

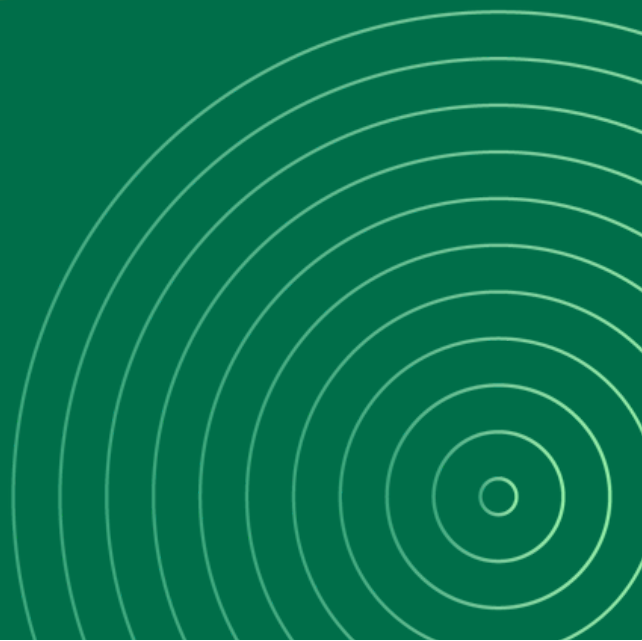


worldwide
independent
network



2021-22

ANNUAL REPORT



In 2021 the Worldwide Independent Network (WIN) began a restructuring of its secretariat, which was completed in early 2022 as the WIN board reviewed the organisation's strategy. Our mission and general priorities have not changed: to promote and assist the network of associations; to facilitate communication and cooperation between them; to develop new associations; to promote a level playing field for independents; and to defend the value of music rights and improve the industry standards and infrastructure.

Of those overarching goals, there are 3 top priorities for WIN this year: to help develop emerging markets; to establish international networking opportunities for members of the associations; and to enhance communications, especially on key industry issues.

We have been actively working to promote new associations and form regional groups since the end of 2019. The pandemic hit shortly after the release of our development plan, and we only had the opportunity to have one in-person meeting before the lockdowns. Human interaction is key to building meaningful relationships, especially in most of our priority territories in Latin America, Asia, and Africa. Thus, we were eager to resume overseas travel in 2022.

In May, we visited Colombia to organise a series of activities including a workshop for local independents on the value of associative work.



Noemí Planas
General Director

From the cooperation we facilitated among LatAm Network members, another event will take place later this year in the Southern Cone, covering Argentina, Chile, Uruguay, and Paraguay. We also look forward to continuing the important work of the Latin American Independent Music Observatory, OLMi, another project born from the collaboration of WIN associations that delivered its first results in February 2022.

Asia-Pacific is another priority. In November 2021, we officially launched the APAC Alliance, a new regional working group that includes representatives from our associations in Japan, South Korea, Australia, and New Zealand, and contacts in territories where WIN does not have a member association, such as China, India, Singapore, Indonesia, and more.

We continue to combine efforts to strengthen the independent sector by developing new associative structures with the support we provide to our existing members. We are working on a new global networking project that will provide the members of WIN associations with opportunities to strengthen collaboration with colleagues abroad, establish and maintain international connections, and bridge the gaps between markets. We plan to launch the first activities later in the year.

This project will expand and complement the offering of benefits and resources we currently provide to our network of independent music trade associations worldwide. Our goal is to continue to collect and share intelligence within the independent community, maximising the resources produced by our members and making them available to others, including translations when relevant.

In May 2022, we published the Global Vinyl Directory, a member-driven collaborative list of pressing plants and other vinyl-related services. Moreover, we have recently updated our website to include new sections on member benefits and member resources, to deliver them more efficiently.

WIN has always played an essential role in coordinating action on key issues when they require a global response. We want to consolidate the organisation as the nexus between the different continents

and continue to address and voice the issues that affect us all on a global scale. WINTRENDS, our latest market research report published in May 2022, provides insights into some of the themes that have the biggest impact on the music industry today, including the role and value of independent labels, the future of streaming, and vinyl supply disruption, among other topics.

Performance rights remains a priority area for WIN, with a streamlined approach. In addition to our own workgroups and participation in other industry forums, we continue to champion the Repertoire Data Exchange (RDx) as a tool for efficiently delivering and receiving sound recording rights repertoire. Adoption by larger independent record labels and more music licensing companies will allow RDx to reach its full potential, creating real efficiencies in managing performance rights internationally.

