

ANNUAL REPORT

2019



THE GLOBAL VOICE
OF MUSIC
PUBLISHING

CONTENTS

INTRODUCTION..... 4

Introduction from the Chairman - Chris Butler
Foreword from the Director General- John Phelan
ICMP in number- A snapshot of 12 months
Current membership
Welcoming our new members

ICMP'S LEGISLATIVE WORK AROUND THE GLOBE..... 11

Canada
Czech Republic
European Union
India
Japan
New Zealand
Nigeria
South Africa
Hague Convention on Recognition & Enforcement of Cross Border Judgments
United States
Free Trade Agreements

ICMP PROVIDING FOR ITS MEMBERS..... 21

Midem 2018
CEEMPC 2018 Bucharest
Production Music Committee Meetings – Cannes, Bucharest and London
ICMP Board Meetings- Johannesburg & Madrid
EU Training Day- Brussels
ICMP Serious Music Bureaus at Frankfurt Musikmesse
Copyright Directive Transposition Meeting
ICMP concert in European Parliament for Cultural & Creative Industries Group
Nomination of colleague to Ukrainian government's CMO committee
Support for NMPA on Music Modernization Act issues

ICMP'S INTERNATIONAL COOPERATION..... 27

World Intellectual Property Organization
European Union Intellectual Property Office (EUIPO)
European Secretary General Network
European Broadcasting Union
European Internet Forum
Music Moves Europe- European Music Observatory
Creativity Works!
European Agenda for Music
Bilbao Group

ICMP'S COMMUNICATIONS & MEDIA STRATEGIES.....33

- Media relations
- Social media
- Global Briefing
- Website traffic boom
- Membership communications

COLLECTING SOCIETY ISSUES.....41

- Spain
- Greece
- Italy
- Romania
- Serbia
- Ukraine
- B2B cooperation

GOVERNANCE.....43

- ICMP Global Board
- The Popular Bureau & the Serious Bureau
- ICMP Committees
 - Production Music Committee*
 - Anti-Piracy Committee & The Ralph Peer II Award Committee*

SAMPLE OF ICMP MEETINGS, EVENTS & CONTACTS..... 47

- Political
- Media
- Stakeholders
- Regular meetings
- Where ICMP has been requested to speak



ACKNOWLEDGEMENTS..... 51

THE ICMP OFFICE..... 52

INTRODUCTION

CHRIS BUTLER
ICMP CHAIRMAN

“ *The past 12 months have been the most momentous in many years for music publishers and indeed the entire music industry.* ”



This past year - both inside and outside the ICMP tent - can be characterised as one of evolution. With Coco Carmona leaving us for South America, we welcomed John Phelan as our new Director General. As Chairman of the Board, I'm delighted that such a major transition has been so positive, yet more so that it holds much promise for the future of our Confederation. The ICMP Secretariat team has served our members seamlessly since our last Annual Report and our Global Board is excited by the operational strategy for the road ahead.

The past 12 months have been the most momentous in many years for music publishers and indeed the entire music industry. Among many major developments after years of hard graft, in March we welcomed the new EU Copyright Directive legislation. Throughout an immensely complex campaign, ICMP played a crucial role for its membership - right at the centre of the battles, across Europe and at the highest political levels. Having secured the legislation our efforts turn to implementation in order to ensure that our aims and wishes are enshrined in the laws of EU Member States.

We also ushered in the Music Modernization Act in the US, championed copyright term extension in Canada, Japan and New Zealand and remain at the centre of the fight for positive copyright reform in South Africa. Challenges remain of course and we continue our efforts in Spain and Greece and turn our attention to India and Slovenia in the Autumn.

Regional meetings continue to be a regular feature in the ICMP calendar. Our Central and Eastern European Music Publishers Congress (CEEMPC18) took place in Bucharest in September and was a resounding success. Since convening in Cannes 2018, the ICMP Global Board met in Johannesburg in November and Madrid in February. On top of the industry issues discussed, we capitalised on the opportunity to meet with key government representatives in both territories. This is the pattern and benchmark we will continue to build upon as a community.

Meanwhile, ICMP's membership has flourished. In 2019 we have agreed to accept 4 new members to the Confederation – welcome to each of you! More details on the following pages. We now work for national associations in some 51 countries around the world, 17 individual Indies, and the 3 Majors, representing more than 10,000 music publishers globally.

I would like to extend my sincere thanks to my colleagues on the ICMP Global Board, the two Vice-Chairs, the Treasurer and Secretary for all their work over the past 12 months. I would also like to thank the ICMP Secretariat for their dedication and drive.

Finally, may I also extend my sincere thanks to all the members of ICMP for your continued support. I personally look forward to working together over the next 12 months towards even greater success as the 'Global Voice of Music Publishing'.

FOREWORD

JOHN PHELAN

ICMP DIRECTOR GENERAL

“Our ceaseless goal is to ensure music publishers
are right at the forefront of the rightholder community
worldwide as well as the political institutions
with which we must interact.”



Time truly flies; ICMP has operated as the global voice of music publishing for almost 30 years.

The kickstart was in 1990, in Cannes, when the International Federation of Popular Music Publishers and International Federation of Serious Music Publishers were twinned. Fast forward to late 2018, and it is a tremendously exciting time to take the helm at ICMP.

The challenges we face are multiple and often immense. For these are days of digitisation and disruption, ‘Big Tech’ and trade, international regulation and the need to reinforce respect for copyright. However music, in all its genres, is a solid bedrock for our work. I view ICMP’s fundamental mission as a relentless pursuit to fairly value, suitably sustain and robustly protect that music.

As a trade body we are profoundly proud of the unique combination of our member companies’ longevity and modernity. Some were ‘start-ups’ in the 1700s. Today, they supply over 50 million musical works across more than 200 digital service providers. They invest heavily in the future- from virtual reality and artificial intelligence R&D, to digitised music notation and voice recognition interaction. Our companies now supply the sounds of smartphones and stadia, car radios and concerts, Alexas and arenas.

It is also ICMP’s privilege to encompass the Indie and Major music community. This treasured trait is unique to publishing within the wider industry. Diversely together we remain undoubtedly stronger. ICMP has grown significantly already this year. Our membership now spans 51 national associations across Europe; the Middle East; north, central and south America; south and west Africa; Australasia and Asia-Pacific.

Our ceaseless goal is to ensure music publishers are right at the forefront of the rightholder community worldwide as well as the political institutions with which we must interact. Structurally, we aim to do so in close cooperation with our national MPAs in order to have two effective work axes- international and national- both operating efficiently in a single network. On the regulatory front, the last 9 months have proven hugely busy for Almudena, Özlem, Tom and I. This 2019 Annual Report gives a brief insight into that work, how we have evolved and how we intend to advance.

We have been at the centre of copyright reforms, cemented a global media presence, modernised our communications strategies and cooperated almost daily with a range of international stakeholders. We have held several hundred governmental and political meetings. ICMP’s social media following is up 17%. Our website traffic is up 31%. The readership rate of our new Weekly Wrap for members surpasses twice the industry average.

That said, we are only getting started.

Allow me to extend our sincere thanks to our members for their expert input since the outset of this latest stage in ICMP’s journey. We are relishing the continuous challenge of securing music publishers’ interests worldwide.

© **7**
COPYRIGHT
LAW REFORMS
TACKLED

© **2**
TERM
EXTENSIONS
WORLDWIDE

+1
STAFF
MEMBER



© **4**
TRADE DEAL
SUBMISSIONS

© **1**
VALUE GAP
ADDRESSED

16 DEBRIEF
NOTES ISSUED

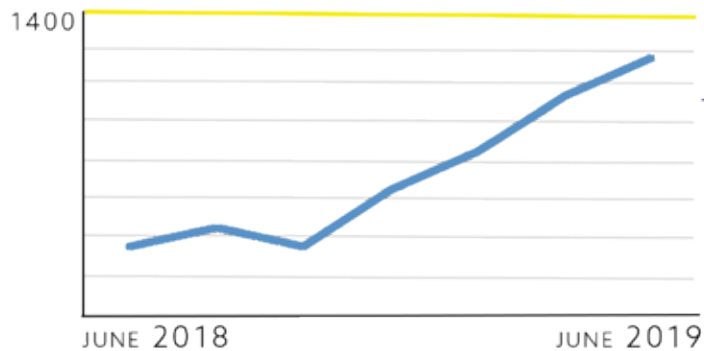
MEETINGS ATTENDED



EVENTS FOR MEMBERS

MEETINGS & EVENTS

AIMP International Summit
 Bird & Bird legal Roundtable on DSM Directive
 BMAT conference
 Canadian Music Week
 Cultural & Creative Industries Intergroup of the European Parliament
 European Broadcasting Union –Classical Music Experts' Summit
 European Parliament Seminar on Publishers' Rights
 European Parliament Workshop on Exceptions and Limitations
 Frankfurt Musikmesse
 Keynote at Schiev Festival, Brussels
 Keynote at Summus Festival Barcelona
 Music Moves Europe – European Commission Programme
 NMPA Board
 Prof. Eleonora Rosati's conference
 University College Dublin
 Featured Artists' Coalition, Chief Executive Officer
 FEP (Federation of European Publishers) - Books
 Frankfurt Musikmesse, Chief Executive Officer
 GESAC (European Grouping of Societies of Authors and Composers)
 GRANDGEORGE, Singer-songwriter
 ICE (Copyright processing hub)
 IFPI - Major labels
 IMPALA - European indie labels
 Leader of the Parliamentary Opposition, Canada
 Ludovico Einaudi, Pianist and composer
 MIDEM Management team
 MPAA (Motion Picture Association of America)
 MMF (Music Manager Forum)
 Professor Eleonora Rosati
 Professor Silke von Lewins
 Chair of the Conference of Presidents, European Parliament
 European Commission Vice President, Andrus Ansip
 European Commissioner for Culture Tibor Navracsics & Cabinet
 European Commissioner for Digital Single Market Policy, Mariya Gabriel
 European Commission, Head of Unit for E-Commerce & Platforms
 European Parliament negotiator on copyright reform Axel Voss MEP
 Minister of Culture for Spain, Jose Guirao
 President of the European Parliament, Antonio Tajani
 Ireland's Ambassador to Canada
 Management of Hot Chip
 Members of the European Parliament, at least 412 re: copyright reform;
 the AVMS Directive; SatCab directive; Geo-Blocking Regulation.
 Music Moves Europe Board
 Office of European Commission President, Jean-Claude Juncker
 Permanent Representation of Austria to EU
 EU Training day
 GrandGeorge concert
 Concert in European Parliament
 PMC Cannes
 PMC Bucharest
 PMC London
 Board Johannesburg
 Board Madrid
 Board Cannes
 Transposition Strategy Meeting
 MIDEMS



