



ELECTRONIC MUSIC
IN FRANCE
[SURVEY]

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FRAMEWORK, CONTEXT AND OBJECTIVES OF THE SURVEY

After 30 years in existence, it was deemed important to draw an up-to-date overview of what the electronic music sector represents in France, both economically and culturally. For this purpose, one hundred and fifty stakeholders in this music scene have been interviewed, creating an open information census of its major economic drivers and enabling its true evaluation, as well as defining its main practices.

The scope of this first exercise is however more a qualitative study than a quantitative audit. It represents a first marker in this endeavour to precisely measure the little-documented real economic contributions of this important cultural movement. To achieve this, the survey had to look beyond aesthetic trends and not leave out any aspect of electronic cultures, treating them all with equal attention and respect.

To ensure the relevance of this approach, Olivier Pellerin and Benjamin Braun have been supported by Sacem staff and by a committee of various qualified figures in the electronic music world.

This working group, throughout their research, maintained an intellectual conformity and rigour, regarding the methodology and content, that proved very productive.

BENJAMIN BRAUN

An independent consultant, he frequently advises the media and culture sectors. For more than ten years, he has been supporting companies and institutions from various sectors to help them face challenges and new opportunities brought about by digital technologies.

OLIVIER PELLERIN

After obtaining a degree in Music Management and Administration in 2000, he began his professional career in jazz, hip-hop and electro as an independent press agent, and created the jazz and rock label Chief Inspector. In 2008, he became press relations officer for Cité de la Musique and Salle Pleyel, before joining Radio France in 2010 in music broadcast programming and production for France Inter and Le Mouv' (Alternatives, Addictions, Laura Leishman Project, etc.). From 2015 to 2016 he joined the innovation unit of Radio France, where he developed 3D/binaural sound music applications. He is now focusing on his work as a free-lance journalist and editor, which for several years has been driving him to write about music and the nightlife world.

DEFINITION AND ARTISTIC, CULTURAL AND ECONOMIC HISTORY UP TO THE 2010s

Electronic music, often gathered under the catch-all diminutive electro, today represents an important, even dominant, artistic trend, the greatest impact on modern culture after hip-hop and rock.

It embraces numerous genres and countless sub-genres, as much stylistic as for marketing, whose names evolve across the successive generations that adopt them. Thus minimal techno, which had its day in the 2000s, has turned into micro house among young aficionados who weren't old enough to hit the dancefloors at the beginning of the century. Likewise, hardstep is the offspring of drum & bass, which itself was an evolution of jungle.

Far from wishing to reconcile purists and converts, still less to draft a periodic table of electronic music, this survey aims precisely to encompass it all in its diversity, from the most specialised to the most mainstream and from the most «underground» to the most commercial genres. It addresses all electronic music, insofar as all participate in a dynamic of

artistic creation and wealth generation whose impact and revenue distribution need to be measured.

In order to define the scope of the analysis, one must consider that all music that is subject to electronic treatment, not as a mere technique but as the core of both the process and the creative end, is regarded as electronic music. While this music is closely tied to the technologies that shape it (hardware and software), it does not preclude the use of instruments (since nowadays, following hip-hop, electronic music can be performed with traditional instrumentation). Its composition and its performance evolve however along constructions that can shatter the traditional framework of verse-chorus-verse and snub the durations of traditional songs. Moreover it can be endlessly sequenced and remixed, its characteristics linked as much to the elaborate resonances and rhythms as to the melodies and lyrics.

This definition, while generic, allows avoiding a pitfall: today electronics have permeated all musical creation, ranging from rock to hip-hop via middle of the road music. Electronics as a mere style effect are outside the scope of this survey in order to focus only on music that uses them as its very essence. Whether techno, house or dance, all electronic music was more or less born out of the technological experimentation of the French works of GRM (Groupe de Recherches Musicales) under Pierre Schaeffer in the late 50s, that ended up permeating popular music on both sides of the Atlantic, whether in Düsseldorf with Kraftwerk since the 70s or Detroit with Underground Resistance in the 80s. The rest of history is henceforth all the better documented now that the reign of electronic music is definitively consecrated.

In order to draw a quick French picture, techno originates with the arrival of rave parties and acid house from England and Belgium in the late 80s. This hedonistic and strongly localised movement quickly unifies a community of activists, joined by ex-punks, and skirts the beginnings of hip-hop. Several organisers, record shops and the radio stations Nova and FG unify the movement. In 1997, FG organises a techno march prefiguring the Techno Parade created by Jack Lang in 1998 and taken over by the Technopol association that still runs it. Even though rave parties are stigmatised, techno culture definitively takes root in Paris and sees the birth of parties, labels, venues and media that will ensure its survival until today. From the Wake Up parties organised by Laurent Garnier between 1992 and 1994 at the Rex Club to techno's first Victoire de la Musique in the «Dance or Electronic Music» category in 1998; from the Rough Trade shop run by Arnaud Rebotini and Ivan Smagghe, co-founder also of Pulp nightclub with Chloé and Jennifer Cardini that will give birth to the Kill The DJ label, a community that will mushroom right up to Daft Punk and David Guetta, allowing the current explosion of a young generation with no complexes, even though it isn't necessarily conscious of what their fervour owes to the activism of their elders who are still well present.

Light will be shed on the complex ecosystem resulting from this quarter-century of evolution, with the purpose of revealing its structures, practices and orders of magnitude as well as its main issues and challenges to come.

1. OVERVIEW OF THE ECOSYSTEM OF ELECTRONIC MUSIC IN FRANCE

In the past few years, the proliferation of electronic music festivals has revealed a growth of this cultural ecosystem which befits addressing beyond mere intuition.

THE ADVENT OF ELECTRONIC MUSIC FESTIVALS

French pioneers in the genre, namely Nuits Sonores in Lyon, Astropolis in Brest, Nordik Impact in Caen and N.A.M.E Festival in Lille, have been joined by Paris in 2013 with two electronic music festivals, the Weather Festival organized by the Surprize agency and the Peacock Society by the We Love Art agency. The emergence of other local scenes, in Nantes, Bordeaux, and in the PACA region, makes up for the French lagging behind on the electronic scene where most stakeholders agree that the beginning of the 2000s was a sort of barren desert. French festivals encouraging the mobility of audiences from all regions, indeed from Europe, makes for an electronic music market whose explosion can be witnessed throughout the national territory. The springing up of new festivals, parties, clubs, collectives and artists has accelerated in the last few years.

Many subscribe to a creative approach whose strong identity and shared aesthetic unifies various scenes and above all audiences.

YOUNG AND CONNECTED STAKEHOLDERS

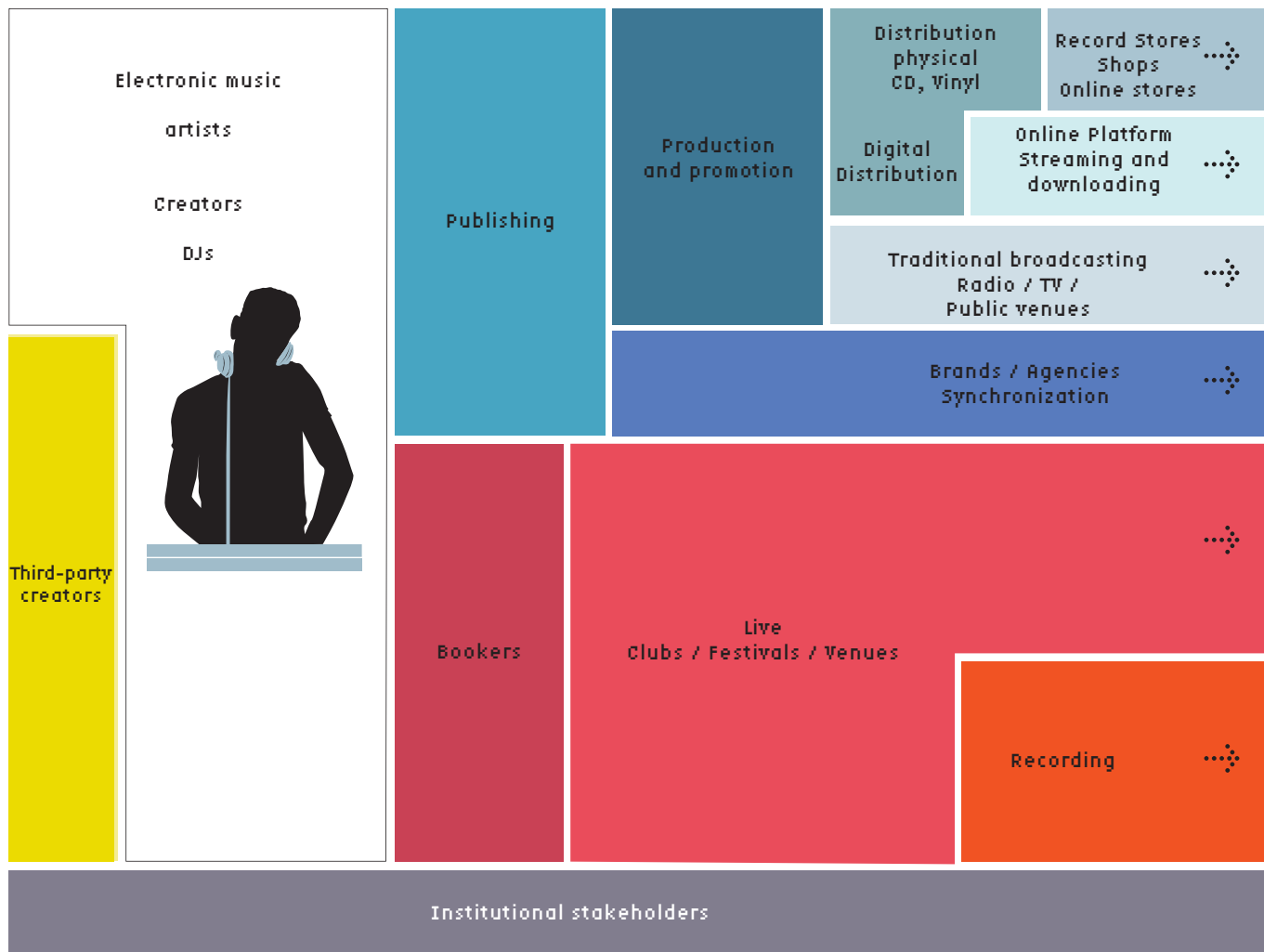
These newcomers, all of them very young, master new technologies that alter the modes of music creation and production (home studio) as well as the way to broadcast and access the produced works (platforms and social networks). **They are digital natives creating for digital natives.**

Far from being unaware of the previous generations, they manifest a learning ability that is boosted tenfold by the Internet's capacity to make a plethora of information instantly accessible anywhere.

Thus a productive acculturation is created, endlessly subverting the electronic music ecosystem, its boundaries in constant motion.



THE ECOSYSTEM OF ELECTRONIC MUSIC IN FRANCE: FROM THE DIGITAL PRODUCER TO THE CONSUMER OF LIVE EXPERIENCE.



A CONSTANTLY RENEWING ECOSYSTEM

The multiplication of stakeholders in an expanding market, including production as well as broadcasting or consumption, modifies behaviours and practices in various segments. To outline before diving deeper into the analysis, one can separate on one side the market segment which deals with the monetisation of the growing broadcasting of dance music works through traditional channels (radio, TV, nightclubs) but which is weakly represented in a live context; on another side a market segment composed of techno/house music, whose artists appear mostly live but whose works are almost never broadcast on traditional channels, to the benefit of low income broadcasting on the internet whose main purpose is communication. Thus electronic music stakeholders are spread across a wide spectrum of structuring and practices, defining diverse and more or less compatible issues and strategies.



Publics

Management of author's rights
and related rights

1.1 CREATION

ELECTRONIC MUSIC MIXES OWN CREATION AND USE OF THIRD PARTY CREATORS' WORKS.

Electronic music may be the genre, following an era launched by hip-hop and its systematic reliance on «sampling», which borrows the most from third party works to create new content. Electronic music producers exhibit a constantly developing musical culture; listen to much music from all ages, unearth sounds and references from the shelves of the world music library, which is now only a few clicks away on the Internet.

Thus creation becomes polymorphic, mixing own production, borrowed works and transformation. Next to the sample banks, content is also originating from peers, whose musical pieces can be remixed, combined in mash-ups, sampled, etc. by the electronic music artist. The remix of "Prayer in C" by Lilly Wood & The Prick by the German DJ Robin Schulz is a revealing example. The latter remixed the music piece on his own initiative and achieved resounding success, which in turn led the original band to sign a contract with him so as to endorse a win-win situation for both parties.

THE TERM DJ COVERS VARIOUS REALITIES.

The various production modes also indirectly impact on various ways to approach live performance. Some DJs appear on stage behind their mixing desk, while others are composers who perform live out of necessity, the former to broadcast their works and benefit from performance revenues, the latter due to falling record sales.

