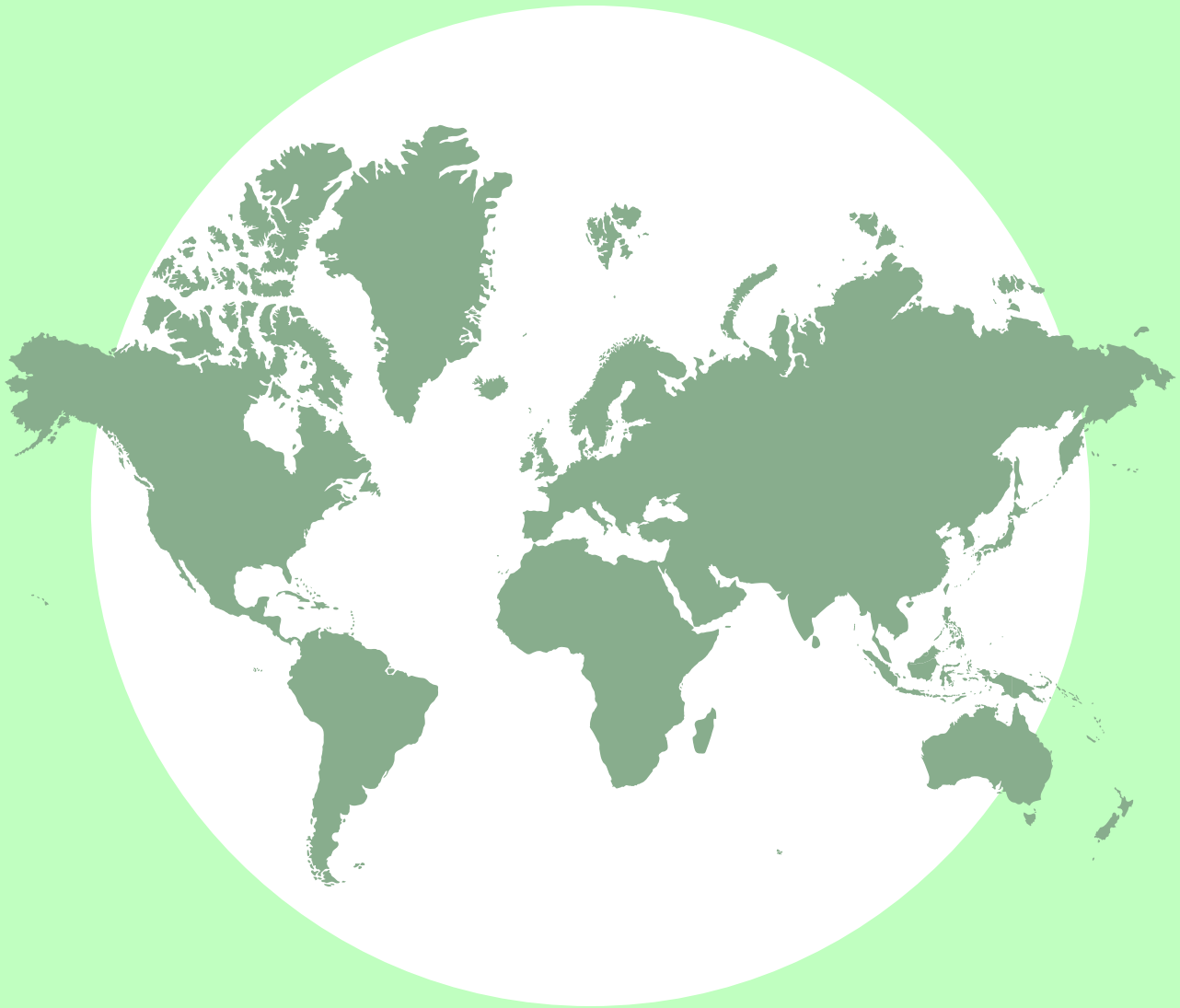




worldwide
independent
network



ANNUAL REPORT 2020-21

CONTENTS

- 01** INTRODUCTION
- 02** ABOUT US
- 03** OUR PEOPLE
- 04** MEMBER SUPPORT
- 05** NETWORK DEVELOPMENT
- 06** MARKET RESEARCH
- 07** PERFORMANCE RIGHTS
- 08** RDX & INDUSTRY STANDARDS

01

INTRODUCTION

WIN turns 15 this year. It was founded in 2006 in response to shared issues faced by the music sector everywhere, with the objective to join independents around the world and enable us to exert our collective strength.