+17%

TWITTER FOLLOWERS



+31%

WEBSITE
UNIQUE
VISITORS



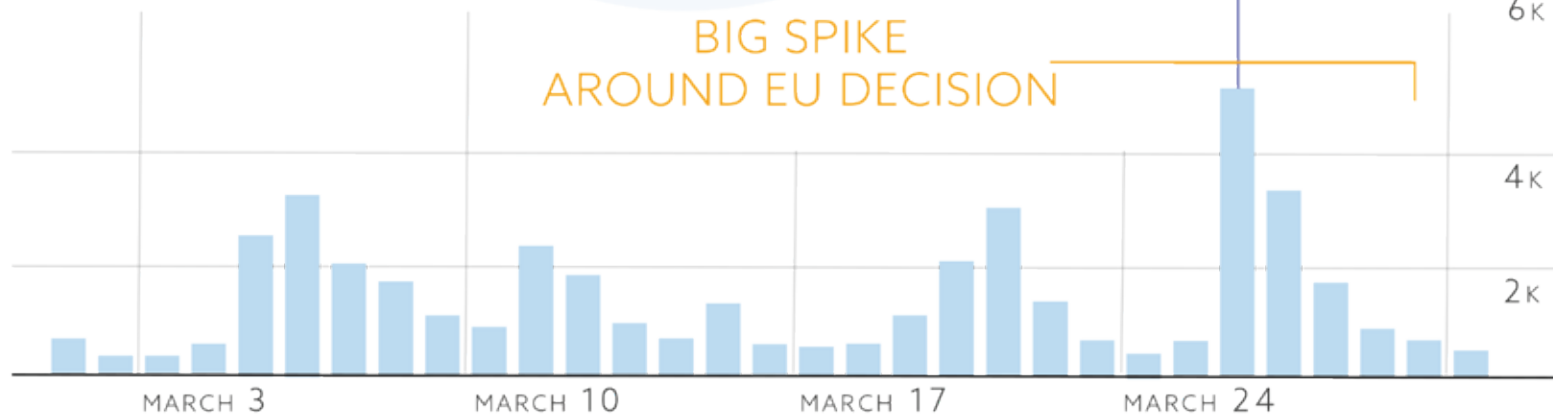
42.1k

IMPRESSIONS OVER 31 DAYS

+5k

IMPRESSIONS
IN 1 DAY

BIG SPIKE
AROUND EU DECISION



36.1%

NEWSLETTER
OPEN RATE

17%

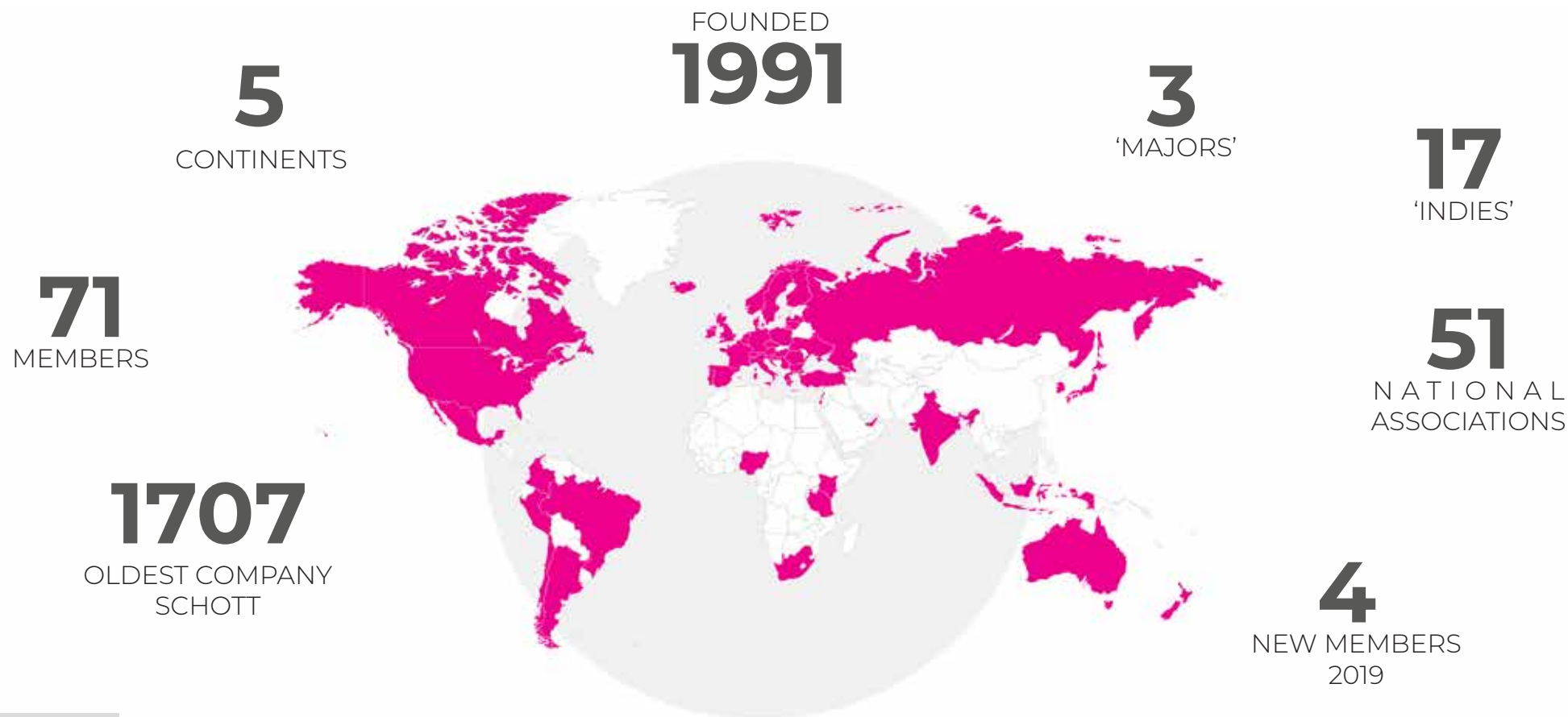
INDUSTRY
AVERAGE

HIGH
ENGAGEMENT RATE
PRESS STATEMENT

3.5x



CURRENT MEMBERSHIP



INCLUDING:



WELCOMING OUR NEW MEMBERS

ICMP's Secretariat sought and received applications for membership of our Confederation from four excellent publisher entities.

These ranged across our class options- from a national MPA in Nigeria, to Indie stalwart Concord, to burgeoning memberships in the Middle East and Eastern Europe.

Our new member colleagues are:

1

WORLDWIDE
CONCORD



2

GEORGIA
GMI RIGHTS MANAGEMENT



3

ISRAEL
MUSIC972 – DALIA PUBLISHING



4

NIGERIA
MUSIC PUBLISHERS'
ASSOCIATION OF NIGERIA (MPAN)



These four outstanding additions to ICMP's community further extend our global reach and cement our place as the 'Global Voice of Music Publishing'.

We are already working with each and their partnership with ICMP opens up the possibility of first ever ICMP regional congresses in Africa and the Middle East.



**LEGISLATIVE WORK
AROUND THE GLOBE**

ICMP'S LEGISLATIVE WORK AROUND THE GLOBE

As an international organisation, operating in an ever more globalised and interconnected world, we must necessarily plan and perform on a worldwide basis.

Culture, laws, commerce, artistry, trade, investment...all these strands of our work no longer occur in national isolation.

This is particularly true in the regulatory environment. Legislative sounds in one territory increasingly affect others. For example, as Europe reforms its copyright regime, China, the US, Canada and others react; as the US overhauls its licensing framework, the rest of the world observes and gleans information; trade provisions for New Zealand are negotiated with the UK; music education projects such as El Sistema in Venezuela are replicated in Scotland.

Accordingly, on behalf of its members' interests ICMP, seeks to be as present as possible in national and international fora to ensure we have the optimum legal and commercial environment for music publishers and their writers and composers to flourish.

In 2019, ICMP brought its lobbying activities in-house after an excellent partnership with G-Plus. The reasoning was to grow our staff, be cost-efficient within our existing budget and be mobile on behalf of our Members.

This section includes some examples of our legal activity in recent months.

CANADA

ICMP has been working closely with our Canadian colleagues at CMPA and APEM on the upcoming review of Canada's copyright framework.

The primary goals include securing copyright term extension for works from life +50 to life +70 and a clarification of the hosting exception/Value Gap.

In May, we participated with our colleagues in a long series of high-level government meetings in Ottawa and Toronto. These included government and opposition political representatives, civil servants, private sector representatives, media and likeminded stakeholder organisations – a test case for ICMP & Member cooperation.

“ ”

*Canada's music publishers
and their songwriting partners welcome the trade agree-
ment reached between the US, Canada and Mexico.*

*The CMPA congratulates their decision
to extend the term of copyright in works
to the life of the author plus 70 years and also
to preserve cultural exemptions to trade.*

MARGARET MCGUFFIN
EXECUTIVE DIRECTOR CMPA

CZECH REPUBLIC

In January the Czech national parliament was due to vote on a law proposal which would have exempted certain state and public premises from licensing obligations for music played on a non-commercial basis – clearly a serious risk to our members in the territory, our multinational members' catalogue and indeed as a precedent internationally.

After being notified by our Czech MPA, ICMP coordinated the International Artists' Organisation, IFPI, CISAC, IMPALA, GESAC, our Czech MPA etc and organised for a letter to all Czech politicians eligible to vote. The Amendment was defeated in the first Chamber of Deputies. Further similar Amendments have now been tabled in the Second Chamber. ICMP is working to replicate the previous campaign to ensure the best result for the music industry in the upcoming vote.

“We only reached out to ICMP at the last minute of the legislative process, once we got the final wording. ICMP was extremely quick to organise and deliver support from a number of international organisations that helped us defeat the legislation in the end.”

MARTIN NEDVĚD

CHAIRMAN, ICMP PMC

& CZECH MPA

EUROPEAN UNION

Political cooperation with the European Institutions

This year, ICMP has worked extremely closely with the European legislative institutions (European Commission, European Parliament and Council of Ministers), across a range of issue affecting publishers.