Regardless, the number of DJs is on the rise, in accordance with the success of electronic music as well as with the ease of its performance and production through the democratisation of technology. For example, the download platform Beatport, basing itself on the number of DJs who buy its music pieces, estimates that there are about 10 million DJs in the world!

Two broad categories of DJs can be distinguished. On one side there is the talented MC who selects and sequences pieces of music in a nightclub, where he is usually a resident employee. On the other side there is the electronic music artist who creates music, live or not, sometimes based on existing works, and who can offer an array of varied arrangements on stage (performance of own works, remixes of third party works, combining of records). Most of the time, the latter performs his art in various clubs or festivals that hire him directly or through his booker and that pay him either by invoice or with a salary depending on his status.

Classification of electronic music artists

Two notions must be distinguished, the producer and the DJ. A producer can of course be a DJ. He can then play his own productions and those of third party artists. Likewise, a DJ can also be a producer in order to strengthen his popularity, and thus multiply his engagements. In general, as an electronic music artist begins his career, he tends to assume both roles in order to multiply his income sources. According to his career's evolution, he can choose to keep all the artistic activities (production and stage performance) or to focus on the one that best suits him. He can limit himself to producing, for himself and/or others, allowing broadcast media and other artists to play his productions. On the other hand he can focus solely on live performance, going as far as leaving the producing of his own pieces of music to others (so-called "ghost producers", sometimes gathered in "production camps" so as to create the most efficient hits possible). Depending on their musical genres and the expected revenues, the artist can combine different profiles to suit him best.



"BEDROOM" PRODUCER

A music aficionado, he masters (often at a young age) computer music software and composes pieces of music, in his bedroom, that he posts on platforms and social media, hoping for a viral success that can be dazzling, as with Petit Biscuit or Kungs. In this case, he can plan to sign a publishing contract, find a label and thus launch his career. The live performance aspect is also addressed since it is what will give his music greater visibility and bring better income opportunities.



CONFIRMED TECHNO DJ

He is under contract with a booker who provides him with sets around the world, on Fridays and Saturdays, or more.

Most of his income is generated by live performance (in clubs, festivals, private events for brands). He is constantly on the road and must learn to compose new music during his travels, in touring transport or in hotel rooms. His compositions extend to movie music or fashion show ambient music.



DEVELOPING ARTIST

He started playing music in private parties and bars. As his knowledge and technique expand, sometimes in close contact with a collective, the number of his sets multiplies to the point where he begins to consider turning it into a profession, at least part-time. Whilst when he began he only made some undeclared income, or was paid in drinks, he is now in contact with a booker who offers to take him on a casual basis and pay him for the performance dates he manages to set up. The question of production arises, since it will allow him to position his trademark brand, it will be his artistic business card that will multiply his hiring opportunities.



INTERNATIONAL STAR

He succeeded in positioning his style and his music which found their audience through the broadcasting of his tracks and/or albums on general public media. He schedules at a frantic pace several hundred dates per year all around the world. He has been approached by other artists to remix their tracks and vice versa. Beyond remixes, he even produces music by other artists, through his publishing company or his label, when it isn't done in his name by a team of producers (ghosts producers). He can also create music for visual media (advertising campaigns, movie soundtracks, music for private events).

CHLOÉ



◆ **What are, in your opinion, the significant developments in the electronic music world in France these past years?**

Electronic music was democratized; it exploded and is affecting everyone. New generations make it theirs. There are so many new parties with a certain prerequisite among young organisers that it looks like its beginnings. Of course, there is also an EDM starification and takeover by the majors, but at the same time there is the opposite with parties where the collectives are known but not the DJs. What's more, there's a pursuit of hedonism.

◆ **What are the challenges for tomorrow?**

Nobody could have imagined this explosion then. Finding a venue was hard, with some very French regulatory particularities. Today there are many unusual venues but the formalities for the organisation of parties should be simplified.

◆ **Has the prevalence of live performance and the Internet definitively changed the way music is produced?**

The Internet has, but so has the evolution of technology. Before, buying equipment was expensive and you needed to be a bit of a geek or to study in a sound school. Today once can find tutorials on the Internet and software has become intuitive, including its own lessons. It is a great change in the way technological knowledge is passed down, even though it cuts two ways since one must be able to find one's way in such an abundance of information.

◆ **Do you have enough time to produce music?**

I can create a piece of music in no time, leave it, and come back to it later. I made tracks in planes, travel gives one ideas. There aren't really any rules. I don't know whether I'd be productive by staying inside a studio all the time. Time constraint can be a good thing. But it is sometimes hard to return to one's life at home after a tour.

◆ **How do you protect your works?**

When I began, I didn't register my works. I am a producer, I make film music, which provides me with income, among which streaming is beginning to take its place. As an artist, I pay attention to platforms that remit rights. As far as played titles are concerned, we often play unfinished pieces, by DJs who haven't even registered them yet, we make special edits for our DJ sets. There is a real desire to reclaim the music, to offer something unseen: this is the added value of the electro DJ. A model should be found between a DJ and a live show, between identified pieces and creation.



Name
Profession
Label

Cassius: Zdar & Boom Bass
Artists / Producers
Ed Banger

CASSIUS

ZDAR

◆ How do you see the recent evolution of electronic music in France?

There are many more parties: it is a movement that develops by going upwards. EDM is certainly the largest music business on the planet, but there is room for everything. Electronic music has become today's pop music.

◆ What advice would you give to young artists?

Each artist is too particular to be able to give general advice. But one must be stubborn, believe in oneself and train a lot to be able to last. One must be careful how one makes money: performing too many DJ sets is a waste! One must stay cool-headed and productive as an artist. Performances are time-consuming, we've seen some promising DJs getting lost and disappearing. They came with 2 or 3 music pieces, then went on many tours and were never heard of again. Being on the road every week-end is tiring and it is hard to recover efficiently so as to be productive for the rest of the week. With Cassius, we have never accepted more than 4 gigs (concert dates, Ed) per month since the beginning.

◆ Does the new generation seem more professional than what you were at their age?

The Internet has freed something. We learned in the field, we were rookies. Then I got an agent licence and we created Absolut Management with Anne Claverie in 1990. Today the evolution of the scene certainly brings more tools but it still remains a story of desire and networking.

ARTISTS ORGANISE WITHIN COLLECTIVES

DJs and other electronic music artists increasingly unite within collectives generating an unprecedented creative rivalry on the current scene.

Beyond artistic stimulation, the advantage of such a gathering also lies in the ability to share the means of production and promotion in a group with a larger visibility as well as in the superior firepower allowing the creating of parties and regular events, and unifying larger audiences.



THE MOST PROMINENT FRENCH COLLECTIVES



1.2 PRODUCTION & PROMOTION

PRODUCTION REINVENTS ITSELF FOLLOWING NEW TECHNOLOGIES

The current growth of electronic music came about by digital natives joining the pioneer generations: digital technologies definitively transformed the production/promotion/distribution/ broadcasting chain and gave power to the creator.

Today's young creators have access to software and hardware that allows them to bring their artistic ideas to life anywhere, from their bedroom (**home studio**, or even **bedroom studio**) to a train carriage or a plane seat. They are able to create complete pieces fast and cheap, without the need for expensive studios and time delays.

While this creation mode isn't really new, even though it further fluidized in these past years, **the way music is broadcast has drastically changed**. The digital revolution that generated highly complex problematics for recorded music has also triggered the decrease of middlemen in the music distribution chain. Henceforth once a music piece is complete, the artist can immediately make it available to his audience on social media and online

distribution platforms. This affects both the rhythm and format of production and promotion. One must adapt to new Internet usages and feed the information flow. The album is gradually replaced by a regular publication of new titles.

A significant proportion of electronic music artists use the production of recorded music and its distribution **first as a promotion tool**, supporting a career based on live performance. The artists instantly "post" their pieces themselves and also send them to other artists. It is a resource that other DJs can broadcast or remix. A remix is usually performed based on an OTC private agreement implying a fixed rate. But quite often it is a simple exchange of goods, between two artists remixing each other's works, according to artistic affinity as well as in a way to pool their respective audiences.

Some electronic music artists gather under **independent labels**. The decrease of middlemen in the production chain and the new versatility it requires often drives artists to create their own structures, both to control the artistic and strategic direction and to multiply income sources, combining production, promotion and publishing of their works and performances. In general one can notice a **significant improvement in professionalism among stakeholders** over the last decade.

PRODUCER INFINÉ: ALEXANDRE CAZAC & YANNICK MATRAY

<u>Name</u>	Alexandre Cazac & Yannick Matray
<u>Profession</u>	Producer / Publisher
<u>Company</u>	inFiné
<u>Booking</u>	Dif
<u>Artists</u>	Rone, Vanessa Wagner, Murcof, Clara Moto, Gordon, Arandel, Cubenx, Danton Eeprom...
<u>Date of creation</u>	28/12/2005
<u>Number of employees</u>	1 employee + 3 service providers + 1 intern



◆ How does an electronic music label face declining sales today?

It is very complicated. The model has been evolving for 15 years. For InFiné, the label is a showcase allowing the developing of each album as an ecosystem, bringing together production, audiovisual aspects, concerts, publications... Our commitment to artists is equally important as producers and as publishers. We also attach a great deal of importance to international growth.

◆ Can a label still durably develop a young artist's career?

We have been managing it for 10 years with our artists, in particular due to subsidies. If we take Bachar Mar-Khalifé's example, we have supported him since his 1st album which went rather unnoticed; the 2nd drew some attention, up to the 3rd that was duly recognized. It is a commitment, a daily struggle. We pride ourselves on succeeding in retaining almost all our artists; on having made their projects available to the largest audiences. It's a real know-how that can be compared to literary publishing.

◆ What does a producer contribute?

This contribution isn't sufficiently recognised. People talk a lot about pipelines, Netflix, Spotify or Deezer, but it all works because we produce content. Would Rone have abandoned his cinema studies if we didn't encourage him to pursue music? It takes a vision, incentive. We pride ourselves on having stimulated the projects by Aufgang, Bachar Mar-Khalifé, Pedro Soler & Gaspard Claus and even the come-back of Bernard Szajner. Today we work with several generations of artists, aged 22 to 76, different countries and figures ... With our "workshop InFiné" festival, we have hosted artists and audiences beyond our label. In the 50s, France knew how to welcome the African American jazzmen. Today we have lost this hosting ability, which is essential. Ambitious cultural policies should be launched, with the ability to stimulate creation in partnerships with historical monuments, national scenes ... we possess the tools to successfully foster these ambitions.

◆ What are the challenges for tomorrow?

Daft Punk has eventually changed many things: more and more small French artists go abroad. The international aspect is a real challenge since electronic music is the one that is exported. One needs to find relevant partners. Thanks to Idol, our digital distributor, and to the Warp label, with which we have signed agreements, we manage to address each territory specifically. The question of innovation is a crucial one: we should be part of the French Tech, associate music to new technologies and benefit from the strength of French start-ups. With our new DIF structure, we offer engineering in cultural branding, it's a way forward for the future.

1.3 DISTRIBUTION

Following the iTunes era, **streaming platforms** have taken a dominant position for the distribution of recorded music, in particular for independent electronic music, YouTube and Soundcloud being at the top, followed by Apple Music, Spotify and Deezer for mainstream artists.

Thus streaming is currently overtaking downloading in terms of value creation in the digital music economy. It creates an upturn in an industry that sees it as an evolution of its model that may finally allow escaping the doldrums that appeared with ... the advent of downloading and illegal pirating practices that branched from it. Yet there is still much to be done in order to sustain the model and generate sufficient income levels to enable continuous creation.

As of now, **placing of music pieces in playlists** on streaming platforms (such as Spotify Fresh Finds) has become the crux and replaced the promotion targeted at traditional media among labels. A digital economy fosters digital practices: relevant positioning within key playlists will ensure the success of a title. And finally it will also ensure the success of future works and of the artist's career, the latter having to ensure the management and growth of his audience on the social media.

Development strategies are built over time between artists, labels and distributors, whose roles are balanced in an egalitarian collaboration, more horizontal than the previous vertical structure adopted by the record companies.

In this context, physical distribution amounts to **limited editions of vinyl records** (between a few hundred and a few thousand) for techno/house music that is thus able to reach a captive audience of aficionados and DJs. The relative return to favour of the vinyl record allows the sustaining of a fragile ecosystem of specialist shops. Even though record stores are more numerous today than 15 years ago, their model is extremely fragile. Records are expensive (maxis between 10€ and 15€ on average, LP between 25€ and 40€ on average) and additionally take long to be produced, since pressing factories have yet to renew a production fleet that had long remained underused. The current revival thus mostly benefits large productions for majors that reissue their classics for a new audience, willing to equip their shiny new turntables at the expense of smaller labels with ever increasing delays.

