ifpi making music thrive

MUSIC IN THE EU

2026

CONTENTS

ifpi making music thrive

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HELPING MUSIC THRIVE IN EUROPE

Prioritising industry-led solutions and enforcing the law in a responsible AI market that works for artists, songwriters and right holders.

Music lies at the heart of European culture, and Europe remains a dominant force in the global music landscape. From classical composers who defined Western music traditions to modern artists filling arenas, topping charts, and building vibrant online communities, European music remains a powerful cultural force. Transcending borders, it inspires and unites us. It is a universal language that touches our shared values and our common humanity and that binds us as a community.

But as valuable as that may be, music is even more than solely a cultural force. It is a formidable driver of economic growth, high-tech innovation and cross-border investment. Across Europe, the music ecosystem supports thousands of businesses, creates jobs, develops talent and fuels technological innovation. At a time when policymakers are seeking to strengthen Europe's global competitiveness, music demonstrates how creativity, entrepreneurship and innovation can work together to deliver both cultural and economic value.

The music industry continues to lead the way in showing how new technologies can be embraced responsibly. Recent initiatives include a labelling framework that will enable fans to distinguish between "AI-Generated" and "AI-Assisted" when streaming music, as well as new global principles governing the eligibility of recordings developed using AI in official music charts that are already rolling out in charts across the world. Together, these measures support innovation and transparency for fans while ensuring that human artistry is recognised, rewarded and protected. This is all on top of the ongoing investment in artists in the EU and worldwide. Just last year, record labels invested a total of €8.3bn in A&R and marketing alone.

This report shows the factors – both internal and external – that underpin a thriving creative economy. The European Union (EU) has created a comprehensive set of tools to support creativity, innovation and investment. Measures such as the EU's Digital Single Market Copyright Directive, the Digital Services Act, the Digital Markets Act and the AI Act have helped establish important and stable foundations for the digital age. More recently, the implementation of new AI Act transparency obligations, including requirements to label certain AI-generated content, marks a further step towards fostering trust, accountability and responsible innovation in the digital ecosystem. The strategic priority today must be the absolute, uncompromising implementation and enforcement of these rules, including ensuring that right holders have the practical and effective means to exercise and enforce them.

The EU institutions are now assessing whether Europe's copyright framework is sufficient to address the opportunities and challenges presented by technological developments such as AI. However, no assessment can be complete or credible until the existing framework has been fully implemented and enforced. Only by applying the rules as they were intended can we properly evaluate their effectiveness and then make informed decisions about whether, and how, the framework should evolve.

The future of European music is bright, but it requires a stable environment where innovation respects intellectual property. We look forward to collaborating with policymakers to ensure Europe remains the best place in the world for music to thrive.

VICTORIA OAKLEY
CHIEF EXECUTIVE OFFICER, IFPI

GROWING EUROPE'S MUSIC SECTOR

Across Europe, record companies are investing in artists, expanding markets, embracing new technologies and helping ensure that revenues are returned to artists and songwriters.

Zara Larsson

EUROPEAN MUSIC MARKET IN NUMBERS

€6.0bn
RECORDED MUSIC REVENUES IN THE EU IN 2025

5.1%
RECORDED MUSIC REVENUE GROWTH IN THE EU IN 2025

21.3%
THE EU'S SHARE OF GLOBAL RECORDED MUSIC REVENUES IN 2025

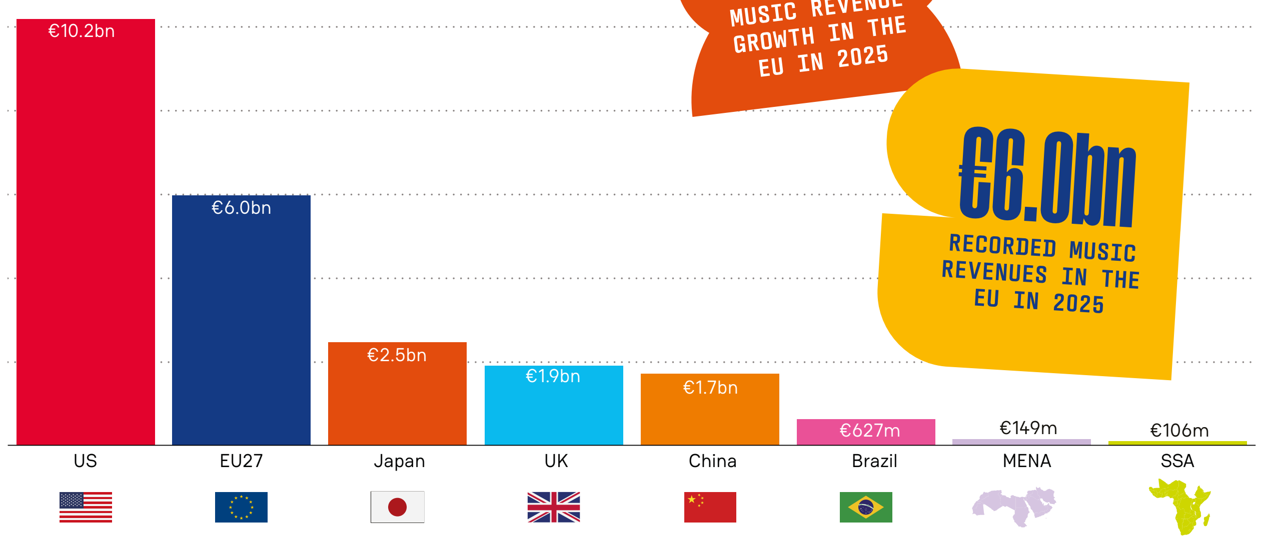
Nine of the Global Top 20
MARKETS ARE IN THE EU, ACCOUNTING FOR
€5.1 bn
OF REVENUES

+€293m
EU RECORDED MUSIC REVENUE GROWTH IN 2025

THE EU IS A KEY MARKET GLOBALLY FOR RECORDED MUSIC

In 2025, the EU generated €6.0bn in recorded music revenues.

REVENUE BY REGION/MARKET (€): 2025



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THE EU'S SHARE OF GLOBAL RECORDED MUSIC REVENUES IN 2025

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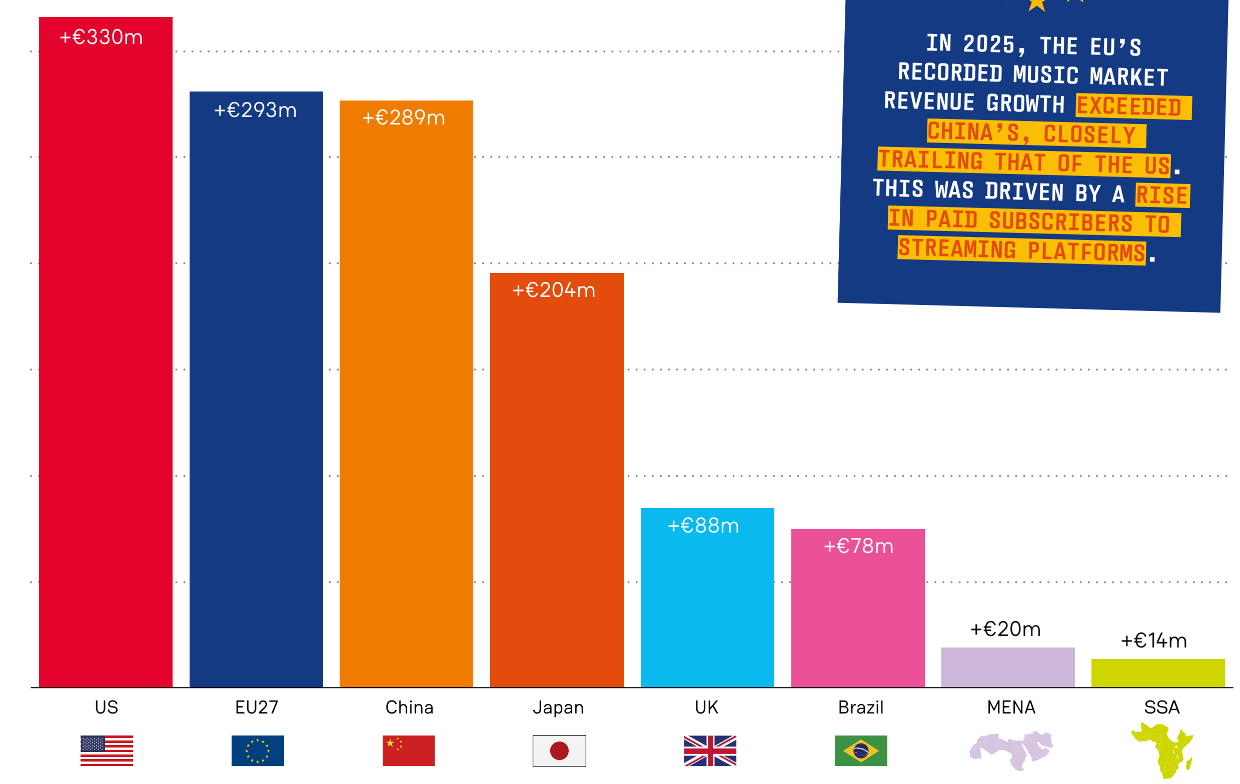
RECORDED MUSIC REVENUE GROWTH IN THE EU IN 2025