Much of the public focus has been on the EU Copyright Directive, rightly so given its complexity, intensity and the global ramifications.

However, we must not forget the work done on several other crucial pieces of legislation e.g. the Audio-Visual Media Services Directive (a win); the Geo-Blocking Regulation (a win); the Satellite and Cable Directive (largely a win).

In the Commission we were in regular contact with Presidency, Vice-Presidency, Commissioner, Head of Unit and political Cabinet levels.

In the Council, we regularly engaged with each of the EU28 government representatives and also both of the overarching Presidencies of the EU throughout their six-month mandates. We are preparing to welcome Finland's Presidency as of July 1.

In the Parliament we met MEPs, Group Heads, and political advisors quite simply in their hundreds over the last 9 months, both in Strasbourg and Brussels.

Concurrently we drove our lobby campaign on the Copyright Directive and cooperated almost daily with like-minded international organisations.

The EU Directive on Copyright in the Digital Single Market

On 26 March, the European Parliament voted to approve the EU Copyright Directive legislation agreed in trilogue with the Commission and Council, after a campaign described by the longstanding European Parliament official spokesperson as *“the biggest lobby operation I have seen in my life”*.

The law tackles several issues for digital music, including one of the biggest facing the music sector worldwide – clarification of the liability of User Uploaded Content (UUC) platforms such as YouTube under Europe’s copyright framework- the ‘Value Gap’ campaign.

Our advocacy efforts yielded further positive results- ICMP secured the following specific advances for music publishers:

- Article 5 – A derogation for sheet music publishers from the stated copyright exceptions;
- Article 16- clarification of music publishers as rightholders, which will benefit songwriters, composers and publishers of all sizes. This solves the legal lack of clarity brought about by the ECJ’s Reprobel ruling on private copying levies.

The text was consequently ratified by the EU28 in the Council of the EU and became law when published in the EU Official Journal on 17 May. There is now a 24-month deadline for governments to transpose the Directive nationally.

We have already completed an ICMP Copyright Directive Transposition Strategy Meeting to with senior company executives and General Counsel to refine our implementation plan for our Membership.

We have also already started to work on exporting this solution internationally given our recent meetings with the Canadian government and our upcoming work mission to the USA.

“We are grateful for MEPs’ recognition that music must be given its rightful value. We’re particularly pleased to secure sector-specific safeguards for music publishers. These battles were hard-fought, crucial wins and are particularly important for our independent publisher members”

CHRIS BUTLER
ICMP CHAIRMAN

EU Satellite and Cable Directive vote

On 28 March, MEPs voted through the EU Satellite and Cable Directive legislation by way of an emphatic majority.

The initial proposal would have led to de facto pan-European licensing for the clearance of broadcast rights in many instances. We worked to push back against this intrusion on the principle of territoriality. Thankfully, the majority of Member States in Council took onboard ICMP’s concerns and pushed back to create a positive end-result on our two key issues of:

- Restricting the application of the ‘Country of Origin’ principle (now limited to news and current affairs);
- Securing legal recognition of ‘Direct Injection’ and thereby protecting our legal rights and consequently revenue streams for cable and satellite transmissions of music.

The Geo-Blocking Regulation

IMCP continues to work on the Geo-Blocking Regulation to ensure digital music services are excluded from its scope.

The law entered into force in December 2018 with the aim of banning “discrimination” between Member States for the online purchase of goods and services. Midway through the process, the Commission included non-AV based copyright-protected content services, in practice meaning our content as carried on DSPs.

Any inclusion within the scope of the geo-blocking ban would have been profoundly detrimental from both a legal and commercial perspective. First, consumer access to legal digital music is not a challenge today (more than 50 million works licensed across 200+ DSPs).

Instead, inclusion would impinge on our Indies’ regionalised licensing practices. Furthermore, it would negate the possibility to price differentiate on DSPs from country to country according to local conditions (Spotify in Poland is €4.99 per month, compared to €9.99 in Spain). An inclusion would lead to price harmonisation and inevitably a reversion to towards piracy in eastern Europe especially.

ICMP worked successfully with the European Parliament to ensure there was no inclusion of music services in the end.

However, the final legal deal included a review clause which would look specifically at the need to include digital music. We are now engaged with the consultancies working on the evidential studies for the European Commission.

“The music sector has worked hard to build cross-border access to music. We should be assured of cross-border protection of our members’ copyright.”

JOHN PHELAN

ICMP DIRECTOR GENERAL

The Audio-Visual Media Services (AVMS) Directive

In late 2018, the European Parliament approved the AVMS Directive deal by 452 votes of a maximum 751.

The Directive seeks to establish a 30% quota of European works in online broadcast media content. TV broadcasters will be obliged to broadcast at least 50% share of European works in viewing time. It also seeks to address the modern day digital sphere by stipulating that at least 30% of Video on Demand (VOD) platforms’ content will have to be European.

It also establishes quantitative rules on advertising (20% maximum of daily broadcasting between 6am and 8pm).

VOD platforms will now be responsible for responding “with haste and efficiency” to user complaints about objectionable forms of content such as incitement to violence or hatred, and they must also contribute to the development of European audio-visual productions, either by direct investment in content or contributing to national funds. The level of contribution should be proportional to the services’ revenues in the country in question.

Platform-to-Business Regulation

On 17 April 2019, the European Parliament adopted the Platform-to-Business Regulation.

The primary aim of this legislation is to establish standards and obligations for services with respect to the transparency of their advertising practices and methodology for product prominence. It is also applicable to search engines.

ICMP contributed to and signed a joint statement with its colleagues in the leading international rightsholder and producer organisations to encourage the EU institutions to continue work on the issue and also to welcome the establishment of the Observatory on the Online Platform Economy.

This is definitely an area in which we will continue to input and advise on.

Directive on Collective Rights Management

The Directive on Collective Rights Management (CRM) was adopted in February 2014. Member States had until April 2016 to implement the legislation into their own national laws, but many several have failed to do so.

ICMP continues to be in close contact with the Commission and with Permanent Representations of EU Member States and our own members to monitor the Directive’s implementation. For example, in 2018 Romania was sanctioned by the Commission for failure to sufficiently implement the law. We worked with DG Justice to advise on the minimum and good standards which should be the target across Europe.

INDIA

In February 2019, Spotify launched in India despite a lack of licensing authorisation for the use of Warner/Chappell's repertoire. Spotify claimed eligibility for a compulsory, statutory license under Indian law which was in fact only intended for online transmissions of broadcasters' content.

ICMP immediately issued a press release to defend our specific member's interests, but also to highlight the risk of such actions to our broader industry. This was picked up widely in top tier media.

We also sought to support Warner/Chappell as it pursued legal action and injunctive relief by supplying translated text and analysis of the legal text in question.

"At the heart of this problem is the inappropriate use of music and the subsequent undervaluation of songwriters – Indian and international. ICMP and its members express their full support of Warner/Chappell Music."

ICMP PRESS RELEASE

JAPAN

Prompted by international pressure and the discussion Trans-Pacific Partnership (TPP11) discussions, Japan moved to amend its copyright law as of January 1. Most positively, the amendments included an extension of the term of copyright protected works from life +50 years to life +70 years.

The MPAJ and ICMP have been working with various industry bodies on implementation and idiosyncrasies such as the "wartime extensions" applicable to the United States, Canada, New Zealand, Australia, the UK, France, Holland, Belgium and Greece.

NEW ZEALAND

New Zealand has launched a legislative reform process in relation to its national Copyright Act (1994).

ICMP compiled and lodged a submission to the public consultation, while it also formally endorsed AMPAL's separate submission.

ICMP's paper brings the international perspective and focusses on key factors such as term extension and revising 'safe harbour' liability exemption provisions to be fit for purpose for the modern age and be appropriate for publishers' interests.

"In conducting the review, it is crucial that the New Zealand Government gives full regard to the views of rights holders and creators, and the commercial realities of the market that they provide in their submissions."

MATTHEW O'SULLIVAN

GENERAL MANAGER OF AMPAL

NIGERIA

One of ICMP's brand new members, the Music Publishers' Association of Nigeria, is experiencing issues with its local collecting society. The society is facing a government order suspending its license for not distributing royalties accurately or efficiently. ICMP is currently taking the necessary steps to engage both parties and is ready to support MPAN at each step.

SOUTH AFRICA

South Africa is currently going through an extremely concerning Copyright reform process. ICMP has worked with its international and South African colleagues since October 2018 to call on the government to resolve the myriad issues stemming from the two draft Bills in question.

Thankfully, the noise is being heard as the Bills were not signed by the President before election day two weeks and there is now the prospect of them being sent back to the country's National Assembly for revision.

ICMP has frequently raised all publisher specific matters in person with the government, with WIPO authorities and in the media. ICMP also continues to help coordinate an international coalition including the MPAA, IFPI, Apple, RIAA, Netflix and Spotify and this issue. The aim is to avert risks such as a form of Fair Use exception and limitations on contractual assignment periods, unwaivable rights.

“We have flagged our concerns on several harmful clauses in the draft Bill which, as they stand, risk diluting the IPRs which underpin South Africa's economic growth”

DAVID ALEXANDER

MUSIC PUBLISHERS' ASSOCIATION OF SOUTH AFRICA

HAGUE CONVENTION ON RECOGNITION & ENFORCEMENT OF CROSS-BORDER JUDGMENTS

As international governments considered including IPRs (including copyright) within the scope of the Hague Convention on Recognition & Enforcement of Cross-Border judgments, ICMP helped to coordinate and draft a joint letter signed by all significant international right holder organisations outlining our concerns on May 22.

These included the Federation of Book Publishers (FEP); the newspaper industry (ENPA); commercial television (ACT), Indie labels (IMPALA); Major labels (IFPI); the photography industry (CEPIC); Hollywood studios (MPAA).

The letter will place concerted pressure on the international governments ahead of their international Diplomatic Conference (DipCon) to realise the implications of any such inclusion.

This was another good example of ICMP Secretariat and international organisations working together as an effective, wide ranging lobby network.

22 May 2019

EXCLUSION OF INTELLECTUAL PROPERTY RIGHTS FROM THE SCOPE OF THE HAGUE CONVENTION ON THE RECOGNITION AND ENFORCEMENT OF FOREIGN JUDGMENTS

We, the undersigned organisations, representing creative industries in the EU, have been following the ongoing negotiations on the proposed Hague Convention on the Recognition and Enforcement of Foreign Judgments closely, particularly whether Intellectual Property Rights (IPRs) should fall within its scope.