Selling records is thus often unprofitable for independent electronic music labels. They remain a product with symbolic appeal, a business card to keep live performance alive.

The more commercial dance music keeps on generating a significant turnover with recorded music for artists benefiting from a large airplay on radios and commercial television, but it has also been following the globally negative evolution of the rest of the phonographic industry for the last 15 years.

<u>Name</u>	Edouard Taieb
<u>Profession</u>	Manager / Agent
<u>Company</u>	Unity Group
<u>Booking</u>	Michael Calfan / Klingande Kungs / Clement BCX Broken Back / Addal
<u>Date of creation</u>	2011
<u>Number of employees</u>	6
<u>Other activities</u>	Publishing



MANAGER UNITY GROUP: EDOUARD TAIEB

◆ What evolutions have you recently noticed in the electronic music world in France?

We have only been into this activity for 5 years and clubs are currently booking many more international artists than when we began. Electronic music festivals are developing according to an economic logic: a DJ with a pen drive who can perform the whole night is less expensive than a whole band. Moreover today DJs are making people dream; electronic music is fascinating. As a consequence, the cost of DJs has increased and has grown by 5 or 6 times within 5 years.

◆ What is your vision of the new French scene?

In France the so-called underground is growing fast, in particular for techno. EDM is more targeted at provincial stages where clubs play hard sounds that will not be heard in larger cities, where listening to techno is a synonym of being cool.

In smaller towns one comes to a nightclub to unwind. In France we are neither underground nor commercial, but precisely in between, with such artists as Synapson or The Avener.

◆ What are according to you the challenges for tomorrow?

This positive evolution will continue. It depends on decisions made by bookers who often market their artists at very high prices. They must be reminded that they are dealing with music, not only a business.

We are currently in the 30 glorious "boom years" of electro, starting 10 years ago with Daft Punk. We still have 20 years ahead of us. Consumption modes change. Electro is the 2nd most streamed genre on Spotify, people like it. Today one can easily make music on one's computer, even pop music is made on a computer. The idea permeates people's minds: electronic music is everywhere and everything is electronic music!

1.4 BROADCASTING

Broadcasting of electronic music is effected in **two extremely different ways**, according to the schematic separation between dance music and techno/house.

The former, dance music, occupies the totality of on air broadcasting in clubs and the media (radio, TV, nightclubs), but is barely present in live performances. The latter, techno/house in its broad meaning, strongly feeds live programming in clubs and festivals but is excluded from traditional on air formats in the media.

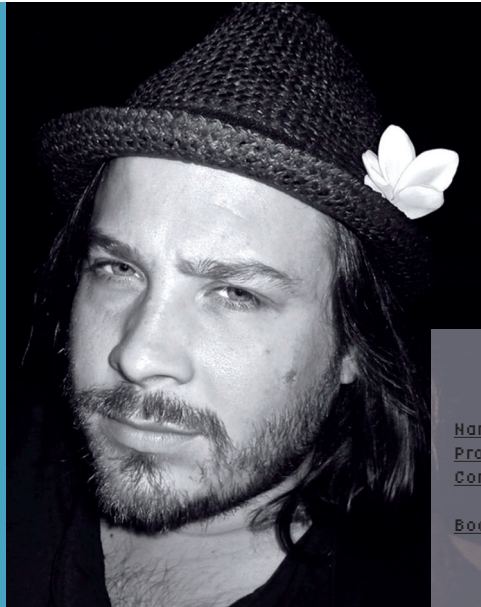
Media covering electronic music are few:

some specialist magazines (Trax, Tsugi or DJ Mag being foremost), some radio stations (such as FG and commercial radio for dance music: NRJ or Fun Radio, and specialist programs on campus networks and Féarock) and some TV shows only for the dance music hits. In accordance with the nature of electronic cultures, most media dealing with its diversity are found on the Internet, including the reference website Resident Advisor (setting yearly rankings for DJs and international clubs), the websites of the specialist magazines Trax, Tsugi and DJ Mag, joined by those of brands active in electronic music: Red Bull Music Academy, Villa Schweppes, etc.

Thus, while electronic music remunerates its authors with the income from its media broadcasting and the sales of works, **live performance** often represents the main source of income for techno/house artists. Its operation, contrary to the production modes facilitated by technological progress, has not changed. The artist still has to grow his reputation in order to obtain engagements in clubs or festivals, where he will perform for his audience.

Fees are covered by his organisation (by the artist if he isn't represented, by his booker if he has one, who then deducts them from the salary fee he has negotiated for him).

The last few years has seen a multiplication of sensu stricto **electronic music festivals**; there are about 60 such festivals in 2016. One can add real music festivals that have fully integrated electronic nights in their programming or extended their opening hours to leave the late evenings to electronic music artists.



<u>Name</u>	Aurélien Dubois
<u>Profession</u>	President
<u>Company</u>	Surprise (Concrete, Weather Festival)
<u>Booking</u>	Antigone, Behzad & Amarou, Ben Vedren, Cabanne, François X, Shlamo, etc.

ENTREPRENEUR SURPRIZE AURÉLIEN DUBOIS

◆ **What are, in your opinion, the significant developments in the electronic music world in France these past years?**

Elected politicians and governmental administrations see electronic music as a real culture, which improves relations and gives the possibility for stakeholders in this culture to venture into bolder and better controlled projects.

◆ **What are the challenges for tomorrow?**

Continuously listening to our audience and being able to anticipate its desires. We are thinking about offering longer opening hours to allow our artists more time to express themselves on stage and thus bring a deeper immersive experience to the audience.

◆ **How can a club retain its customer loyalty on a weekly basis?**

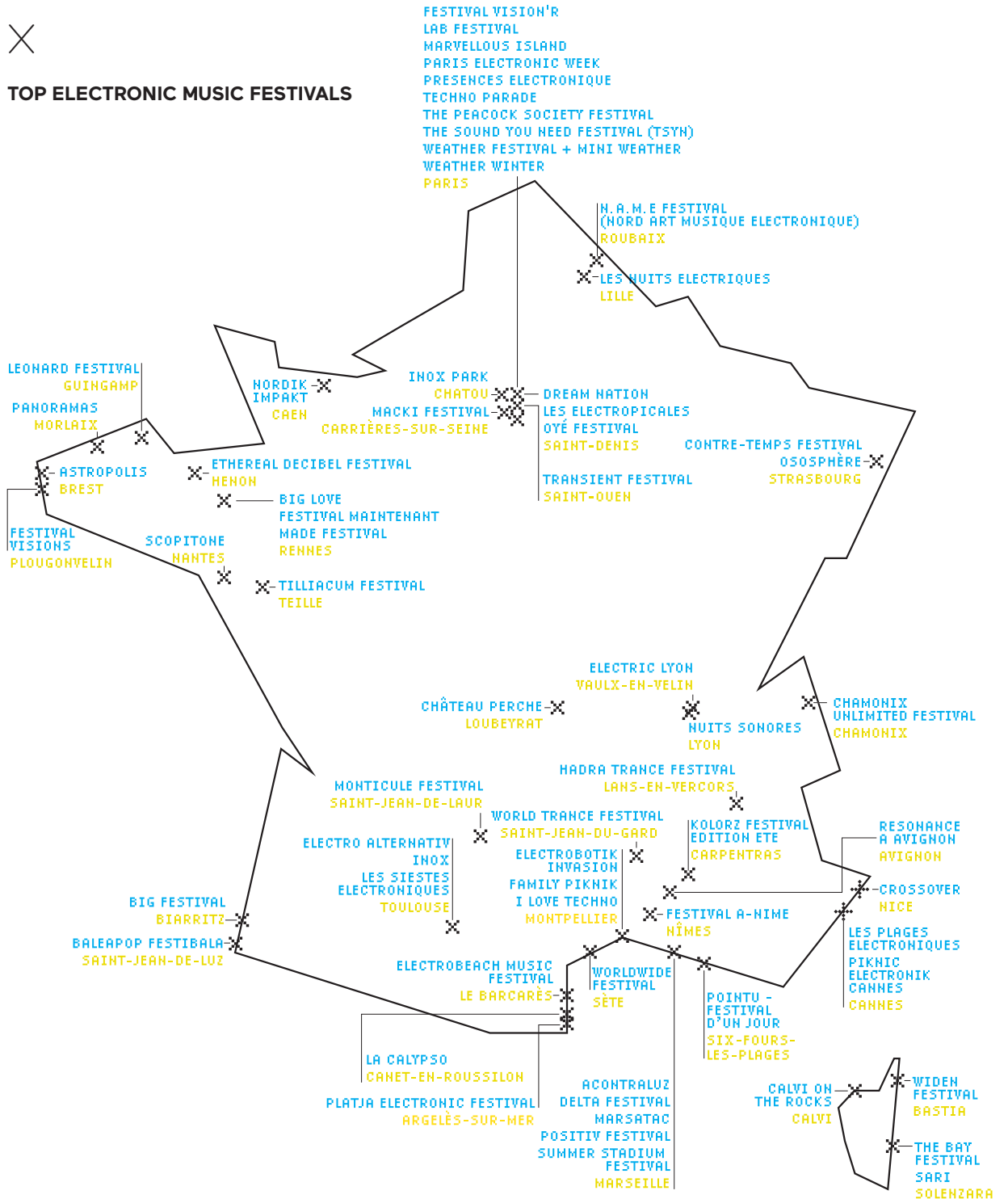
We must be able to offer the best of artistic diversity to our audience. This involves a constant questioning, a search for new talents and the ability to put forward an offer that is able to evolve according to the mood of our audience. We reflect on these aspects every day.

◆ **You combine several activities. Does it mean that the activity of a club is no longer self-sufficient today?**

Not at all, it is due to my craving for creating projects. I love diversifying my activities. This diversity is a need for an entrepreneur in live performance shows. The demand from audiences is changing at such a speed that one needs to have several projects to offer.



TOP ELECTRONIC MUSIC FESTIVALS



The increasing requirements that audiences expect from top class events force programmers to constantly scrutinise their offering. The demand for novelty is continuous and the lack of new content is penalised. Festivals and clubs will thus need to provide increasing diversity and novelty in their artist programming.

For all that, while the scare that the techno bubble might burst has been around for several years without actually witnessing it, one must be wary of a standardisation of programming and events at the very moment when electronic culture is reaching its commercial maturity in France, albeit lagging some way behind her German or English neighbours who had embraced its commercial potential from the very beginning.

In this context, more and more clubs and festivals stand out from classic discos through specialist programming.

At the end of each week, from Thursday or Friday until Saturday, they host different artists every night, united around artistic sets with distinct styles. They are as much French as international, appealing to specific audiences and performing DJ sets or live sets (machines, keyboards, etc.) that require both preparation and rehearsals.

They enjoy a real creative status and their performances are likened to a live show. They therefore expect a salary in accordance with their fame, of up to several thousand euros in clubs and up to 20,000 or 30,000 euros for headlining at festivals. The success leading to strong growth in fees for electronic music artists over these last 5 years also has a price to pay in the weakening of these venues' and events' financial models.

1.5 PUBLISHING

A not inconsiderable resource could compensate for the loss of revenue due to the lack of broadcasting for most electronic music, except dance music. This resource is the use of **music for visual media**. The publisher plays a central role in supporting fixed works (synchronisation) and to respond to a growing demand for music composition for visual media.

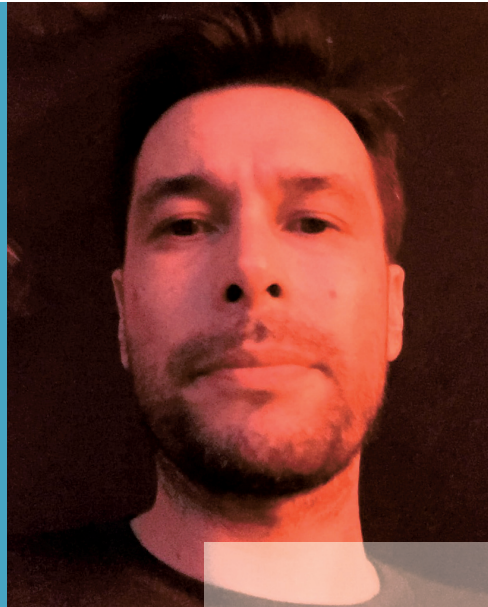
The job of the publisher in electronic music lies largely in **synchronization** and composition of music for visual media. The advent of Internet culture has increased the production of videos, in particular in advertising, and the need for music to accompany them. While electronic music may be often seen as eclectic for large TV campaigns, they are more welcome for web campaigns.

Many musicians thus generate steady income from web advertising campaigns, ranging from several hundred to several thousand euros with the accompanying broadcasting rights.

The publisher also must develop his artist's catalogue, by finding collaborations for his client, proposing other artists to sample or remix his music. The remixer is an arranger. He negotiates a fee for the remix master as well as for the publishing. The publisher claims no rights to the master part that depends on the producer and artist alone, but takes his share of the publishing rights.