Our sector has demonstrated its resilience through one of the most challenging events in recent history. 2022 is the year for the consolidation of post-covid recovery and the year we begin to reap the fruits of the work done in recent years. We will continue to walk alongside our members to build a fairer future for the independent community around the world.

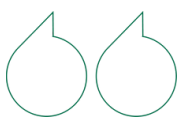
Noemí Planas
General Manager

About us

WIN brings together 34 independent music trade associations in 38 countries throughout Australasia, Asia, Europe, North and South America, representing thousands of music companies and professionals worldwide.



WIN secretariat and members at WINCON 2022



Notwithstanding the continued challenges Covid restrictions presented in the past year, the global independent community demonstrated its resilience and determination to navigate a path forward. The WIN board and Trade Association members came together in person at Indie Week in NYC to discuss challenges and opportunities facing the sector and explored ways to expand its global network. We look forward to building upon our success in the year ahead.

Maria Amato
WIN Chair

New members

WIN welcomed two new members this year. In July 2021, AIM Ireland, representing the Republic of Ireland, became a member. In January 2022, BMYD became a member, representing Turkey.



Our board

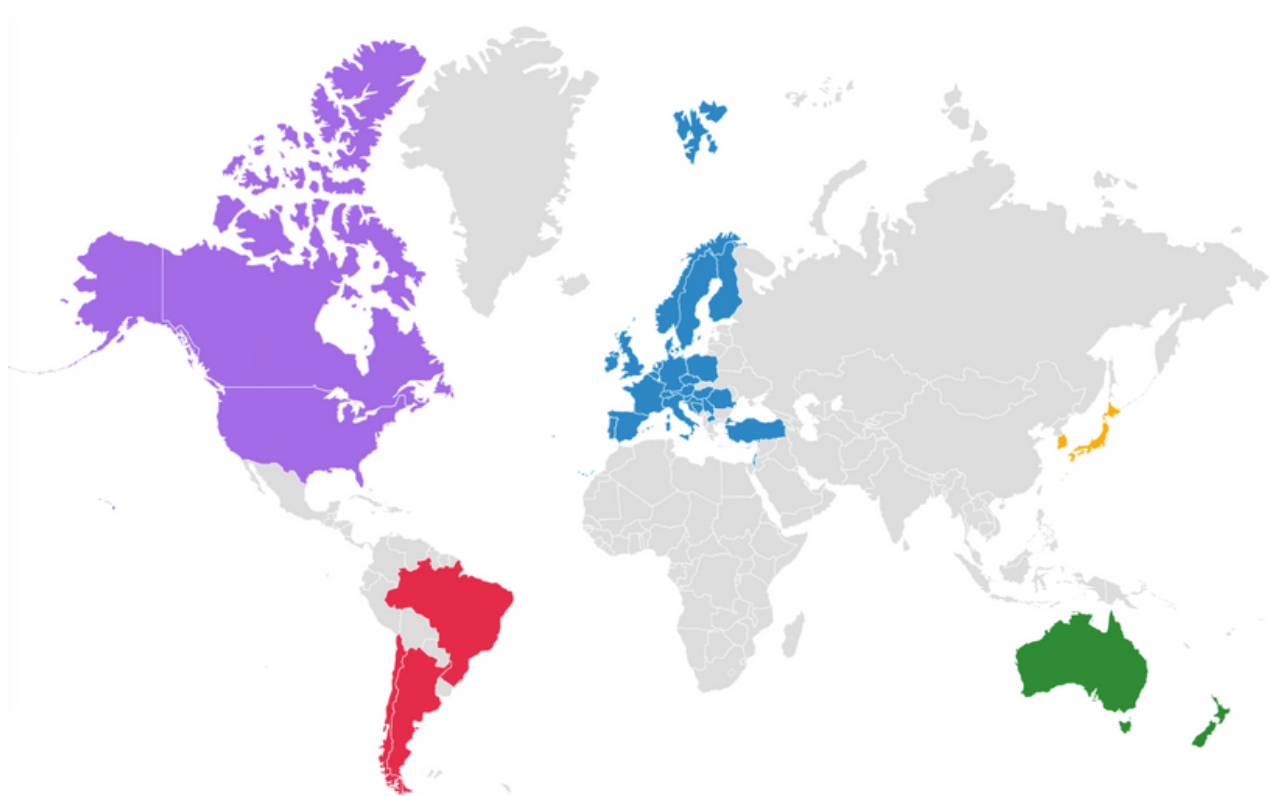
Our directors are representatives of independent music companies and trade associations in key markets around the world.