Suggestions to include Intellectual Property Rights - particularly copyright - within the Convention give rise to serious concerns across and throughout our sectors.

Whilst we support the Convention's overall objectives of improving international judicial cooperation and the possibility of facilitating enforcement of certain foreign judgments, we cannot support the inclusion of copyright within the scope of the Convention as proposed for adoption at the Diplomatic Conference. The proposed Convention in its current form would not assist copyright right holders and instead it would create serious risks of counter-productive effects for our industries.

We invite the European Commission and EU Member States to take our concerns into account ahead of the upcoming Diplomatic Conference and we ask that copyright be comprehensively excluded from the scope of the Convention.

ACT – Association of Commercial Televisions
CEPIC – Centre of the Picture Industry
EMMA – European Media Magazine Association
ENPA – European Newspaper Publishers' Association
EPC – European Publishers Council
FEP – Federation of European Publishers
FIAPF – International Federation of Film Producers Associations
ICMP – International Confederation of Music Publishers
IFPI – International Federation of Phonographic Industry
IMPALA – Independent Music Companies Association
ISFE – European Video Games Industry
IVF – International Video Federation
MPA – Motion Picture Association
NME – News Media Europe
STM – International Association of STM Publishers

UNITED STATES OF AMERICA

ICMP has supported our US member, the NMPA on a number of crucial copyright files via media outreach and advocacy efforts.

For example, on 19 April, ICMP submitted a formal recommendation to the U.S. Copyright Office supporting the NMPA in its bid for designation as the Mechanical Licensing Collective (MLC).

We are also supporting NMPA in its objection to Spotify, Pandora, Amazon, and Google's appeal against the US Copyright Royalty Board's decision to increase songwriters' streaming royalties by approximately 44%percent.

We have also sought to closely coordinated our work internationally, for example when it comes to US interests in South African law reform (e.g. meetings with the South African ambassador) or trade discussions with jurisdictions such as the UK (formal submissions outlining priorities across industry partners such as the RIAA, MPAA, IFPI etc.).

Erich Carey, Vice President and Senior Counsel of the NMPA, has been particularly diligent in contributing his expertise in order to secure our joint interests across a number of regulatory and legal issues.

“We have flagged our concerns on several harmful clauses in the draft Bill which, as they stand, risk diluting the IPRs which underpin South Africa's economic growth”

DAVID ISRAELITE

CEO OF NMPA

FREE TRADE AGREEMENTS

Free Trade Agreements (FTAs) often include chapters which encompass major opportunities or risks to Intellectual Property Rights, including copyright.

When IP chapters are included in trade negotiations, ICMP seeks to ensure robust protections, for example delivering harmonised term of copyright protection, revision of hosting liability exemptions and strong enforcement possibilities.

It has been a busy 12 months on the FTA front as can be seen below

Comprehensive and Progressive Agreement for Trans-Pacific Partnership (TPP 11)

The Comprehensive and Progressive Agreement for Trans-Pacific Partnership (TPP 11) entered into force on 30 December 2018. The 11 signatories are: Singapore, Brunei, New Zealand, Chile, Australia, Peru, Vietnam, Malaysia, Mexico, Canada and Japan.

ICMP has been consistently working on this file together with our members in Australasia, Canada and Japan. Our focus was on including provisions on term of protection for copyright. This however became problematic due to the US leaving the negotiations and consequently much of the IP chapters being dropped. That said, pressure has worked to ensure term extension in Japan and we now focus on New Zealand via the ongoing trade negotiations with the EU.

The United States, Mexico, Canada trade agreement (USMCA)

The United States, Mexico and Canada signed a new trade agreement (USMCA) on 30 November 2018, which would supplant the existing NAFTA trade agreement. The USMCA's primary positives include its requirement on signatories to establish a term of copyright protection of works of at least life of the author plus 70 years.

The USMCA still requires implementation by each participating country and is currently held up the US Congress. ICMP has liaised closely with both our US and Canadian members in order to contribute to its implantation, most recently in our trade mission to Canada during which we repeatedly stressed the importance of its implementation for music publishers to government officials.

EU-Japan Economic Partnership Agreement

The EU-Japan Economic Partnership Agreement (EPA) was signed on 17 July 2018. Among other IP-related issues is a provision on the collective management of rights which reinforces CMOs' obligations to collect on behalf of authors while requiring operational "best practices" across their activities.

ICMP has worked closely with our member on the ground for several years to deliver such an outcome and in October 2018 drafted a letter reiterating our strong support for the deal and calling on the European Parliament to proceed with a swift ratification process.

This letter was co-signed by a large number of international organisations in joint support of our position.



European Business Calls for Swift Ratification of the EU-Japan Economic Partnership Agreement

Brussels, 12 October 2018

The European business organisations, signatories of this statement, hereby reiterate their strong support for the EU-Japan Economic Partnership Agreement (EPA), and call on the European Parliament to proceed with a swift ratification process, following the signature of the Agreement on 17 July 2018. This will allow both businesses and consumers as a whole to reap the benefits of this modern, comprehensive and balanced Agreement.

Japan and the EU are two like-minded and highly developed economies with a similar approach to today's challenges (i.e. aging population, security, environment) and long-standing trade and investment links. Trade in goods and services between Japan and the EU exceeds 160 billion euro per year, and bilateral exports are estimated to increase by 29% for Japan and 34% for the EU.¹

While the international community is witnessing a rise in protectionist measures across the world, the EU and Japan have, on numerous occasions, repeatedly sent positive signals by confirming their strong commitment to free and fair trade at both the multilateral and the bilateral level.

Our European business organisations here represented are convinced that the ratification of this Agreement will further reinforce the existing strategic collaboration, notably by creating a trade zone of 600 million people covering a third of global GDP, and by paving the way to shape together tomorrow's international rules.

We stand strong behind this Agreement as it will deliver many benefits, such as:

- contributing to advancing both the social and economic agenda and thereby improving the quality of peoples' lives in the EU and in Japan;
- ensuring economic predictability, a valuable tool of particular strategic importance in times when rules-based trade and cooperation is challenged;
- enabling a level playing field between both partners, with a whole new range of commercial opportunities for European and Japanese consumers and companies alike;
- removing almost all tariffs on goods, opening up services and public procurement markets and creating common rules for bilateral trade;
- guaranteeing and protecting geographical indications and intellectual property rights;
- facilitating services and investment flows;
- fostering collaboration by means of common R&D, new channels of regulatory cooperation, coherence and standardisation.

The Japan-EU EPA represents a thorough Agreement reflecting the shared interest and high-standard rules of two well-developed and value-based economies. We call on the European Parliament to endorse this high-standard Agreement to allow for its rapid final ratification. We also call on the European Parliament

EU-Mercosur trade agreement

The EU has been negotiating a trade deal with the four founding 'Mercosur' governments (Argentina, Brazil Paraguay and Uruguay) for 4 years now as part of a broader Association Agreement between the two regions.

The IP chapter covers, among other things, the term of copyright protection (life plus 70) cooperation on collective management of rights and rules on non-discrimination against members of collecting societies.

Through our membership of the European Commission's Civil Society Dialogue, ICMP has attended a number of meetings on this FTA to give input.

We have also been in contact with both our Argentinian, Mexican and Brazilian members for their input.

EU-Korea free trade agreement

The EU announced in October 2018 that talks will open to update the existing EU-Korean free trade agreement, which was ratified in December 2015.

Whilst the terms have not been set yet at this early stage, we expect Korea to be asked to update its rules on Public Performance Rights (PPRs) and improve licensing scenarios for the use of copyrighted music.

ICMP is liaising with the European Commission and European Parliament's trade committee to identify the negotiating parameters and subsequently input on behalf of music publishers.

New Zealand-EU free trade agreement

New Zealand is eager to conclude an FTA with the EU, Prime Minister Ahearn and her trade negotiating team visited Brussels in March for this reason.

President Juncker has informed that a deal could be finalised by the end of 2019.

ICMP is monitoring progress on developments with EU trade negotiators in the Commission and of course stands ready to work alongside our colleagues in New Zealand to concert pressure for our 'asks'. For example, New Zealand is only one of two OECD countries with a term of protection for works of life +50 (the other being Canada, and this would extend should the USMCA be ratified).



MEMP

**PROVIDING FOR
ITS MEMBERS**

ICMP

PROVIDING FOR ITS MEMBERS

ICMP organises numerous events across the globe every year. These gatherings are vital for a) maintaining face-to-face contact with our members b) increasing our clout with key decision-makers and stakeholders worldwide.

Below is a snapshot of the ICMP-hosted events held over the past 12 months.

MIDEM 2018 CANNES

ICMP once again held a number of meetings and events at the annual MIDEM music industry event in Cannes.

On 5 June, we organised a 'Publishers Q&A' session, in which top publishers gave expert advice on music publishing to interested parties.

That evening, ICMP presented Japanese music publishing icon Misa Watanabe with the 2018 ICMP Ralph Peer II Award for Outstanding Contribution to Music Publishing.

Following that, Ralph Peer II (Peer Music's Chair and CEO, ICMP Board Member, President d'Honneur and Treasurer), was named Officier dans l'Ordre des Arts et des Lettres (Officer of the Order of Arts and Letters) by the French government. The award was given in recognition of Ralph's outstanding contributions to the arts in France and internationally.

On June 6 at our AGM, a new ICMP Board and Bureaux was elected for 2018-2020.

This preceded a joint meeting of our Popular and Serious Bureaux, in which EU copyright reform, Collective Rights Management and issues with a number of CMOs were discussed.

Finally, on 7 June, our Production Music Committee (PMC) met to discuss and exchange information on the EU's General Data Protection Regulation (GDPR), issues related to neighbouring rights, copyright reform and national updates. PMC elections were also held for the 2018 – 2020 time period.



CEEMPC 2018 Bucharest

ICMP held its annual Central and Eastern European Music Publishers Congress (CEEMPC) in Bucharest on 20 September. This was spearheaded overseen by Andrei Filip and ICMP.

The Congress was opened by the Secretary of State from the Romanian Ministry of Culture and National Identity, Răzvan Ștefan Rab alongside ICMP's Chair Chris Butler.

Andrei helped to organise guest presentations by the Romanian Copyright Office and the local CMO, UCMR-ADA. The region's music industry was given centre stage during a panel debate, before Markus Nees, COO of online licensing hub International Copyright Enterprise (ICE) gave an in-depth insight into the company's workings. A session was devoted to the latest trends in Collective Rights Management was next before an update on September's EU copyright vote and trilogue negotiations was provided.