The artist or his label can benefit from working with a publisher who will price-fix his catalogue so as to share in higher publishing revenue than would have been generated by keeping all publishing to himself but without the skills or the network necessary to optimise the revenue. However, since the 2000s, labels are attempting to claim the publishing rights of their artists' productions so as to compensate for the loss of revenue from falling sales.

In general, as with other music genres, the publisher's role is to develop his artist's career. Publishing revenues that he collects can help his artist with acquiring production equipment, or a studio, or investing in promotion...to see to it that the artistic project is fully developed and scaled up into a more competitive market than before, demanding that projects have proven their worth before consecrating them.



PUBLISHER ETENDARD MANAGEMENT: CHRISTIAN DE ROSNAY



Name
Profession
Company
Publications

Christian de Rosnay
Publisher / Manager
Etendard Management
Breakbot, Dj Pone, Justice,
Kavinsky, Sefyu, The Shoes,
Uppermost, Woodkid, etc.

◆ **What are the specific features of electronic music as far as publishing is concerned?**

A high potential for export (pieces are often instrumental or sung in English), a music genre that is increasingly used for synchronisation (especially by brands), which provides an alternative to radios in terms of audience exposure. But collecting author's rights on advertising synchronization licences has proven to be a long and hard battle, all the more so abroad.

◆ **Can synchronization and music for visual media compensate for the drop in sales?**

Indeed, the synchronization of a musical work with an audiovisual work generates revenue for the rights holders of the musical work. Moreover it represents an additional means to provide exposure for the work and can even leverage the sales of phonographic media.

◆ **In your opinion, what are the main evolutions of the French electronic music world in the past 3 years?**

Brands seem to have adjusted to electronic music and are increasingly associating with this field. Globally a drop in synchronization revenues has been noticed for 3 years (the brands leveraging the fact that they provide an opportunity for the exposure of a work and relying increasingly on commissioned works – rather than commercial works – to be the producer and/or publisher in certain cases). We can only note the drop in sales in physical or virtual media for the benefit of streaming, as well as a return of the vinyl record (certainly as a result of consumption usages that drive the audience toward an item considered more valuable).

1.6 MANAGEMENT

In comparison to the sulphurous climate that cloaked electronic music with the emergence of rave parties in the early 90s, the politico-cultural environment now casts a much more benevolent eye. The growing professionalisation of all the stakeholders in this field over the last decade, as well as burgeoning recognition of the music's artistic value, has allowed for smoother relations with local communities and authorities, even though some local differences persist.

Moreover, state institutions have attuned themselves to the explosion of electronic cultures by adapting, albeit recently, the legal and cultural apparatus governing them (intermittent employee contract granted to DJ, VAT reduction for clubs, etc.). They now tend to **encourage and support** the development of electronic music, in recognition of the entertainment it brings to their regions and the high demand for it from audiences. Of course, local recognition varies. Whilst Paris is exceptional, paradoxically combining the aggravated nuisance levels inherent in a record population density with a capital city's overflowing calendar of staging multiple cultural events (parties, clubs, festivals...), other French cities are not lacking: Lyon, Nantes, Bordeaux, Brest, Strasbourg, etc. Outside of the cities, further discussion with local authorities is sometimes needed to secure a festival site in a countryside or unusual location.

We must note the proliferation of culturally activist collective organisations, structures and events on the national electronic music scene, answering to the current need by audiences for live interactive experiences. Beyond the frontline professional activities, the many amateur practices must also be accounted for.

AMATEUR PRACTICES AND FREE PARTY

The Freeform association, a centre providing resources and empowerment for such practices, counts 4000 parties organised in France each year. They answer to a need for freedom outside such structures as clubs or festivals. In 2001, the Mariani amendment regulated free parties by enforcing their declaration in advance, but their unpopularity systematically led to their cancellation. While the situation has now evolved into a constructive dialogue involving several ministries and communities, here too regional disparities impact on organisational possibilities.

At a ministerial level, however much Techno Parade is a national cultural success, many stakeholders consider that the Ministry of Culture isn't yet a discussion partner who has fully assessed the value of electronic cultures.

REQUEST FOR SUPPORT EXPRESSED BY THE SECTOR

Many stakeholders of electronic music are calling for an **artist support mechanism**, via the introduction of support funds whose financing and operating systems are yet to be defined. Even though they aren't necessarily informed about existing aid for creativity, they are calling for endowments for small record stores, labels or artists, to help with rent/hire, equipment, tour support, etc.

Aid for projects

There are several aid schemes accessible on the monprojetmusique.fr website that gathers all the support schemes for the music and cultural sector. For example, support provided by Sacem is described in its aid programs and accessible on the Project Aid website (<https://aide-aux-projets.sacem.fr>); other programs are co-funded by the whole sector (FCM or the Export Bureau). Of its 6 main aid programs ⁽¹⁾ in the field of modern music, the most important ones are the support for pre-production to publishers (over 50 supported projects) and the support to festivals (over 15 have an exclusively "electronic music" programming).

Two examples of supported events:

- **French beat**, launched in 2013, whose objective is to promote the French electronic scene to international audiences and to foster exchanges between France, Europe and North America. In partnership with the Cosmopolis in Lisbon, the MEG (Montreal Electronic Groove) and the MaMA in Paris, The French Beat allows 3 young creators each year to perform on these three stages, thus contributing to the development of their career and to talent circulation.

- **French Wave**, the 1st international transmedia experience in French electronic music, mixing generations and offering: a web platform, TV documentaries, a web series and international concert evenings. This project benefits from partnerships between Sacem, the Export Bureau, Institut Français and Unifrance.

Over the course of 2015, support from Sacem to the electronic music repertoire has amounted to a total of 255,000 euros, representing about 7% of its commitment towards modern music.

[1] Pre-production aid (Publishers), Autoproduction aid, Career support, Aid for venues, Stage production aid, Aid to festivals.

Artist status and Technopol schemes



<u>Hom</u>	Tommy Vaudecrane
<u>Profession</u>	Président
<u>Company</u>	Technopol - Techno Parade
<u>Activities</u>	Protection, recognition and promotion of electronic music
<u>Date of creation</u>	1996
<u>Number of employees</u>	3

DEFINITION OF THE DJ AND VJ ARTIST

(for the latter, only in the CCNEAC)

The only definitions can be found in the two main Collective Conventions regulating the sector of live shows: National Collective Convention of Artistic and Cultural Companies (CCNEAC) + National Collective Convention of Companies in the Private Sector of Live Shows (CCNESPSV).

“He or she uses techniques of mixing, scratching, sampling, on music, instruments, sounds or voices that are pre-recorded or produced live, for the interpretation on stage of an original work.”

“The VJ interprets a dramatic, choreographic or musical work. He uses techniques of capture, broadcasting, image processing and audio-visual processing, live, from pre-existing images and/or videos, specifically created for the work or not and/or images and related sounds, created live.”

Both definitions are inscribed in the list of performing artists. Therefore, DJs and VJs are today considered performing artists.

DJ AND VJ ARTISTS = PERFORMING ARTISTS: CONSEQUENCES

Presumption of salaried status, article L.7121-3 of the Labor Code. Therefore a DJ or VJ artist performing on stage, for a payment, is presumed to have a salaried status. The organiser employing him must thus fill a DUE + employment contract + remuneration statement + declarations and payment of social contributions.

Exemptions for the avoidance of presumption of salaried status: entrepreneur (individual or Society) holding a show entrepreneur license n°2. A DJ or VJ artist, established as a sole trader or in a Society, can directly invoice the organiser. However, such a legal structure must hold a show entrepreneur license n°2 or, with less than six performances per year, issue an Intermittent Show Declaration to DRAC for each performance date.

NB: recently, Pôle Emploi has begun recognizing the DJ artist or VJ artist status; therefore during the social declaration to their services, the DJ/VJ artist profession is identified. This implies that a DJ/VJ artist, who wishes to entirely rely on his remuneration linked to his artistic activity, is able to do so under the "DJ/VJ artist" profession, and thus claim the unemployment scheme regulated by Annex 10 of the Unédic Convention (intermittence).

DJ ENTERTAINER: ANOTHER STATUS OUTSIDE THE PRESUMPTION OF SALARIED STATUS

There are DJs who provide entertainment at private parties or carry out their activity within discos with no specific artistic programming. Such people are not considered as performing artists but rather as DJ entertainers. From a social viewpoint, they will belong to the general scheme and can be salaried as in any other profession.

They can bill through their individual structure or Society, without an obligation to hold a show entrepreneur license.

The separation between a DJ artist and a DJ entertainer is sometimes hard to define. It is the legal nature of the structure within which the person is performing that will be largely decisive: if the structure holds one or several show entrepreneur licenses, it will be assumed that it is a DJ artist; if the structure holds no license, it will be a DJ entertainer. One will also check whether the correspondence surrounding the event is focused on the name of the DJ or on a concept: if it focuses on the name of the DJ, then he is a DJ artist; if it focuses on the concept, then he is a DJ entertainer.

1.7 AUDIENCE

Electronic music audiences are **very young and expert**, thanks to a wide culture built online. No music piece escapes their vigilance and the so-called "track ID" practice has become widespread. It consists in recording with a smartphone the moment when an appreciated but unknown piece is playing, then posting it on social media, asking for help from the community with its identification. The Facebook group « Weather Festival Music », with over 30,000 members, is the epicentre of this practice.

This propensity for erudition does not prevent new consumers from favoring **experience**. Whilst good programming is a necessary condition, it is not sufficient. The last 4 years have quenched the thirst of a young audience that does not realize that such programming as those of the Weather festival, Nuits Sonores, Concrete or of the Rex Club can gather more French and international artists than were programmed throughout a year in one venue in the previous decade. Young consumers only retain that they can see their favourite artists up to several times a year in the same city, and thus favour context and price as selection criteria in a competitive offer.

The objective is to spend some time, varying from a few hours to over 24 hours, in one or several venues that offer top artists as well as a friendly and exotic atmosphere. Sited ideally in unusual venues, the scenery, side activities (catering, relaxation, games, etc.), themed evenings as well as the services (transport, accommodation, cashless payment options, etc.), are increasingly valued.

These are the criteria according to which the young audience will choose to spend a significant amount of money for a night at a venue, or even for a multiday pass or an entire festival. Yet, according to the chosen event and duration, the fee may range from 30€ to over 100€. One's budget is thus mainly affected by the entrance fee. There usually isn't much left for spending at the bar, the restaurant or on merchandising. The young audience often drinks cheap alcohol before going to the club or the festival, spending little at the venue.

The economics of venues hosting these audiences and undergoing a tight squeeze on their prices is thus weakened. French festivals are among those with the cheapest entry fees in Europe. This is in particular the result of cultural policies that always endeavored to make culture accessible to the largest audience. Whilst the audience may celebrate, festivals have to account for this constraint. For although subsidies are lower in financing schemes for electronic music, the latter is no less competing with all other leisure offers, especially now as its audience is widening into a more popular base. The Beatport website estimates, based on festival goers of its mother company SFX, that there are 350 million potential fans of electronic music in the world.

<u>Name</u>	Michel Pilot
<u>Profession</u>	Secretary General
<u>Company</u>	Surprize (Concrete / Weather)



CULTURAL ADVISOR

MICHEL PILOT

◆ **How do you see the progress of the electronic scene in France from its beginnings until today?**

The greatest victory for electronic music since its beginning until today has been that fact that it managed to resist all the prophets of doom who often gravitated around it. I have always said so and I haven't changed my mind, the two greatest cultural musical creations of the 20th century are Jazz and Electro.

◆ **In your opinion, are there similarities between the current craze and the scene's beginnings in the 90s?**

The electro culture still numbers many people who took part in its creation. Some of these people are today committed to pass this culture onto the young generations. They in turn have the desire to learn more and to live through what we lived. This may explain the craze for electronic music at this beginning of the 21st century.

◆ **Do you think that electronic music has today found its rightful place in French society?**

I don't know what finding one's place means. All cultures have their place in our societies. They are the cradle of our civilization. Electro is one cultural component of our society. It exists and participates in the dreams necessary to every human being.

◆ **What do you think the main upcoming challenges are?**

The most important is for this culture to keep its values. Jazz managed in its own time to express strong messages so as to expose the misery of black people. Let electro music convey a powerful message through all its stakeholders so that our world stays on the right course before it is too late.

2. ECONOMIC IMPACT OF ELECTRONIC MUSIC IN FRANCE

In order to assess the impact of electronic music in France an incremental approach has been adopted, consisting in aggregating all the constituents of the distribution and broadcasting market for electronic music, in order to extract an economic outline.

Without reducing the strength or the richness of the gathered data, it is important to stress the limitations of the exercise. For some elements it was necessary to cross-check different sources (surveys, interviews, etc.) and to resort to approximations while ensuring that resulting figures were consistent.