€6.0bn
RECORDED MUSIC REVENUES IN THE EU IN 2025

THE EU REMAINS A HEAVYWEIGHT MARKET, WITH REVENUE GROWTH EXCEEDING THAT OF CHINA

REVENUE GROWTH BY REGION/MARKET (€): 2025

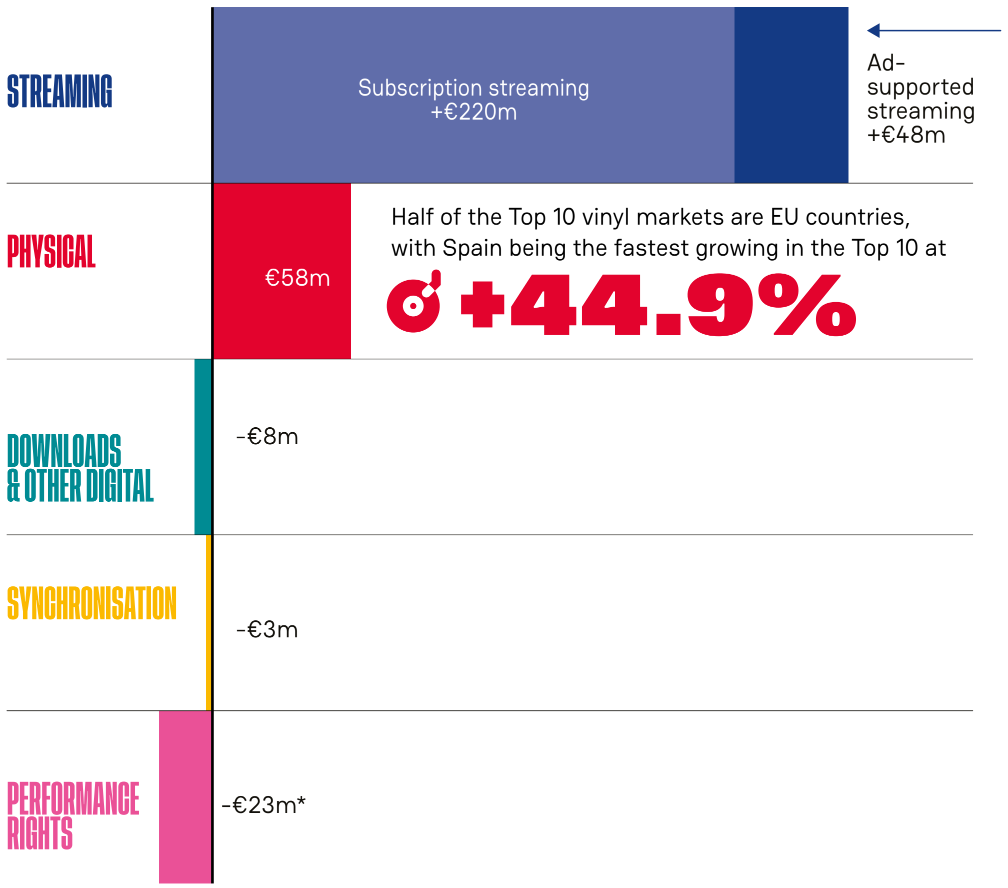


IN 2025, THE EU'S RECORDED MUSIC MARKET REVENUE GROWTH EXCEEDED CHINA'S, CLOSELY TRAILING THAT OF THE US. THIS WAS DRIVEN BY A RISE IN PAID SUBSCRIBERS TO STREAMING PLATFORMS.

STREAMING CONTINUES TO PROVIDE A STRONG BOOST TO GROWTH IN THE EU

Fans' consumption of music on streaming services continued to be the major driver of revenue in the region, contributing 66% of Europe's recorded music revenue in 2025.

REVENUE GROWTH BY FORMAT (€): 2025

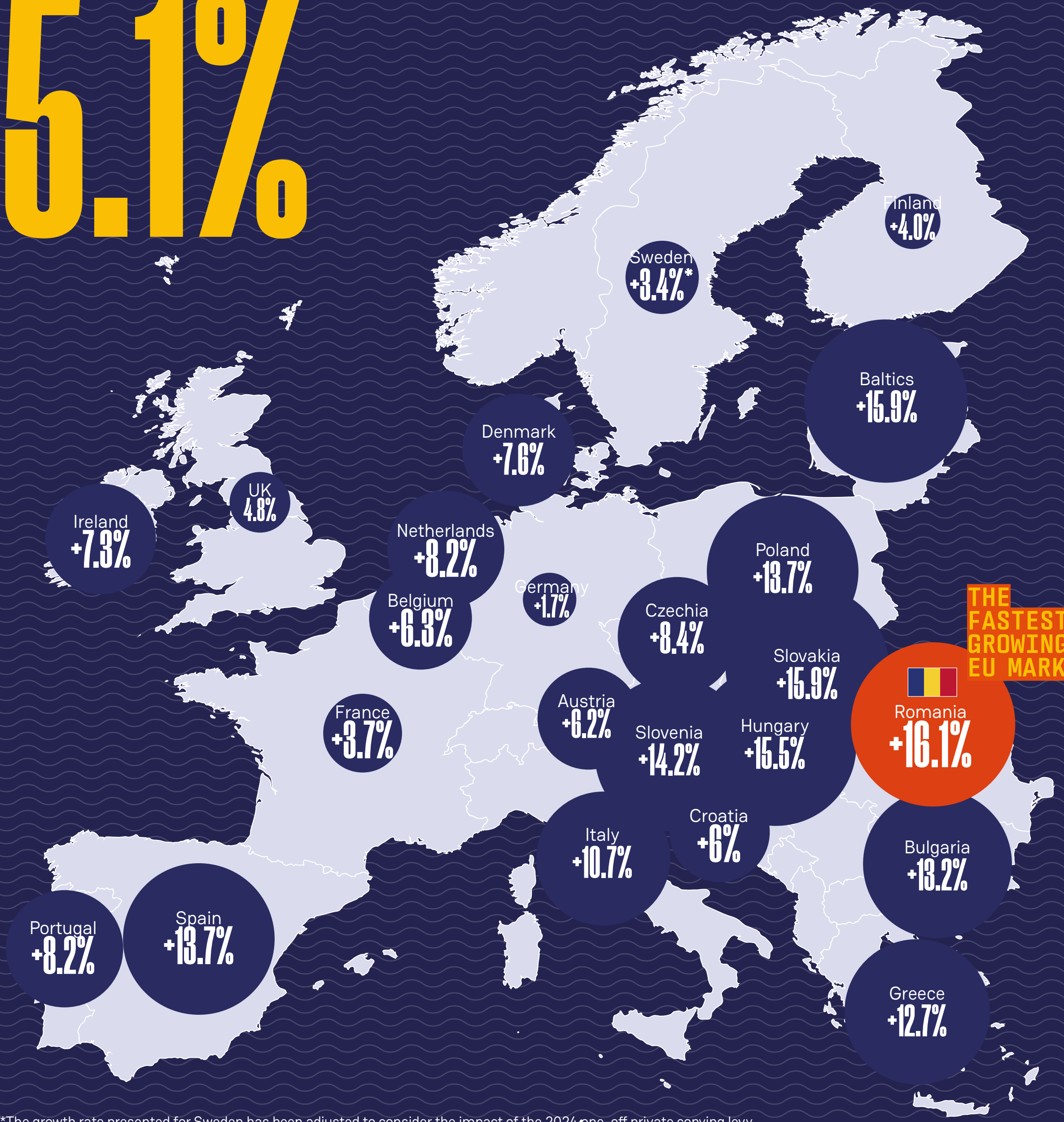


STREAMING GROWTH was bolstered by strong subscriber growth from the dominant DSPs in the market, including Spotify, Amazon, YouTube Music and Apple Music, alongside subscription increases implemented by platforms across Europe.

*The decline in performance rights revenues was driven by exceptional private copying levy income in 2024 from Sweden and Germany of +EUR99m. Exclusive of these incomes in 2024, revenue growth in 2025 would have been +EUR77m

INDIVIDUAL MARKETS GROW AT DIFFERENT RATES, WITH THE EU AS A WHOLE GROWING

5.1%



*The growth rate presented for Sweden has been adjusted to consider the impact of the 2024 one-off private copying levy.

AFTER ROMANIA, SLOVAKIA AND THE BALTICS GREW AT THE FASTEST RATE OF

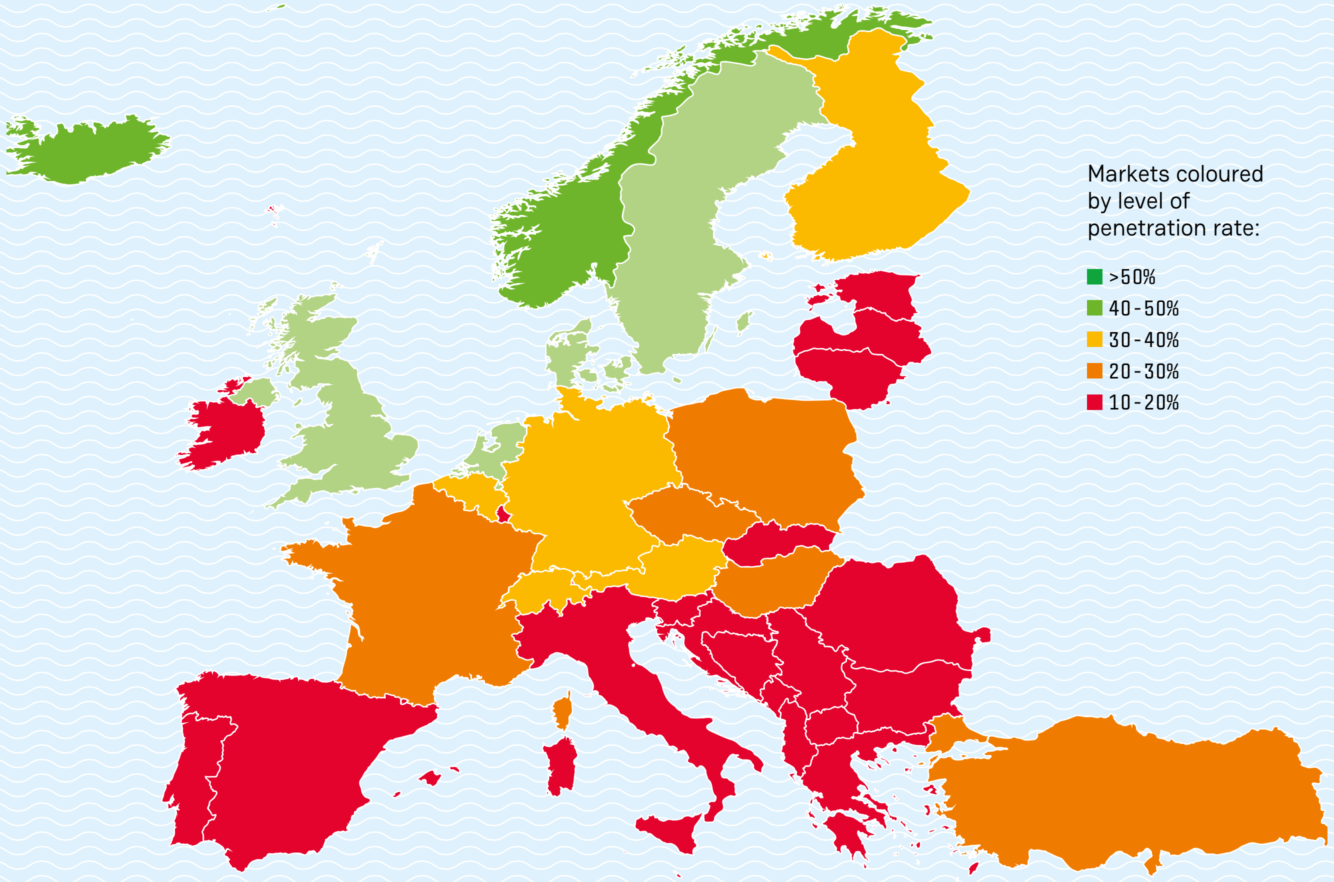
+15.9%

THE FASTEST GROWING MARKETS TENDED TO BE THOSE IN

CENTRAL, EASTERN AND SOUTH-EASTERN EUROPE.