The evening concluded with a guided tour of the magnificent Enescu Museum and an ICMP Cocktail Reception.



PRODUCTION MUSIC COMMITTEE MEETINGS Bucharest, Cannes and London

On 21 September, ICMP's Production Music Committee held a meeting of its members to discuss the latest developments affecting their business area. Various important issues were on the agenda, including how to maximise royalties from both CMOs and television stations, neighbouring rights, national developments as well as the impact of artificial intelligence on the sector.

ICMP also oversaw the committee's most recent meeting of its Board and full membership in London in November last year.



ICMP BOARD MEETINGS Johannesburg & Madrid

ICMP's Board met in Johannesburg in October 2018 in the midst of a crucial copyright law reform. It was also the first Board meeting for new ICMP Director General John Phelan.

Presentations were given by our colleagues David Alexander of Sheer Music and Ryan Hill of UMP.

We secure meetings with representatives from South Africa's Ministry of Trade and Industry, calling on them to resolve issues of concern as the country's copyright overhaul entered its final stages. Board members also met with major music market stakeholders in a roundtable event, including artist managers, record labels and digital services including Spotify and Deezer.



Here we go! ICMP does Jo'burg. Thanks to all at SAMRO for their hospitality. @ICMP @the_MPA @samromusic



The next Board meeting took place in Madrid on 27 February 2019. We analysed the market problems in Spain stemming from SGAE's dysfunction and also lent attention to relevant law reforms.

An ICMP delegation met with Spain's Ministry of Culture to discuss the harm being caused to Spanish music, songwriters and composers and established a high level relationship which is ongoing today.



“
Thanks to ICMP involvement, people are aware that what is happening in Spain is not just a local problem; it impacts the entire international community of authors and publishers.
”

TERESA ALFONSO
VICE-CHAIR OF ICMP POPULAR BUREAU

EU TRAINING DAY Brussels

ICMP held an EU Training Day at our Brussels headquarters on 28 November.

ICMP Board Members were in attendance as were national Music Publisher Associations from Denmark, Finland, France, Norway, the UK and others.

The Training Day was designed to inform and increase our lobby capacity and effectiveness. Focus was placed on how the EU's legislative system works, media engagement and optimising social media representation.

Expert external input came from *Spotify* and the EU correspondent for The Times newspaper.

Following this, our delegation visiting met privately with prominent copyright defensive MEPs Mary Honeyball and Helga Trüpel in the European Parliament.



ICMP & SERIOUS BUREAU Frankfurt Musikmesse

The ICMP Serious Music Bureau met on 4 April 2019 at the *Frankfurt Musikmesse* – Europe's largest music industry trade fair.

Bureau attendees shared and discussed their national updates. A senior political advisor from the European Parliament provided an insider perspective on Copyright Directive negotiations and highlighted opportunities and risks for the implementation plan ahead.

ICMP also met bilaterally with the Chief Executive of the *Musikmesse*. We have opened negotiations for direct collaboration next year – the 40th anniversary of the *Musikmesse*.



COPYRIGHT DIRECTIVE TRANSPPOSITION STRATEGY MEETING

On 14 May, ICMP held a copyright directive transposition meeting at BMG's London offices.

In attendance were Senior Execs and General Counsel across our Indies and Majors, Board representatives and several MPAs.

ICMP gave:

- A) A detailed update and rundown of the implications of the Directive for our members;
- B) Take onboard further feedback from the companies re: legal and commercial perspective;
- C) Proposed a legal, political and media plan for the implementation stage for our MPAs;

External input came from the Executive Manager of Audible Magic who spoke of the implications for content recognition services of Article 17.

This was followed by Richard Smirke, UK Editor of Billboard who gave insight on media engagement do's and don'ts.

This was a key input source for ICMP's Copyright Directive Transposition Strategy issued to its MPA members.

ICMP CONCERT IN EUROPEAN PARLIAMENT

On 20 March, ICMP co-organised a musical performance by renowned artist GRANDGEORGE at the European Parliament. The event was hosted by Dr. Christian Ehler MEP, Chairman of the European Parliament's Cultural & Creative Industries Intergroup and was part of the *Building a Stronger Europe through Creativity and Culture* conference, which featured interventions from the President of the European Parliament Antonio Tajani and European Commission President Jean-Claude Juncker.



NOMINATING COLLEAGUE TO UKRAINIAN GOVERNMENT'S CMO COMMITTEE

In January, following a call for proposals from the Ministry of Trade and Development and a request from our member, ICMP formally nominated the Head of the Ukraine Music Publishers' Platform, Bogdan Glovatsky to sit on the government's committee for the accreditation of CMOs.

Bogdan was subsequently appointed to the Committee.



SUPPORT FOR NMPA ON MUSIC MODERNIZATION ACT ISSUES



In April 2019, ICMP formally submitted to the Register of the US Copyright Office its support for the NMPA's bid to be nominated as the licensing vehicle (MLC) pursuant to the Music Modernization Act. The MLC will bring about a modern method of distribution of royalties and ICMP firmly believes it clearly the best candidate in the field.

Separately, we were also supportive of the NMPA in its opposition to Google, Spotify, Amazon and Pandora's appeal of the US Copyright Royalty Board's decision. The CRB decision marked a clear victory for the NMPA and would prompt a 44% streaming royalty rate increase for songwriters in the US. ICMP will continue to extend every option of support to its colleagues in the USA.



**INTERNATIONAL
COOPERATION**

ICMP'S INTERNATIONAL COOPERATION

As well as working with rightsholder organisations on a multilateral and regular basis, ICMP is an active member of a number of critically important institutions and alliances. These include The World Intellectual Property Organisation (WIPO) and the EU Intellectual Property Office (EUIPO).

WORLD INTELLECTUAL PROPERTY ORGANIZATION

ICMP has secured “consultative status” with WIPO. This is the highest status granted by the United Nations to non-governmental organisations (NGOs) and allows us to participate directly in its work and to organise private meetings with staff.

This privilege sees us participating in numerous WIPO meetings, including the annual General Assemblies, the Standing Committee on Copyright and Related Rights (SCCR) as well as the Intergovernmental Committee on Intellectual Property and Genetic Resources, Traditional Knowledge and Folklore (IGC).

ICMP & WIPO enhanced cooperation

ICMP also signed a bilateral Memorandum of Understanding (MoU) in September 2018 which will seek to enhance cooperation between the two organisations. One area we are provisionally examining is good accurate data in terms of the worth of music publishing to economies.

ICMP had a full day of private bilateral meetings with WIPO officials, including Deputy Director General Sylvie Forbin in December 2018. We continue to liaise with all their relevant teams as needed, for example most recently on copyright legislative reform in South Africa in order to pursue a favourable outcome for music publishers.



58th WIPO General Assemblies

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WIPO SCCR (Standing Committee on Copyright and Related Rights)

ICMP attended two WIPO SCCR meetings over the past year: SCCR 37 from 26 – 30 November 2018 and SCCR 38 from 1 – 5 April 2019.

We typically attend the opening sessions, in which the Director General and member states offer in depth statements. We also follow meetings relevant to the potential draft treaty on broadcasting as well as sessions devoted to limitations and exceptions for a range of groups such as libraries and education institutions.

The SCCR is still working towards convening a Diplomatic Conference for the adoption of a treaty on the protection of broadcasting organisations. The EU state positively shares our stance that the existing international copyright regime does everything required of it, therefore there is no need for a new treaty broadening exceptions and limitations internationally. Issues will be taken up again at the next meeting of the committee, scheduled for October 2019 and ICMP will be there.

WIPO Intergovernmental Committee meetings

ICMP participated at three meetings of the Intergovernmental Committee on Intellectual Property and Genetic Resources, Traditional Knowledge (TK) and Folklore (IGC) over the past year.

Discussions continue to be focused on developing an instrument to protect traditional knowledge (TK), and traditional cultural expressions (TCEs).

ICMP monitors this Committee given that the mention and possible inclusion of words from songs, poetry, and rhythm could form part of a possible instrument. We continue to be supportive of a non-binding instrument rather than a Treaty to protect TK.



Local WIPO workshops and seminars

Each year, WIPO organises a number of national workshops and seminars on intellectual property and ICMP's members are often invited to speak at these events. Over the past year, various ICMP members have spoken at such events in Singapore and Kenya.

These intimate gatherings are important for us as they allow music publishers to engage with local intellectual property offices and governments in different parts of the world.

EUROPEAN UNION INTELLECTUAL PROPERTY OFFICE (EUIPO)

As a private sector member, ICMP attends meetings of the EUIPO's Working Groups, plenary sessions and private sector stakeholder sessions.

We currently participate in the following five working groups:

- IP in the digital world;
- Public awareness;
- Legal and international;
- Enforcement;
- Economics and statistics



EUROPEAN SECRETARY GENERAL NETWORK

In April 2019, The cross-industry European Secretary General Network (ESGN), a pan-European cooperation group of principals from a wide range of sectors, appointed ICMP's Director General to their membership. The ESGN spans industries from telcos to software; cultural to financial services. ICMP will seek to avail of this network for raising awareness of music sectoral issues, regular information gathering and potential coalition building.

CO-OPERATION WITH THE EUROPEAN BROADCASTING UNION

In March 2019, ICMP's Director General met with the EBU's Head of Music to begin initial discussions on a joint project between music publishers, their songwriters and the EBU's broadcast membership.

EUROPEAN INTERNET FORUM

Also in April, ICMP joined the European Internet Forum (EIF), which comprises some 60 MEPs and other political figures, companies such as Vivendi, SoundCloud and Amazon, as well associations including the European Newspaper Publishers' Association and the Federation of European Publishers.

EIF focuses on issues at the top of the political agenda and on emerging future trends at both European and global level. ICMP can now actively contribute to EIF's continuous programme from within. In the near term this will focus on special projects for the incoming Commission, Council and Parliament. It is an effective means of amplifying music publishers' voice within institutions and across other primary industries.



MUSIC MOVES EUROPE - EU MUSIC OBSERVATORY

Late last year, ICMP's Director General was appointed to the Advisory Board for the Music Moves Europe (MME) programme. MME is the overarching framework for the European Commission's initiatives and actions in support of the European music sector.

As part of this, ICMP will contribute to a Music Moves Europe – A feasibility study for the establishment of a European music observatory.