Another difficulty encountered in measuring the economic impact is the ability to precisely delineate the electronic music surveyed. As with the rest of the study, focus was directed on music subjected to electronic processing at the core of both the process and the creative purpose.

Finally, the 1st edition of a survey, by definition, prevents any comparison with previous versions. Analysis has relied on the latest available data from 2015 unless otherwise specified.

MEASURE OF THE ECONOMIC IMPACT

The analysis has been focused on the main economic segments of the ecosystem described in the first part of the survey.

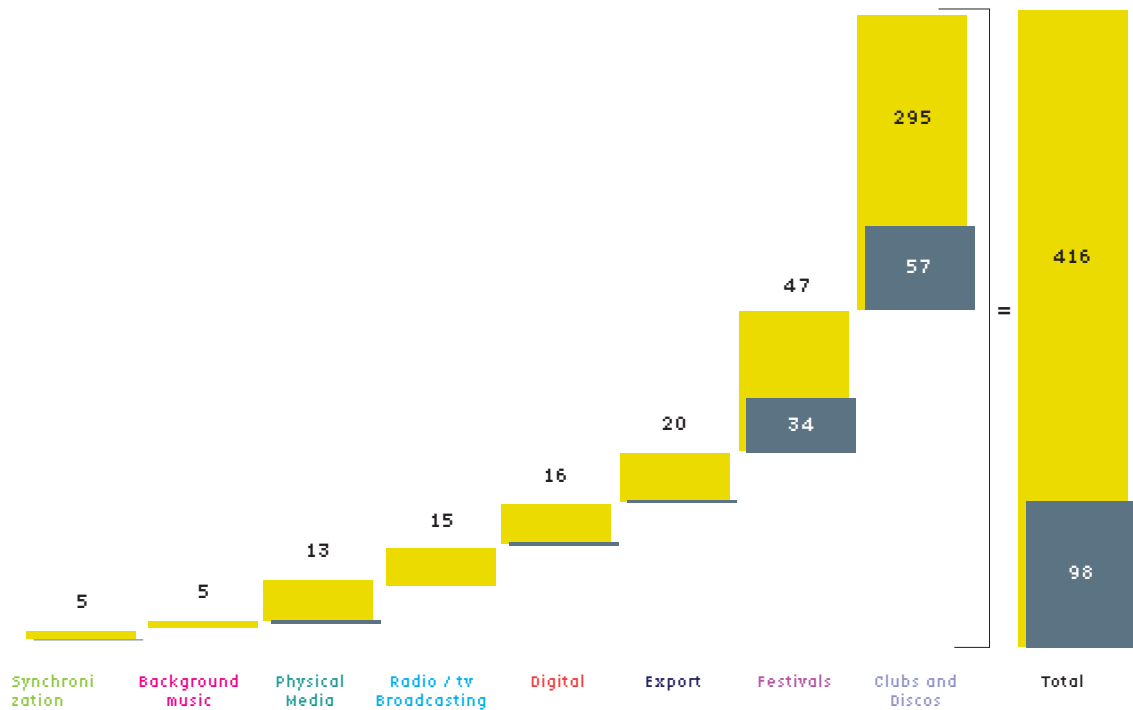
For each segment, the economic impact of electronic music has been assessed, and then a techno/house subset has been differentiated.

Electronic music driven by live performance



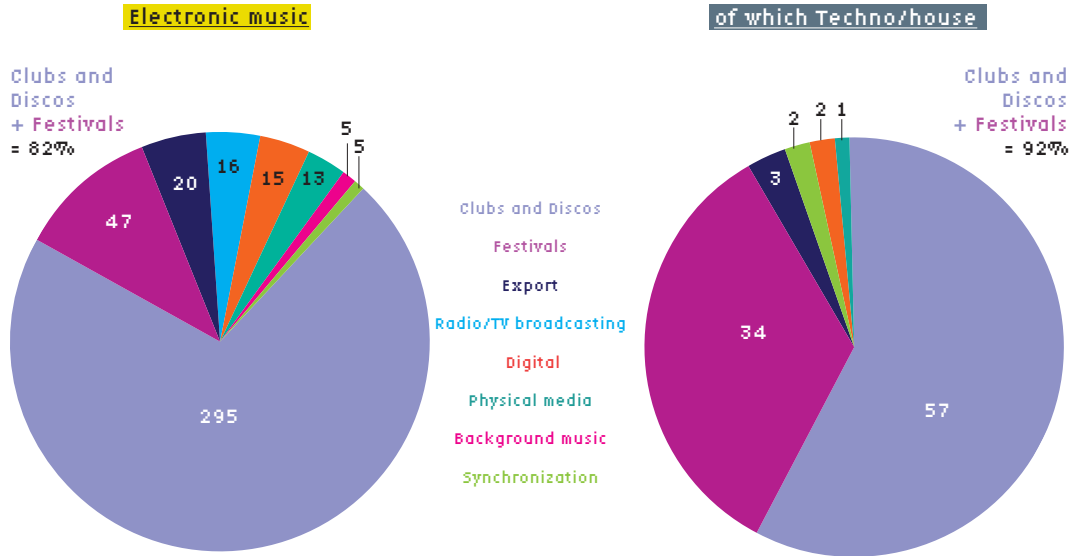
ECONOMIC IMPACT IN FRANCE [IN MILLIONS OF EUROS EXCLUDING TAXES]

◆ Electronic music ◆ Techno/house





**BREAKDOWN OF THE ECONOMIC IMPACT
[IN MILLIONS OF EUROS EXCLUDING TAXES]**



Electronic music in France represents 416 million euros excluding taxes. 71% (295 million euros) comes from the turnover of clubs and discos and **11%** (47 million euros) from the turnover of festivals. These two segments alone represent **82%** of the economic impact.

5% (20 million euros) comes from the export of this music, **4%** (16 million euros) from digital distribution on streaming and downloading platforms, **4%** (15 million euros) from authors’ rights and related rights claimed for the broadcasting of works on TV and radio, **3%** (13 million euros) from the distribution of physical media, **1%** (5 million euros) come from rights claimed for background music for public areas and events and **1%** (4.5 million euros) comes from domestic revenue for synchronizations.

The techno/house subset that we have set apart represents 98 million euros excluding taxes, or 24% of the total. The two main segments represent **92%** of the impact of the set: **58%** (57 million euros) come from the turnover of clubs representing **19%** of the total turnover for clubs and discos for electronic music and **34%** (34 million euros) from the turnover for festivals representing **72%** of the total turnover for festivals for electronic music.

3% (3 million euros) comes from the export of this music, **2%** (2 million euros) come from domestic revenue for synchronizations, **2%** also (2 million euros) from digital distribution on streaming and downloading platforms and less than **1%** (0.6 million euros) from the distribution of physical media.

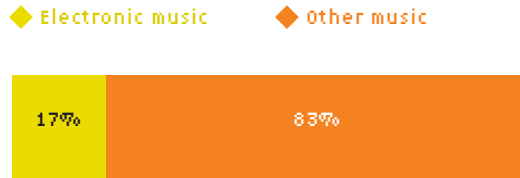
The overall market for the synchronization of electronic music represents about 9 million euros. It is composed of synchronizations performed in France (4.5 million euros), and those performed abroad (4.3 million euros included in the export segment).

Electronic music represents 17% of modern music



ECONOMIC IMPACT OF ELECTRONIC MUSIC

The market for electronic music represents a total of 416 million euros excluding taxes, or 17% of the market for modern music.

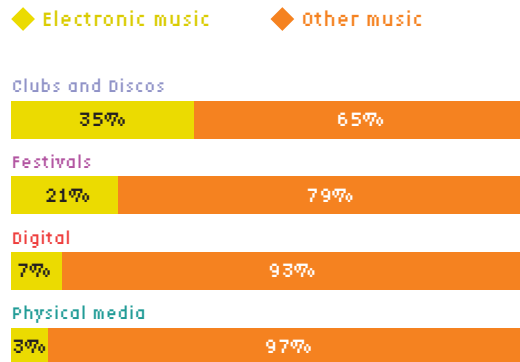


ECONOMIC IMPACT BY SECTOR

This market is driven by live performance:

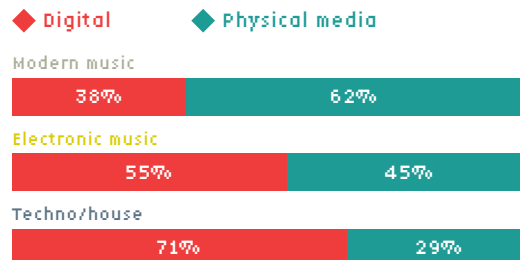
- The turnover of electronic music represents 35% of the turnover of clubs and discos.
- Electronic music festivals are 21% of the total turnover generated by modern music festivals.

As far as physical and digital distribution is concerned, consumption of electronic music differs from usages of other music. In the online music market, 7% of income from modern music comes from the digital distribution of electronic music. For physical media, this proportion drops to 3%.



REVENUE FROM DIGITAL DISTRIBUTION AND PHYSICAL MEDIA

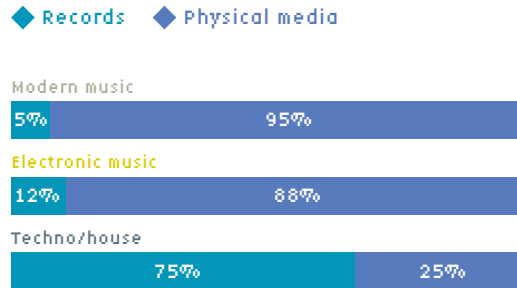
The **physical/digital split** is once again specific in the electronic music field: the proportion of digital distribution for electronic music reaches 55% and even 71% for techno/house.





REVENUE FROM SALES OF PHYSICAL MEDIA

It should be noted that **vinyl records are a flagship medium for electronic music**. While they account for 5% of sales of modern music in physical media, vinyl represents 12% of sales of electronic music. It is even more relevant for techno/house with its leading share of 75% of sales in physical media.



Scope and sources of economic data

Physical media

Turnover excluding taxes generated by the sales of electronic music on physical media, vinyl records and CDs, regardless of the distribution channel, including online trading. Source GfK

Digital

Turnover excluding taxes generated by digital distribution of electronic music, with the sale of digital files on one side (downloading) and revenue of streaming platforms aggregating advertising revenue and subscription fees on the other side.

Source GfK completed by data from SNEP

Clubs and discos

Turnover excluding taxes of techno/house clubs, with a share* (30%) for electronic music of the turnover of general discos.

Source Sacem

* Shares based on assumptions agreed on by the survey working group.

Festivals

Turnover excluding taxes for electronic music festivals, with a share (10%) for electronic music of the turnover of general festivals.

Source Sacem and Barofest 2015 (CNV/IRMA/SACEM)

Radio/TV broadcasting

Rights claimed by the music sector for the broadcasting of electronic music works in traditional audiovisual media (author's rights and associated rights).

Source Sacem and SPRE

Synchronization

Share (10%) of revenue excluding taxes generated by synchronizations and commissioned electronic music for exploitation in France in advertising films and music for image, in television shows and cinematographic works. Source CSDEM

Export

Share (8% on average) of revenue excluding taxes claimed for the export of electronic music (mainly broadcasting, live performance, recorded music, synchronizations). Source Export Bureau

Background music

Rights claimed for the broadcasting of electronic music in public areas.

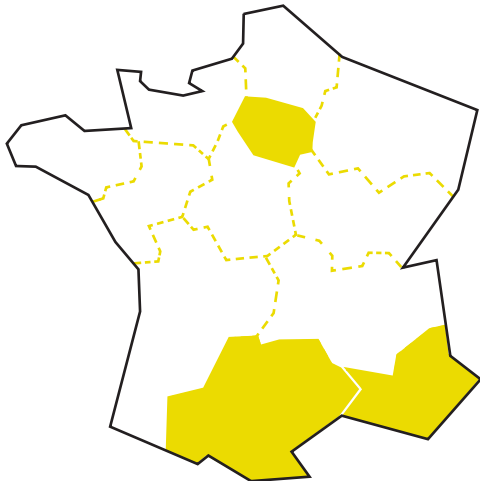
Source Sacem

2.1

FOCUS ON FESTIVALS



GEOGRAPHIC DISTRIBUTION
60% OF FESTIVALS TAKE PLACE IN ÎLE-DE-FRANCE, PACA AND OCCITANIE

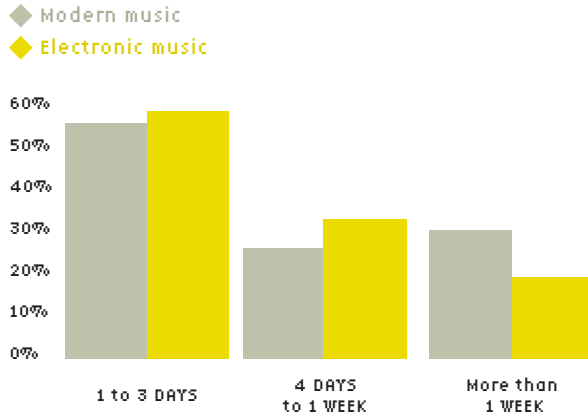


Electronic music (techno/house) festivals are mainly concentrated in **3 regions that alone host 60% of the total supply: Île-de-France, PACA and Occitanie**. However, while Nouvelle-Aquitaine and Auvergne-Rhône-Alpes, two traditionally festival regions, host comparatively fewer electronic music festivals than modern music festivals, they do host some of the main events, respectively the Big festival and the Nuits Sonores.

