



DEVELOPING MUSIC EXPORT IN EUROPE: PART II

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1. Introduction	4
1.1. Revisiting key terms and concepts	4
1.2. Developing music export in Europe	5
1.3. An ecosystem view to the music sector	6
1.4. About this report	7
2. European Music Export Strategy	8
2.1. EMES structure	8
2.2. EMES functions	10
3. Who – reviewing stakeholders	12
4. What – reviewing strategic objectives	13
4.1. LEARN	13
4.2. GROW	17
4.3. CROSS	19
4.4. RISE	21
4.5. EXCHANGE	23
4.6. MEASURE	24
5. How – using EMES as a toolbox	26
5.1. Music export organisations	26
5.2. National and regional governments	30
5.3. European music policy	32

1. Introduction

This report follows the “Developing music export in Europe I”, published in 2023, which clarified key terms and concepts, only briefly revisited here, such as music export and music export capacity and provided the key rationales underlying the joint efforts to music export capacity development in Europe. It also described the broader sectoral, institutional and policy context behind the European Music Export Strategy (EMES), while outlining the strategy itself only briefly. Finally, it used the strategy’s 6 step framework to map 29 European music export organisations, from goals, funding and governance to activities.

This report focuses on the EMES framework itself, explaining its structure and function, identifying who and how are the key stakeholders involved, and how EMES could be used as a tool to map the needs and current activities of music export development as well as taking action to improve the status quo by better coordination, policy co-creation and cooperation across multiple levels. In that sense, **EMES – the European Music Export Strategy – is a strategic framework for coordinated action to develop music export capacity in Europe.**

1.1. Revisiting key terms and concepts

The “Developing music export in Europe I”¹ report began with noting that

“Music export is a widely used catchphrase to refer to a range of practices and outcomes of artists, creators, music companies and other music organisations aiming to work internationally, which means crossing borders to reach new audiences, creative and market opportunities”.

A more elaborated definition of **music export**, as used in the context of EMEE, was articulated in the 2019 study on European music export strategy². There, music export was defined narrowly with a focus on earning music-related revenue from foreign markets while also noting the broader context of “internationalisation”:

“Music creation and consumption is to a considerable degree international, meaning that much of the music composed, performed, recorded and released in one country also finds its way across borders to other countries, regions and continents - even more so with the advent of Internet and music streaming platforms. This is an important driver of cultural diversity everywhere and cultural exchanges within Europe are especially valuable. Additionally, the movement of music (including its creators, performers and audiences) across borders also generates a set of important revenue streams for national music industries: the latter is what is meant when talking about music export”³.

¹ Sillamaa, V. (2023). Developing music export in Europe I. EMEE. Available online: <https://www.europeanmusic.eu/content/developing-music-export-in-europe-i/>

² European Commission, DG EAC, Jacquemet, B., Le Gall, A., Saraiva, N., et al., (2019). Music moves Europe : a European music export strategy: final report. Publications Office. <https://data.europa.eu/doi/10.2766/68347>. Page 6.

³ *Ibid.*

This narrow definition could be clearly marked against the much broader, open and vague notion of “internationalisation”, which can include all possible aspects of cross-border activities, such as cultural cooperation, cultural diplomacy or country branding. However, “music export” and “internationalisation” are mostly used interchangeably and in unspecified ways, whether among the industry professionals or (mostly cultural) policymakers. Thus, music export in any given discourse might refer to the economic outcomes (export revenue) of cross-border activities, or any other kind of international practices where music is in some way involved and moves across borders.

It must be noted that from a top-down policy making perspective, or in an academic debate, these differences in emphasis can be important. However, when taking the practical perspective of an artist or a music entrepreneur then the economic, strategic, artistic and cultural considerations mostly make up a mostly coherent and organic whole. Setting them apart into different strategic goals would be artificial, even if analytically interesting.

Another key concept is **music export capacity**, defined in the previous report as both the resources available as well as the knowledge, skills and ability to make use of them to create and grow international careers and businesses in an environmentally, economically and socially sustainable way. Developing this capacity needs a multi-level approach. Three levels were identified:

1. **Music exporter level** with a clearly defined (singular) focus on developing export opportunities for an artist project or a music business venture of some kind.
2. **Sector organisation level** with a broad collective interest to increase export opportunities for the whole sector or some target groups within it.
3. **Music ecosystem level** refers to a national or a regional development level of the whole sector and to what degree it serves as an enabling environment for music exporters and organisations who support them.

1.2. Developing music export in Europe

The driving vision behind the work of EMEE, the European Music Exporters Exchange, a network of European music export organisations, provides the broadest rationale for developing music export capacity in Europe:

Talent, creativity and initiative is intrinsic and potentially everywhere. An artist, creator or a music entrepreneur should have the means and ecosystemic support to realise their full international potential regardless in which European country they are born and set out to achieve their vision.

This is not a reality today, as confirmed in several studies, starting with a Study on European Music Strategy in 2019. In the most general sense it is important to strive towards a future where Europe is the home territory for European artists and creators. Overcoming the geographical, but also

developmental fragmentation of European music sectors can be achieved through empowering the culturally rich grassroots level – the many artists, professionals and SME, making up the bulk of the sector⁴, working constantly to create new music and bringing it to audiences. Making crossing borders easy for European musical repertoire, artists and their teams, will also empower them to be competitive in the international markets.

The brief history of EMES was recounted in the previous report, outlining the Music Moves Europe initiative and its role in commissioning studies, pilot projects and most recently a cascading grants programme with music export as one of the focus themes (LIVEMX). All these projects have sought to show in practice that developing music export capacity is responding to a real need in the sector and that there is significant merit in cooperating also on a European level. Why and how exactly does the added European value emerge and connect with national and sectoral levels is the main focus of this report.

1.3. An ecosystem view to the music sector

It has been increasingly argued that it's useful to view the music sector through an ecosystem lens.⁵ Much work remains to be done to apply the ecosystem concept to the music sector in earnest and take it beyond being just a metaphor.⁶ One of the core features of the ecosystem lens is that it emphasises the complex and interconnected relations between all actors on multiple levels – a principle underlying much of the mechanics of European Music Export Strategy as outlined in this report. This is why the term music ecosystem is used throughout this report.

In a recent paper, Kimenai *et al* defined **music ecosystem** as “*the network of music sector actors, their environment, their interdependencies and interactions through the production, distribution and consumption of music so that value is created for the system itself, and for the systems it is part of*”.⁷ Indeed, there is a multi-level structure to the music ecosystems in Europe. On the one hand it is important to recognise the diversity and disparity of the level of development in and resources available to music ecosystems on national and regional levels. Smart and well-informed policies and actions are needed on those levels to overcome some of these developmental challenges. However, on the other hand, there are important gains to be won from cross-border and pan-European collaboration to reduce needless duplication of certain efforts as well as reaping the benefits of scaling up and coordinating others. For example, building strategic longer-term partnerships and presence in countries far-away from Europe is not affordable for artists, professionals, music companies and even music export organisations from most medium sized and smaller European countries on their own. Joint efforts, however, can succeed.

⁴ Council of the EU (2021). Council conclusions on the recovery, resilience and sustainability of the cultural and creative sectors (2021/C 209/03).

⁵ See for example: Berkers, P., Wijngaarden, Y., Kimenai, F., Hitters, E. (2023). From Metaphor to Measurement of Popular Music Ecosystems: Putting Diversities at the Heart of Resilience. In: (Ed.) Virani, T. Global Creative Ecosystems. Palgrave Macmillan.

