



the global trade body for independent music publishers

Spring Assemblies

IMPF held its 2026 Spring Assemblies following the trade mission, on March 19 - 20, at the Waldorf Astoria Berlin.

Upon welcoming delegates to the Assemblies, IMPF President **Annette Barrett** said: “We first started to organise this meeting last October. We wanted to come to Berlin for a number of reasons: Firstly, to acknowledge the strength of the German market for indie publishers; secondly the importance of GEMA in the sphere of collective management; and thirdly to recognise Budde Music as a founding member of IMPF and the late Rolf Budde as a fierce advocate of indies everywhere.

“What continues to inspire me is the scale and impact of the independent music publishing sector,” she added, speaking more broadly. “We are the custodians of an extraordinary body of work based on a richness and diversity of musical creativity from around the world. That shared strength is what gives us the credibility and influence to have a seat at the table.”

Germany as a Creative Hub

The first session of the Assemblies looked at Germany as a creative hub, **Benjamin Budde** (Budde Music Publishing); **Birgit Böcher** (DMV), **Georg Sobbe** (Bundesverband Musikindustrie) and **Thimo Prziklang** (GEMA).

The spotlight session took a broad look at how Germany’s cultural and economic ecosystems are shaping music business and culture, and identified emerging opportunities.

Benjamin Budde built on some of the insights gained from the trade mission sessions from the previous day, highlighting in more detail the opportunities that radio still provides in the territory, especially when it dovetails with live.

“Germany has something that is very unique compared to other markets, in its radio market,” he said. “Because Germany still has a thriving radio business, with many radio stations organising concerts in tiny towns across Germany, keeping it very local, there’s a huge chance for breaking new artists via radio. I think that’s the source of Germany’s export business. It’s been a very important part over the last decade. There are many artists that come to Germany from territories like the UK such as Dua Lipa and James Arthur, who start with radio and are able to build over

time - being played on the radio station and getting booked on the radio festivals. With that new audience, you build a story that you can present in other countries."

Thimo Prziklang (Director Strategy & Development, GEMA) talked about the influence of Germany's broader live market: "It's worth pointing out that Germany has got a very strong live concert sector," he said. "On GEMA's side of the business, we had 250,000 licensed concerts last year. That's a push for the market. We are also seeing developments in streaming, developments in AI... but a real positive development is the live sector, which led to a record number of collections for GEMA in 2025."

Part of that live activity is thanks to the schlager music genre, which is still has an incredible impact on the overall music landscape in Germany. Budde noted that the country's shift from physical to digital product has happened later in the territory compared to others because of the popularity of schlager music and the older demographic that it is typically associated with. But Birgit Böcher pointed back to the data that live music concerts offer, saying that the genre is breaking through to younger generations: "if you look at the live schlager concerts, they're all full with a lot of young people in attendance. I think that's a good thing."

Royalty Distribution Gaps

The second panel to take place at the Assemblies focused on royalty distribution gaps and the implication for independent music publishers. It took a candid look at the working relationship between independent music publishers and CMOs in territories across the world, and how inefficiencies affect financial stability, market competitiveness, and cultural diversity across global music ecosystems.

The discussion was held between **Teri Nelson Carpenter** (Reel Muzik Werks), **Sylvain Piat** (CISAC), **Lisa Ni Choisdealbha** (IMRO) and **Michel Allain** (WIPO).

The session aimed to uncover practical recommendations that can lead to more efficient, equitable, and culturally representative royalty systems that would support independent publishers and the songwriters they represent. Teri Nelson Carpenter took the opportunity early on to suggest that the foundation of any lasting solution would be based on three things: "When you think about this whole topic, it's about the lack of communication, clarity and collaboration We need to share where the disconnects are."

Her advice to CMOs? "If you want to get a better relationship with publishers, involve them in your governance and working groups."

Although Nelson Carpenter was also keen to give credit where it's due, saying, "I look to the likes of CISAC and I thank them - their collaborative nature with publishers, songwriters and working groups will help this issue."

IMRO's Ni Choisdealbha agreed that collaboration is key here, saying that the momentum had to come from both sides and at all levels.

"It's not us and them," she insisted. "It's the rising tide that lifts all boats. As a CMO, we don't know publishers' problems unless they tell us. Come to us and tell us. I'm not promising it's going to be done overnight, but we can't fix problems unless we know what they are. There's no point in a CMO staying on the path that they're on unless they're serving the customer. Collaboration needs to happen on a grassroots level - the small publisher and local CMO getting together and working it out. There isn't a CMO in the world that wouldn't agree to that because they'd be shooting themselves in the foot."

Various possible industry and policy interventions around this issue were discussed including ongoing work at WIPO on CMO governance, potential CISAC initiatives such as shared dispute-resolution mechanisms or expanded access to CIS-Net, and the responsibility of DSPs and platforms to deliver greater transparency to support fair and balanced licensing negotiations.

WIPO's Michel Allain said that the problem that many of the smaller CMOs around the world are facing is access to data, as well as pointing to a need for significant upgrades to infrastructure.

"We've got to step up and respond on the highest level technologically, with investment in digital infrastructure," he said. "When you have these legacy systems that you have to upgrade - that's where the problems lie."

He also suggested, however, that problems around this issue begin much earlier than we might appreciate.