Electronic music (techno/house) festivals are often operated by younger entrepreneurs than at modern music festivals. They more willingly draw their inspiration from foreign models dominated by commercial structures. Moreover, the historical wariness of public authorities towards electronic music left little expectation of public funding and subsequently didn't favour the development of associative models.



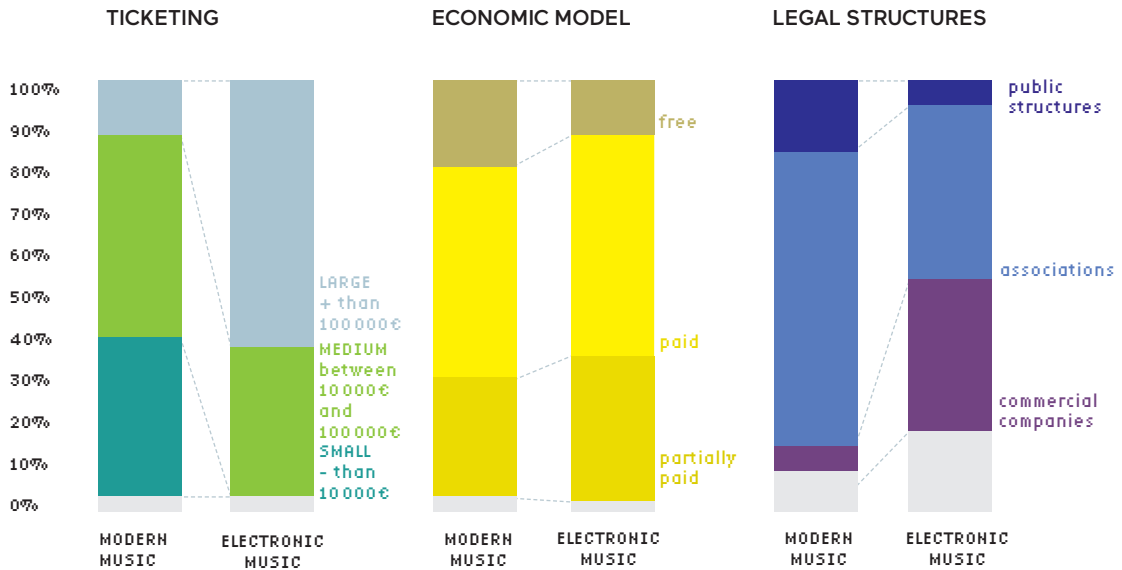
SEASONS AND DURATION



More than **80% of electronic music (techno/house) festivals take place in spring and summer** and about 60% outdoors (same characteristics as for all festivals). However, electronic music festivals tend to be shorter: over **85% last less than a week versus 75% of modern music festivals.**



ECONOMIC CHARACTERISTICS



◆ No data

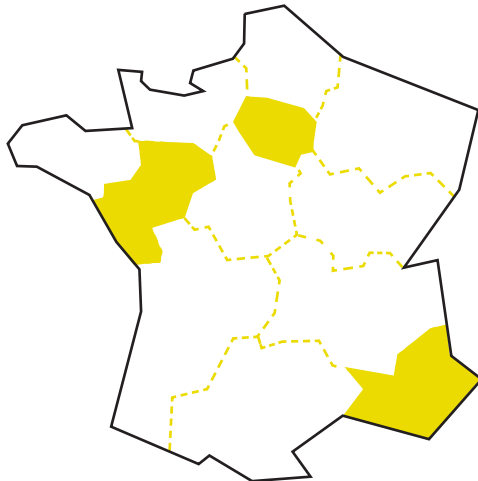
Electronic music (techno/house) festivals are large festivals, entry paying and **more driven by commercial companies than the average modern music festival.**

Sources Barofest (CNV/IRMA/SACEM) 2015

2.2 FOCUS ON CLUBS



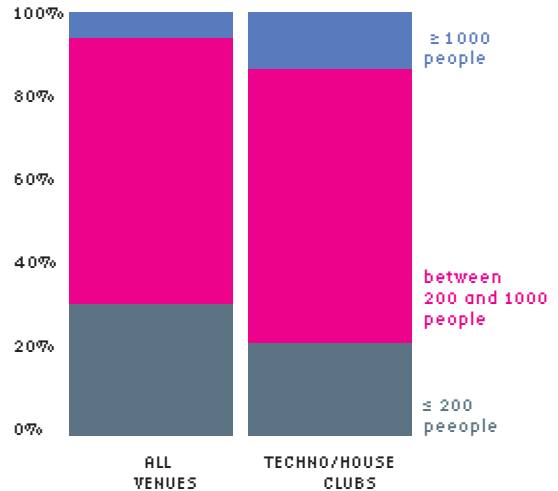
GEOGRAPHIC DISTRIBUTION
60% OF TECHNO/HOUSE CLUBS
IN ÎLE-DE-FRANCE, PACA
AND PAYS-DE-LA-LOIRE



Unlike the distribution of French nightclubs spread across the whole territory, electronic music (techno/house segment) venues are concentrated in the **Île-de-France region** which hosts over a third of the total offering. It is followed by the **Pays-de-la-Loire** and **Provence-Alpes-Côte d'Azur regions** that **host about one quarter of techno/house clubs.**



CAPACITY

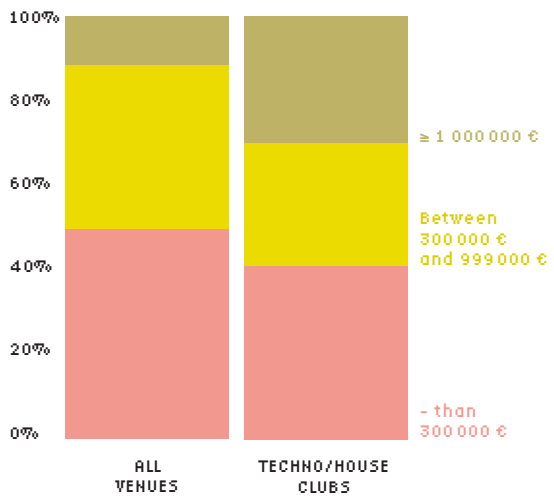


The proportion of techno/house venues with a **capacity of 1000 people or more is twice as large as the proportion among nightclubs** in general. Also there are notably fewer small-sized venues among techno/house clubs.

Clubs with a specific techno/house programme have an economic model markedly different from the rest of the sector: they bear higher staging costs due to artists with national and international fame being programmed each week-end. In return their audience accepts paying higher entry fees. It is a live show economy, generating a higher turnover as well as higher expenses.



**ECONOMIC CHARACTERISTICS
[TURNOVER BREAKDOWN]**



Electronic music venues are mostly medium and large venues.

The ratio of venues with a turnover over 1 million euros is 3 times larger among techno/house clubs.

3. DEVELOPMENT CHALLENGES FOR ELECTRONIC MUSIC IN FRANCE

The growth witnessed by the world of electronic music in France over the last five years has allowed its stakeholders to claim their due and to rise to the level of other musical styles, in terms of both economics and status, and insofar as recognition of their creative input is concerned, in particular around live performance.

Thus, along the whole value chain, breakthroughs have been achieved, and situations challenged, along with a growing professionalism. It results in a new deal with projects to complete and challenges to face regarding the artists and the venues that host them, the regulatory socio-legal frameworks, and the modes of collective or individual rights management.

3.1 ARTISTS

Electronic music artists, like any other musician, want to be recognised as **creators** when performing live. When they use existing works, they want to be considered as **remixers**, a status close to that of jazz arranger. However **the status of DJ remixer**, created by Sacem in 1997, remains unrecognised by most and has fallen into disuse. In every case artists look to sustain their artistic activity through an adapted status.

They demand that a distinction is made with those DJs whose activity only relies on the selection and sequencing of third party works. The artistic input by DJ creators goes beyond mere record selection; they enrich it with unique artistic transformations, by being able to mix and modify several music pieces at once, but also adding their own creations or even playing only their own music. Even though they rely on machines and software, electronic music artists are like any other composer and demand that this status be definitively recognised, even more so in the current quasi full digital era.



Name	Kungs
Profession	Artist
Company	Val Prod / Barclay



KUNGS

◆ **How old were you when you started composing and did you expect to succeed so fast?**

I started composing at 17; creating unofficial remixes for songs I enjoyed (Coldplay, Bob Marley...). After some of them hit several million views on Soundcloud and YouTube, I had the opportunity to deliver several official remixes including "Are You With me" by Lost Frequencies and "On My Way" by Axwell & Ingrosso. Then things got serious and I could perform in clubs around France and Europe at 18. Finally in February 2016 everything sped up with the release of "This Girl". I didn't expect to reach this stage of my career so fast, however it is the case today and I'm very happy about it.

◆ **Are you interested in the album format?**

Absolutely. I think that an album is a necessary step in an artist's career as it lets me show the world different aspects of my music. To my mind, limiting an artist to one or two singles makes no sense. My music draws its inspiration from very different things and it is sometimes complicated to express all these aspects across a few singles. The album allows an artist to build their musical identity and showcase it to the world.

◆ **Do you use the Internet to produce music (online tools, remote collaboration with artists, etc.)?**

Not really for the production but to find inspiration, nothing better than browsing the Internet and listening to all kinds of music. But I happen to collaborate with artists through the Internet, I send them instrumental versions, they return a vocal track and we adjust them together while producing the music piece.

◆ **Was live performance a step you considered when you began composing and is it easy to take?**

I definitely love the idea of being a DJ, but I think that an artist has to offer more than a simple DJ set so as to (once again) showcase his universe to people and provide them with a more immersive experience, including singers, some live instruments and of course visual productions.

◆ **Do you find enough time to produce music (considering the time dedicated to tours, social media, etc.)?**

Producing while traveling is sometimes complicated. Sometimes an afternoon in a studio or home studio is enough to make much more progress. However I do manage to produce during tours. Usually the finishing touches require some peace and quiet.



<u>Name</u>	Para One
<u>Profession</u>	Artist
<u>Company</u>	Ed Banger
<u>Booking</u>	The Talent Boutique

PARA ONE

◆ **In your opinion, what are the main evolutions for electronic music in France over the last years?**

The increase in the number of festivals and the opening of SMACs (Current Music Stages, Ed) to electronic music.

◆ **What are the challenges for tomorrow?**

The end of concert "imitation" and a better integration of club culture, sound systems and rave parties (in short DJing) with venues formatted for "live performance".

◆ **Has the prevalence of live performance and the Internet permanently changed the way music is produced?**

Of course, the album format (which I miss) being its first victim. The necessity to survive in this difficult context also limits the freedom of creation when it should be the opposite: poverty should produce new ideas.

◆ **Do you have enough time to produce music?**

Yes I do. It is my full-time occupation.

◆ **How many titles do you release per year (including remixes)?**

I fluctuate between none this year and about sixty tracks in 2012! Let's say about ten titles per year on average.

3.2

CHALLENGES FOR RIGHTS MANAGEMENT

Two modes of rights management coexist on a non-exclusive basis for artists and their managers: collective management and individual management.

Which mode to choose depends quite often on how informed artists and their management are about their rights, as well as about the strategies that can be implemented according to the stage of development of their careers.

COLLECTIVE MANAGEMENT

This model operates a 3-stage process: "artist registration of their works – performance tracking of works – distribution of rights".

A process that, when fully followed, optimises creators' rights and revenue.

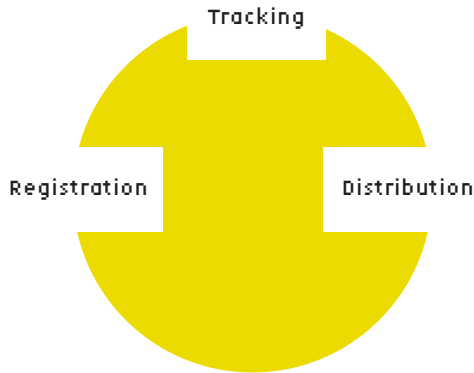
This mode answers the questions raised about simplifying registration and tracking performance of works efficiently.