STREAMING SUBSCRIBER PENETRATION RATES VARY ACROSS THE EUROPEAN REGION

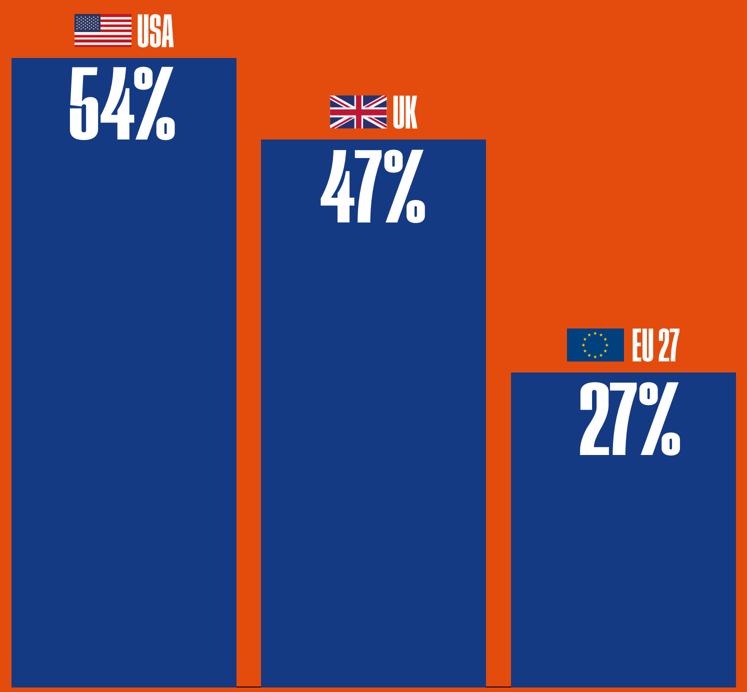
MUSIC STREAMING SERVICE SUBSCRIBER PENETRATION* BY REGION/MARKET: 2025 - EUROPE



OVERALL, THE EU REMAINS A REGION WITH TREMENDOUS GROWTH POTENTIAL FROM A PAID SUBSCRIBER PERSPECTIVE

DESPITE BEING ONE OF THE REGIONS WITH A MORE ESTABLISHED RECORDED MUSIC INDUSTRY, SUBSCRIBER PENETRATION STILL LAGS BEHIND EQUIVALENT ESTABLISHED GLOBAL MARKETS – HIGHLIGHTING OPPORTUNITY FOR GROWTH.

MUSIC STREAMING SERVICE SUBSCRIBER PENETRATION* BY REGION/MARKET: 2025



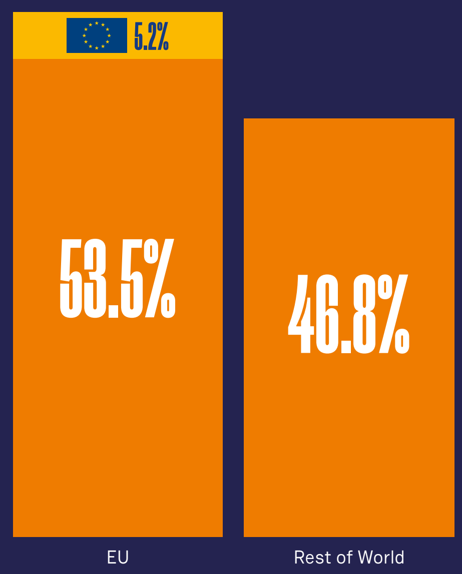
*User of the subscription accounts as a percentage of population

RECORD LABELS HELP HOMEGROWN ARTISTS ACHIEVE COMMERCIAL SUCCESS IN THE EU

EUROPEAN MUSIC MARKETS ARE DIVERSE AND DEMONSTRATE STRONG DOMESTIC REPERTOIRE REPRESENTATION IN THEIR CHARTS.

Blanka

DOMESTIC ARTIST IN YEAR END TOP 10S



IN THE EU, AN AVERAGE OF

53.5%

OF TRACKS IN A COUNTRY'S YEAR-END TOP 10 WERE BY DOMESTIC ARTISTS, WITH A FURTHER 5.2% BY ARTISTS FROM OTHER EU COUNTRIES. IN THE REST OF THE WORLD, THE DOMESTIC SHARE WAS 46.8%

FINLAND, GREECE AND HUNGARY'S ENTIRE YEAR END TOP 10S WERE MADE UP OF TRACKS BY DOMESTIC ARTISTS

Ludovico Einaudi

DESH IS THE MOST DOMINANT DOMESTIC ARTIST ACROSS THE EU

FEATURING EIGHT TIMES IN THE YEAR END HUNGARIAN CHART.

DESH

EUROPEAN POLICY MANIFESTO

EUROPE HAS THE FRAMEWORK. LET'S PUT IT TO WORK.

A strategic roadmap to enforce Europe's existing rules, empower creators, and drive sustainable innovation and growth.

European music is a cornerstone of our cultural identity, a global ambassador for our values and a powerful engine for economic growth. Thanks to forward-looking leadership, the European Union has successfully established a world-class regulatory system designed to protect intellectual property and foster creativity, thereby attracting investment and enabling innovation to flourish.

Ideally, governance should be market-led. Legislation can be cumbersome and slow – and given that technology develops and changes so fast, oversight must be fast and nimble as the challenges morph with increasing speed.

The EU institutions are now examining whether Europe's copyright framework is fully equipped to address the opportunities and challenges presented by technological developments such as AI. The most immediate, impactful and effective way the EU can support the creative industries is through the rigorous implementation and robust enforcement of its existing rulebook. Stable foundations, not a shifting landscape, will solidify Europe's position as the premier global hub to create, invest in and enjoy music in the digital age.

When implemented thoughtfully, the adoption of AI presents transformative opportunities for European creators, the broader cultural sector and technological innovation alike.

Conversely, without proper safeguards, it poses severe risks to the creative community.

There is no good reason why it should not succeed. There is already a fast-growing responsible AI market that would benefit the entire European tech and music ecosystem.

Kriss Kross Amsterdam

01. ENSURE EUROPE'S RULES DELIVER IN PRACTICE

Music is a direct contributor to Europe's global standing. It drives innovation, supports jobs, strengthens cultural identity and helps project Europe's values and creativity around the world. The EU recorded music market continues to grow, with European repertoire reflecting the Union's cultural diversity and connecting with audiences around the world.

At the heart of this success is the continued investment by record companies in artists and their music. Such investment depends on a stable, enforceable regulatory framework anchored by robust copyright protections.

Over the past decade, Europe has taken steps to update that framework for the digital age. It showed global leadership by adopting the EU DSM Copyright Directive, the EU Digital Services Act, the EU Digital Markets Act, and the EU AI Act.

We welcome the EU's recent initiatives on copyright that are aimed at strengthening the resilience and competitiveness of Europe's cultural and creative sectors. Our collective priority now, must be to see these rules work in practice. Effective implementation and enforcement of the existing rules are the most effective route to supporting a competitive EU-wide marketplace for digital content in which creativity, innovation and the cultural industries can thrive.

The effective application of copyright rules is fundamental to the continued growth and success of European music and artists. When rights are respected and fairly valued, a virtuous cycle is created: investment in artists increases, innovation flourishes, new technologies and services emerge, and consumers benefit from a wide range of cultural offerings. This serves fans, rewards artists, enables legitimate services to succeed and allows record companies to invest in the next generation of European talent.

THREE PRIORITY ACTIONS:

1. DELIVER A FULL, CONSISTENT AND MEANINGFUL IMPLEMENTATION OF THE EXISTING EU ACQUIS.

The EU has responded to technological developments by adapting its existing laws and enacting entirely new legislation, such as the EU AI Act. The priority now is to ensure that the current framework is fully, correctly, and effectively implemented and applied.

2. ENSURE MEANINGFUL TRANSPARENCY OF AI COMPANIES.

Input and output transparency are essential enablers of a well-functioning licensing market. They help ensure that creators can be fairly remunerated for the use of their work, while giving consumers confidence about the provenance and nature of the content they are consuming. The obligation created by the EU AI Act on AI model developers to be transparent about the third-party content they have used must be workable and enforceable by right holders. This requires clear action by the EU AI Office and should be complemented by strengthening the procedures already provided in the intellectual property rights [IPR] enforcement acquis to address the lack of transparency among AI developers. In parallel, procedural measures at member-state level should be enhanced to ease the evidential burden on right holders seeking to enforce their rights through the courts in the EU. In tandem, it will be important to ensure that the obligations to label AI-generated content are implemented effectively, taking into account voluntary agreed industry standards.

3. MAINTAIN AN EFFECTIVE SINGLE MARKET FOR ENFORCEMENT.

The EU should continue its important work to ensure that the protections provided for intellectual property rights enforcement under EU legislation remain effective.

Sylwia Grzeszczak

02.
LET MUSIC'S DYNAMIC, DIVERSE AND COMPETITIVE MARKET FLOURISH IN EUROPE

Exclusive rights provided by EU copyright laws underpin music's deep economic and cultural value. They allow right holders to decide if and how their works can be used, allowing them to negotiate free market value for their works, whilst providing the ability to enforce their rights.

The continued growth and development of Europe's music market demonstrate the merits of this approach. Voluntary direct licensing has delivered strong creative partnerships, innovative services for fans and increasing revenue to the creative community. It has enabled the current, legal music streaming model to thrive and has led to a significant decline in traditional forms of piracy.

This dynamic and diverse marketplace is thriving, built on the ability of players to freely develop commercial partnerships based on exclusive rights, legal certainty and a well-functioning single market for the exercise of rights. To ensure its continued success, we must preserve these foundations and avoid unnecessary regulatory interventions that risk fragmenting the market or interfering with the effective exercise of rights.

The same framework is already enabling the development of a competitive and diverse market for AI licensing. Voluntary licensing arrangements underpinned by exclusive rights are emerging across the music ecosystem, involving major and independent music companies, and AI developers ranging from start-ups to some of the world's largest technology companies. This demonstrates that market-led solutions can support both responsible AI innovation and the creative sector.

Berq

Kygo

THE PRIORITY ACTIONS:

1. ENSURE THAT VOLUNTARY LICENSING IS RESPECTED IN THE CONTEXT OF GENAI TECHNOLOGY.

Voluntary licensing allows bespoke solutions tailored to the specificities of the service, platform, or application. This principle has been acknowledged in the European Parliament's Legal Affairs Committee *Report on copyright and generative artificial intelligence – opportunities and challenges* and should be upheld in any further EU initiatives on copyright and AI.