⁶ This work is ongoing, for example by researchers at Erasmus University Rotterdam, for example, see this [article and animation](#) by Frank Kimenai.

⁷ Frank Kimenai & Carsten Winter (2025). [The European Music Ecosystem](#). Commissioned by the Creative Europe programme of the European Commission.

At the heart of developing music exports are the **music exporters** – the artists, professionals and music companies seeking to develop their careers and businesses internationally. The **goals** they set are facing specific **challenges**, requiring strategies and **capacity** to overcome them. To develop and implement their strategies and strengthen their capacity, the music exporters have specific **needs**. Broadly these needs include access to information, training, services and financial credit, investment, and support opportunities.

The needs of the music exporters become the guiding focus for the goals and strategies of the **music export organisations** (MEOs) and other sector organisations. It is their mission to provide services and support that help to fulfil at least some of these needs. In doing so, the music export organisations have, in turn, their own challenges and have to have strategies and the capacity to meet them. The MEOs also, therefore, have their specific needs. These are broadly to do with the ability to build and maintain teams with competent and experienced staff and access to financial resources over a longer time period on at least a minimally stable basis.

Similarly, the needs of the music exporters also become the guiding focus for **national** and **regional** as well as **European music policy makers** – to the degree that internationally successful music careers and businesses are recognised as important policy goals. Making effective policies, however, requires information and professional partnerships with the sector representatives, ideally in an ongoing co-creative policy making setting rather than through rare stock takings. This has its own set of challenges and therefore policy makers also have their specific needs with regards to music (export) policy making.

It is possible to establish a system of cooperation between these levels that builds on a mutually beneficial value exchange. This entails information and insights about the workings and needs of the music exporters flowing “upwards” to the music export organisations and from there to policy makers. This information has the potential to inform effective policy making and well designed support services and thus creating value “down the stream” to music exporters. This is the dynamic logic behind the European Music Export Strategy.

1.4. About this report

This report provides an analytical overview of the EMES as a framework: outlining its structure and functions, reviewing the stakeholders and their relations, elaborating on the six strategic objectives, and outlining the ways EMES can be used to map music export development on several levels as well as to take action through better programme and policy design. In chapter five, a preliminary methodology for mapping music export development using EMES is provided, but only in a general schematic sense. Actual implementation will require additional adapting.

2. European Music Export Strategy

A straightforward definition of “strategy” usually relates three components: **goals** to be achieved, **actions** that are believed to lead to achieving those goals, and **resources** needed to take these actions. If goals are reasonably clear, necessary actions mostly well understood and sufficient resources secured, strategy can be implemented. However, in the case of the European Music Export Strategy, there is no single “owner” nor “funder”. The strategic goals are broad and require many different and independent actors to act in concert. Therefore, EMES should be first and foremost understood as a **strategic framework for coordinated action**. It provides a coherent set of high level strategic goals and thus can be used by multiple actors – whether sector organisations, governmental or EU institutions, to align their overlapping interests and coordinate resources to devise the best policies and courses of action together.

EMES consists of two main **structural** elements: a 6-step development path laying out the 6 strategic objectives; and a multi-level stakeholder map, including music exporters, music export organisations (and other sector organisations), national and regional governments and EU institutions as well as networks, in this case most pertinently EMEE. Together these create the EMES grid that **functions** as a framework for mapping, gap analysis, comparative analysis and can be used for guidance in aligning new policies, programmes and other actions. EMES thus provides a map to understand who does (or could be doing) what to develop music export capacity across European countries.

2.1. EMES structure

The 6-step development path is an analytical breakdown of the most important aspects of developing music export capacity on multiple levels. These are, in turn, coupled in sets of two.

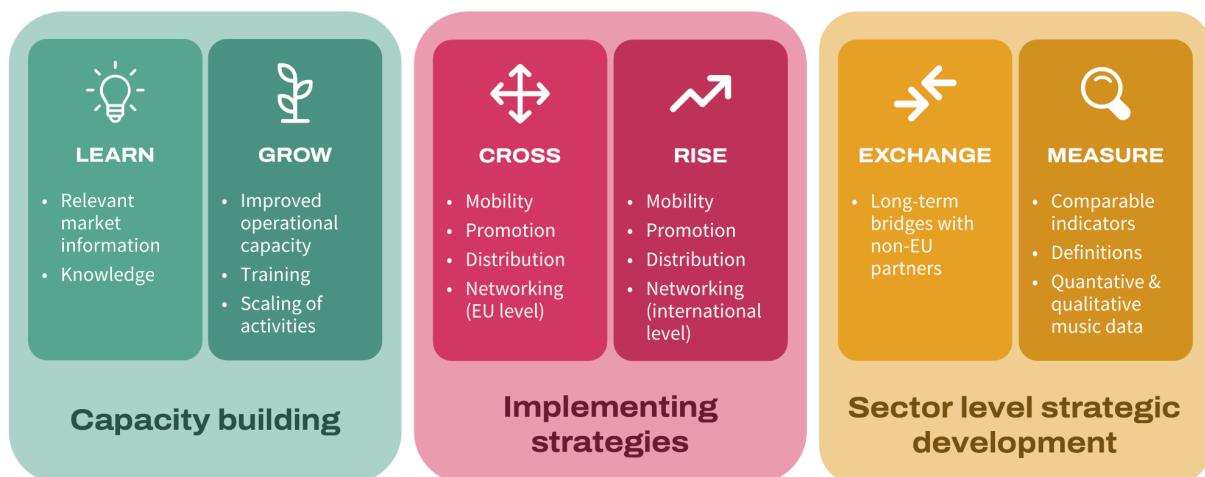


Figure 1. The 6-step development path of EMES.

Each of the six steps corresponds to a strategic objective describing a desired future state in the language of the present – a state that the joint efforts to develop European music export capacity might seek to bring about.

1. LEARN	Relevant and up-to-date information and knowledge on music markets and industry trends is available for all European music professionals to LEARN and make active use of it.
2. GROW	Artists, creators and entrepreneurs find a supportive environment to GROW their knowledge, skills, experience and capacity in every European country. This is made possible as the music ecosystems in Europe are well developed, constantly improving and providing artists, creators and music companies with the needed support to realise their full international potential.
3. CROSS	Artists, creators and music companies can easily CROSS European borders to present their music to audiences elsewhere in Europe – this is supported by strategic and administrative collaboration between national and regional public and private organisations, coordinated bilaterally and on a European level.
4. RISE	European artists, creators and music companies RISE to the global level, being competitive and successfully getting European music to be heard by music listeners across the world. This is supported by European, national and regional level strategic programmes and other collaborations.
5. EXCHANGE	European music organisations develop long-term bridges and partnerships with non-EU partners through EXCHANGE of experiences, best practices and business contacts. This will also provide ways to invite key players to visit Europe and discover our talent.
6. MEASURE	The international success of European talent can be MEASURED through a well-organised system of music data collection, analysis and publication of research.

Figure 2. The strategic objectives of EMES.

The key stakeholders in EMES are the **music exporters** whose actions will ultimately bring about the underlying vision – the artists, professionals and music entrepreneurs developing international careers and businesses to the fullest of their potential regardless of which European country they are born in and choose to work from. The other stakeholders can be viewed as operating on three levels – the **sector level, national and regional policy level** and **European level**. Each of these stakeholders have their role in and a value offer to developing music export capacity in Europe. Each of them also have their own specific challenges and needs which, in turn, can be analysed across the six themes of EMES. Thus, the EMES grid emerges.