In fact, electronic music does not lend itself to pre-registration of performed programs, unlike all other types of music. Quite often the DJ or the electronic music artist mixes many musical pieces (sometimes very short samples) and his performance often relies on unpredictable improvisations. In this way, the electronic music artist is akin to the improvised jazz artist. However, one must also note that the artist's added value is closely linked to the originality, exclusivity and novelty of his program, which may lead him to prefer keeping its content secret.

In any case, electronic music artists often consider that the works they perform are not correctly identified and moreover are often not included in the catalogues of rights management societies, since very few of them are registered by their creators.



COLLECTIVE MANAGEMENT



On the one hand, some of these works aren't necessarily subject to registration as they fall under a confidential usage, in particular for works released in limited edition on vinyl and whose anticipated traditional or digital broadcast is negligible outside a narrow circle of insiders. On the other hand, the works registration process, for those works whose potential revenue may be appealing to their authors, is sometimes still too inflexible in their eyes. Moreover, the potential additional revenue that collective management might offer may seem too low in relation to DJ salaries, or may be little understood by the artist or indeed unknown, notably around all aspects beyond immediate revenue.

The world of electronic music is partially ignorant of the collective rights management practices due to a lack of information and of collective practice. It is important to circulate information via a better learning program as well as to simplify the registration process for electronic music works and programmes.

Ultimately, in order for rights collection to operate optimally, the identification of works needs to be improved. This involves tracking mechanisms that need to be capable of the identification of works performed live, whatever the venue (clubs or festivals, concerts and parties). Recent technological

progress, enabling the recognition of sounds (the best known to the general public being the app Shazam), has allowed several stakeholders to offer new identification processes with an efficiency that may allow optimal tracking in the very near future provided that artists and labels provide these stakeholders with sound samples of their titles and associated metadata, or at the very least their titles and the creator's name.

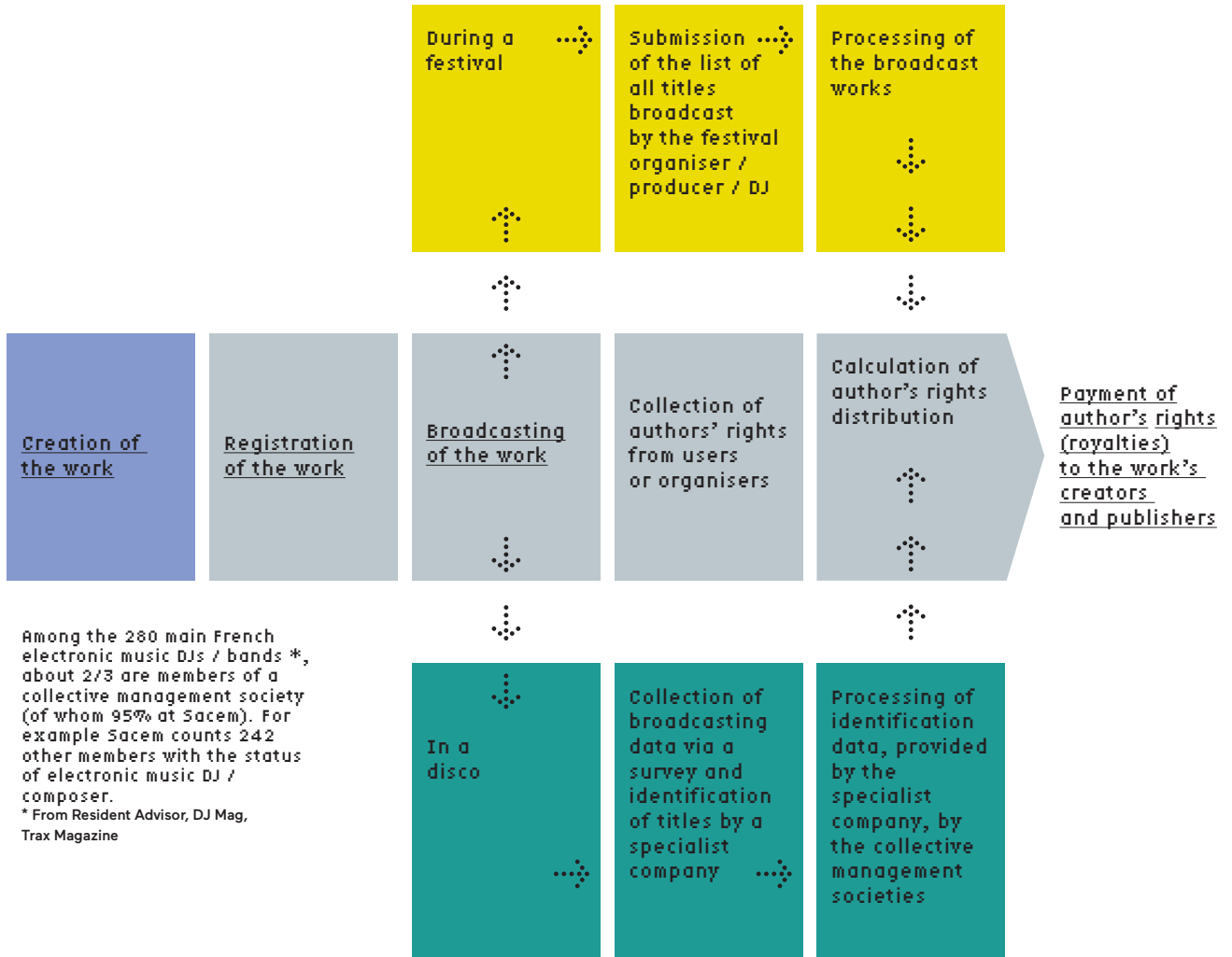
Solutions involving direct and strictly confidential submissions of DJ and electronic music artists sets (e.g. through a direct Internet connection from the artist's or club's terminal) to rights collection and distribution societies (SPRDs) are also being studied in order to alleviate the difficulties due to manual submission (whether via paper or online form) of works broadcast declarations. It turns out that artists, always preoccupied with the exclusivity of their programs as a guarantee of their added value, are rarely opposed to such systems as long as their confidentiality is ensured. The identification of performed works thus becomes efficient in comparison with registered works databases.

The correlation of **work registration simplification** with **efficient tracking** is thus the way forward to ensure the "work registration – tracking – distribution" process is really efficient. It mainly relies on a better dialogue between artists, venues and Sprds to **foster mutual trust**, ensuring a fairer and optimized distribution of electronic music rights for all.



THE OPERATION OF A COLLECTIVE MANAGEMENT SOCIETY

All rights collected during a festival are distributed according to the program of the works performed and their duration.



Rights collected from discos are distributed based on weekly recordings performed by a specialized society out of a sample of 100 discos. These recordings allow drawing up of a representative picture of the broadcast works.

<u>Name</u>	Guillaume Heintzmann
<u>Company</u>	Alter-K
<u>Date of creation</u>	14/03/2006
<u>Number of employees</u>	5 (2016)
<u>Other activities</u>	law professor at Iscom (Higher Institute for Communication).



PUBLISHER ALTER K: GUILLAUME HEINTZMANN

◆ What are the specifics of electronic music in terms of publishing?

First of all, it must be noted that all "general" publishing problematics also apply to electronic music, there is a common basis for all music: rights collection, table of usage information by collective management societies, development tasks, international issues, etc.

Among problematics specific to electronic music, one can single out those linked to writing and production, which are much more "exogenous" than other types of music, often integrating pre-existing sounds, textures and rhythms.

Moreover electronic music lends itself to cooperation between artists. Electronic music authors or composers as well as their publishers are thus frequently facing two cases: *samples* (1) and *remixes* (2).

(1) Samples

A sample is defined as the usage of a pre-existing work or of part of a pre-existing work within a new work. The new work is then mixed, combining composition / original writing and reuse of an external and prior work. The use of samples can be found anywhere but this practice is found mostly in electronic music and hip-hop, a type of music culturally open to borrowing, re-use and collaborations.

(2) Remixes

In a remix, an artist/ author-composer uses separate tracks (stems) from a work by another artist in order to create a different version of that work. These remixes allow synchronizations that were impossible with the original works. Moreover, in the case of electronic music, a remix is increasingly part of a label's or publisher's strategy and marketing for an artist's development. Should one necessarily see the remixer as a new creator of the remixed work? On what basis: as a co-composer? As an arranger?

As a co-author if lyrics are added? Generally a remixer is most often branded as an "arranger". The point is that the status of arranger limits the remixer's share of the public performance rights since the arranger claims only 1/12 of the rights, versus an often larger part as a composer.

◆ Can synchronization and music for image mitigate the drop in sales?

Yes, synchronization is an important source of revenue both for publishers and producers / labels. But even though sales have dropped, the new model has now been thoroughly implemented, mainly based on streaming revenue and an important aid system for production, clips, stages, as well as a tax credit considerably reducing the expenses of music sector structures. This new ecosystem allows the continuous development of projects. Synchronization is an indispensable complement to this model but it remains a highly haphazard sector.

<u>Name</u>	Jean-Christophe Bourgeois
<u>Company</u>	Sony/ATV Music Publishing (France)
<u>Date of creation</u>	1995



ÉDITEUR SONY - ATV: JEAN-CHRISTOPHE BOURGEOIS

◆ **What are, in your opinion, the main evolutions of electronic music in France in the last 3 years?**

It is striking to see that the impressive development of the electronic live scene was not due to the success of some "star" artists on the radio, but rather to the successful development of a relatively dislocated ecosystem around large mainstream media and their programming. Moreover, the cultural grip of electronic music has strengthened. Electro sounds are today found in most musical productions whatever their style, in dance shows, movie soundtracks and sound illustration for audiovisual programs, sound effects on TV and radio.... In short electronic sounds are omnipresent even though electronic music isn't so in the media.

◆ **What are the challenges for tomorrow?**

The transition towards a world dominated by streaming is challenging the economic model on which many independent electro labels developed. The access ability of electro stakeholders to published playlists on these platforms will also be a key issue. Finally creators in the world of electronic music are doomed to innovation, as failure to provide it will cause the ubiquity of electro sounds to wear thin.

◆ **What are the specifics of electronic music as far as publishing is concerned?**

They are numerous. Firstly, regarding the distribution of rights among creators. A standard configuration for the creation of an electronic music work sees the contribution of one or several composers/producers/ track writers on one side, creating an instrumental "track", and one or several topliners on the other side dealing with writing the melody and the lyrics if necessary. However this distribution does not follow the traditional formats of composer / lyricist that are still prevalent within Sacem, since the topliner creates both the melody (belonging to composition) and the lyrics. Collaborations within the electro world moreover often cross boundaries, bringing together creators contracted to different author societies, sometimes evolving into a different legal framework. Finally, in some cases, a sample may be used, a pre-existing work may be interpolated or a mash-up of several works created... In short, a real complexity can emerge around these works and it is up to the publisher to overcome these sometimes numerous obstacles in order to allow a smooth usage of the work and a fair remuneration of the beneficiaries.

◆ **Can synchronization and music for image balance the drop in sales?**

They can contribute to it. In particular the widespread broadcasting of electro sounds in French society should make electronic music less eclectic in the eyes of marketeers and agencies. The development of more targeted communication operations, as opposed to exposure in adverts during prime time, on national TV channels targeting a mass audience, also provides electro stakeholders with new opportunities. Finally a new generation of movie directors and producers, who grew up listening to electro, will be able to impose its aesthetics in the years to come.

Tracking issues

In order to ensure fair distribution, an author's rights society requires the most representative and/or most complete broadcasting data possible. It also requires that the works have been registered.

If rights distribution is based on surveys, usage data has to be collected from a sample of venues representative of the sector economy, the broadcast repertoires, the geographical implantations and the activity (guest DJs or not, opening hours and days, etc.).

If distribution is based on the playlist of performed titles, i.e. accounting for all the works and their duration, it is necessary to be able to gather this information in an exhaustive manner.

The data gathering and processing procedure must follow various requirements for each distribution scheme, either survey or programming based:

1.

Sound recording must be capable of recognising performed titles.

2.

The sound database must be large and diverse enough to identify all titles.

3.

Identification quality of titles and their mode of transmission to the author's rights society must facilitate the distribution process

4.

The process must guarantee end-to-end data integrity, i.e. at no time may data be susceptible to corruption or modification.

For a program-based distribution, two additional requirements have to be met:

5.

The date and venue of the event must be precisely established in order to correctly match collected rights with performed titles.

6.

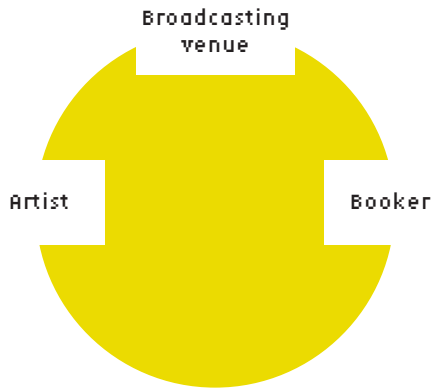
The collected programme list must be complete.