In January 2022, WIN welcomed Maria Amato as its first female Chair and its first Chair representing the Rest of the World bloc. Maria has served as CEO of the Australian Independent Record Labels Association, AIR, since 2008 and brings a wealth of experience with a background in finance and business management.

WIN also welcomed new board members Jeffrey Chiang (LIAK, South Korea), Paul Pacifico (AIM, UK) and Sandra Rodrigues (ABMI, Brazil).

Our members



Independent music trade associations represent an average of 75 full members, ranging from 15 for the one with the fewest members to 1200 for the largest.

48% of WIN associations have an associate membership tier, with an average of 72 associate members, ranging from 7 to 3500.

48% of our members have a "Friends of" program, with an average of 5,5 friends, ranging from 1 to 100.

Only 14% of the WIN associations limit their full membership to record labels. The rest accept other music industry professionals such as self-releasing artists, distributors, publishers/songwriters, managers, bookers/promoters and/or others.

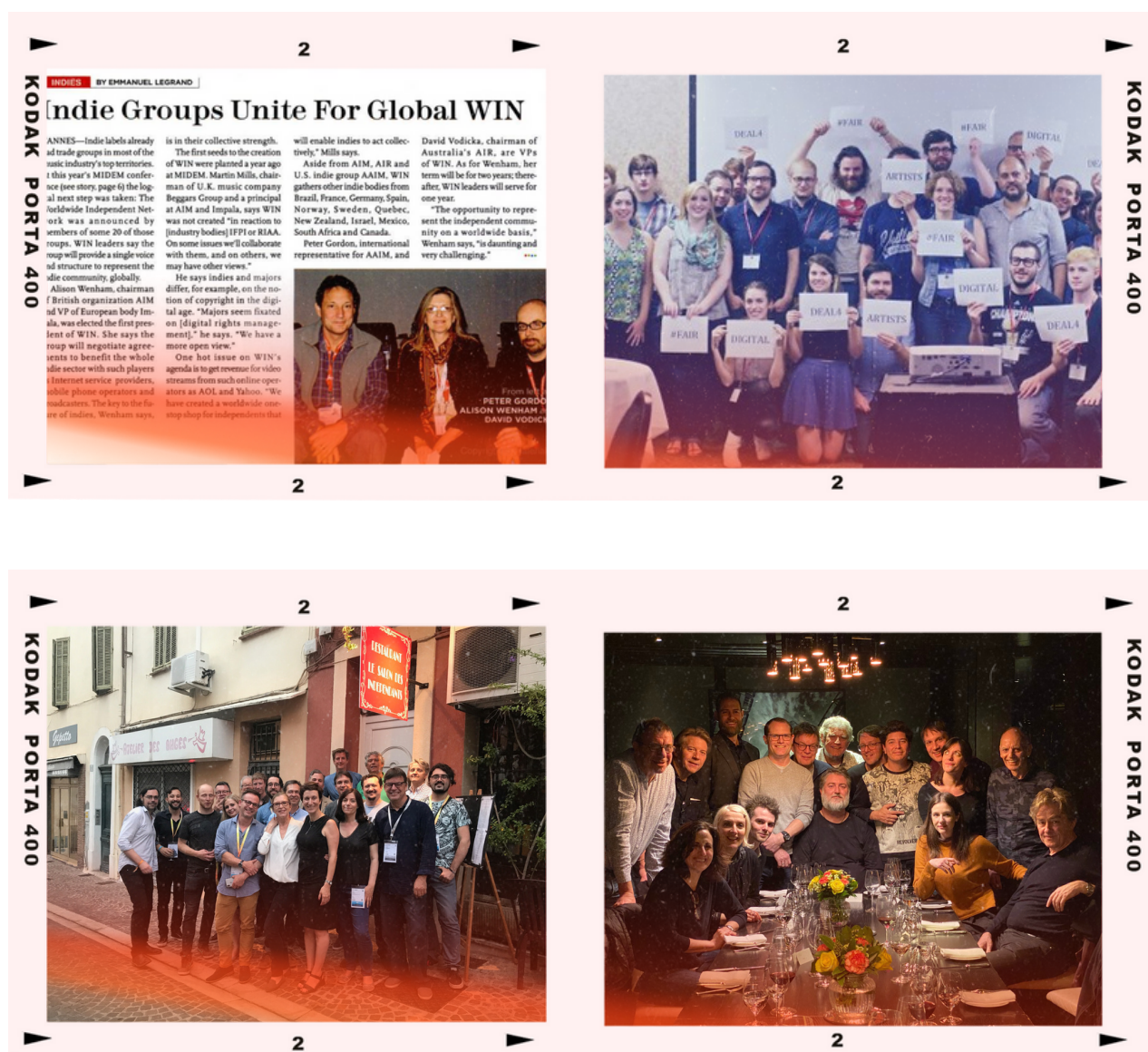
WIN associations employ an average of 3,5 full-time staff and 1 part-time.