2. ENSURE THAT RIGHT HOLDERS RETAIN THE FREEDOM TO EXERCISE THEIR EXCLUSIVE RIGHTS IN THE MANNER THAT BEST SERVES ARTISTIC AND COMMERCIAL NEEDS.

We should avoid any type of legislative intervention that downgrades exclusive rights. These would limit the artists' and right holders' freedom to decide whether and on what terms their rights are used. By undermining rights, such regimes undermine right holders' ability to negotiate terms that reflect fair value for their music.

Gaia


HOV1

03. ENABLE RESPONSIBLE AI AND MUSIC TO GROW TOGETHER

From artists and songwriters to record companies and beyond, the music community has historically backed innovation – whether in music style and composition, the use of new technologies for music creation or how fans can enjoy music or music-based content. GenAI technology is no different.

Record labels are actively engaging and partnering with AI developers that acknowledge and respect the rights of creators through negotiated licences while taking on the bad actors who use music without permission. This work is being done to ensure the value of music to AI developers is fully recognised.

However, licensing relies on copyright laws that uphold the foundational principle that AI developers must obtain authorisation for their use of the content from right holders before using it. AI developers must also be required to keep records of the content that they have used to develop their models and disclose this to those with legitimate interests, and to label AI-generated content to provide transparency to consumers.

The EU AI Act establishes obligations on AI developers regarding copyright compliance and transparency, under which they must disclose information about the content used to train their systems, to ensure that artists and record labels can enforce their rights. The Act also requires marking and labelling of AI-generated content. The EU has made and is making steps to provide tools to AI providers to help meet these obligations (the transparency template, the GPAI Code of Practice, and the Code of Practice on Marking and Labelling).

These obligations should now be implemented and applied effectively. Only meaningful implementation will ensure that technological progress serves the entire creative ecosystem and helps right holders to fully embrace AI. Without effective transparency, there will be no effective licensing of copyright, and no effective enforcement. Lack of effective licensing will stifle the growth of the competitive AI licensing market and innovation.

THE ECONOMIC CASE FOR VOLUNTARY LICENSING BASED ON EXCLUSIVE RIGHTS

Economists have explored policy options that would achieve the optimal balance between enabling AI development while ensuring adequate protection of copyright. Their report, published in 2025, concludes that voluntary licensing yields the best results for music.

- Copyright holders are likely willing licensors.
- Any purported risk of right holders "holding out" is significantly less than the economic and societal damage caused by right holders not receiving market rate remuneration.
- AI developers "free riding" on creative investment would harm both cultural production and the quality of future AI models.
- The argument that copyright hinders AI innovation and that broad exemptions or compulsory licensing is therefore necessary, especially for start-ups, does not stand up to scrutiny.
- There is no economic basis for weakening existing copyright protections.

THE REPORT WAS DEVELOPED BY COMPASS LEXECON, ONE OF THE WORLD'S LEADING INTERNATIONAL ECONOMIC CONSULTANCIES.

READ THE FULL REPORT

Evidence from wider industry analysis, including work by The Economic Case For Voluntary Licensing Based On Exclusive Rights, similarly underlines the importance of market-based licensing solutions in supporting both innovation and the long-term sustainability of the creative ecosystem.

WPI ECONOMICS (2026), DRIVING UK GROWTH: THE ROLE OF LICENSING MUSIC IN THE AGE OF AI

READ THE FULL REPORT


Esther Abrami


Alice Sara Ott

WHAT NEEDS TO BE DONE NOW?

TO MAKE EFFECTIVE USE OF THE EXISTING TOOLS TO ENSURE THAT RESPONSIBLE AI AND MUSIC GROW TOGETHER, THE EU SHOULD TAKE THREE STEPS:

1. Implement practical solutions requiring the work-by-work disclosure of the works used or a comprehensive list of the data sources accessed for GPAI training;

The European Commission should introduce a mandatory "second tier" in the existing Transparency Template provided for under the AI Act. This would mean the following:

✔ TIER ONE
PUBLICLY AVAILABLE SUMMARIES:

AI developers and deployers make publicly available a certain level of information of the use of training data or copyright-protected content to enable right holders to make a prima facie determination if and how their rights have been engaged; and

✔ TIER TWO
MORE DETAILED RECORDS UPON REQUEST:

Upon request by right holders seeking to enforce or license their rights, AI developers and deployers must provide a sufficiently detailed summary of the content used for training, including more detailed records of training data for which the party has a legitimate interest, such as copyright-protected content.

2. Assess whether the application of the GPAI obligations of the AI Act need to be complemented with national procedural measures to address cases of non-compliance more effectively and encourage Member States to apply them. For example:
   - ✔ rules on liability for not complying with the AI Act obligations;
   - ✔ the introduction of disclosure procedures;
   - ✔ rules that would ease the evidential burden for right holders in the context of litigation when there is insufficient transparency on the part of AI model providers, to facilitate the gathering of evidence, as has been proposed in France.

3. Assess whether the existing EU acquis on IPR enforcement is effectively implemented and complied with, and from there, whether it remains sufficient to provide effective enforcement procedures to address unauthorised use of copyright-protected content for AI training purposes.

Protections must be in place to prevent an artist's name, image, likeness and voice being used without authorisation. Existing legal frameworks in many countries already provide protections through a combination of personality rights, copyright, unfair competition, consumer protection and other laws.

The Commission should conduct a thorough analysis of the existing protections for elements of personality to understand how they could be used to their full potential to prevent an artist's name, image, likeness, voice being used without authorisation and whether any legislative improvements are needed.

04. PROTECT ARTISTS' MUSIC

ONLINE PIRACY

Piracy remains a challenge in the EU. The EU must continue to be vigilant and ensure that its enforcement and related legislation are effective.

HOW?

1. ENSURE THAT ALL EU MEMBER STATES FULLY IMPLEMENT THE EXISTING EU ACQUIS TO HELP CREATE A WELL-FUNCTIONING SINGLE MARKET FOR ENFORCEMENT, AND TAKE ACTION AGAINST THOSE MEMBER STATES THAT FAIL TO DO THAT.

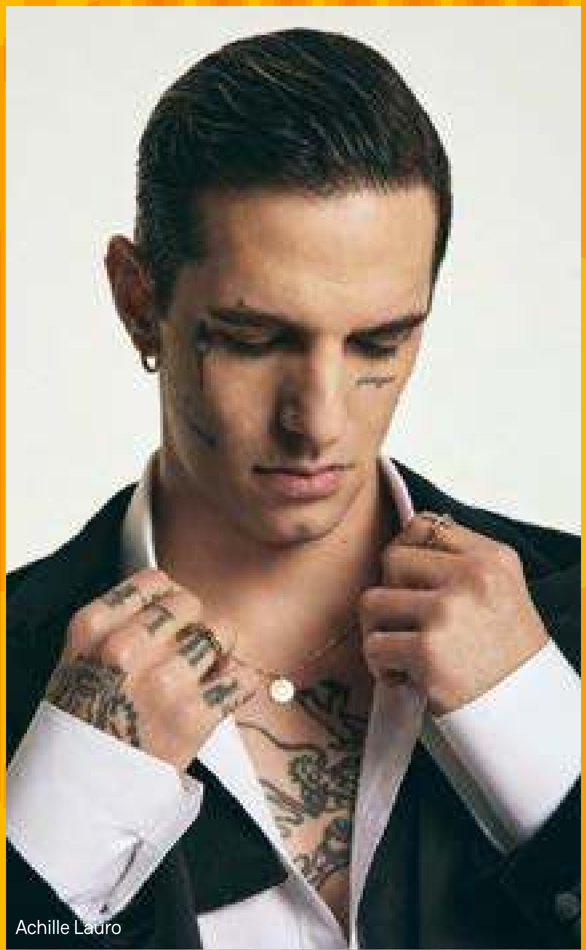
2. ASSIST RIGHT HOLDERS TO TACKLE ONLINE AND OFFLINE PIRACY MORE EFFECTIVELY BY ENSURING THAT MEMBER STATES:

- ✔ Provide for effective injunctive relief,
- ✔ Provide full implementation of all other remedies available in the EU Enforcement Directive,
- ✔ Correctly implement and apply other EU instruments, such the DSA, NIS2 Directive, and the EU AI Act.

3. CONTINUE WORKING ON IPR ENFORCEMENT, INCLUDING THE LIVE PIRACY RECOMMENDATION. THIS SHOULD:

- ✔ Improve notice and action, by clarifying that all hosting providers must implement and comply with a notice and stay down regime,
- ✔ Introduce an obligation on all intermediaries to implement effective Know Your Business Customer (KYBC) procedures, so as to remove the cloak of anonymity from criminal operators.

Lanberry



Achille Lauro

TACKLING STREAMING FRAUD IN MUSIC

Streaming fraud remains a serious issue perpetrated by agile and persistent bad actors.

By artificially generating plays of manipulated or fake content, bad actors are diverting vital revenues away from the artists, songwriters, record labels, music publishers and others who are legitimately entitled to them and who power the music economy.

While record companies are taking robust action, to stop fraud at scale, streaming services, content aggregators and distributors – the organisations with the data, scale and leverage to prevent this fraudulent activity – must also increasingly act together to identify, disrupt, and shut out those who abuse the system.

Alongside this, IFPI will work with governments and law enforcement agencies to improve understanding of how these criminals operate and to support effective investigations and enforcement actions.

FOR FURTHER INFORMATION PLEASE SEE THE FULL SECTION ON STREAMING FRAUD ON PAGE 40

05. CONTINUE SHOWING GLOBAL LEADERSHIP IN PROMOTING STRONG COPYRIGHT IN EUROPE AND ABROAD

The EU has shown global leadership by providing equal protection for all right holders with no discrimination based on nationality or residence. This includes public performance and broadcast rights which are essential components of Europe's music economy.

Various businesses pay to play the music that attracts and retains customers, drives revenue and boosts employee morale. The licensing of this activity provides vital and growing revenue streams for the artists, producers and songwriters who created and produced that music, which can be reinvested in growing Europe's music economies as well as encouraging their music exports.

Introduction of mandatory material reciprocity in the EU would mean that EU Member States would cease collecting public performance and broadcasting royalties for a large part of the recordings broadcast or performed publicly in Member States, predominantly US recordings. Because of reduced overall royalty collections in the EU, all right holders would be harmed, as confirmed by NERA, the economic consultancy, which assessed the harm caused by the possible introduction of mandatory material reciprocity in the EU.

WHY?