Capacity building		Implementing strategies		Capacity building	
LEARN	GROW	CROSS	RISE	EXCHANGE	MEASURE
		MUSIC EXPORTERS Goals, challenges, capacity, needs			
		MUSIC SECTOR LEVEL Music export organisations:Goals, challenges, capacity, needs			
		NATIONAL AND REGIONAL LEVEL Policy goals and challenges, policies and programmes, needs of governments			
		EUROPEAN LEVEL EU institutions and cultural networks. Policy goals and challenges, policies and programmes, needs			

Figure 3. EMES multilevel stakeholder grid.

2.2. EMES functions

EMES has two main functions: 1) it provides an analytical framework for mapping the current state of music export capacity and its development on several levels; and 2) it can serve as a guiding framework for policy making and designing new programmes, support schemes and other actions to achieve the six strategic goals.

Mapping using EMES can be done for the following purposes and outcomes:

- **Mapping the current state** of music export capacity development on a regional, national or European level. This includes taking stock of all the programmes, funding schemes, policies and other actions or resources available for music exporters or also music export organisations.
- **Mapping the current value offer** of an export organisation. This includes listing all the activities of that organisation and analysing them across the 6 step grid. This might include the entire set of activities of an organisation or a focus on a single programme. It must be kept in mind that programmes and other actions are often composite, consisting of many parts and offer several kinds of value. It is likely, then, that when analysing a music export development programme or an action, it can be related to several steps of EMES.
- Based on the above mappings, it is possible to undertake a **gap analysis** – upon mapping the current state of music export development in a country, for example, it is possible that certain themes across the 6 steps are better covered with programmes and actions to achieve the strategic objectives than others. This analysis can provide valuable input for designing new policies, schemes or programmes to fill those gaps.

- Doing **comparative analysis** and **best practice review** based on mappings of several organisations, countries or regions. Filling the gaps that emerge in one country could be inspired by what is done elsewhere.
- Making visible the **alignment between policies and actions on national / regional and European levels**. On the one hand this means highlighting the links between national and European policies, including the Music Moves Europe initiative. On the other hand, this means articulating the best division of roles and tasks between national / regional organisations, such as music export offices, and European networks, such as EMEE. There are actions that EMEE can take or coordinate that are best done on a European level. The EMES grid can make it clearer which actions and why.

Taking action using the EMES grid relies on the previously described mapping exercises and the input they provide, and can take the following forms:

- **Setting and aligning policy goals** as well as **making new policies** to better match with the needs of the sector, the gaps in the current state of music export development and across several levels of policy.
- **Designing new tools** – programmes, funding schemes and other actions. This step can benefit greatly from a comprehensive and comparative gap analysis and best practice review. Also, as the past EMES pilots have shown, there are activities best done in cooperation on a European level, while others need to be tackled on regional or national level.
- **Evaluating actions, programmes and policies** by conceptualising success criteria and impact indicators, measuring or collecting information about direct outputs of these actions and programmes, and analysing how well they lead to broader impact that reflects the 6 strategic objectives of EMES.

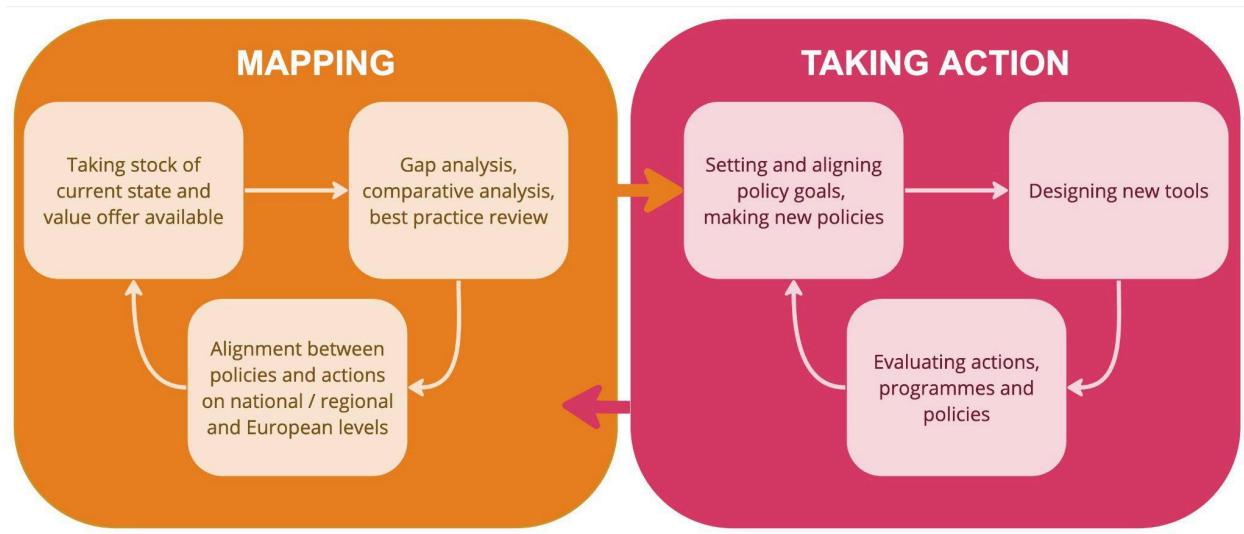


Figure 4. The functions of EMES.

3. Who – reviewing stakeholders

As outlined in 1.3., it's useful to view the key stakeholders as part of a dynamic ecosystem with complex relationships. These relationships need to be managed strategically if commitment to shared goals is to be achieved and maintained. At the vanguard are the **music exporters – artists and creators, their teams and music companies** whose goals are related to building international careers and businesses. It's also useful to remember that their motivations to do so are complex, organically integrating artistic, cultural as well as economic imperatives.

Other stakeholders are grouped along two dimensions: Sector and policy dimensions and national / regional and European levels. This provides an interconnected support network from both sectoral organisations – **MEOs** on the national and regional level and **EMEE** on the European level – as well as from policy makers, both **national/regional governments** as well as the **EU institutions**. As can be noted on figure 5, the national and regional MEOs are most closely connected with the music exporters, providing them an array of services and support schemes. However, in many European countries there are also direct support schemes available for them from governments. EMEE's actions are mostly directed towards the MEOs. However, by creating studies and making resources available on the web that can be accessed by everyone, EMEE is contributing also directly towards the music exporters. Finally, the EU has the Creative Europe programme, Culture Moves Europe scheme and through the Music Moves Europe initiative several actions are available also directly to the music exporters. Yet, it is mostly the sector organisations that create projects funded from Creative Europe.