The main sources of income for independent music trade associations are membership fees and public funding/grants, followed by sponsorships.

WIN15

In 2021, WIN celebrated its 15-year anniversary. Voices from the independent community were invited to share their favourite memories and achievements, which were compiled in a dedicated section of our website highlighting key WIN milestones.

Some of these milestones include the creation of the Global Independent Standard in 2012, the Fair Digital Deals Declaration in 2014, the first WINTEL report in 2016, and the launch of the Repertoire Data Exchange (RDx) in 2020.



Member support

WIN facilitates networking and collaboration, joining up independent music markets in the world to remain competitive in today's globalised music economy. We build capacity, helping independent music trade associations be more sustainable by providing support, benefits, and resources.

Resources

We offer ongoing resources and benefits to our members, including a monthly newsletter, regular updates on industry-related topics, and event discounts, to name a few. This year we have redesigned our website and added new areas to make it easier for members to access and look for resources and benefits.

In May, we published the WINTRENDS report (see Market Research). Some articles, such as the one on Discovery Mode, were distributed to member associations together with a dedicated fact sheet.

In response to the supply-chain issues faced by independents worldwide we created the Global Vinyl Directory. It is a member-driven collaborative list of vinyl pressing plants and other related services around the world which allows our members to filter resources by region, country, and/or type of service.

Best practices

One of our core missions is to advocate industry-wide best practices and promote equality, diversity, and sustainability in the music sector.

In December 2021, led by AIM in collaboration with the BPI, companies and organisations came together to form the Music Climate Pact, a commitment to science-based targets to reduce climate emissions. WIN signed the pact as a supporter and we have promoted it to our members around the world.



International networking

Connecting the global independent community and promoting the collaboration of associations and their members in different parts of the world is one of our priorities.

In June 2022, a new project focused on facilitating international connections, networking and export opportunities was approved. The first activities will take place in the fall of 2022.

Events

One of the ways we help our members build capacity is by promoting and participating in the events they organise.

This year we took part in Indie-Con Australia (AIR), the Asia Pacific Indie Summit (IMCJ), Ireland Music Week (AIM Ireland), UFinest Pro Mixer (UFI), Rio Music Market (ABMI), the 20 Minutes With podcast (IMPALA), Manifest Talks (SOM), AIM Connected (AIM), Premios MIN (UFI), Indie Week (A2IM) and the Libera Awards (A2IM).

External events also give us the opportunity to communicate our mission and the value of independent music companies and their associations.

We participated in Cursos de Verano de la Universidad de Cádiz (Spain), Screen x Screen (Canada), Primavera PRO (Spain), and the IAFAR Conference (UK).