The objective of the workshop is to collect the perspective of leading EU music experts on key trends and opportunities facing the music sector in Europe. This will enable the research team to flag the most urgent matters that a future European Music Observatory could accurately map and monitor. Our first meeting is scheduled for 15 June.



As well as the new additions, ICMP maintains its regular commitment to the following alliances. See overleaf...

CREATIVITY WORKS!

ICMP has a close and fruitful partnership with a Brussels-based coalition Creativity Works! which gathers together the multinational cultural and creative industries for co-operation.

Creativity Works! members include trade bodies leadership for the Hollywood studios (MPAA), commercial TV (e.g. Sky, Mediaset, TFI...), book publishers. The objective of the coalition is to have an private dialogue and coordination with regard to policy making and the economic contribution made by the cultural and creative sectors in the digital age. ICMP meets within Creativity Works! Regularly, helps shape its campaigns to raise awareness of the importance of the creative industries.



EUROPEAN AGENDA FOR MUSIC

ICMP is an official supporter of the European Agenda for Music. An initiative of the European Music Council. The Agenda details which directions to pursue in order to ensure a music sector that remains strong, fair, innovative and diverse in a rapidly changing world.



THE 'BILBAO GROUP'

Originally a music-industry only informal group to discuss policy priorities, this has extended to include other AV sector rightholders with similar interests.



**COMMUNICATIONS
& MEDIA STRATEGIES**

ICMP COMMUNICATIONS & MEDIA STRATEGIES

Since the new team starting its work in October 2018, ICMP has:

- Continued to communicate to its membership worldwide;
- Simultaneously engage in a listening exercise to see how to tailor that communication to best suit its membership;
- Heavily emphasised the importance of increasing the presence of music publishers in conventional media worldwide (broadcast and print);
- Drive an increase in effective social media engagement

The strategic goal here is not external communication for the sake of it or for volume, anyone can do that, but rather to stress and pursue the right engagement i.e. with high level political representatives; journalists; industry representatives.

ICMP has done this via a mix of media relations, honing of our social media practices; newsletter format adjustment, 'on call' email availability and driving traffic towards the ICMP website. Some of the considered changes to our communications strategy can be read below.



MEDIA RELATIONS

We have broadened to include our target range to the 4 key parameters of: broadcast and print (increasing the former), trade and conventional (increasing the latter).

We have increased our media database from approximately 100 with a focus on trade press in Europe and the US to over 4,000 media contacts worldwide in all areas of relevant coverage.

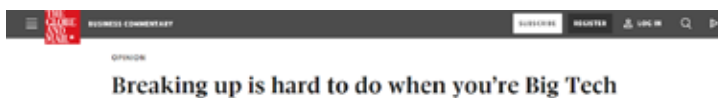
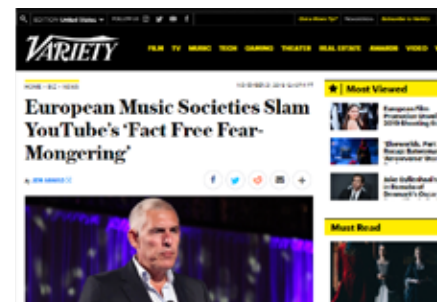
Press releases on relevant ICMP issues have been an important tool, but we have stressed more direct relationships with established journalists and a willingness supply both on and off record comment.

As a result, ICMP is now regularly featured in *Billboard*, *Music Week*, *Music Business Worldwide*, *Musikwoche*, Brussels based EU-media such as Euractiv and the Parliament Magazine, but we have built up our radio and TV media representation as well as high value online and print outlets such as the *BBC*, *The Times*, *El Pais*, *Associated Press*, *Reuters* and *Bloomberg*, the *FT*, across Europe, South Africa, Canada for example.

This is a first for ICMP and we will continue to employ this approach to get our message across to a wider audience than previously.

We have also forged closer links with the likes of *Music Business Worldwide*, *Variety*, *Billboard* and *Euronews* who have all interviewed our Director General on several occasions over the past few months.





WARNER/CHAPPELL VS. SPOTIFY: MUSIC RIGHTS COMPANY BACKED BY FELLOW PUBLISHERS IN INDIA LICENSING DISPUTE

"ICMP AND ITS MEMBERS EXPRESS THEIR FULL SUPPORT OF WARNER/CHAPPELL MUSIC IN ITS ACTIONS."

JOHN PHELAN, ICMP



"Governments around the world are starting to realize that Google and the big tech companies have responsibilities in many different areas," said John Phelan, director-general of the International Confederation of Music Publishers, which represents Sony, Warner, Universal and many independent publishers.

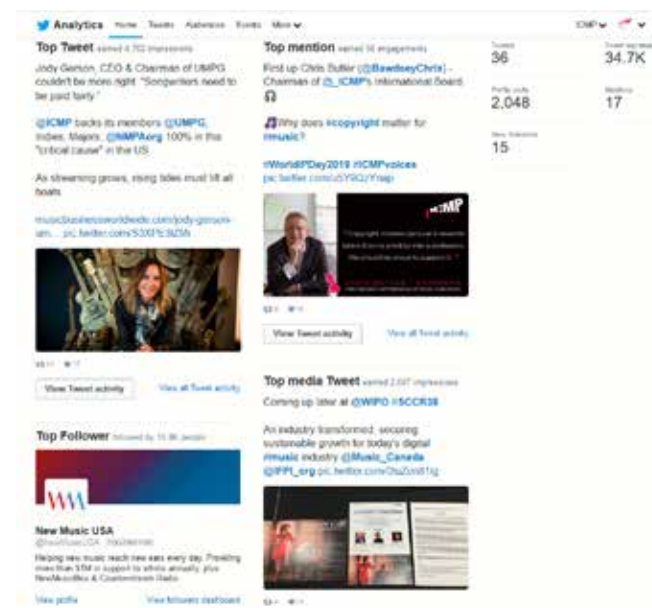
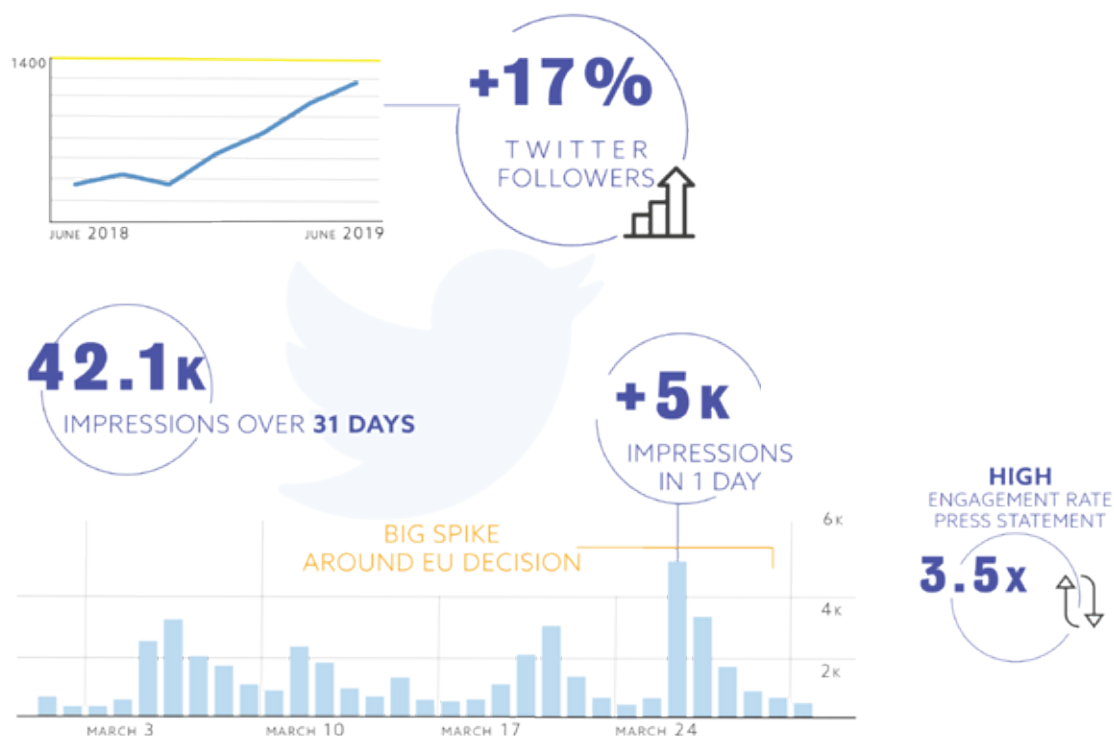
SOCIAL MEDIA

ICMP continues to build a high quality following on its Twitter feed.

- In the last year alone we have increased the number of our Twitter followers by **17%**.
- Our account garners an average of some **30K** tweet impressions (the number of times a tweet shows up in somebody's timeline) per month
- **More than 2000 people** visit our profile on average monthly.

For an example of this increased impact, in March 2019 on the EU Copyright Directive more than **5,000 views** of one of our tweets was registered, while in that month we had more than **40,000 impressions**.

We also live tweet from events and our opinions are regularly retweeted by influencers in the music industry.





ICMP @ ICMP · May 9

A pleasure to present on music industry & legal developments as part of #CanadianMusicWeek. Especially alongside @NMPAorg colleague @eccareymusic who's driving great progress in the US.

Thanks @casselsbrock & @JacquieLaRocque for warm welcome.
#musicpublishers #copyright



ICMP @ ICMP · May 11
Pleasure to have @ericaric join sub-group of senior music publishers from around the world at @BIRACUK today to give insight on how the #musicindustry can better interact with #UK. Great insight. Thanks Richard!



ICMP @ ICMP · May 9
The power of music.

Great to meet with the Prime Minister of Canada's Office to discuss the future of music in Canada, and Canadian music around the world (3rd biggest exporter worldwide) 🇨🇦 🇬🇧

#musicpublishers #CanadianMusicWeek

ICMP @ ICMP · May 7

Debate today by @LiveEurope on the future of live music in Europe. They're doing crucial work & always great to be hosted by one of the best rock venues around @Allconcerts #music #live #ICMP



ICMP @ ICMP · May 15
The CASE Act: You Have Questions. We Have the Answers. copyrightalliance.org/case-act-the-ca-act/ via @MusicCopyright



The CASE Act: You Have Questions. We Have the Answers.

ICMP @ ICMP · Apr 26
Latest in ICMP's #VoiceAroundTheGlobe series today on #WorldIPDay is our colleague @DavidBuxton - CEO & President of the great team at @NMPAorg



#credit #compensation #contributions #creations. Copyright is all about the credit.