- ✔ There will be less investment in local artists by producers in the EU,
- ✔ Users will have an economic incentive to avoid performance royalties by playing "free" (unprotected) sound recordings (mainly US artists),
- ✔ There will be less money for social and cultural programmes,
- ✔ Share of costs for royalty collections incurred by CMOs will increase and EU right holders will have to cover that.

Pierre Garnier

Nil Moliner

ROLE OF A RECORD LABEL

Pinguini Tattici Nucleari

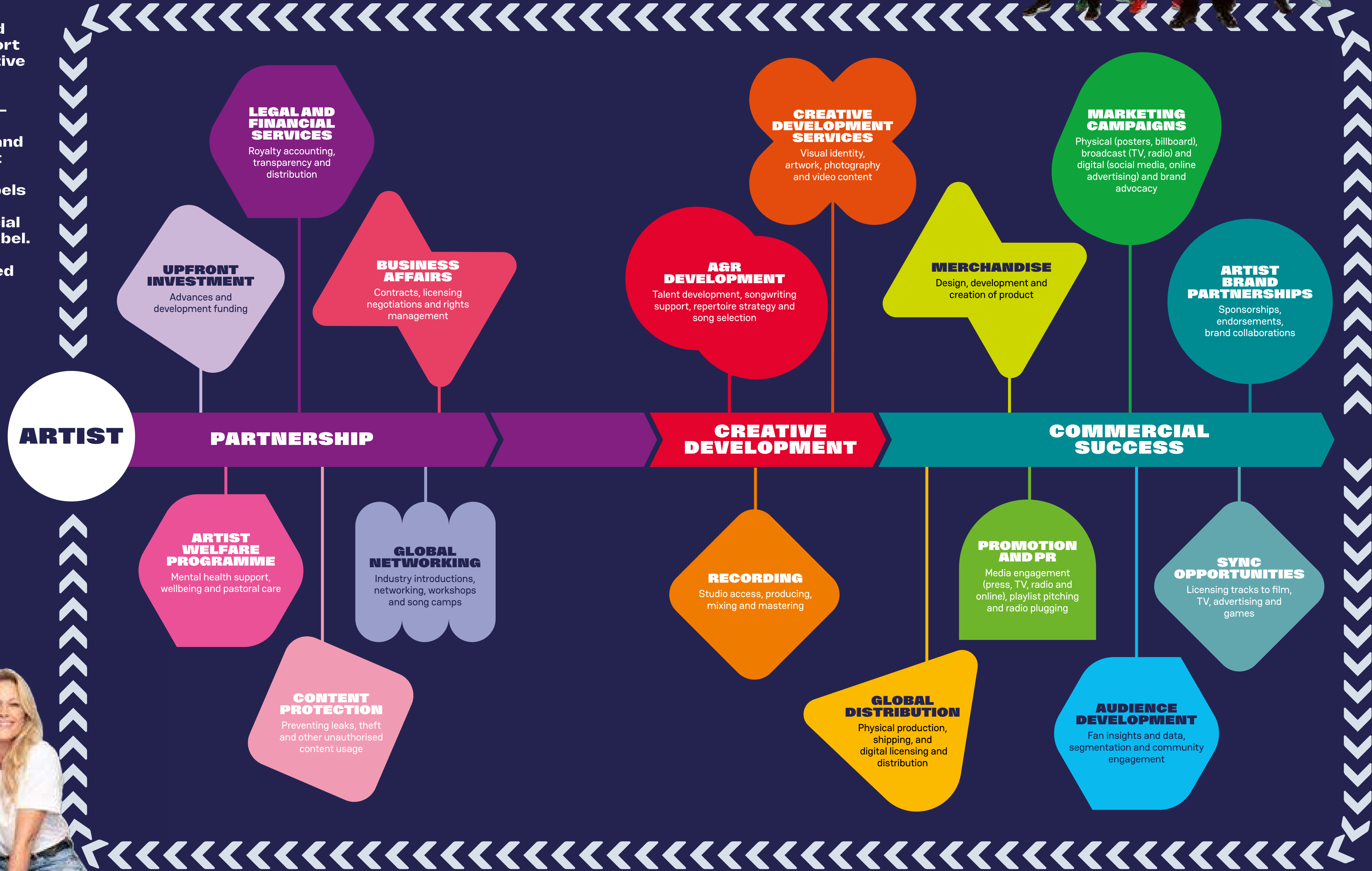
In today's competitive music market, record labels find and nurture new talent and support artists in realising their creative and commercial potential.

In addition to providing world-class expertise, labels act as primary investors for talent and fund both artist development and global marketing. While successful projects allow labels to recover their initial outlay, the financial risk of commercial failure rests entirely on the label.

In 2025, record labels invested a total of

€8.3bn globally

[approximately US$9.3bn] in A&R and marketing – just two of the many ways they support the development and promotion of artists and their music.



ANNA

Helene Fischer

IFPI Music in the EU 2026

SUCCESSFUL ARTIST PARTNERSHIPS START WITH THE MUSIC

CASE STUDY:

LUIS FERNÁNDEZ
President of Universal Music Spain

UNIVERSAL MUSIC: SPAIN

For Luis Fernández, President of Universal Music Spain, developing an artist takes place over the long-term. "Our job is to build and craft around artists – patiently and carefully for the long-term" he says.

That philosophy underpins Universal Music Spain's approach to artist development in a market that sits at the crossroads of Europe and Latin America.

"This is a country where we've got a huge mix of different languages and cultures, and we are the bridge between Europe and Latin America," Fernández explains. "The Spanish-speaking market gives us a huge opportunity to connect artists with audiences beyond our borders."

Spain's music market is also distinctive in its listening habits, with audiences embracing both Latin and Anglo music.

According to Fernández, who took on his latest role in February but has been at Universal Music since 2023, succeeding in such a diverse market requires more than identifying great songs. It demands a deep understanding of culture and close relationships with artists.

"If you want to be a leader in the music industry, you must have a conversation with an artist through a cultural lens," he says. "You need to be able to talk about everything around them. An artist who is going to succeed and stay in the market for years must be someone who can engage with the world around them."

Those conversations, he says, are best had face to face.

"It's really important for us to have proper conversations and to talk about music and what is happening. You have to become part of their strategy."

Fernández points to Spanish pop star Lola Índigo as an example of that long-term partnership. The goal is not simply to build an artist's profile in Spain or Latin America, but to help them achieve global success.

That ambition is supported by close collaboration across Universal Music's international network.

"I'm in touch with colleagues around Europe, especially France and Italy," he says. "They understand what is happening here and can see that Spanish-language music is growing very fast in their markets."

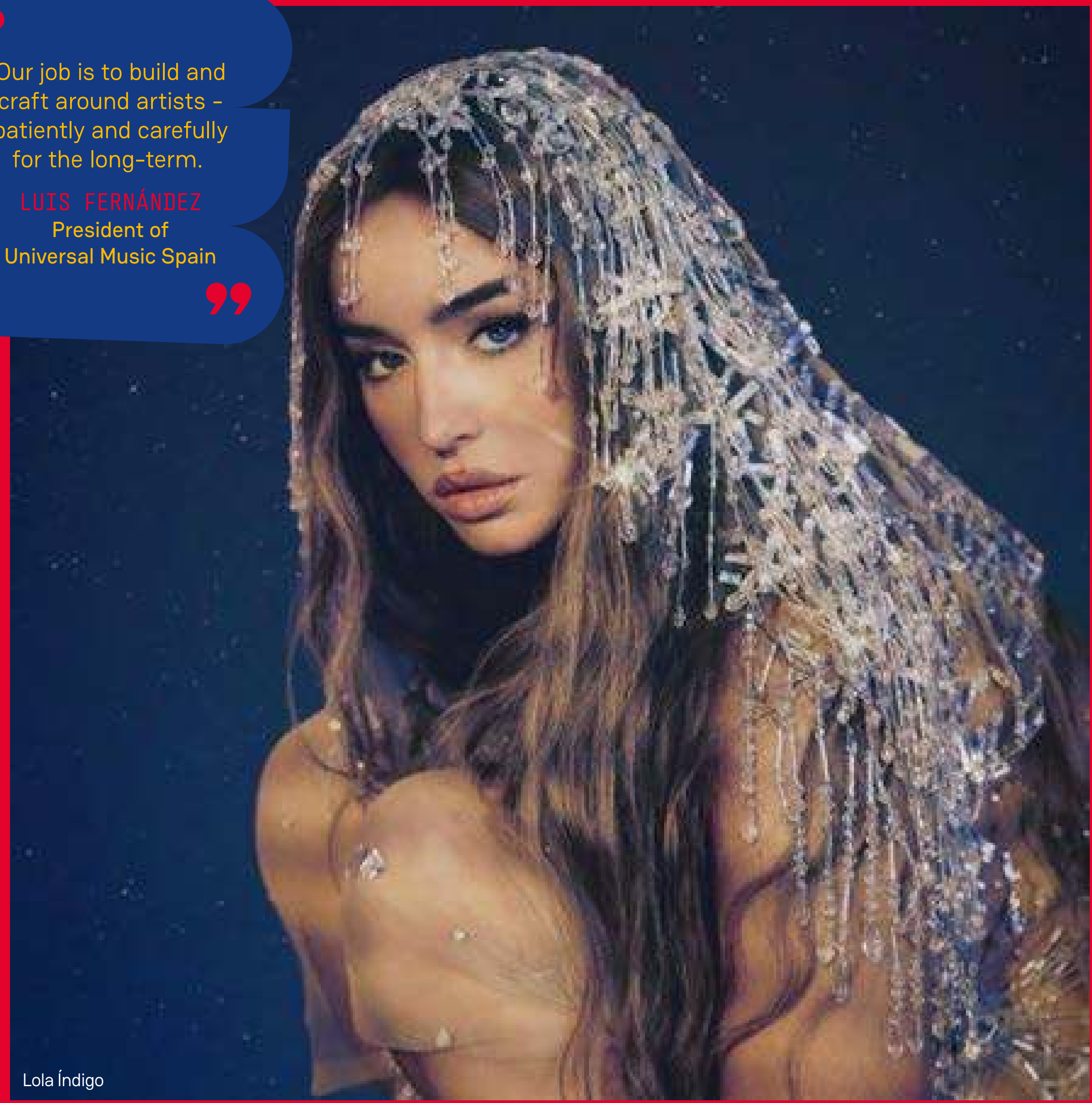
For Fernández, successful artist partnerships are built on trust, respect and a shared passion for music.

"Respect is really important between both sides. It is about confidence, being interested in what is happening in the world, and not being afraid of artistic conversations. We are here because we love music."

That passion, he says, is "the soul of this business".