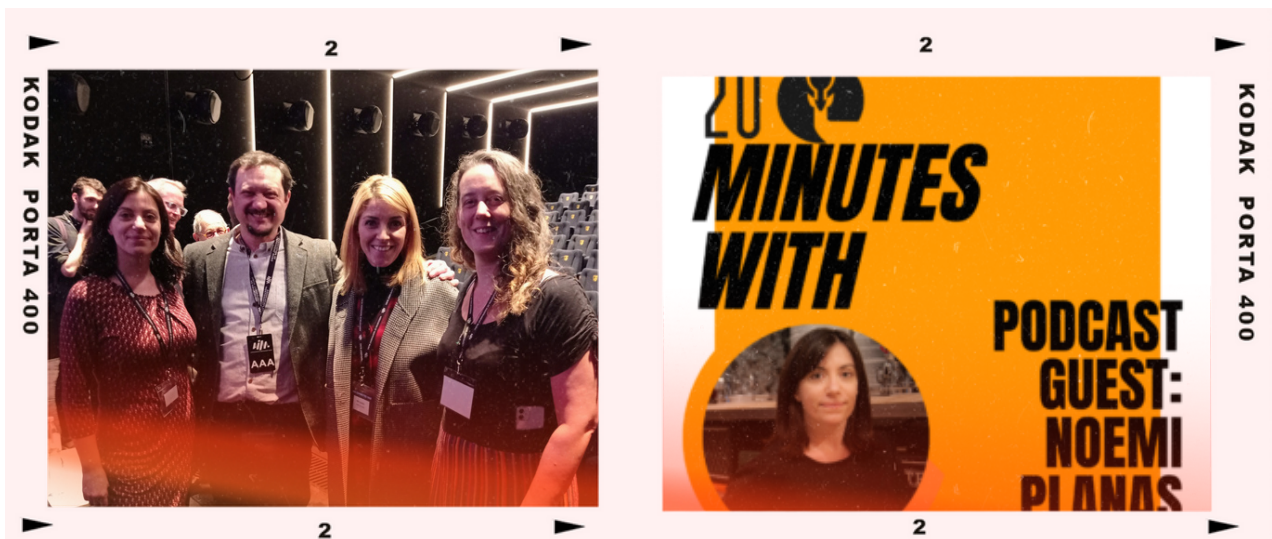
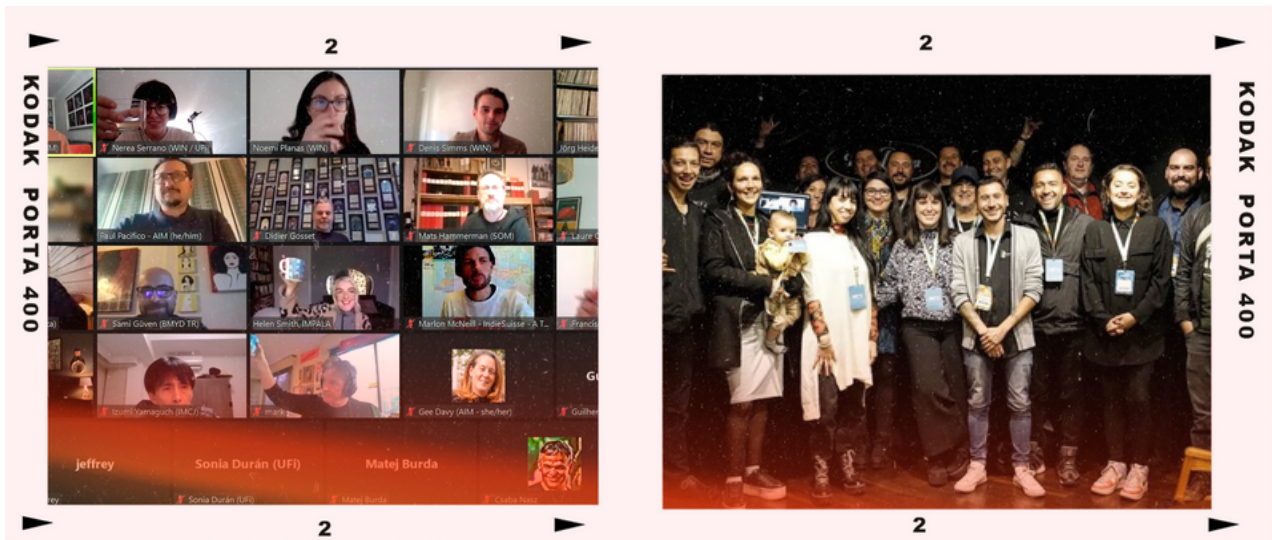
WINCON

WINCON is WIN's annual conference for the network of independent music trade associations. At this event our members get together to share knowledge and resources, to learn from each other, and to celebrate being part of a global community.

After two years of virtual meetings during the pandemic, in June 2022, WINCON returned as a face-to-face event at A2IM's Indie Week in New York. The topics discussed included advocacy, the value of music, how associations can be financially sustainable, and regional collaborations.

The day ended with an exclusive 'In Conversation' session with Merlin's SVP, Member & Partner Success, Jim Mahoney. It was followed by a networking activity where representatives of the associations had the opportunity to socialise and exchange ideas.

We held a virtual WINCON in December 2021, as part two of the one that took place in June last year. The topics discussed included the future of market research, sustainability and environmental issues, future WIN projects and a special 15th anniversary session to commemorate WIN's achievements.



Network development

WIN's network development work focuses on strengthening the independent sector by promoting the development of new associative structures in markets and regions without current representation and through regional alliances.