World Intellectual Property Organization (WIPO), U.S. Copyright Office, governments and 2 others

ICMP @ ICMP · May 14
Important 2019 #music industry survey for #creators from @UK_Music.

MIPA @ the MIPA
Are you a musician, songwriter, composer, producer, engineer or artist? @UK_Music have launched the 2019 survey for creators in the #musicindustry...

ICMP @ ICMP · May 26
They said yes! MIPs approve #CopyrightDirective

Music publishers secure specific wins for songwriters and composers at EU address #europa

Our work will now continue with national governments across Europe.

ICMP statement below:



ICMP @ ICMP · Apr 13
#songwriters criticise Spotify's #CRB ruling appeal in open letter 'You Have Used Us' @NMPAorg @naty #royalties

bit.ly/2NAJ0KT



ICMP @ ICMP · May 3
#songwriters and #composers look to tap into growing online gaming market @makowsky @PSS&M&K



Music industry takes aim at Fortnite over song royalties
Songwriters and composers look to use new copyright laws to cash in on the boom in online gaming.
theguardian.com

ICMP @ ICMP · Apr 5
Coming up later at @WWF #GCC2018

An industry transformed: securing sustainable growth for today's digital #music industry @Music_Canada @CMAA



ICMP @ ICMP · Apr 23
Industry coalition should form the mechanical licensing collective (MELC) @NMPAorg @naty @browns @browns @browns via



Songwriters of North America Argues for Industry Coalition to Form...
The Songwriters of North America has submitted a letter to the Copyright Office arguing why its industry consensus coalition, which also includes the CMOCC, should...

ICMP @ ICMP · Apr 10
Jody Gerson, CEO & Chairman of UMPG couldn't be more right: "Songwriters need to be paid fairly."

@ICMP backs its members @UMPG, Indies, Majors, @NMPAorg 100% in this "critical cause" in the US.

As streaming grows, rising tides must lift all boats.

ICMP @ ICMP · May 21
member company @SonyMusicPub continuing to invest in the most modern, high tech royalty portals for musicians. Becoming the home right across our industry for millions of works & musicians. #TheVocal @naty @TheVocal



Sony Music to deliver 'Real Time' royalty data to artists, and enable 'Real Time Royalties' and 'Cash Out' set to make life much easier for Sony acts
musicbusinessinsider.com

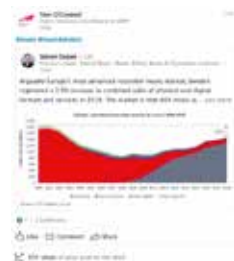
ICMP @ ICMP · May 17
Pleasure to catch up with Graham Davies @IvorAcademy CEO on all things songwriting & music publishing. Congrats on transition from BASCA-The Ivors Academy. Reflects huge work they do for songwriters/composers. 1 of biggest events in calendar ahead @IvorAcademy.com/awards/the-ivs... @TheIvors



ICMP @ ICMP · May 17
On day 1 we published, read ICMP interview in @GlobalWork on music industry. YouTube Value Gap @thejobboardmail.com/news/come...
"Governments around the world are starting to realize that Google and the big tech companies have responsibilities in many different areas." @GlobalWork



Finally, we are also active on LinkedIn and have some **270 connections** that regularly receive news on the sector.



GLOBAL BRIEFING

As part of our communications review, the bi-monthly Global Briefing has taken a break for the time being. There are two principal reasons: to providing a more frequent, concise Weekly Wrap to our membership and also by making it an internal newsletter enabling ourselves to be more publisher-specific and candid. We may revisit this decision in future in order to cater for an external audience (we received such feedback). So watch this space.

WEBSITE TRAFFIC BOOM

The ICMP website houses news, statements, videos and positions. It is kept up-to-date with fresh items such as news and events posted on a regular basis. Over the past year, the website has attracted more visitors than previously.

According to Google Analytics, we have seen a **30% increase** in visitors to the website since January 2019. This is due to more news items being posted, as well as users being directed to the site from our increased media coverage and Twitter presence – proving the benefits of an interwoven strategy.

We may revamp the design and functionality in the near future.



MEMBERSHIP COMMUNICATIONS

Weekly Wrap

In March, we launched the Weekly Wrap. One version is sent to our Full Membership and the ICMP Board receives another. It is issued each Friday.

It seeks to provide a concise summary of ICMP's activities that week (law reform work, trade missions, membership cooperation, meetings, media, social media) as well as provide a central resource for calendar and logistical matters.

It has proven very popular: it has a **more than 40% average opening rate** which is considered extremely high (the Mailchimp cross-industry average is 17.6%)



Report to our members - International Reports and ICMP Debrief Notes etc.

Information on issues of relevance is provided via email to our members on a regular basis. In addition, ICMP produces a series of *International Reports* which summarise the main developments at WIPO, Global and EU levels for Boards of MPAs. A round up of all Regulatory, Legal and Advocacy initiatives is disseminated to members twice a year.

Another addition over the past year is that of *ICMP Issue Debrief Notes*, which give Full Members more detailed insight into important developments such as an FTA being concluded, or legislation being passed.

We also communicate quickly to our members with short 'flash updates' with important news as it happens.

Intranet

All of the above reports, minutes of meetings etc. can be accessed via the ICMP intranet, which keeps all important documents together. Members from around the world are able access this information via the main ICMP website.



**COLLECTING
SOCIETY ISSUES**

ICMP

COLLECTING SOCIETY ISSUES

In the last 12 months, we have helped our global membership deal with some serious issues affecting music publishing. This will be any area of greater focus going forward. Some examples include:

SPAIN

Spain has faced two main issues in recent times: the continued dysfunction of CMO SGAE and secondly amendments to its copyright law framework.

ICMP has been in regular contact with the government in pushing for and then in support of its application to the courts for a judicial order seeking the reform of SGAE into a more transparent and representative organisation for the benefit of the music sector.

Subsequently, CISAC has issued the threat of sanctions against SGAE unless it reforms and the possibility of temporary expulsion.

Among the efforts being made, an ICMP Board delegation met with the Ministry of Culture in Madrid in February. Media relations on the case continue.

B2B COOPERATION

ICMP is evaluating and reviewing the best way to enhance cooperation with CMOs and CISAC - the global association of CMOs, given mutual concern in recent years that an increase in Board-Board contact is required. We will seek to establish such an interaction and will look to build on the mutual cooperation demonstrated in regulatory affairs for example in South Africa, Spain, EU, Czech Republic, at national, European (GESAC) and international level (CISAC).

GREECE

The dysfunction in the market stems from attempts by both existing societies Autodia and EYED try to seek to collect and distribute royalties from licensees. With the market split between both vehicles this has proven a challenge for a trade body to secure a mandate. The efforts are best steered towards the provision of accurate metadata in order to try and effectuate more accurate distributions.

ROMANIA

In March 2018, Romania was notified by the European Commission for being in breach of EU law by not having sufficiently transposed the EU Collective Rights Management (CRM) Directive. Consequently, the country is now amending its copyright laws.

ICMP has been in contact with the Romanian government in recent months to seek to ensure the laws will maintain the ability for free market choice.

SERBIA

Collecting society SOKOJ only admits publishers representing local repertoire to its General Assembly, a problem exacerbated by inadequate transparency in its distributions.

ICMP has twice written to Serbia's Intellectual Property office, outlining our concerns and proposed solutions for the problems caused in this market.

UKRAINE

There are 20 societies operating in Ukraine with only a handful having any legal authority to represent authors and producers. In addition, the necessary copyright legislation has been lacking, while effective collective management is on hold.

ICMP is working both with our member on the ground and the Ukrainian Agency of Copyright and Related rights to form a strong coalition of publishers and to ultimately secure fair royalty payments for creators. ICMP's nomination of the Head of the Ukraine Music Publishers' Platform Mr Bogdan Glovatsky to sit on the government's committee for the accreditation of CMOs in the country was accepted.

ITALY

Italy's competition authority AGCM has ordered local society SIAE to deal with concerns over monopolistic practices. AGCM also handed SIAE a symbolic fine of €1,000. ICMP is working with our local member FEM and AGCM to address the situation.



AMP

GOVERNANCE

GOVERNANCE

The ICMP Global Board and two Bureaux were elected for the term 2018-2020 at our Annual General Assembly at MIDEM 2018. Since then, there have been a couple of changes to their composition.

In May, Pekka Sipilä, ICMP's long serving Board member retired and recused his seat, to be replaced by Niclass Björlund. In January 2019, Concord Music Publishing expressed its formal interest in joining ICMP. John Minch joined us in Madrid for our main Board meeting at the of the Chair. We look forward an esteemed Indie such as Concord formalising its relationship with ICMP post-AGM. The current Board and Bureaux are listed below and overleaf:

ICMP GLOBAL BOARD



CHRIS BUTLER
CHAIRMAN, ICMP &
MPA UK



GUY HENDERSON
ICMP VICE-CHAIRMAN &
SONY ATV/EMI



NICOLAS GALIBERT
ICMP VICE-CHAIRMAN &
CSDM OF FRANCE



RALPH PEER II
ICMP TREASURER &
NMPA OF THE USA



GÖTZ VON EINEM
ICMP SECRETARY &
DMV OF GERMANY



AMA WALTON
BERTELSMANN MUSIC GROUP
(INTERNATIONAL)



ANDREW JENKINS
UNIVERSAL MUSIC PUBLISHING
GROUP (INTERNATIONAL)



IAN JAMES
AMPAL OF AUSTRALIA



JODIE FERNEYHOUGH
CMPA OF CANADA



JOHN MINCH
CONCORD MUSIC
PUBLISHING (INTERNATIONAL)



KATHLEEN MARSH
CHAIR, ICMP SERIOUS BUREAU &
MPA OF THE USA



KAGENOBU KUWAHATA
MPAJ OF JAPAN



NICLASS BJÖRLUND
MPA OF SWEDEN



PAOLO FRANCHINI
CHAIR, ICMP POPULAR BUREAU &
FEM OF ITALY



PIERRE MOSSIAT
IMPF (INTERNATIONAL)



SCOTT FARRANT
IMPA (INTERNATIONAL)



STEPHEN CLARK
WARNER-CHAPPELL
(INTERNATIONAL)