Lola Índigo

> Our job is to build and craft around artists – patiently and carefully for the long-term.
>
> LUIS FERNÁNDEZ
> President of Universal Music Spain



Lola Índigo

But it is the team around an artist that turns great songs into lasting careers.

"You can make the best song, but it still takes a team to build something that lasts. Our job is to support the artist to make timeless records and timeless songs, and to build a catalogue that will still matter in 20 years. We are crafting long-term careers."

He points to the importance of copyright as the bedrock of those long-term careers. "An artist's long-term career is underpinned by strong copyright foundations. AI represents a huge creative opportunity for artists, but it must be responsibly built and used. Transparency, consent, and compensation are non-negotiables."

Spain's music market has evolved rapidly in recent years. Digital consumption has grown significantly since the pandemic, while the country's thriving live music scene creates new opportunities for artists to connect with audiences.

"Spain is unique because we have hundreds of festivals," Fernández says. "It's a great place to combine album releases with live music."

At the same time, physical formats remain an important part of the business, with Spain now the world's tenth-largest vinyl market.

For Fernández, that reflects something deeper than commercial success.

"For us, this isn't just about entertainment. Music is our cultural heritage. And it supports the economy through job creation. Protecting and amplifying our music on the world stage benefits us all. That's how you build an industry and a culture that lasts."

LONG-TERM THINKING POWERS NORDIC MUSIC SUCCESS

CASE STUDY:

MARK DENNIS
Managing Director of Sony Music Sweden, Finland and the Baltics

SONY MUSIC:

SWEDEN, FINLAND, BALTICS


Kygo

It will come as little surprise that Mark Dennis, Managing Director of Sony Music Sweden, Finland and the Baltics, is optimistic about the future of music in the EU.

Having spent his career working across the region and the wider music business, he has had a front-row seat to one of the industry's most remarkable success stories: a collection of relatively small markets that consistently produce world-class artists, songwriters and producers.

Despite their modest populations, the Nordic countries continue to deliver an extraordinary concentration of creative talent.

"It continues to be a rich source of creative talent," he says. "Not just artists, but writers, producers and people across the creative industry."

Sweden has long been recognised as a music powerhouse, but Dennis believes the wider region deserves more attention.

"The music industry in Sweden has punched above its weight, but I'd say the same applies to the other Nordics as well."

He points to Finland, where a new generation of writers and producers is increasingly making its mark internationally.

The region's achievements are not accidental. According to Dennis, it has been built over decades through visible role models, collaboration and a culture that encourages the next generation to be even better.

"ABBA was really the starting point for the big wave of Swedish exports," he says. "When you can see people who have succeeded, it gives you the confidence to believe it's possible for you too."

From ABBA to Roxette, Avicii and Zara Larsson, each success has helped create a sense of possibility.

Yet what stands out most to Dennis is the collaborative spirit that underpins the Nordic music community.

"There's less of a sense of competition and more a feeling that together we can reach greater heights."

It is a philosophy that closely mirrors Sony Music's own approach to artist development.

"The core of what we're trying to achieve is long-term artist partnerships," Dennis says. "In essence, patience and trust."

Rather than chasing trends, the company focuses on helping artists build sustainable careers. That means providing not only A&R support, but a broader network of services designed to support artists throughout every stage of their career.

From in-house studios and creative teams to legal, business and financial guidance, it is about being "the centre of an artist's career," Dennis explains.

That support often starts with the practical realities new artists face. Recording sessions and successful releases may be the most visible part of an artist's journey, but Dennis believes trust is built by helping them navigate the less glamorous work: protecting artists from streaming fraud, AI deepfakes, and piracy; negotiating detailed, future-facing agreements with technology companies to maximize the value of their music; and identifying new revenue opportunities that both scale and deepen their connection with fans.

"Those aren't always the sexiest parts of the music industry," he says. "By being pragmatic, honest, transparent, and then also making sure that the artist is fully aware of all the things that we are actually able to do builds trust and shows we're committed to being a good partner on every level."

Patience, meanwhile, remains central to the philosophy.

Some Sony Music Sweden artists have remained with the company for more than 25 years, while others viewed today as breakthrough acts have been developing behind the scenes for close to a decade.

For Dennis, those long-standing relationships are crucial to the story.

"If we can't show that we work with artists over 20 or 30 years, how can we convince a new artist that we have that vision for them as well?"

Demonstrating longevity helps reinforce the idea that artists are not defined by a single hit, but by sustained relevance over time.

The same long-term thinking shapes international strategy.

Breaking Nordic artists globally no longer means focusing exclusively on the UK and US. Instead, the company takes a targeted, market-by-market approach.

> There's less of a sense of competition and more a feeling that together we can reach greater heights.
>
> MARK DENNIS
> Managing Director of Sony Music Sweden, Finland and the Baltics

"We think about where an artist might find their first success," Dennis says. "You can't conquer every market at once."

Rather than following a one-size-fits-all path, Sony Music looks for what it calls "door-opener markets" that can provide a platform for broader international growth. The strategy has helped drive major global careers for artists such as the Norwegian star Kygo, who debuted in 2015 and has since amassed more than 40 billion streams. Strong early traction in regions including Asia and South America, alongside the US and Europe, was instrumental in fuelling his worldwide success.

Looking ahead, Dennis remains confident about the opportunities for Nordic talent, but he is also aware that sustainable growth requires collective responsibility.

"It's incredibly important that we work together with partners," he says, pointing to challenges including streaming fraud and the misuse of AI. Protecting the integrity of the music ecosystem is essential.

The Nordics have built a strong track record of producing talent and fostering collaboration. Maintaining that will be critical to ensuring the region continues to succeed on the global stage.


Zara Larsson

IFPI Music in the EU 2026

A GLOBAL COMMUNITY WITH A STRONG VOICE

CASE STUDY:

PRISCILLA KOTEY
Managing Director, Warner Music Ireland

WARNER MUSIC GROUP: IRELAND

"The Irish music scene is probably the healthiest it's ever been," says Priscilla Kotey, Managing Director of Warner Music Ireland. "We're absolutely teeming with talent and producing artists that are achieving global success at a much higher ratio than some of our EU counterparts."

The popularity of Ireland's domestic repertoire is growing rapidly, with Irish artists increasingly dominating streaming charts and festival line-ups at home. "The market share for Irish artists has tripled in the last couple of years," Kotey explains. "Being able to puncture the Top 100 and Top 50 on Spotify has been a massive turning point."

She points to a combination of factors behind this momentum: stronger artist development infrastructure within record labels; the establishment of BIMM Music Institute in Dublin; the growth of Ireland Music Week, which showcases the best local talent to a global industry audience; and the rise of social media allowing artists to connect directly with audiences worldwide.

"There's been a cultural shift," she says. "Irish people have become way prouder of Irish music than ever before. If you look at Electric Picnic (an annual arts and music festival in Ireland) eight years ago, it was predominantly international acts. Now the line-up is at least 50% Irish artists."

For Kotey, music is deeply tied to Irish culture and community. "Music is at the beating heart of our national identity," she says. "There's not a pub you walk into in this country where there isn't a music performance happening in the corner. When people go home at Christmas, someone always stands up and sings a song."

That strong cultural connection also translates into international opportunity. "We're a country of nearly six million people, but there are Irish communities in every pocket of the world," she explains. "If you're an Irish act and you're looking to break in Canada, Australia, France or Germany, you already have an audience there through the Irish diaspora."


Florence Road


Kingfishr

> Music is at the beating heart of our national identity.
>
> PRISCILLA KOTEY
> Managing Director, Warner Music Ireland


Amble

Kotey believes Warner Music Ireland's role is to help artists develop sustainably before stepping onto the global stage. "What we can do is nurture artists, protect them, develop them and educate them about the music business. We're more like a launch pad."

One artist story that exemplifies this approach is Irish folk trio Amble. Kotey first discovered the band after receiving a recommendation from a Warner Records colleague in the US.

"I listened to the music on the train home and just loved it," she recalls. "I literally turned around, got back in the car and drove into town to see them play."

What she saw convinced her immediately. "There were 50 or 60 people singing every word back to them. The chemistry between the guys was incredible. It felt really special."

Warner Music Ireland worked closely with Warner Records in the US to help develop the band internationally while staying true to their roots. "At the heart of it, Amble are a band from Ireland," says Kotey. "Our job is to make sure those roots stay authentic, because that's what audiences connect with."

She points to the band's rise, which has been impressively rapid. "Two years ago, they were supporting Picture This at St Anne's Park in Dublin," she says. "Now they're headlining the same venue themselves."

For Kotey, artist development is fundamentally about helping musicians amplify who they already are. "I always tell artists: I'm not always right," she says. "I can't tell you who you're supposed to be. You need to know that yourself."

Instead, Warner Music Ireland focuses on supporting creativity and helping artists build lasting fan communities. "We're here to amplify it, strategize around it and help artists build their audience," she says. "But the artist has to know in their core who they are."

Looking ahead, Kotey believes Ireland's influence as a music market will continue to grow. "We're small, but we're busy," she says. "And the talent just keeps coming."

HOW ONE GOVERNMENT SCHEME HAS HELPED CREATE THE NEXT GENERATION OF TALENT IN ITALIAN MUSIC

CASE STUDY:

ENZO MAZZA
Federazione Industria Musicale Italiana (FIMI)

NATIONAL GROUP: ITALY

Italy's recorded music market is one of Europe's strongest growth stories, with targeted public policy playing a crucial role in accelerating investment and supporting diversification across the industry to strengthen local repertoire.

Italy's music tax credit scheme is a key component of the success story, according to Enzo Mazza, CEO of Federazione Industria Musicale Italiana (FIMI). The policy was introduced in 2014 and has become a model for how governments can support sustainable growth in the music sector.

"The tax credit was a strong message from government recognising the importance of music production and the music industry," says Mazza. "It is a really useful tool, particularly for helping companies invest in new talent."

Inspired by similar initiatives in France and adapted from Italy's film tax credit system, the scheme was designed to encourage labels to invest directly in new recordings. Rather than operating as a grant programme, the system rewards companies that commit resources to artist development and production.


Astro

"Supporting the people behind the music unlocks unlimited opportunities for all."

ENZO MAZZA
Federazione Industria Musicale Italiana (FIMI)

The tax credit is recognised in the amount of 30% of the costs incurred for development, production, digitalisation and promotion of music phonographic and video recordings. This money can be claimed for recording costs, mixing, making videos, paying/licensing copyrights and other A&R expenses.

"Music is a high-risk industry," Mazza explains. "Most recordings do not generate enough revenue to cover the investment. The tax credit helps companies support this risk and invest more."