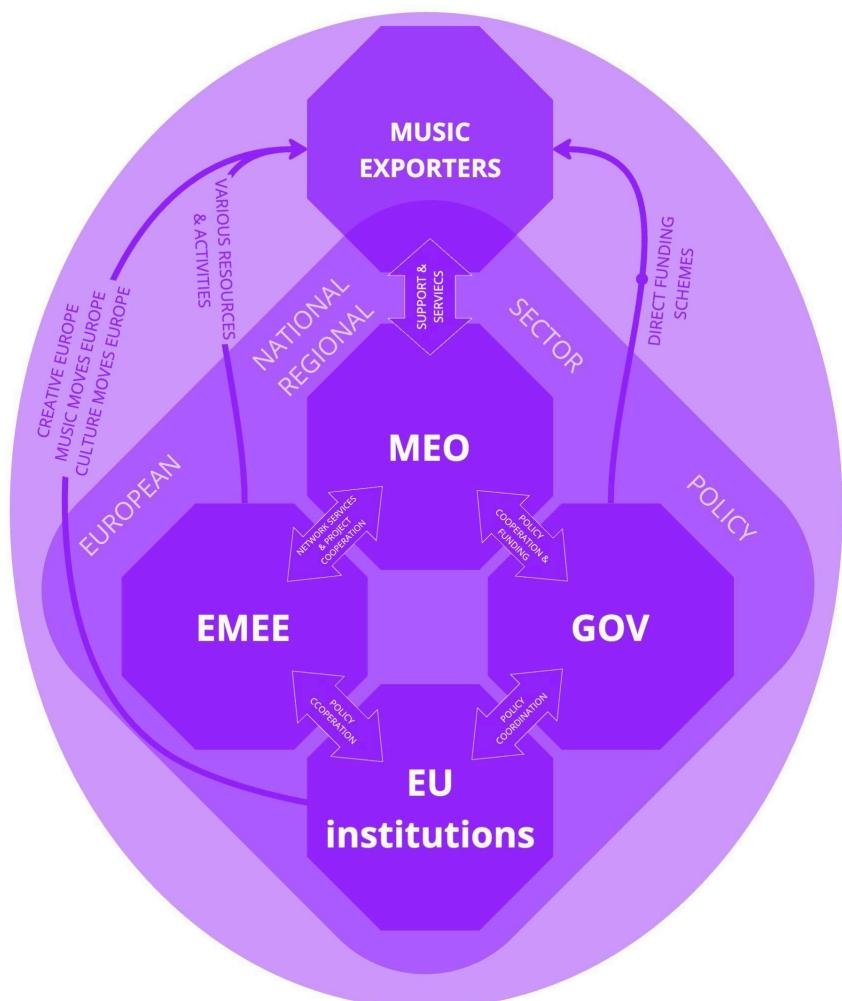


Figure 5. EMES stakeholder relations.

4. What – reviewing strategic objectives

The six strategic objectives are articulated from the perspective of the music exporters. However, all other stakeholders have a role to play in realising these objectives. In this chapter each objective has been elaborated and analysed.

The following questions are addressed about each strategic objective:

1. What are the main challenges in achieving it?⁸
2. What is currently being done by the MEOs and EMEE to achieve it?

A more detailed analysis of challenges, actions needed to overcome them, and needs of the stakeholders requires mappings of the specific music ecosystems on national and regional level.

4.1. LEARN

Strategic objective

Relevant and up-to-date information and knowledge on music markets and industry trends is available for all European music professionals to LEARN and make active use of it.

LEARN is first and foremost about making relevant and useful information available to music exporters. This information should be accessible so that it can be viewed at one's own time and pace.

Looking from the perspective of international development, the LEARN objective has two sides: first, whether artists, music professionals and entrepreneurs in a country or a region have access to information about music export development, other markets and music industry trends more broadly.

⁸ There are clear environmental and social sustainability dimensions to achieving these objectives. EMEE has begun the work of developing guidelines and later a roadmap on how to address these concerns, but there are no conclusive results yet to be added in this report.

This includes creating educational resources about music export and industry more broadly, but tailored to the specific needs of the national or regional music ecosystem and organising access to them. Second, whether professionals in other countries have sufficient information about the artists and music industry in the country under review. This includes collecting, promoting and disseminating information about music in Estonia narrowly to strategic target groups, or broadly to the international public. There can be organisations and policies aimed at either of those and or at both.

Therefore, information relevant to music export development might include:

Information for the artists and professionals in the country under review	Information about the artists and professionals in the country under review
<ul style="list-style-type: none">• Insights about European and international music markets and sectors• Analyses of music industry trends on various levels• Toolkits and tutorials about various music export related topics	<ul style="list-style-type: none">• Up-to-date promotional information about artists currently active in music export development (i.e country and scene based playlists, newsletters, web resources, artist databases, etc.)• Up-to-date business directories of music companies providing an easy access point to find partners in a particular country

4.1.1. What are the main challenges in achieving it?

Different information needs to be collected and updated at different schedules. Various toolkits as well as market and sector insights are perhaps the slowest to expire, but still require at least yearly maintenance. Information and analysis of sector trends moves at multiple speeds and some response capacity is needed if it is to remain relevant. Music company directories would ideally be refreshed on a rolling basis and artist related promotional information requires regular updating and communication in weekly, monthly or event-based newsletters and on websites to be useful.

Creating relevant market and trend insights and tools requires a methodologically sound and consistent approach, long-term capacity for maintenance and building up communication channels that industry professionals are widely aware of and subscribed to. All this requires a long-term strategic vision, stable resources and coordination. Most of the European MEOs lack these resources (with CNM and a few others being an exception). Also, doing all this work in parallel and duplicating efforts on a national level is inefficient. Instead, such materials should be done in collaboration and results shared among all.

The main challenge is having the capacity and a well coordinated system to collect, edit, organise, publish and disseminate the various kinds of information effectively and efficiently.

4.1.2. What is currently being done by the MEOs?

The MEOs have three distinct audiences for whom they need to curate a rich selection of information resources:

- **Local artists and professionals** in their countries or regions who need information on markets and industry trends, etc.;
- **International professionals** who want to learn more about local artists, industry and the market, how to find relevant partners and whom to contact.
- **Policy makers and funders** who want to have yearly updates on the impact of the MEO's activities.

There are many kinds of information resources the MEOs create and curate:

NEWS, NEWSLETTERS, MAILOUTS & SOCIAL MEDIA	Many MEO websites host a news section, covering open calls, information about activities, programmes, and other activities offered by the MEO itself or others in the sector. MEOs also send newsletters or targeted mailouts to share information both for the local industry and to international professionals.
ARTIST DIRECTORY & ARTIST ON TOUR INFO	Information on where and when artists from their countries or regions are performing.
MUSIC BUSINESS DIRECTORY	An overview of the music companies in a country, useful for an international professional to find a relevant partner.
MUSIC SECTOR OVERVIEW	An overview of the local music market and sector for the use of international professionals (currently being done by EMEE).
EDUCATIONAL RESOURCES	Educational and other resources for the local industry.
EXPORT MARKET PROFILES	Export market profiles about various countries. (Currently also being done by EMEE).
PLAYLISTS	Playlists curated by the MEOs and featuring artists from those countries.

What an MEO does in terms of information services and curation depends on local context. In some countries there might be other organisations taking care of certain types of information, while in some the MEO might be the only one doing work in this space. Another crucial feature is the capacity of the MEO in terms of budget and staff. An overview of how many MEOs do which activities is given in figure 6.