Latin America

The LatAm Network, our dedicated workgroup in the region, continued to meet this year to advance its agenda. In December, an online meeting took place identifying the knowledge gap on key aspects of operating an independent music company as a main priority in Latin America. Producing and sharing resources in Spanish and incorporating the role and value of record labels in all our activities in the region were adopted into the strategy.

In May 2022, we visited Colombia for the first time to consolidate the work done in previous years. As part of the BIME Bogotá conference, we organised a series of activities including panel discussions, a workshop for local independents on the benefits of associative work, and a face-to-face meeting of the LatAm Network.

Representatives from the Argentine and Chilean associations and local partners from Uruguay and Paraguay convened to promote a new event later in the year to meet the needs of the countries of the

Southern Cone subregion. The aim is facilitating cooperation, sharing knowledge, and promoting the creation of new associations.

Asia-Pacific

The APAC Alliance is a new working group in the Asia-Pacific region, officially launched at the first Asia Pacific Music Summit in November 2021. It aims to facilitate dialogue to unlock the potential of the region, which is becoming the centre of the world economy. Formed by the existing associations in the region: IMCJ (Japan), LIAK (South Korea), IMNZ (New Zealand), and AIR (Australia), the objective is to include other territories such as Singapore, China, India, and Indonesia in the discussion.

Other activities

We continued to aid companies interested in starting associations in Cameroon, Colombia, Costa Rica, Mexico, Peru, Singapore, South Africa, Turkey, and Uruguay.

We took part in IMX (China), BIME (Spain), VMF Pro (Peru), MMF's Formación para la Transformación (LatAm), INAMU en el Espacio Cultural Iberoamericano (Argentina/Spain) and BIME Bogotá (Colombia).

Performance rights

WIN helps the independent sector navigate the complex world of international performance rights management and interfaces with wider industry initiatives to improve industry standards.

Workgroups

WIN's Performance Rights Group meets quarterly. The first in-person meeting after the pandemic was held in London in June. This working group routinely oversees the practical aspects of sound recording rights management and collecting societies on a day-to-day basis.

We continued monitoring the impact of the pandemic on the collection and distribution of performance rights revenues and future projections. One of this year's priorities is to improve membership access to music licensing companies that currently do not allow the affiliation of foreign companies.

The WIN/IMPALA Performance Rights Group, a broader group comprising trade associations and record companies, met online in September 2021. A survey was conducted over the summer and a detailed analysis of issues related to the functioning of collective management organisations around the world was presented and discussed at the meeting.

WIN also represents the international independent sector at DDEX, PRC meetings, IFPI's MLC Review, the MTV Distribution Committee, and is a member of IMPALA's Collecting Societies and Copyright committees.



RDx

RDx continued its activities. The Repertoire Data Exchange is a joint venture between WIN and IFPI that allows record companies to provide repertoire and rights data to multiple music licensing companies at once, using the DDEX-RDR standard.

This year, collective management organisations AGEDI, GVL, and SCF joined RDx. Several music companies have also applied and are in various implementation stages.

We have created and updated support materials and resources, such as roadmaps and guides, to help potential new users. Additionally, a series of special onboarding webinars were held in September 2021.

Market research

Market research has historically been an important part of WIN's mission and, as the music industry's economy evolves, quality market intelligence available to our members and the wider independent sectors becomes paramount.

WINTRENDS

The WINTRENDS report was published in May 2022. It focuses on turning the spotlight on the trends observed across the independent recorded music industry globally. It also provides an overview of the key themes and factors having the greatest impact on the sector, featuring a series of articles that look at the issues from a variety of perspectives.

Topics include Spotify's Discovery Mode, the role and value of independent record labels, the growth of vinyl and accompanying issues, diversity, exports, and spotlights looking at Latin America, Asia, and Merlin.

WINTEL

WIN conducted a global survey in partnership with House of Research in early 2021 which was distributed to independent music companies within WIN's network of associations. The anonymised results per country were shared with WIN associations in the Summer.



OLMI

The first results of the Latin American Observatory of Independent Music (OLMI), which seeks to understand and define the region's independent music ecosystem, were published in February 2022.

In an unprecedented exercise, the project gathered information from 11 countries: Argentina, Bolivia, Brazil, Chile, Colombia, Costa Rica, Ecuador, Mexico, Paraguay, Peru, and Uruguay. One of the main findings was the coexistence of three realities: territories with a precarious and developing industry, other territories with a more mature industry but with economic problems, and others with potential for growth.



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