hospitality

↳ The Hague, Netherlands

PIP – European Cooperation

↳ Brussels, Belgium

Bandswith – Sustainability and
Ecological Challenges in the
Independent Cultural Sector

↳ Topolò, Italy

Robida – Situated Publishing:
Possibilities and Challenges of
Editorial Practices in Post-Rural
Contexts

2023, August

↳ Oslo, Norway

Insomnia – Arabic-Speaking
Countries Minority Media, Arts, and

Culture in Oslo and Norway

2023, September

↳ Helsinki, Finland

Pixelache – The Commons:
A Sustainable Model for
Independent Radio?

↳ Paris, France

Réflexivité(s) – Remaining
Independent in Today's
Photography Sector

↳ Lisbon, Portugal

Nêga Filmes – Exploring Lisbon's
Independent Cultural Scene

↳ Tromsø, Norway

Insomnia – Safer Spaces: In the
Currents and Context of Tromsø

2023, October

↳ Copenhagen, Denmark

Palanga Street Radio –
Decentralising Digital Power in
Culture: Let's Stop Using MAGMA

↳ Heraklion, Greece

Comeet Creative Space –
Introduction to Inclusion and
Accessibility in Culture

↳ Seville, Spain

Sala X – Imbalances in the Musical
Representation of Territories
between the North and the South
of Europe

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Babel International – France • Bandswith – Belgium • BASIS Vinschgau
Venosta – Italy • BAZAAR – France • Bi:pole – France • Bijat – Kosovo •
Black Artist Database – UK • Borsch magazine – Germany • C/o
pop – Germany • Cameltown – Belgium • Canal 180 – Portugal • City of
Brussels – Belgium • City of Lyon – France • Come Play With
Me – UK • Consentis – France • Cultivamos Cultura – Portugal •
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Spain • Flumi – Spain • Fundación Uxío Novoneyra – Spain • Garp
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Intonal Festival – Sweden • ISBN books+gallery – Hungary • Kajet –
Romania • L'Observatoire des Politiques Culturelles – France • La forêt
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Germany • Stichting Trasformatario – Netherlands • T+U – Hungary •
Terraforma – Italy • The Art of Social Change Podcast – France • The
Shift Project – France • Tropisme – France • Unsound – Poland • Vinylbox
Napoli – Italy • Whisper Not Agency – Spain


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