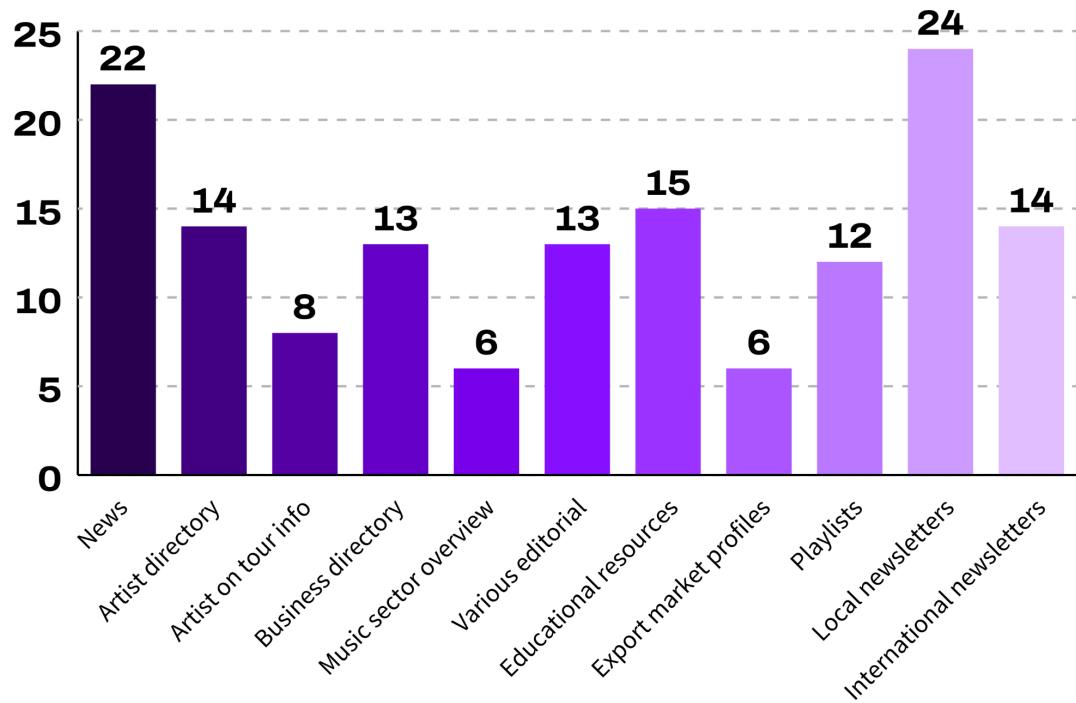


Figure 6. Types of information resources provided by the MEOs (2023, n=29).

4.1.3. How is EMEE working with LEARN?

EMEE is developing its own [Resource Centre](#) containing European and international market reports, and an evolving collection of resources providing guidance on export development. There are nearly 20 European market profiles and 12 international market guides of various sorts available and more are in the works over the next few years. The resource centre also contains the music export development reports, including the new series of country profiles (the first ones will be published in 2025).

4.2. GROW



2. GROW

Strategic objective

Artists, creators and entrepreneurs find a supportive environment to GROW their knowledge, skills, experience and capacity in every European country. This is made possible as the music ecosystems in Europe are well developed, constantly improving and providing artists, creators and music companies with the needed support to realise their full international potential.

GROW is focused on training based on active participation, such as seminars, workshops, consulting, advice, mentoring or business development programmes – activities with the aim of building the music exporters' capacity to develop international careers and businesses.

The GROW objective covers a vast ground of knowledge and capacity. Various courses and programmes are offered for entrepreneurship in general and so-called creative entrepreneurship in particular. However, music, as other cultural and creative sectors, is specific enough and requires highly tailor made approaches. The need for information, knowledge, insights and also practice is highly versatile and meeting it on all levels of expertise is challenging. Four different target groups can be defined for capacity building activities:

1. Generally interested audience – among the people who like to casually learn more about music industry at seminars, conferences and other public events also include some who might be inspired to build a career or a business in music. Such wider public outreaches are important to make sure that finding a way into the sector is easy and available.
2. Beginners who need basic knowledge and training through formats such as seminars, workshops and traineeships.
3. Intermediate professionals with some experience and knowledge, but need support to develop their ideas into a working project or a company through mentoring and incubation programmes as well as networking.
4. Advanced entrepreneurs and professionals who already run a working business and need the support to develop it further, enter international markets and grow their operations. Business development programmes and at least some investment is of key importance.

4.2.1. What are the main challenges in achieving it?

While organising seminars or one-off workshops is relatively easy and accessible for most MEOs, the overall effectiveness and impact of them is limited. General information about how things are done in the sector is a useful start, but applying this knowledge to one's own specific situation usually requires additional advice, consulting, mentoring and potentially also resources. Developing and implementing tailor-made programmes that are providing a more personalised approach is costly and requires significantly higher capacity of the MEO running them. There is also little comparative

analysis available of what is done elsewhere to provide useful insights and learning for the MEOs seeking to develop new programmes.

For any training format expert speakers, workshoppers, mentors and advisers are needed. In bigger European countries with well developed music ecosystems such experts can be easier to find and recruit. In others, it can be a struggle. There is no functioning expert network the MEOs and other organisations could tap into to involve trainers, speakers or mentors with a proven track record.

The main challenges are access to comprehensive analysis of what works (best practices), having the capacity to organise more tailor-made programmes, and having an expert network to find and recruit trainers or mentors with a proven track record.

4.2.2. What is currently being done by the MEOs?

MEOs are currently doing:

SEMINARS, WORKSHOPS AND TRAINING PROGRAMMES	Mostly standalone training events are the most flexible approaches to filling knowledge gaps in ways that are more involved and interactive for participants
CONSULTING AND ADVISING	Services ranging from informal consulting and advice, including administrative support e.g. creating grant applications to one-on-one artist strategy meetings.
MENTORING	Mentoring can generally refer to “providing support, challenge and extension of the learning of one person through the guidance of another who is more skilled, knowledgeable and experienced”. ⁹ Mentoring is more than consulting and usually requires a longer-term process of several meetings.
BUSINESS DEVELOPMENT PROGRAMMES	Include more structured programmes targeting music companies rather than artists, however, often a way to develop your company within the constraints of a limited programme is through working with a particular artist project.

4.2.3. How is EMEE working with GROW?

EMEE is providing capacity building to its members, the European MEOs, including:

- An annual EMEE forum – the main venue for the MEOs to meet and work together in various formats to learn together and from each other.
- Working groups where a particular theme is addressed, issues raised and solutions sought.
- (From 2025 onwards) webinars and training for members.

As part of the EMX project, EMEE also developed and piloted a capacity building programme for music professionals. However, the key learning was that training for artists and professionals directly is best left to national and regional organisations who understand their local needs and context and can tailor

⁹ Quote by Andrew Pollard in “Reflective Teaching in Schools”, cited in: <https://www.ambits.eu/insights/mentoring-vs-coaching-the-differences>

the programmes accordingly. However, there are also successful cross-border programmes, such as the [Eastern European Music Academy](#).

4.3. CROSS



3. CROSS

Strategic objective

Artists, creators and music companies can easily CROSS European borders to present their music to audiences elsewhere in Europe - this is supported by strategic and administrative collaboration between national and regional public and private organisations, coordinated bilaterally and on a European level.

CROSS is focused on music exporters being able to develop their careers and businesses in Europe as if in a single market for music.

4.3.1. What are the main challenges in achieving it?

For those music exporters working in smaller markets in Europe, opportunities for raising the investment needed for international development are very limited – the domestic markets are simply too small. Also, in many European countries targeted mobility and export development funding is either limited or not available at all. More detailed mapping of European countries is needed to get a fuller understanding of resources available and constraints to accessing them.

Many music exporters, especially in the early phases of their careers and businesses, lack the professional networks needed to develop their presence in other countries. They often also lack the capacity to create an export strategy and need professional advice and support in both. Attending showcase festivals and conferences can be useful, but navigating those events can prove a struggle in itself. It can take several years to actively participate to build up the beginnings of an international network and that is a significant investment for an artist team or a music company. A similar challenge is experienced by many smaller MEOs as well – building the professional network needed to help artists and professionals in their country across all the different music industries and scenes would require the staff capacity to divide focus areas. However, most MEOs are small teams of 3 or less and are therefore time, attention and resource constrained to develop sufficient European networks on their own.

There are specific administrative hurdles related to tax and other issues for artists crossing borders in Europe. These are well documented over the past years.¹⁰

¹⁰ Dick Molenaar has done work on artist taxation over the past decades and his latest analysis can be found here: <https://www.allarts.nl/files/Artist-taxation-social-security-and-VAT-January-2024.pdf>

The main challenges are therefore limited investment and support for music export development, lack of access to professional networks in target countries and administrative hurdles to cross-border movement of artists in Europe.