We have achieved a great deal since. The Global Independent Standard in 2012, the Fair Digital Deals Declaration in 2014, the first WIntel in 2016, and the launch of RDx in 2020, are amongst our most relevant milestones.

The global impact of the COVID pandemic in 2020 required the organisation to change direction from its existing plans for the year, cancelling all travel and adapting to the virtual world. But our main mission remained to connect, support and develop independent music trade associations globally.

We focussed on mapping lobbying initiatives and strategies in place around the world, extracting best practices for our members to model their local advocacy work accordingly.

We reinforced the work of regional groups, with the creation of the LatAm Network and laying the foundations for a future Asia-Pacific Network. This has been key to the success of initiatives such as the Latin American Observatory of Independent Music.

We also responded by providing resources, publishing updates and reports, and hosting webinars on the impact of the pandemic, to ensure that the independent sector was well informed about the immediate response and the expectations for the future.

We re-launched WIntel, our flagship market research project, after a three-year gap, with the emphasis on providing facts and resources to assist the independent sector globally, regionally, and country by country.

2020 also saw the operational launch of RDx, WIN's joint venture with IFPI. RDx operates as a one-step single conduit through which labels and their partners can deliver sound recording repertoires directly to multiple Music Licensing Companies using DDEX standards.

The challenges of the past year have demonstrated the value that WIN brings to the international independent music community. Our efforts to provide support and to create spaces for the exchange of knowledge and discussion have delivered real benefits during this trying time. We look forward to the coming years with optimism and we are motivated to further develop and improve the independent sector.

Noemí Planas
General Manager

02 ABOUT US

WIN acts as a global coordination and support body for the independent sector, focusing on its long-term development and sustainability. Through transparency, innovation and cooperation, our goal is to foster a diverse and vibrant ecosystem where all independent labels have equal access and opportunities.

WIN is also a focal point for collecting and sharing knowledge about the independent sector and wider music industry at national and international level.

OUR PRIORITIES

ADVANCE, ASSIST AND EDUCATE THE NETWORK OF INDEPENDENT MUSIC ASSOCIATIONS

FACILITATE COMMUNICATION, KNOWLEDGE SHARING AND COOPERATION BETWEEN THE MEMBERS

DEVELOP ASSOCIATIONS AND REPRESENTATION IN NEW MARKETS AND REGIONS

PROMOTE CULTURAL DIVERSITY AND A LEVEL PLAYING FIELD FOR THE INDEPENDENTS

CHAMPION THE VALUE OF INDEPENDENT RIGHTS AND IMPROVE INDUSTRY STANDARDS AND INFRASTRUCTURE

WIN brings together 32 independent music trade associations in 36 countries throughout Australasia, Asia, Europe, North and South America, representing thousands of music companies and professionals worldwide.



03

OUR PEOPLE

WIN SECRETARIAT



Noemí Planas

General Manager

Daily operations, strategic planning, outreach, representation and liaison with industry bodies, RDx, performance rights, copyright, digital licensing and other global industry issues, network development, admin and funding.



Denis Simms

Membership & Projects Manager

Member support, resources, capacity building, market research, WINCON, communications, databases, website, newsletter, logistics and documents for meetings, admin, and general support to the General Manager.