The impact has been substantial and is an important supporter of strong growth. Increasing engagement with paid subscriptions is driving this while physical formats such as vinyl and CDs are also seeing renewed demand across Italy's recorded music industry.

The benefits of the tax credit have extended far beyond mainstream commercial releases. Independent labels now account for the majority of projects using the scheme, while investment has expanded into niche and culturally important genres.

"What is most interesting is that the tax credit is used not only for mainstream releases, but also by labels investing, for example, in classical, ambient and really niche local genres," Mazza says. "This is helping Italian repertoire beyond the mainstream."

The policy has also helped diversify Italy's music market, widening the industry to create new and exciting opportunities for young people, as well as encouraging the industry to boost its innovative practices.

According to Mazza, the scheme gives labels the confidence to continue investing in music that contributes to cultural diversity and long-term artist development. "The fact that the production of both mainstream and non-mainstream repertoire can survive because it is helped by tax credit, is great news," Mazza says.

Albums supported by the tax credit have gone on to achieve major commercial success, including chart-topping releases. Mazza points to the recent breakthrough success of Italian singer-songwriter Olly as an example of how investment in local talent can translate into mainstream cultural impact.

Olly won the 75th Sanremo Music Festival in 2025 with his hit song "Balorda nostalgia", setting a record in Italian charts with both the annual best-selling album & annual best-selling single in 2025.

"It is a great story," Mazza says. "It is based on a brilliant partnership between the record company and the artist, and it is all connected to the tax credit."

For Enzo Mazza, it all comes down to the fact that effective music policy should encourage investment and deliver a positive impact across the entire music sector.


Caparezza

"These measures should be for everyone," Mazza argues. "With the boost to investment in our local music industry, we are seeing a more diverse music landscape, which unlocks more jobs, wider reach, and a stronger local market. Supporting the people behind the music unlocks unlimited opportunities for all."

As policymakers across Europe look for ways to strengthen local repertoire and cultural diversity, Italy's experience demonstrates how targeted tax incentives can deliver measurable creative and cultural benefits, while ensuring local music continues to thrive in the modern streaming era.


Olly

HOW AN INDEPENDENT LABEL BUILT A EUROVISION WINNER

CASE STUDY:

SANYA ARMOUTLIEVA
CEO, Virginia Records Bulgaria

VIRGINIA RECORDS: BULGARIA

When it comes to the Bulgarian music scene, two words spring to mind for Sanya Armoutlieva, CEO of Virginia Records Bulgaria: "potential" and "undiscovered."

That potential has now found its biggest stage yet in Eurovision.

With international media describing DARA and her winning song Bangaranga as the competition's dark horse, Armoutlieva says "many people were very surprised by Bulgaria's win."

DARA first came into the spotlight on the Bulgarian X Factor at just 16 years old, where she came third. This is where she first met Armoutlieva, who was part of the jury panel.

"I had zero hesitation about how special she was as an artist," Armoutlieva says, citing her stage presence, vocal blend, and ability to connect with audiences.

"The incredible performer you saw winning the Eurovision contest with a brilliant song, co-written by her is a result of continuous work of a whole team and herself, not just behind the stage of Eurovision, but in the course of many years of development" she adds.

Virginia Records nurtured DARA's raw talent from the very start of her career.

"One of the most important things we did was to build DARA up not only as a performer with a repertoire of hits, but also as a songwriter. We have invested in a creative centre with three recording studios, a dance rehearsal space, a photo corner and a workshop room, so that all artists with whom we work, could develop all kind of skills - writing, recording, performing, shaping their visual identity, learning about the business, in one place," Armoutlieva says.

The Virginia Records team regularly organise not only songwriting sessions, but one of the biggest international songwriting camps in the region - Sofia Songwriting Camp.

All of this is underpinned by the depth of skills within the label, handling all the elements of an artist's career - from repertoire, audio and video production, marketing, digital distribution to manufacture and sales of physical products and merchandise, brand partnerships, concert booking and promotion, administration of copyrights.

DARA was picked to represent her country for Eurovision through two stages with the national broadcaster, BNT. This was a public and jury vote in January 2026, followed by a song selection a month later where she performed three candidate songs. This is where Bangaranga was picked on a 50/50 public-and-jury vote.

The song was an instant hit in the team's eyes. "We had a song that worked on first listen, it had specific Balkan touch, but could travel, while keeping DARA's own voice and personality at the centre of it," Armoutlieva says.

She adds: "Key to the win, I believe, was that the song and the artist were perfectly matched: Bangaranga gave DARA a vehicle for the energy and stage presence she has always had, the staging and choreography were so unusual and gave the whole TV performance a distinct visual identity."

Bangaranga was performed in English, which removed a language barrier for many listeners, but Armoutlieva emphasises the importance of keeping a strong Bulgarian and Balkan identity.

However, the win was not just a huge moment for DARA and her team but also the country. Bulgaria made its Eurovision debut in 2005, came runner up in 2017, but had never won before.

She says: "This was a genuinely historic night for the country - not just for music, but for how Bulgaria sees itself on the European stage. It was a moment of individual significance for all Bulgarians. For Virginia Records, it was validation of a model we have been building for years: invest in artist development, build local infrastructure, and pair Bulgarian artists with the best international collaborators we can find."

After the final, Bangaranga went to number one on the Spotify daily chart in eleven countries, topped the official singles charts in Germany and Austria (the first Eurovision-winning song to top the German chart since Loreen's Euphoria in 2012), and entered the UK chart at number 21. The track had a 173-point margin over second place - the largest winning margin in Eurovision history - and was the first entry since 2017 to top both the jury and public vote.

> DARA's win didn't happen overnight; it is the result of a decade-long relationship between artist and label.
>
> SANYA ARMOUTLIEVA
> CEO, Virginia Records Bulgaria

Armoutlieva says: "DARA's win didn't happen overnight; it is the result of a decade-long relationship between artist and label."

And in terms of what's next, Armoutlieva says her vision is now to "convert a single huge moment into a sustained global career" but she also has a wider takeaway for Bulgaria.

"DARA's win puts a spotlight on Bulgaria that the whole local industry can build on - international A&Rs, labels, songwriting teams, DJs, festival bookers, brands are paying attention to Bulgarian artists in a way they weren't twelve months ago."

DARA

AI & MUSIC:

LICENSE TO INNOVATE IN EUROPE

Music companies have a proven track record of embracing innovation and creating new opportunities for artists across Europe.

AI represents the next generation of this innovation and is a top policy priority both globally and in the region.

Across Europe, policymakers are considering whether new AI regulations are needed. It is essential that these frameworks uphold strong copyright protections, ensuring the growth of Europe's creative industries is not undermined.

Music companies are actively engaging with AI developers to build licensed models that generate new revenue streams for artists. Our goal is to foster an ecosystem where AI and human artistry thrive together.

L2B

KLAY: INNOVATION IN PARTNERSHIP WITH MUSIC


MUSIC TECHNOLOGY COMPANY KLAY SIGNS FIRST-OF-ITS-KIND AI LICENSING DEALS WITH SONY MUSIC ENTERTAINMENT, SONY MUSIC PUBLISHING, UNIVERSAL MUSIC GROUP, UNIVERSAL MUSIC PUBLISHING GROUP, WARNER MUSIC GROUP

Music Technology Company Helping to Pioneer AI Licensing

Los Angeles-based music technology company KLAY Vision Inc. has closed separate AI licensing agreements with Universal Music Group (UMG), Universal Music Publishing Group (UMPG), Sony Music Entertainment (SME), Sony Music Publishing (SMP), and Warner Music Group (WMG). These agreements establish terms on which KLAY will help further evolve music experiences for fans, leveraging the potential of AI, while fully respecting the rights of artists, songwriters, and right holders.

KLAY has already reached a significant milestone, becoming the first AI music startup to secure formal licensing agreements with all three major record labels, pre-launch.

Rather than relying on unlicensed data, KLAY is building its platform on a fully licensed, legally compliant dataset, positioning itself as an example of how AI innovation can develop in partnership with the music industry.

Founded by musician and producer Ary Attie and Thomas Hesse, who has worked across Sony Music, Bertelsmann and BMG, the company aims to enhance music listening rather than replace creativity.

Its agreements with Sony Music Group, Warner Music Group and Universal Music Group establish terms on which KLAY will help evolve music experiences for fans. Instead of generating entirely new songs from text prompts, KLAY's Large Music Model enables users to customise, combine, and reinterpret existing licensed recordings, creating new ways for fans to engage with music while ensuring creators and right holders remain at the centre.

"We are an AI-supported service focused entirely on the listening experience for the consumer," says Hesse. "We're not a text-based music meme generator - we're trying to innovate in how people listen to and engage with the music."

From the outset, the company says it sought to build a model that brought harmony to the music ecosystem.

"We wanted to build something fully aligned with the interests of musicians, songwriters, and all the institutions that represent them," Hesse explains.

For Hesse, AI represents the latest chapter in a long history of technological innovation supporting creativity rather than replacing it.

"People were concerned when the synthesiser was invented that it would be the end of the music business," he says.

He argues that audiences will continue to value authentic human creativity.

> "We wanted to build something fully aligned with the interests of musicians, songwriters, and all the institutions that represent them."
>
> THOMAS HESSE, Co-Founder, KLAY

"The culture is always going to be pushed forward by artists and songwriters, and we want to be at their service."

In Hesse's view, AI should enhance, not substitute, artistic creation.

"AI always must be at the service of great musicianship, great artists and great songwriters. It will never replace them - it will support them. And once their work is finished, it will support the experience of people listening to it."

Central to KLAY's approach is the belief that innovation and copyright protection work together.

"When you build a product that is fully ethical and respectful of copyright, you can work with the community to build something that is aligned with the culture, that riffs off it, works with it and supports it, both in how it's consumed by listeners and how the creators of that culture are properly compensated."

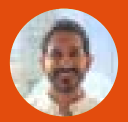
The company sees licensed AI as a means to expand engagement with music while ensuring that creators are rewarded.

"We are embracing and celebrating the amazing body of work created by artists and songwriters over decades. Our goal is to provide a service where that music can be enjoyed even more."

Looking ahead, Hesse believes that a trusted and rights-based approach will help unlock AI's potential for music.

"The more people familiarise themselves with guardrails that put artists and songwriters at ease, the closer we get to a very bright future."

Q&A AI POLICY IN PRACTICE



ABBAS LIGHTWALLA IS IFPI'S DIRECTOR OF GLOBAL POLICY. HERE, HE PROVIDES HIS INSIGHTS INTO THE AI POLICY CHALLENGE AND THE SOLUTIONS.

WHAT IS THE ISSUE WITH GEN AI?