4.3.2. What is currently being done by the MEOs?

EXPORT FUNDING	Most MEOs provide some funding for export activities, but with some notable exceptions, these are limited in scope.
SHOWCASES AND CONFERENCES	MEOs attend these events to both amplify the opportunities of artists and professionals present as well as maintain and develop their own networks. There is a wide array of different approaches and methods the MEOs deploy to make use of these events strategically.
TRADE DELEGATIONS AND OTHER NETWORKING TRIPS	MEOs also organise stand-alone trade missions and showcases, delegations, or other networking trips to cities and countries for which there is a sufficient show of interest from the professionals.
LOCAL EVENTS AND INCOMING DELEGATIONS	A reverse action of inviting professionals to a local event allows for a group of delegates from very diverse territories to converge. MEOs engage with various forms of incoming delegations, such as organising or co-organising professional events themselves, cooperating with other local events, funding visitor programmes or doing stand-alone incoming delegations.
CO-CREATION FORMATS	Co-creation formats are a broad category of different types of events, including songwriting camps, synch camps, residencies, etc. A co-creation event can serve as a showcase for the writers involved because often they can show their skills to artist managers, labels and publishers, or client companies (i.e. film or ad producers, etc.).

4.3.3. How is EMEE working with CROSS?

EMEE organises European networking missions and meetups for MEOs to support them in developing their own professional networks as well as network among each other. EMEE is also one of the consortium partners in the second Music Moves Europe cascading grants project LIVEMX which has music export as one of the focus areas.

4.4. RISE



4. RISE

Strategic objective

European artists, creators and music companies RISE to the global level, being competitive and successfully getting European music to be heard by music listeners across the world. This is supported by European, national and regional level strategic programmes and other collaborations.

RISE is focused on extending the export development range to non-European markets. In typology of activities and to some degree also challenges it mirrors CROSS, but there are also some strategic considerations with the considerably higher costs of working with far-away countries.

4.4.1. What are the main challenges in achieving it?

The main challenges outlined in RISE – the limited investment and support for music export development and lack of access to professional networks in target countries – are the same, but significantly amplified in volume when it comes to international markets. Organising a tour or a marketing campaign in the US, Japan, India or Mexico is simply more costly or can be more challenging in other ways, such as finding the right partners and developing long-term collaboration with them. There are also differences in business culture to take note of (especially pronounced in Japan).

Maintaining an active long-term presence in a country far away, both in terms of distance, but also in terms of time-zones, requires more investment and extra capacity from the music exporters. This also pertains to developing professional networks through attending conferences and showcases.

These challenges do not only apply to the music exporters, but to many of the MEOs as well. Beyond the capacity issue – only some MEOs have the staff and the resources to maintain active initiative towards far-away countries – there is also the strategic justification to take into account. In smaller European countries, there is a limited pool of artists and professionals at any given time ready for active export development. The likelihood to find a critical volume of participants to justify a mission to, say, Mexico with a focus on electronic music, is high in France and Germany, but almost non-existent in Lithuania or Slovenia, for example. This means that unless there is European level cooperation, the few electronic music artists from Lithuania or Slovenia with a potential for Mexico, might never have a chance to develop it fully.

The administrative hurdles related to visa and tax issues when going to international markets are compounded in complexity and might require costly consultancy to solve, setting another barrier for European music exporters to overcome.

The main challenges are therefore limited investment and support for music export development, lack of access to professional networks in target countries and administrative hurdles to entering international markets.

4.4.2. What is currently being done by the MEOs?

The same activity types outlined above in the CROSS chapter broadly apply to RISE as well.

EXPORT FUNDING	Most MEOs provide some funding for export activities, but with some notable exceptions, these are limited in scope.
SHOWCASES AND CONFERENCES	MEOs attend these events to both amplify the opportunities of artists and professionals present as well as maintain and develop their own networks. There is a wide array of different approaches and methods the MEOs deploy to make use of these events strategically.
TRADE DELEGATIONS AND OTHER NETWORKING TRIPS	MEOs also organise stand-alone trade missions and showcases, delegations, or other networking trips to cities and countries for which there is a sufficient show of interest from the professionals.
LOCAL EVENTS AND INCOMING DELEGATIONS	A reverse action of inviting professionals to a local event allows for a group of delegates from very diverse territories to converge. MEOs engage with various forms of incoming delegations, such as organising or co-organising professional events themselves, cooperating with other local events, funding visitor programmes or doing stand-alone incoming delegations.
CO-CREATION FORMATS	Co-creation formats are a broad category of different types of events, including songwriting camps, sync camps, residencies, etc. A co-creation event can serve as a showcase for the writers involved because often they can show their skills to artist managers, labels and publishers, or client companies (i.e. film or ad producers, etc.).

4.4.3. How is EMEE working with RISE?

EMEE organises international missions to MEOs to prospect non-European markets and open doors to future potential. These missions are supported by market studies and fact-finding missions.

4.5. EXCHANGE



5. EXCHANGE

Strategic objective

European music organisations develop long-term bridges and partnerships with non-EU partners through EXCHANGE of experiences, best practices and business contacts. This will also provide ways to invite key players to visit Europe and discover our talent.

4.5.1. What are the main challenges in achieving it?

Developing mutually beneficial partnerships with international partners requires a long-term strategy and stable capacity to maintain proactive initiative. This is a challenge for MEOs even in larger European countries and entirely out of reach for those in the smaller ones. In this area a shared European framework and action is clearly needed to ensure that MEOs, and through them music exporters, from all European countries can partake from the value of strategic partnerships. Identifying the relevant partners and developing a tailor-made approach to working with them requires regular visits, communication and a cooperation strategy. There is potential in collaborating with EU institutions (such as the EU delegations) and international cultural relations departments of national governments, whether through joint projects, sharing networks and strategic alignment of cultural policy goals.

The main challenge is the long-term capacity of the MEOs and EMEE to develop a tailor-made approach to each international partnership and maintain it proactively over longer time periods.

4.5.2. What is currently being done by the MEOs?

Information about the ways MEOs work individually with international partners is still to be collected. A future mapping will aim to bring more clarity and detail to this area.

LONG-TERM COLLABORATION PROJECTS	MEOs in Europe are increasingly working together in European cooperation projects or in other bi- and multilateral projects.
STRATEGIC PARTNERSHIPS	<i>Information yet to be collected.</i>

4.5.3. How is EMEE working with EXCHANGE?

EMEE is developing the “EMEE Bridges” initiative – an approach to maintain and build long-term partnerships within those countries that EMEE has organised missions to.

4.6. MEASURE



Strategic objective

6. MEASURE

The international success of European talent can be MEASURED through a well-organised system of music data collection, analysis and publication of research.

MEASURE focuses on the various ways the results and outcomes of music export developments can be measured and understood. This includes work with defining concepts and indicators as well as organising data collection, but it also includes qualitative monitoring and making sense of processes, challenges, policies and their evaluation with regards to music export development in Europe.

4.6.1. What are the main challenges in achieving it?

The key challenge is the lack of a comprehensive and coherent conceptual framework for measuring and understanding how music moves across borders, both in Europe and beyond. There is no institution in Europe that would proactively lead work in this. Data on music economy, creation, consumption, production, labour markets and sectors is to a large degree missing and what exists is scattered in various organisations, often behind confidentiality requirements.