POPULAR BUREAU



PAOLO FRANCHINI
CHAIR, ICMP POPULAR BUREAU
& FEM OF ITALY



TERESA ALFONSO
VICE-CHAIR OF ICMP POPULAR
BUREAU & AEDEM OF SPAIN



RALPH PEER II
ICMP TREASURER &
NMPA OF THE USA



JODIE FERNEYHOUGH
CMPA OF CANADA



DAVID ALEXANDER
MPA OF SOUTH AFRICA



KAGENOBU KUWAHATA
MPAJ OF JAPAN



NICLASS BJÖRLUND
MPA OF SWEDEN



AD HESKES
NMUV OF THE NETHERLANDS



HALIT UMAN
CSDM OF FRANCE



BENJAMIN BAILER
DMV OF GERMANY



DAVID KASSNER
MPA OF THE UK

SERIOUS BUREAU



KATHLEEN MARSH
CHAIR, ICMP SERIOUS BUREAU
& MPA OF THE USA



DR. AXEL SIKORSKI
VICE-CHAIR, ICMP SERIOUS BUREAU
AND DMV, GERMANY



CHRIS BUTLER
CHAIRMAN OF ICMP
& MPA OF THE UK



ANTAL BORONKAY
HMPA OF HUNGARY



SUSUMU MORIKAWA
MPAJ OF JAPAN



LAURA MORO
FEM OF ITALY



CECILIA LEÓN
AEDEM OF SPAIN



DAVO VAN PEURSEN
NMUV OF THE NETHERLANDS



CLAUDE DUVIVIER
CEMF OF FRANCE



JARI ESKOLA
FMFA OF FINLAND

PRODUCTION MUSIC COMMITTEE

ICMP's Production Music Committee work involves helping production music publishers and composers to discuss the issues of the day dealing with the digitisation and globalisation of our industry. ICMP coordinates meetings and joint calls for the members.

The current members of the ICMP Production Music Committee are:



MARTIN NEDVĚD

CHAIRMAN, ICMP PRODUCTION MUSIC
COMMITTEE & STUDIO FONTANA OF THE
CZECH REPUBLIC



ALEX BLACK

EMI OF THE UK



DAMIAN SLONINA

JAGUAREC OF POLAND



JULIETTE METZ

ENCORE MERCI OF FRANCE



PATRICK APPELGREN

UNIVERSAL MUSIC PUBLISHING,
NORDIC REGION



PIETRO GIOLA

MACHIAVELLI PUBLISHING OF ITALY



GILDA FULCO

INTERVOX PRODUCTION MUSIC,
GERMANY



HOREA PASCU

BLUE ISLAND MUSIC OF ROMANIA



EINAR HELDE

APL OF DENMARK



NATALIE DICKENS

FELT MUSIC OF THE UK

ICMP has other working committees focusing on issues of importance:

- The Anti-Piracy Committee
- The Ralph Peer II Award Committee – This committee has Chris Butler, Ralph Peer, Andrew Jenkins and Guy Henderson as its members.



**MEETINGS,
EVENTS & CONTACTS**

SAMPLE OF MEETINGS, EVENTS & CONTACTS

It has not been quiet.

The ICMP team is determined to be present, authoritative and compelling in all fora worldwide where the voice of music publishers should be heard. Below is a list of examples of meetings and contacts we have had on behalf of our members:

POLITICAL

- Canadian Government, Heritage Department, Director
- Canadian Government, Broadcasting, Copyright and Creative Industries, Director General
- Chair of the Conference of Presidents, European Parliament
- European Commission Vice President, Andrus Ansip
- European Commissioner for Culture Tibor Navracsics & Cabinet
- European Commissioner for Digital Single Market Policy, Mariya Gabriel
- European Commission, Head of Unit for E-Commerce & Platforms
- European Parliament negotiator on copyright reform Axel Voss MEP
- Minister of Culture for Spain, Jose Guirao
- President of the European Parliament, Antonio Tajani
- Ireland's Ambassador to Canada
- Management of Hot Chip
- Members of the European Parliament, at least 412 re: copyright reform; the AVMS Directive; SatCab directive; Geo-Blocking Regulation.
- Permanent Representation of Austria to EU
- Permanent Representation of Croatia to EU
- Permanent Representation of Czech Republic to EU
- Permanent Representation of Denmark to EU
- Permanent Representation of Estonia to EU
- Permanent Representation of Finland to EU
- Permanent Representation of France to EU
- Permanent Representation of Germany to EU
- Permanent Representation of Ireland to EU
- Permanent Representation of Slovakia to EU
- Permanent Representation of Spain to EU
- Permanent Representation of Sweden to EU
- Permanent Representation of UK to EU
- Permanent Representations of Italy to EU
- Permanent Representations of Romania to EU
- Permanent Representations of the Netherlands to EU
- President of Socialists' & Democrat Group, European Parliament, Udo Bullman
- Prime Minister of Canada's Office
- Privy Counsel to the Canadian Government
- Member of the House of Commons, Canada, Mr. Richard Hébert
- South African Department of Trade and Industry
- Spanish Ministry of Culture
- UK Intellectual Property Office, Director
- UK Music, Chief Executive Officer and Communications Manager
- US Government Mission to the EU;
- World Intellectual Property Office (WIPO), Director General; Dep. Director General; Director, Copyright Law Division; Director, Copyright Management Division; Director, Respect for IP Division; Director, Copyright and Trademark Policy Directorate.
- Office of European Commission President, Jean-Claude Juncker
- Music Moves Europe Board

MEDIA

- ABC (Spain)
- Associated Press (International)
- BBC (International)
- Billboard (International)
- Business Day (South Africa)
- Business Report (South Africa)
- CBC News (Canada)
- Digital Music News (International)
- Electron Libre (France)
- El Pais (Spain)
- Euronews (International)
- Financial Mail (South Africa)
- FT (International)
- Globe and Mail newspaper (Canada)
- Le Monde (France)
- Music Confidential (International)
- Politico (International)
- Raw Politics (International)
- Reuters (International)
- Suddeutsche Zeitung (Germany)
- The Sunday Times (International)
- The Times (London)
- TimesLive (South Africa)
- Variety (International)

STAKEHOLDERS

- Apple, Head of Publisher Relations; Head of Public Affairs
- Axel Springer
- Bob Dylan's manager
- British Phonographic Industry, Chief Executive Officer
- CISAC, Chair and Director General
- Creativity Works! coalition
- .MUSIC
- Ancienne Belgique Venue Managers
- Association of Commercial Television (ACT)
- Audible Magic Content Recognition, Executive management
- Canadian Music Reproduction Rights Agency, Senior Vice President
- Chair, European Parliament's International Trade Committee
- Deezer, COO
- Digital Music Europe (DSPs collective)
- European Broadcasting Union, Head of Music
- European Internet Forum, Executive Director
- European Music Observatory
- European Newspaper Association (ENPA)
- Featured Artists' Coalition, Chief Executive Officer
- FEP (Federation of European Publishers)- Books
- Frankfurt Musikmesse, Chief Executive Officer
- GESAC (European Grouping of Societies of Authors and Composers)
- GRANDGEORGE, Singer-songwriter
- ICE (Copyright processing hub)
- IFPI- Major labels
- IMPALA- European Indie labels
- Leader of the Parliamentary Opposition, Canada
- Ludovico Einaudi, Pianist and composer
- MIDEM Management team
- MPAA (Motion Picture Association of America)
- MMF (Music Manager Forum)
- Professor Eleonora Rosati
- Professor Silke von Lewinski
- PRS for Music, CEO and Head of Public Affairs
- SACEM
- Spotify, Head of Regulatory Affairs, etc.
- The Ivors Academy (ex. BASCA), CEO and Chair
- The Waterboys

REGULAR MEETINGS

- Creativity Works! Monthly Plenary Meetings, Brussels
- European Music Council
- 'Bilbao' Group
- EC Civil Society Mercosur, Brussels
- EU events (press conference, stakeholder hearings etc.) on the Value Gap
- WIPO, Standing Committee on copyright and Related Rights, Geneva
- EUIPO Working Group Observatory Meetings, Brussels and Alicante
- EUIPO Observatory Plenary Meetings, Brussels

WHERE ICMP HAS BEEN REQUESTED TO SPEAK

- AIMP International Summit
- Bird & Bird legal Roundtable on DSM Directive
- BMAT conference
- Canadian Music Week
- Cultural & Creative Industries Intergroup of the European Parliament
- European Broadcasting' Union –Classical Music Experts' Summit
- European Parliament Seminar on Publishers' Rights
- European Parliament Workshop on Exceptions and Limitations
- Frankfurt Musikmesse
- Keynote at Schiev Festival, Brussels
- Keynote at Summus Festival Barcelona
- Music Moves Europe – European Commission Programme
- NMPA Board
- Prof. Eleonora Rosati's conference
- University College Dublin





ACKNOWLEDGEMENTS

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ICMP would like to sincerely thank all those people, organisations, colleagues and friends who have provided hard work, insight, intelligence and data which enables and enhances ICMP's work.

We are all professionally involved in a profoundly enjoyable and permanently evolving industry. It's our privilege to work for the music publishers' trade body and to serve as the 'Global Voice of Music Publishing'.

We look forward to working for you and to enhancing ICMP's growth and success in the days ahead.

The ICMP Secretariat team would like to extend especial thanks to:

- | | | | |
|--|--|---|---|
| <ul style="list-style-type: none">• The Board of Directors of ICMP• Chris Butler, ICMP Chairman• The Executive Board of ICMP• The Popular Bureau• The Serious Bureau• The ICMP Production Music Committee• The ICMP Anti-Piracy Committee• Louise Hilditch• Jackie Alway• Antony Bebawi | <ul style="list-style-type: none">• Erich Carey and the NMPA• Margaret McGuffin• Andrei Filip• The ever industrious (and cheerful!) MPA UK Team• Their francophone friends at CSDEM and CEMF• Teresa Alfonso• David Alexander• Cecilia Leon• Rafa Aguilar• Florian Kömpel | <ul style="list-style-type: none">• Elisabet Widlund• Ger Hatton• Jorge Mejia• Veronica Vacarezza• Gustavo Menendez• Alexandra Lioutikoff• Nestor Casonu• Lea Moussa• Fernando Marcos• MIDEM | <ul style="list-style-type: none">• AIMP• Stephanie Pochon and her G-Plus team• Our 4 new Members in 2019• The endless list of stakeholder colleagues who cooperate internationally.• The EU institutions' door security teams for getting used to us and breezing us through |
|--|--|---|---|

Most importantly...

Sincere thanks to each one of our member organisations and companies. Here's to ever increasing co-operation among music publishers and more mutual success in the days ahead.

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