Generative AI models are usually developed using vast datasets. This means they can produce text, images, videos or music within seconds from simple prompts. To create high-quality outputs, generative AI requires high quality inputs. When developed and deployed responsibly, these technologies have the potential to unlock exciting new opportunities for creativity, innovation and fan engagement.

However, in some cases, bad actors are developing their generative AI models using copyright protected material without authorisation. The outputs from these systems then compete with the original works. In the case of music, they are flooding streaming services and being consumed in ways that divert listening and payments away from artists.

WHAT IS THE WAY FORWARD FOR THE INDUSTRY?

Record companies are proactively working to define music's relationship with AI. All with the goal of helping to shape a responsible approach to AI, one that supports innovation, protects human artistry, enables market-led licensing and ensures that the rights of creators and other right holders are respected. They are engaging with developers who are recognising and respecting intellectual property rights to enhance the creative process and bring extraordinary and exciting experiences to fans. Importantly, these licensing solutions are already emerging across the music ecosystem. Major and independent music companies are entering agreements with AI developers, while voluntary licensing solutions are being explored by a range of market participants. A diverse and competitive market for AI licensing is already developing, underpinned by exclusive rights, voluntary licensing and commercial freedom. This activity is based on a foundational principle: authorisation.

Through the same licensing models that fuelled the growth of streaming, gaming and social media, record companies are ensuring that the intrinsic value music brings to these technology companies is fully recognised and appropriately remunerated.

WHAT IS THE MOST EFFECTIVE WAY TO ENSURE MUSIC IS PROPERLY VALUED IN THESE ARRANGEMENTS?

Historically, voluntary direct licensing has generated the best results for the music community and led to real innovation based on the partnerships that develop because of it.

Despite this, we have seen proposals for statutory remuneration rights, compulsory licensing models and mandatory collective management arrangements that would interfere with right holders' ability to directly license their content.

These alternative remuneration schemes are not the solution. They simply distort the market by stripping right holders of their exclusive rights and the ability to decide whether, how and by whom their work is used.

By eroding rights in this way, such regimes eliminate bargaining power, tilting the scales against right holders and taking away the means to guarantee appropriate market value for music.

To protect artists' interests in such a dynamic and evolving environment, right holders must retain the freedom to exercise their exclusive rights in the manner that best serves artistic and commercial needs, and blunt legislative interventions that would downgrade them must be avoided at all costs.

Governments can play a positive role in this by ensuring that existing copyright and AI rules are implemented and enforced effectively, and by requiring meaningful transparency around the content used to develop AI models to ensure that right holders have the practical and effective means to exercise and enforce their rights. This creates legal certainty, supports responsible innovation and helps ensure that good actors are not undercut by those using music without authorisation.

As highlighted throughout this report, when copyright is respected, transparency obligations are meaningful and enforceable, and market-led licensing is allowed to develop, creators, technology companies and consumers can all benefit from AI's opportunities.

WHAT IS BEING DONE TO HELP FANS?

IFPI and industry partners announced a voluntary track labelling system to give fans clearer information about the use of GenAI in sound recordings.

Track-level labelling across digital music services helps fans distinguish between "AI-Generated" and "AI-Assisted" recordings.

The AI-Generated label is deployed when GenAI was used to generate the entirety or the primary portion of the creative elements of the recording, whilst AI-Assisted is when the recording was created substantially by humans, but GenAI was used for some expressive elements.

In addition, IFPI has implemented global principles for the eligibility of AI-developed recordings in Official Music Charts. The principles will enable official charts to accommodate lawful use of AI in the creative process whilst remaining an authentic celebration of human artistry.

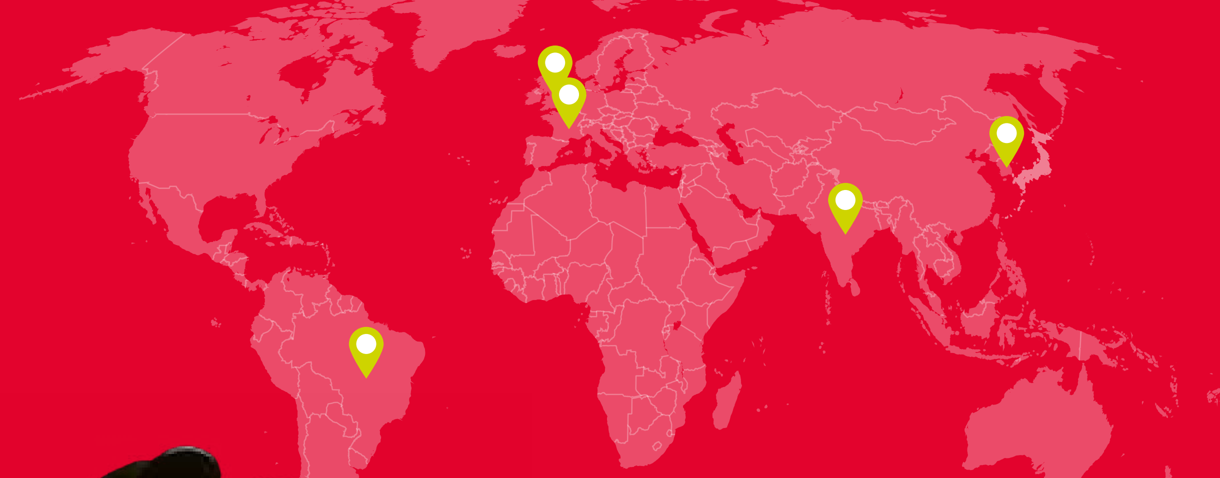
The framework will establish a clear boundary between human-led creativity and works that are purely synthetic, or generated by unauthorised AI models. It will also help to ensure that any tracks with a fraudulently boosted stream count are not recognised or celebrated in the charts.

Together, these initiatives help fans make informed choices, promote transparency around the use of AI in music, and ensure that innovation develops in a way that continues to recognise and celebrate human artistry.

MUSIC EMBRACES INNOVATION; PEOPLE AROUND THE WORLD BACK RESPONSIBLE AI

Music has always been about innovation. From artists and songwriters to music companies and beyond, the music community has historically backed innovation – whether in music style and composition, the use of new technologies for music creation or how fans can enjoy music or music-based content. GenAI technology is no different, and we are eager to seize its opportunities.

Equally, when in late 2025 IFPI asked about 10,000 people across the UK, France, Brazil, South Korea and India for their views on AI and its implications on copyright for the creative industries, they expressed support for fairness, human creativity and heritage.



Amo & Aymen

69% of respondents across all five countries opposed AI companies' use of creative works to develop AI platforms without authorisation or payment.

Most people across all five countries agreed that each of their respective governments should introduce new rules to make AI developers be more transparent about the content they have used to develop their models. This included 65% of French respondents.

77% of French respondents say protecting and promoting France's unique cultural identity is extremely/very important and there is strong support for new rules on transparency.

Survey conducted from 10 to 25 November 2025 by Stack Data with a representative sample of 2,003 British, 2,000 French, 2,000 Indian, 2,000 Brazilian and 2,001 South Korean respondents.

PROTECTING THE ECOSYSTEM IN EUROPE: TACKLING STREAMING FRAUD

The music industry faces an increasing threat from streaming fraud. By artificially generating plays for manipulated or fake content, bad actors are siphoning vital revenues away from the artists, songwriters, record labels, music publishers and others who power the music economy.

While record companies are taking robust action, we need organisations at every stage of the streaming value chain to take proactive steps to prevent, detect and act on fraudulent activity.

STREAMING FRAUD - WHAT IS IT?

Fraudsters exploit gaps in music platforms' protections and across the supply chain. These criminals upload tracks via distributors and deploy armies of 'bots' to create artificial 'plays' of those tracks to generate income.

Because streaming services pay right holders from a finite pool of revenue, income is being diverted from legitimate creators who attracted users, subscriptions, and advertising to these platforms in the first place.

This is theft, plain and simple.

And with the rise of generative artificial intelligence (AI), the practice has been industrialised, enabling the mass creation of artificial content and artificial listening, and making large-scale fraud cheaper and faster to perpetrate - and harder for systems to detect.

RECORD COMPANY ACTION

IFPI and its member companies are taking direct action against those enabling and profiting from streaming fraud. Legal proceedings have led to the disruption and shutdown of manipulation services in multiple territories, including Germany, France, Norway, Brazil and Canada, with further actions underway.

IFPI also works closely with governments and law enforcement agencies to improve understanding of how these crimes operate and to support effective investigation and enforcement.

But enforcement alone cannot solve the problem at scale.

In January 2026, Deezer reported it was receiving more than

90,000

fully AI-generated tracks every day.

Deezer also revealed that up to

85%

of all streams on AI-generated music were fraudulent in 2025 - up from the 70% figure it reported last year.

STOPPING FRAUD AT SCALE: TAKING ACTION AT EVERY STEP OF THE CHAIN

Bad actors are agile and persistent. To stop fraud, the organisations with the data, scale and leverage to prevent this fraudulent activity, including streaming services, content aggregators and distributors, must act together.

Sarah Connor

SO, WHAT NEEDS TO BE DONE?

1. IMPLEMENT ROBUST IDENTITY VERIFICATION

Distributors need to know who is providing content to their services and digital service providers (DSPs) need to verify that accounts are used by real humans who are genuinely engaging with music and not 'bots'. These kinds of requirements are used in a variety of industries, such as banking, and involve verifying the identity of clients, including a determination of the level of risk that they could engage in unlawful activity.

2. VIGOROUSLY VET THE CONTENT

Distributors must put in place measures to verify not only the identity of their clients, but the legitimacy of their content before it goes live. The authenticity of both the customer and the content should be regularly reviewed.

3. LEVERAGE ECOSYSTEM DATA

DSPs have the advantage of seeing across the entire ecosystem and they must leverage this bird's-eye view. This means using first-class measures to be more effective in detecting, shutting down and mitigating the impact of fake plays and suspicious playlists.

4. CROSS-INDUSTRY INTELLIGENCE SHARING:

When a bad actor is identified by one platform or service, they shouldn't be able to simply move their "business" to another. Information in respect of known bad actors and their methods should be shared to prevent them from evading enforcement and repeating their behaviour. That means regularly updating measures to capture new fraudulent activity and actors based on shared learnings.

These actions amount to something simple and essential: streaming services and distributors working together to identify, disrupt, and shut out fraudsters who abuse the system. This is essential as generative AI continues to grow and develop.

Record labels are working to meet these standards. And, if we collectively use existing tools to share intelligence and apply best practices, we can make streaming fraud genuinely difficult and expensive to pursue.

But it will happen only if the entire music community comes together and commits to meaningful, sustained action.

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