The national statistics methodologies, following Eurostat and the NACE classification system, have important problems (even after the 2024 revision) and sector specific statistics is not forthcoming. There are very few trade associations gathering data on their members systematically and this happens by necessity under confidentiality agreements. The reports based on aggregated data do not harmonise easily with national and European statistics systems. The private data collection methodologies and data quality are not known and this also raises reliability issues.

There are also conceptual challenges with appraising the success of music export developments. The lack of quick results might be interpreted as a lack of success or effect. That would be premature as the real value and impact of concrete actions can accumulate over time and what seems a direct outcome of one event can in fact be a longer development reaching its breaking point. Evaluating outcomes (as opposed to direct outputs) is on the other hand hampered by the longer timelines significant results can be expected to manifest. This presents an attribution problem - in case of success, it is very hard to ascertain who exactly and what events led to this and thus accredit them appropriately.

The main challenge is the lack of a comprehensive and coherent framework for data collection and the lack of a stakeholder with sufficient capacity to proactively lead the work on music statistics.

4.6.2. What is currently being done by the MEOs?

Most MEOs only gather basic information about the direct outputs of their activities, whether through feedback surveys or direct communication. No notable regular impact measurement efforts exist and this is due to the conceptual complexity mentioned above as well as the resources needed to implement an ambitious data collection, analysis and evaluation cycle.

ANNUAL REPORTS	Some MEOs publish annual activity reports that provide insights into how they work, what kind of programmes are provided, etc. In some cases these also include financial information.
MEASURING EXPORT REVENUE	Very few MEOs are involved in attempts to measure music export revenues in their country.

4.6.3. How is EMEE working with MEASURE?

EMEE is mapping the best practices of music export development and publishes yearly reports. In the future, EMEE plans to develop a framework to measure music export in Europe and organise pilot projects to test various approaches.

5. How – using EMES as a toolbox

The two main functions of EMES – mapping and taking action – can be applied by organisations, such as MEOs, as well as by policy makers, whether on national, regional or European level. Below, a brief outline and explanations have been given of the ways EMES can be applied, organised across three levels – music export organisations, national and regional governments and EU institutions. In each case, the role of EMEE as the leading developer of the EMES framework has been outlined as well.

5.1. Music export organisations

MEOs can apply mapping to their own organisation with regards to the current service profile and value offer of the organisation, gaps in that profile and also comparative analysis with the way other MEOs are working. EMEE has a directly supporting role, providing the tools, expertise and conducting regular comparative mappings itself.

MAPPING MUSIC EXPORT DEVELOPMENT MEO / sector level		
Activities	MEOs	How EMEE can support
MAPPING THE CURRENT STATE AND VALUE OFFER	MEOs can conduct a mapping of their own organisation and the full range of services and resources they make available to the music exporters. The EMES grid can be used to analyse a single programme as well as the whole organisation (see the mapping template below).	EMEE can provide tools, expertise and advice to the MEOs. EMEE also conducts regular mappings of European MEOs. The first mapping was conducted between 2020-2023 and the report covering 29 MEOs was published in 2023.
GAP ANALYSIS	MEOs can take stock of the results of the mapping, identify gaps in their value offer and services profiles and use this as input to developing new programmes and actions.	EMEE provides tools, expertise and advice to the MEOs.
COMPARATIVE ANALYSIS AND BEST PRACTICE REVIEW	Based on the mappings of multiple MEOs from various countries, each MEO can carry out a comparative analysis with relevant other MEOs.	EMEE will create and manage a best practice resource that holds all practice descriptions from its members in a comparative structure.

Organisational mapping consists of a fairly detailed description of activities. It is likely that some programmes and actions cannot be linked with only one step of the EMES framework. In this case the programme goals and descriptions of activities can be linked with several EMES goals and themes. The questions for mapping programmes, actions or policies, are:

1. What services are provided or programmes and actions done in this category?
 - a. Name of the programme
 - b. Goal(s) of the programme (link with EMES objectives)
 - c. Detailed description of the methodology and activities (link with EMES themes)
 - d. Describe the target group
 - e. Organisational details (time, number of editions, etc.)
 - f. Staff and resource capacity needed for the programme or action.
2. What are the key outputs of these activities? (Numbers of participants, users, various result metrics, etc.).

A template for organising the results of the programme and action mapping is provided below. Programmes spanning several EMES steps should be mentioned in each relevant sub-category.

The **gap analysis** requires a more analytical approach and among other things needs some sort of an evaluation of the effectiveness of actions and the scope of their actual reach in terms of target groups vs the potential total reach. This should also include consultations with the music exporters to learn what they see as the main challenges and needs and whether the current service profile of the MEO is delivering all that is needed and what might be missing. Methodology and tools for gap analysis will be developed by EMEE.

MUSIC EXPORT DEVELOPMENT PROGRAMME/ACTIVITY MAPPING TEMPLATE		
	ACTIVITY GROUPS	ANSWERS
 1. LEARN	NEWS, NEWSLETTER AND MAILOUTS	
	ARTIST DIRECTORY	
	ARTIST ON TOUR INFO	
	MUSIC BUSINESS DIRECTORY	
	MUSIC SECTOR OVERVIEW	
	EDUCATIONAL RESOURCES	
	EXPORT MARKET PROFILES	
	PLAYLISTS	

2. GROW 	OTHER	
	SEMINARS, WORKSHOPS AND TRAINING PROGRAMMES	
	CONSULTING AND ADVISING	
	MENTORING	
	BUSINESS DEVELOPMENT PROGRAMMES	
	OTHER	
3. CROSS 	EXPORT FUNDING	
	SHOWCASES AND CONFERENCES	
	TRADE DELEGATIONS AND OTHER NETWORKING TRIPS	
	LOCAL EVENTS AND INCOMING DELEGATIONS	
	CO-CREATION FORMATS	
	OTHER	
4. RISE 	EXPORT FUNDING	
	SHOWCASES AND CONFERENCES	
	TRADE DELEGATIONS AND OTHER NETWORKING TRIPS	
	LOCAL EVENTS AND INCOMING DELEGATIONS	
	CO-CREATION FORMATS	
	OTHER	
5. EXCHANGE 	LONG-TERM COLLABORATION PROJECTS WITH INTERNATIONAL PARTNERS	
	STRATEGIC PARTNERSHIPS WITH NATIONAL, REGIONAL OR LOCAL GOVERNMENTS WITH REGARDS TO INTERNATIONAL CULTURAL RELATIONS	
	OTHER	

 6. MEASURE	YEARLY ACTIVITY REPORTS SUMMARISING OUTPUTS ACROSS ALL ACTIVITIES	
	REPORTS ON THE SHORT-, MEDIUM- AND LONG-TERM RESULTS OF PROGRAMME AND ACTION PARTICIPANTS	
	REPORTS ON ESTIMATED OR CALCULATED YEARLY EXPORT REVENUE ACROSS THE WHOLE SECTOR	
	OTHER	

MEOs can also use EMES as a guideline to take action in three areas: contributing to policy making, designing new programmes and actions, and evaluating programmes and actions.

TAKING ACTION IN MUSIC EXPORT DEVELOPMENT MEO / sector level		
Activities	MEOs	How EMEE can support
DESIGNING NEW PROGRAMMES AND ACTIONS	MEOs can use the results of their mapping and gap analysis as the basis for designing new programmes and actions for their own organisation or in collaboration with other stakeholders, whether sector organisations or policy makers.	EMEE's work in collecting, analysing and publishing best practice reviews supports developing and designing new programmes. EMEE also provides the platform for collaboration between MEOs from different countries.
EVALUATING PROGRAMMES AND ACTIONS	MEOs should aim to establish evaluation protocols already in the design phase of new programmes and carry evaluation out regularly.	EMEE can support the MEOs with tools and advice during design and implementation of evaluation.
CONTRIBUTING TO POLICY MAKING	MEOs can use the results of their mapping and gap analysis to highlight for policy makers what areas of music export development are missing in their country and region. Comparative analysis and best practice review of approaches from other countries can serve as inspiration and policy learning.	EMEE can provide training to MEOs with regards to policy making and advocacy. Also, EMEE's music export development reviews provide much of the comparative analysis and best practice review needed for the purposes of policy making.