WIN BOARD



Francesca Trainini
PMI, Italy



Jörg Heidemann
VUT, Germany



Kees Van Weijen
STOMP, Netherlands



Mark Kitcatt
Everlasting Recs, Spain



Michel Lambot
PIAS, Belgium



Helen Smith (O)
IMPALA, Europe



Garry West
Compass Records, US



Gord Dimitrieff
Aporia Recs, Canada



Lisa Levy
Robbins Ent, US



Richard Burgess
AZIM, US



Zena White
Partisan Recs, US



Jason Peterson (O)
Go Digital Media, US



Carlos Mills
ABMI, Brazil



Chan Kim
Fluxus Inc, South Korea



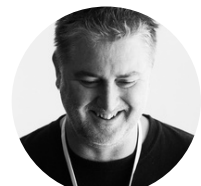
Maria Amato
AIR, Australia



Oliver Knust
IMICHILE, Chile



Tak Yamazaki
IMCJ, Japan



Dylan Pellet (O)
IMNZ, New Zealand

04

MEMBER SUPPORT

We promote knowledge sharing and cooperation between the network of independent music trade associations, acting as a facilitator to increase contact and collaboration. Our ongoing support plan is designed to build capacity within the associations and, in turn, aid the labels that make them up.

RESOURCES

We create new resources (guides, reports, translations) and disseminate existing ones through our channels (monthly newsletter, special bulletins, website). In 2020-21, we built a dedicated site for mapping Covid-19 measures and resources at a global scale, published a guidance paper on performance rights, shared several updates on topics of interest to our community, and created resources for WINTEL in 19 languages.

CAPACITY BUILDING & NETWORKING

We organise our own seminars and workshops, collaborate with our members' conferences and activities, and participate in other industry events. In 2020-21, we organised multiple webinars and town hall calls on RDx, performance rights and WINTEL. And we participated in TIMM (IMCJ), Rio Music Market (ABMI), Fluvial (IMICHILE), EN.M.I.R.A. (ASIAR), Runda Digital Day 2.0 (Runda), UFinest (UFI), Lunch & Learn (CIMA), Pan-Am Indie Summit (A2IM, CIMA, ABMI, ASIAR & IMICHILE), Indie Week (A2IM), and more.



WINCON

Representatives from our 32 member associations meet every year to exchange experiences and knowledge and learn about new developments in a variety of topics such as membership management, finance and sustainability, advocacy, industry standards, market intelligence, commercial issues, and more.

WORKING GROUPS

We coordinate working groups on performance rights, market research, free trade agreements, inclusivity & social justice, and value of music in the streaming age. They are made up of a combination of companies and associations and act as exchange forums where issues are analysed in in-depth discussions, with the goal of providing practical assistance.

05 NETWORK DEVELOPMENT

WIN promotes associative work in markets and regions without current representation. Our main objective is to foster the professionalization and structuring of the independent sector by promoting the development of new structures and building regional alliances.

INDIVIDUAL MARKETS

We provide practical assistance and consulting to local companies in key markets: Mexico, Colombia, China, India, South Africa, Nigeria, Indonesia, Singapore, and more, through calls, meetings, and email exchanges.

REGIONAL GROUPS

We develop and co-ordinate regional groups consisting of existing trade associations and individual companies from territories without one.

The LatAm Network was launched in 2020 and met 5 times throughout the year to work on issues such as Covid's response, digital opportunities, and performance rights management challenges in the Latin America region. The collaboration of participating associations ABMI, ASIAR and IMICHILE has been key to the success of the Latin American Observatory of Independent Music project.

The APAC Network is a new group for the Asia Pacific region that is currently being developed.

RESOURCES

We have developed a repository of documents and we are working on a toolkit and additional resources to help the process of forming new associations. Colombia and Uruguay have already used this to draft bylaws for their upcoming associations. We also maintain a simple but effective contacts database of key local companies in each priority territory, as well as regional mailing lists.



EVENTS

We participate in key international conferences, workshops and networking events to raise awareness of WIN and the importance of collaborative structures for local independents. In 2020, we took part of IIMS (China), Corriente (Peru), IMESUR (Chile), Sandbox Summit (UK), BIME (Spain), Circulart (Colombia), China International Music Industry Conference (China), South African Music Week (South Africa), Reeperbahn Festival International Beijing (Germany/China), Screen x Screen (Canada), and more.

06 MARKET RESEARCH

Market research is a key part of WIN's mission. One of the most significant observations of the impact of the COVID pandemic has been the lack of quality market intelligence available to our associations, to assist them with obtaining emergency funding and other support. Our goal is to provide an ongoing platform to gather and assess the economics of our sector, for the benefit of the associations in all countries and the wider independent sector.