"Education is key," he said. "As an industry, we don't value copyright management skills enough and we don't invest in education at all stages. "We have the WIPO Academy, including a distance learning course on IP. For the artists and publishing staff, I would recommend CLIP - it's artists speaking to artists and publishers speaking to publishers."

Ni Choisdealbha agreed, saying, "We need to educate kids in what a royalty is, what an IP is, and what they are handing over when they create things. There are kids creating things, uploading to YouTube and expecting the money to roll in. From the point of view of a kid who wants to make it in the industry, they need to understand what ownership is from a very early age. By the time they are 18 - 20, the ship has sailed."

Market Access & Growth Opportunities in Eastern Europe

With Eastern Europe being one of the fastest-growing music markets in the world today, driven by streaming adoption, rising local repertoire, and cross-border collaborations, the third panel of the two day event looked at the music markets of countries like Poland, Romania and the Baltics, which are seeing strong digital growth, along with Ukraine and the Balkans, which are proving an ability to produce globally relevant artists despite infrastructure challenges.

Patrycja Lobaczewska, (Believe); **Virgo Sillamaa** (EMEE); **Paulina Golba** (Golba Music Publishing) and **Mitko Chatalbashev** (CISAC and BIEM) provided insights to give independent publishers a greater understanding of the region's characteristics and opportunities.

Paulina Golba began with some broad market considerations, and noted something of a disparity between the size of the collective territories and their performance as music markets, which she attributed to issues in infrastructure.

"There is a population paradox in Eastern Europe," she said. "There are 102 million people across nine Central Eastern European countries, compared to 84 million people in Germany alone. However, total collections across those nine CEE societies is only 40% of GEMA collections.

"My belief is that talent is everywhere but infrastructure development isn't," she added. "Small societies [across CEE] have to do the same job [as their larger counterparts in other parts of the world]. GEMA has almost 800 people, whereas we have the likes of SOKOJ and SOZA with around 70 people. I see them as heroes. Every day they are struggling with huge amounts of data and having to do the same job."

For the above reason, Golba urged partners to send "gold standard data" to their sub-publishers to get the best out of the region."

However, EMEE research coordinator and ex-CEO of Music Estonia Virgo Sillamaa pointed to the great strides that had been made in the region: "10 years ago, we didn't have any publishers in Estonia," he offered as an example. "On paper, yes, but not modern publishers that could develop talent. Today, we have two small publishers building the whole business - FAAR Music and Tier Music Publishing. They are driving a paradigm shift in how people work and the attitude of artists, songwriters and composers. That's a massive change.

"Shout out to IMPF as well because making this exchange happen is key for these kinds of territories," he added.

AI – Licensing, Litigation & the Future of Creative Rights

Following the formalities of the General Assembly on the second day of the event, delegates gathered for a final panel focusing on AI. It was moderated by IMPF Secretary General **Nicole Schulze**, who gave some opening remarks to set the tone.

"Publishers aren't against innovation, they're for it, and they recognise that AI is part of the future," she said. "We are trying to align with AI providers but they're not really listening. It's not a new discussion, we know the playbook. Just as with discussions around user generated content and the value gap, it's about resisting accountability. The question is, how do we create the ecosystem that we all want?"

The rest of the panel consisted of **Kai Welp** (GEMA); **Tamay Aykut** (Surreal); **Anders Søgaard** (University of Copenhagen); **Verena Bößmann** (Dunstan Music/Dunstan Media, Board of

Directors, VUT) and **Adriana Moscoso del Prado** (GESAC), with discussions encompassing both licensing and litigation.

Moscoso del Prado said that political courage to develop and enforce robust licensing legislation is the key to protecting artists and their representatives: “What we are asking for at GESAC is political will and courage to rebalance the situation, and specific legislation to protect the creative sector,” she said. “The current copyright framework is not able to be applied. When gen AI companies come to Europe, they say there is no basis for a license because they have trained in the US or China - but they are targeting the European market. We need to find a way to develop a licensing market. With the framework we have now we cannot enforce the copyright legislation.”

Verena Bößmann was keen to make sure that the music industry’s focus is not too narrowly placed on licensing music as AI training data, suggesting that the creative value of what the music industry has goes beyond that.

“In addition to training data licensing, we need viable business models that focus on personality rights,” she said. “Why do people spend hundreds of dollars to go to a concert? It’s about the personality, the experience, the emotion, the brand. We shouldn’t be asking for platforms to give us flat fee peanuts for licensing creative rights. We need to tell them that it’s about much more than the words - it’s about the personality and the emotion, and they have to pay for that in an appropriate way.”

Anders made similar distinctions between AI and organic work based on the human element, also suggesting that the value of music came from more than just the raw ‘data’ that tech companies are using for their generative models. With this mindset, there was a hopeful suggestion that artistic expression will survive any AI apocalypse.

“My gut feeling is that we have no reason to think that whatever you can develop in a biological system you can’t [with an AI system] - but that doesn’t mean that we have to value it the same,” he said. “When you think about a musician you tend to reduce it to input/output. But as a society we might have an interest in the human capacity that develops over time. So even if AI can make music better than we can, it doesn’t mean we have to care. People still got to the Olympics to watch a human run 100m in 10s when we have machines that can do it in three.”



IMPF is the global trade and advocacy body for independent music publishers. IMPF helps to stimulate a more favourable business environment in different territories and jurisdictions for artistic, cultural, and commercial diversity for its music publisher members and the songwriters and composers they represent. www.impforum.org