5.2. National and regional governments

MAPPING MUSIC EXPORT DEVELOPMENT National / regional governments		
Activities	Governments	(In cooperation with) EMEE
MAPPING THE CURRENT STATE OF MUSIC EXPORT DEVELOPMENT	Governments can commission a full mapping of the current state of music export development on a regional or national level. This includes all relevant organisations and their activities that contribute to this area of work.	EMEE can provide the tools (methodology and templates) and advise in planning and implementation.
GAP ANALYSIS ON A SECTOR LEVEL	Based on the mapping, governments can commission a gap analysis and identify missing or under-represented elements in the music export development in their country or region.	EMEE can provide the tools (methodology and templates) and advise in planning and implementation.
COMPARATIVE ANALYSIS AND BEST PRACTICE REVIEW	Governments can also commission a comparative analysis and a best practice review, focusing on the gap areas that need new programmes or actions. Best practices from elsewhere can serve as input for policy learning.	EMEE's best practice reviews can provide input and EMEE can also partner in best practice review, contributing methodology and experience.
ALIGNMENT BETWEEN POLICIES AND ACTIONS ACROSS DIFFERENT LEVELS	After taking stock of the current state of and gaps in music export development governments can analyse whether the current policies in place are effective in achieving the goals in the area of music export development. Also, what actions should be designed and implemented on the sector level, which should be enabled by policies on national and regional level, and which policies and actions could be enabled by policies and actions on the European level.	EMEE can provide support with tools and advice as well as developing the structure of the analysis.

Mapping music export development on national or regional level uses essentially the same structure of EMES as provided in the above template with the addition that each activity line will likely have several organisations contributing to the activities. The questions are:

1. [GENERAL] Which organisations are active and with a relevant profile for the music export development mapping?
2. [FOR EACH ROW IN THE TEMPLATE] What services are provided or programmes and actions done in this category by the organisations mapped?
 - a. Name and concise description of the activity (and the organisation)
 - b. Describe the target group

- c. Organisational details (time, number of editions, etc.)
- d. Staff and resource capacity needed for the programme or action.

3. What are the key outputs of these activities? (Numbers of participants, users, various result metrics, etc.).

As with the MEO level, the **gap analysis** also on national or regional level requires a more analytical approach and an evaluation of the effectiveness of actions and the scope of their actual reach in terms of target groups vs the potential total reach. The gap analysis also needs consultations with the relevant music sector organisations, most importantly the MEOs, to learn what they see as the main challenges and needs and whether the current set of policies is delivering all that is needed and what might be missing. The development of methodology for the gap analysis might be supported by EMEE.

National and regional governments can also use EMES as a guideline to take action in three areas: co-creative policy making, designing new policies and programmes, evaluating policies and programmes.

TAKING ACTION IN MUSIC EXPORT DEVELOPMENT National / regional governments		
Activities	Governments	EMEE
CO-CREATIVE POLICY MAKING	When making music (export) policy, governments should consult with the sector stakeholders in an ongoing and systematic way. Establishing a structural dialogue requires more than an occasional stock taking study, but rather a process with a clear governance that would serve as the venue for discussions, formulation of policy and programme ideas and proposals and testing ideas with the sector in their early phase to avoid misalignment later.	EMEE provides capacity building for its members (MEOs) to be better equipped to participate in policy dialogues constructively and effectively.
DESIGNING NEW POLICIES AND PROGRAMMES	Governments can use the learnings from the mapping phases as input to design new policies. The gap analysis points to what is needed, the comparative analysis and best practice review can provide inspiration and learning from solutions elsewhere and the co-creative policy approach with the sector helps to arrive at well designed policies and programmes.	EMEE's own research efforts can provide input for policy ideation, design and dialogue.
EVALUATING POLICIES AND PROGRAMMES	Governments are likely to have processes of regular policy and programme evaluation in place. The EMES framework can be integrated into those parts looking at the relevant music (export) policies.	EMEE can advise with regards to methodology of integrating EMES into a policy evaluation framework.

IMPROVING MUSIC STATISTICS	Governments can take steps to improve the system of collecting data about the music ecosystem and making relevant statistics. The current system is problematic and deficient.	EMEE can advise with regards to concepts and indicators relevant for music export development.
EMPOWERING ACTION ON EUROPEAN LEVEL	Programmes like Creative Europe and initiatives such as Music Moves Europe can only exist when the EU Member States call for them and decide to finance them on the EU level. Alignment analysis in the mapping part can use EMES framework to clarify which actions could be delegated to European levels.	EMEE can serve as a cooperation facilitator for European projects as well as leading them itself.

5.3. European music policy

At the heart of European music (export) policy are initiatives of the EU institutions, such as the Music Moves Europe led by the European Commission, and activities of the cultural networks, in this theme most pertinently EMEE. Using EMES as a mapping and action framework on a European level is most useful for clarifying what actions could most effectively be done on a European level, whether through EU programmes, studies and calls for tenders; or as projects led by EMEE or as cooperation between national and regional MEOs.

MAPPING MUSIC EXPORT DEVELOPMENT EU institutions		
Activities	Governments	(In cooperation with) EMEE
MAPPING EU COMPETENCIES ACROSS EMES	An EU level mapping of music export development can first clarify which policy fields relate to each activity group and what are the EU competencies in those fields. This provides the general scope of potential EU action with regards to the different aspects of music export development.	EMEE can provide input for such an analysis or carry it out.
MAPPING RELEVANT EU INSTITUTIONS AND FRAMEWORKS	There are many EU institutions and initiatives as well as strategic frameworks that can potentially play a role in music export development. EMES framework can serve as the organising principle to map those and link with relevant goals and activities. This would help to identify potential points of cooperation.	EMEE can provide input for such an analysis or carry it out.
COMPARATIVE ANALYSIS	When music export development is mapped on national levels, there might be a European interest in conducting high-level comparative analysis of the results of those	EMEE can provide input for such an analysis or carry it out.

mappings. Given that the EMES framework helps to guarantee reasonably harmonised methodological approach, such an analysis is feasible.

TAKING ACTION IN MUSIC EXPORT DEVELOPMENT EU institutions

Activities	MEOs	EMEE
CO-CREATIVE POLICY MAKING	There is already an ongoing structural dialogue with the music sector and European Commission. This could provide for focused dialogues on specific topics, such as music export development.	EMEE can participate in the dialogues, provide input and insight, or lead the dialogue focusing on music export development.
DESIGNING NEW MUSIC SPECIFIC POLICIES AND PROGRAMMES	Creative Europe as the main cultural policy tool of the EU is a flexible programme, but there are good reasons for a more sector specific approach in designing funding instruments.	EMEE can provide input and insight into the policy making process and contribute to stakeholder dialogue.
IMPROVING MUSIC STATISTICS	Collecting data and making statistics about music ecosystems in Europe requires a coherent and comprehensive methodology used in all European countries. Measuring music export development and how music moves across borders in Europe and beyond needs a broad-based cooperation initiative and it can be led and funded by the EU.	EMEE can advise with regards to concepts and indicators relevant for music export development.