WIntel

WIntel 2021 is currently in its project phase, and will cover data for the years 2018, 2019 and 2020. The objective is to produce a report with the focus on delivering country specific conclusions of immediate relevance and use to the associations and their members.

We consulted widely with the associations and various stakeholders to ensure we are delivering the most useful market research possible to support our network. Germany-based House of Research gathered data through a

survey that was open from February 25 to June 25, and their analysis will integrate existing third-party data sets in order to model the size of national markets and the global independent market share. WIN has provided support to the associations via webinars, weekly reports, and other resources.



OLMI

OLMI is the Latin American Observatory of Independent Music. The project was born from the support of WIN and the associations of independent music companies in the region: IMICHILE (Chile), ABMI (Brazil) and ASIAR (Argentina). Inspired by the model of the Digital Observatory of Chilean Music, its objectives are characterizing the independent sector to optimize the decision-making of Latin American agents, companies and artists; promoting a competitive and collaborative musical ecosystem; and providing added value to hundreds of companies and their associations in the region. This capacity building and market research project is being developed in coordination with WIntel.

07

PERFORMANCE RIGHTS

WIN supports independent music trade associations and their members navigate the complex and ever-changing world of international performance rights management.

WIN's work in the performance rights space remains in two parts: (1) directly assisting associations and companies, and (2) representing the independent sector at industry level. WIN's work in this area compliments that of Merlin in the exclusive rights licensing domain.

DIRECT ASSISTANCE

WIN's association and company assistance programme has been in place for several years. It is led by the secretariat together with a focus group of member record company experts working in this area day to day.

The WIN Performance Rights Group, a focus group that deals with the practical aspects of rights management and dealing with CMOs/MLCs on a day-to-day basis, met 3 times in 2020-21. The focus was on the impact of the pandemic on collections and distributions, MLC updates, and RDx.

Regular meetings of the WIN / IMPALA Performance Rights Group, the wider group consisting of trade associations and companies, were replaced by two webinars, resulting in broader participation and engagement from members.

In addition to regular updates and other resources, in 2020 we published a guidance paper summarizing the key points to consider about the effects of the Covid crisis on performance rights, setting out key considerations for associations, labels and rights holders. It was made available in English, Spanish and Portuguese, and was widely downloaded from our website.



REPRESENTATION

WIN acts as a central forum, continually monitoring developments across the broadest range of countries, identifying issues of broader significance, and bringing these to the attention of the wider industry via IFPI and other groups.

We represent the independent sector at PRC meetings, IFPI's MLC review group, MTV Distribution Committee, and more.

08

RDX & INDUSTRY STANDARDS

RDx is a joint venture between IFPI and WIN. It is a pan-industry technical platform allowing record companies to deliver repertoire and rights data directly to multiple Music Licensing Companies (MLCs) using existing DDEX standards.

It was built with the aim of improving the flow of sound recording metadata between MLCs and right holders around the world. RDx allows MLCs to populate their databases with more accurate and consistent data, in a more timely and efficient way. RDx also sends messages about the registration status and any claims conflicts back to rights owners, which helps to improve transparency.



RDx launched in 2020 with 4 leading MLCs (PPL, Re:Sound, SENA and Gramex Finland) and 4 independent and major record companies (Beggars Group, Universal, Sony and Warner) using the service. In 2021, SCF and AGEDI have joined RDx, with a growing number of MLCs and right holders preparing to join through 2021.

WIN is actively involved in all aspects of RDx Limited's management and outreach. We organise and participate in webinars for trade associations and their member companies, produce support materials, answer general inquiries and assist interested companies with guidance on how to get started, in close collaboration with IFPI.

DDEX

The launch of RDx is one of many examples of the efficiencies and benefits derived from implementation of common technical standards across the industry. WIN continues its liaison role within DDEX, bringing the perspective of the sector to various working groups to ensure standards are developed in harmony with the sector's needs, in particular with the Recording Data and Rights (RDR) (formerly known as 'Music Licensing Company'/'MLC').

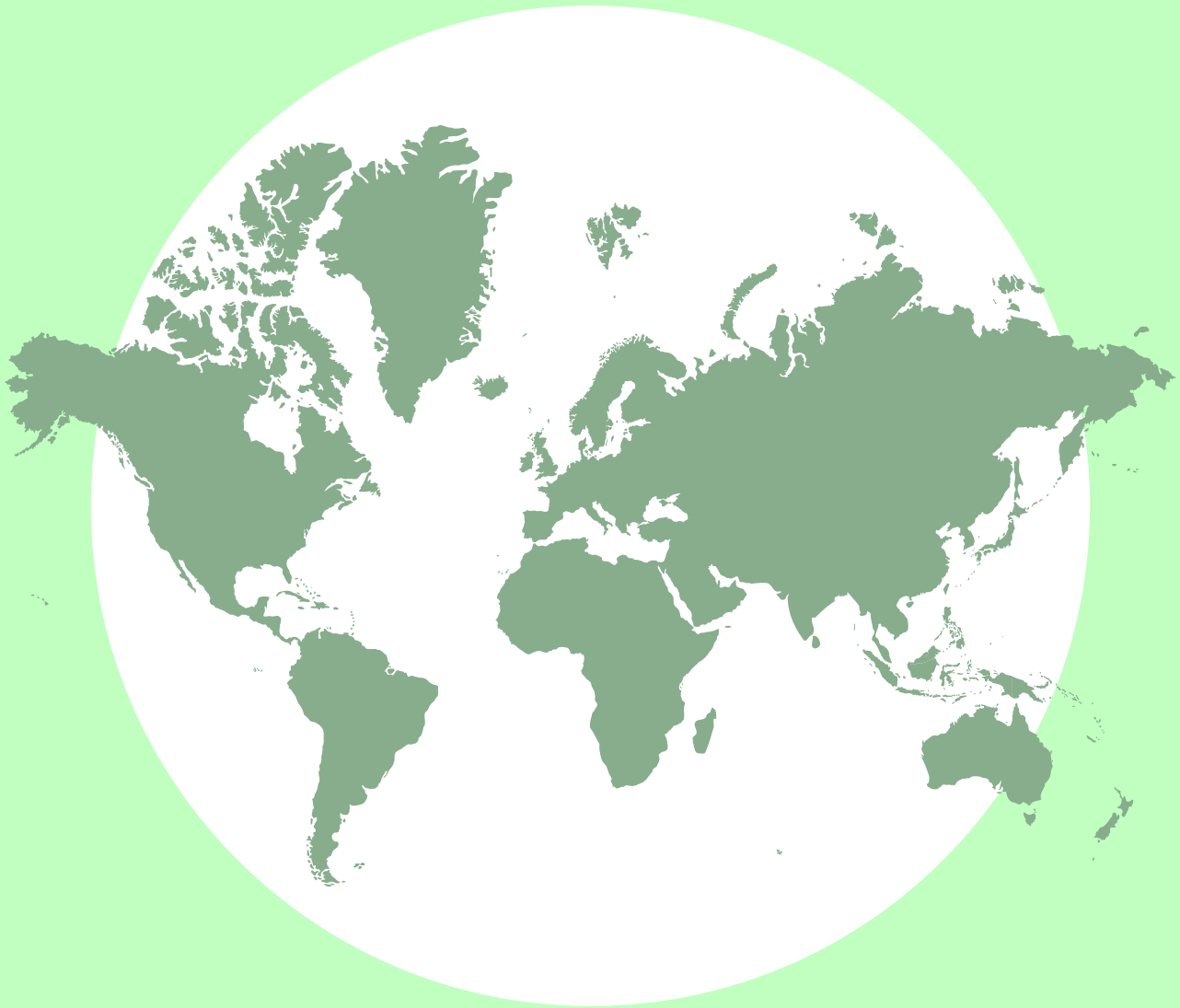
OTHER STANDARDS

We represent the interests of the international independent sector in developing other industry standards across the global digital supply chain.

We are a liaison member of the ISO groups for ongoing review and development of the ISRC code, and cooperate with IFPI on consultations and other work.



worldwide
independent
network



@WINFORMUSIC
WINFORMUSIC.ORG

2021 WORLDWIDE INDEPENDENT NETWORK