For several years new companies have been developing around music recognition technologies (MRT), for title tracking and identification.

Around the world, author's rights management societies resort to these providers. One can for example mention Bmat music innovation, DJ Monitor, Yacast, or Trax-air. Yacast is the solution used by Sacem in France. DJ Monitor is also one of the reference solutions, in use for more than 10 years in the Netherlands by BUMA, the local author's rights management society. A technological alternative is to directly collect identification data on the performed titles (DMC, Direct Metadata Collection). This is the technique offered by a company such as Pioneer DJ and used in Australia by APRA, the local author's rights management society – in conjunction with other measures. Whatever the technology used, the feedback from author's rights management societies shows that data capture is only the first step. It is followed by comparison and identification that will only succeed for titles that have been previously registered and for which tracking companies have access to sound footprints and metadata provided by artists or their publishers.



INDIVIDUAL MANAGEMENT



INDIVIDUAL MANAGEMENT

It relies on a 3-way co-operation between “broadcasting venue – booker – artist” and provides immediate financial profitability.

This mode is often considered to return a higher financial reward than the rights expectations that may be generated from one’s works or performances in the long term. This forward-looking assessment can be part of an artist’s analysis of his career. For example he can consider that his music has little broadcasting opportunities or that his current fame does not yet provide him with sufficient live performances and that the projected rights income does not make it worthwhile to entrust rights management to a third party.

The artist or his management, for similar reasons linked to specific broadcasting, may also manage their own rights and collection. It is possible to draw parallels with metal music. A band such as the giant Rammstein, that manages to fill stadiums by performing music that is only broadcast through concerts or its recordings, for which the band is the author, the composer and the performer, does not need to resort to collective management. The expectation is to earn more revenue by cutting out the management fees of an SPRD, however this ignores the distribution modalities that may actually benefit the artist.

It is especially important to consider, in terms of artist career typologies and their evolutions, and of the nature of their works and their type of use and broadcasting, that individual and collective management are not mutually exclusive and may succeed one another or even cohabit.

3.3 CLUBS

Among some 2,000 French nightclubs, those that enliven their city, not only by relaying the buzz of the local scene and the strength of its communities, but also by hosting artists from other cities and countries, in tune with artistic trends, are growing in number. Even though they are a **3%** minority among the total number of nightclubs, their cultural impact is undoubtedly prominent and their actions support creation. By approaching traditional unions and organizations of the sector, they join an increasing professionalization approach that adds flexibility to the operation of the sector.

Those clubs that base their activity on diverse artistic programming, organized in sets connected to distinct aesthetics, wish to be recognized for their **cultural contributions**. The programmed artists perform under the conditions of **live shows** and therefore demand a distinct status from traditional discos that employ resident DJs, whose activity mainly rests on the selection of existing works.

Taking this specific aspect of live shows into account involves modifying the fiscal base, in particular VAT (with a 5.5% rate), integration to the sector of live shows through a contribution to CNV and the obligation for the operator to hold a show entrepreneur licence.

These evolutions in the nature of exploitation as well as in the use of musical works can also lead to an evolution in the level and modes of musical rights collection.

A judgment must thus be made by the venues, as to whether they wish to be recognized as a live show activity (which in particular pays a salary to the programmed artists since they are recognized as artist creators under the “part-time showman” status) or as a simple disco (paying a salary to resident DJs).

The distinguishing feature of clubs that lay claim to the artistic and cultural specialism of their programming, in contrast to discos that enliven their parties by only playing pre-existing works for their audience, has **legal, fiscal and social (and therefore financial) consequences**, and shifts the boundaries between venues, bookers, artists and their representatives.

Name
Profession

Bruno Blanckaert
President of the Grand Rex
and of CSCAD (Artistic
Cabarets and Discos
Trade Association)



CLUBS

REX CLUB / CSCAD: BRUNO BLANCKAERT

◆ **What are, in your opinion, the main evolutions of electronic music in France in the last 3 years?**

Electronic music touches a wider audience than before when it was restricted to insiders in urban centers. It has now become popular in the positive sense of the word. As President of CSCAD, I can tell you that in general electronic music is currently evolving and that its broadcasting venues will multiply and evolve as well. They will become innovative and multicultural, with a modern identity.

◆ **How can a club retain its customer base on a weekly basis?**

It is entirely connected to programming in a strongly competitive environment. The ability of a club to attract DJs and specific artistic scenes is paramount. If I take the example of the Rex, it has a very strong identity: customers know what to expect and are not deceived. We are a quality label, thanks to the expertise of the people in charge of programming.

◆ **As president of CSCAD, do you see an obvious distinction between general discos and clubs with a specific techno/house programming that we have identified in this survey? And how do you characterize it?**

The patrons of electro clubs are more elitist and come for different reasons. General discos host an audience that comes to be entertained and needs to meet outside of the usual bar closing hours in order to meet people, even more so in provincial towns; whereas electro clubs attract customers who come to enjoy a musical event rather than to meet people. It does not preclude encounters, but the musical interest forces the club to consider mobilizing events and innovative offers. When we do not practice ad hoc programming, we would rather not open. And we should break free from the club framework.

◆ **What are tomorrow's challenges for clubs and electronic music?**

There is a need for investment. New venues must work on the quality of sound and setting, the types of sets, surprise events able to host world renowned artists almost ad hoc. These are the challenges for tomorrow. What is happening in Paris surpasses anything happening in the rest of Europe, even in Berlin or London. Southern countries obviously have the ability to band together giant collective parties, particularly outdoors thanks to their climates. We will be increasingly drawn to inventing exceptional events such as Hors-Série at Gare Saint-Lazare, and taking over public areas.

3.4 FESTIVALS

Festivals specialized in electronic music have been evolving since their beginnings under the framework of live shows. **They wish to be recognized as venues where artists produce an original work, even when it uses existing works as its base material.** The underlying claim is to definitively endorse the major cultural contribution that they provide on their own grounds, without differentiating from other modern music festivals, notably in terms of hosting and facilitation of administrative or security procedures, for which the requirements are still quite often higher than for festivals focused on other aesthetics.

Here again a parallel can be drawn with metal music which proved, for example with the Hellfest and the exemplary and extremely friendly behaviour of its audience, that the mistrust it faced at its inauguration was not justified. Moreover electronic music festivals wish to definitively get rid of the residual repression attached to rave parties at the beginnings of techno in France in the 90s, and to exhibit how well they respond to current audience expectations and thus are privileged players in the evolution of contemporary society.

Finally, from an economic perspective, France has a specific festival structure. It fluctuates between medium-sized to large-sized festivals. However, the huge dance music festivals that exist in the rest of Europe and in the United States, the most famous being Tomorrowland, created in Belgium by the Dutch operator ID&T in 2005 and now belonging to the American SFX Entertainment, and which hosts hundreds of thousands of participants and has been adopted in America and Brazil, these have not managed to enter the French market. **Cultural exception is still playing its role, in particular through the Evin Law of 1991 that, by strongly limiting advertising of tobacco and alcohol, prevents the large alcohol producers from entirely funding such giant festivals, as is the case in the rest of Europe.** Even though they are multiplying, large French festivals, that dominate electronic events, are thus much smaller than European or American mega-festivals. The fact remains that one of the challenges is to succeed in creating a balanced network of festivals in the national territory.



BOOKER THE TALENT BOUTIQUE: PIERRE BLANC



Name	Pierre Blanc
Profession	Producer of shows / tours
Company	The Talent Boutique
Booking	Pedro Winter, Para One, Daniel Avery, Jamie XX, London Grammar, Metronomy, Benjamin Clementine, Django Django, Yelle...
Date of creation	2004
Number of employees	7
Other activities	festivals, promoters, business contributor

◆ What is the influence of the multiplication of electronic music festivals?

Salary offers are better for festivals but it is hard to foresee the limits of this evolution. Today there are more festivals but that tends to dissolve the survival abilities for smaller initiatives (small venues, small promoters...) a bit. During the great Ed Banger era, whose tours were managed by my then associate, one could perform anywhere in France. The risk in the multiplication of festivals is to drain local scenes, as they are developed by the clubs throughout the year. Facing competition from festivals, club owners are less prone to invest in new things. We thus notice the development of collectives: everybody becomes a bit of a promoter, it is more risky but it is the only solution.

◆ Will the development of festival offers be sustainable?

Young audiences that have already attended several events in the same hangar are looking for something else. In Concrete, one is a yard away from the DJ. In Weather, the DJ is on a remote stage but lacking the charisma of a band. These stages often benefit from a lighting show and scenography, but it remains random. Models have strongly evolved: festivals have to find their USP to retain their audience, even though

programming is weaker each year. To come back to Weather, the creation of the Hors-Série concept (an event at Gare Saint-Lazare in Paris in September 2016, Ed) is interesting as a consideration on the history of Weather. Models associating clubs and festivals, such as Concrete and Weather in Paris or Nuits Sonores and Le Sucre in Lyon, are super laboratories for the development of artists. It is even more the case when they are joined by a booker (respectively Concrete Booking and A.K.A).

◆ What are the implications for you as a tour organiser?

The development of tours and the production of shows remain the core of the profession. But there is a trend for horizontal diversification regarding what our artists can offer. It requires knowledge of the brands, finding partners, having a small club and a good booker. We also take participations in festivals, either through association with existing structures in which we can take actions at different levels (delegated programming as for Plages de Rock in Grimaud) and with which we share a common

vision on development, or by creating festivals on our own or in collectives (We Love Green in Paris, L'Édition in Marseille).

◆ How do you manage your artists?

All our artists, whether French or international, are declared under the "part-time showman" status. There may be additional billing systems for some artists that we do not employ ourselves but with whom we have signed an agent contract for exclusive representation. These are often artists producing records, sometimes having a label, composing movie soundtracks, etc. in short they have a multi-project management and the ability to structure their business. It can become interesting once a certain level of activity has been reached, but one must start "part-time", for insurance, benefits, remuneration statements, etc.

3.5

SUSTAINABILITY OF CULTURAL STRUCTURES

Structures hosting artists and electronic music are the catalyst of their development and organize into a fabric of various sizes and statuses. The sustainability of these cultural stakeholders is not guaranteed and a study of several existing models argues in favour of a need for the renewal of infrastructures.

One may consider today that, ranging from the collective or the very small club, organized as an association or even an informal structure, to the event agencies for which electronic music is merely one activity among others, there are two major operating orientations.

A first model, a historically French cultural tradition, resorts to public funding through grant allocations from institutions or local communities. A second model is organized around very powerful economic stakeholders, who buy venues, events, and artist catalogues, concentrating the whole production chain (Fimalac, Live Nation, Bolloré, Lagardère, etc. have recently arrived onto the cultural scene from the media world).

Between the first model, declining as a result of increased pressure on public finances, and the second, whose financial interests aren't always aligned with long term cultural development, voices are being raised demanding a third way. It calls for the redefinition of economic models for cultural structures, responsible for the emergence of new generations of artists and agents who are the breeding ground for the future of electronic music.

The cultural response to current challenges can be collective and embrace the innovation which is boosting the whole working environment, the economy and more extensively the whole society. Tomorrow's solutions may lie in the ability to invent new models: co-working, syndication of micro-structures, hybrid public/private solutions through a rational brand integration and endorsement, neither completely funded, nor completely profitable.

Incubator ideas are under consideration in Lyon or in Paris, following what the Mila or the Gaité lyrique have prefigured in Paris, but mainly dedicated to electronic cultures.

<u>Name</u>	Vincent Carry
<u>Profession</u>	Director
<u>Company</u>	Arty farty / Sucre / Nuits sonores
<u>Date of creation</u>	2003



ENTREPRENEUR ARTY FARTY VINCENT CARRY

◆ What are, in your opinion, the main evolutions of electronic music in France in the last 3 years?

Electronic culture has become both mature and very popular. Very popular since it has never addressed so many people, while generally remaining highly sophisticated.

The battle for electronic culture is won every weekend in each French city insofar as other aesthetics seem to have been taken by surprise by this staggering phenomenon. Mature since it seems that we have finally left the techno monotheism and that electronic music, which was starting to go round in circles for the past 3 years, is about to find openings, in particular towards world music, queer culture, cross-disciplinary artistic leanings, music-image tie-ups, etc.

◆ How does an electronic music festival maintain its originality?

Both through its format and its programming. Re format, the ambition of Nuits sonores has since the beginning been to break the union of time and place. We have cultivated a model of mobility, of journey, of venue multiplicity, while favouring industrial or historical heritage sites. Since then, we have never stopped reinventing ourselves, in particular by digging up new locations and new concepts. On the programming side, only a mix of total independence and intransigence can ensure originality. In this arena, we sadly feel more and more alone.

◆ What characterizes the new French scene?

It hasn't reached its finest hour but it attempts to defend itself, sometimes with panache, a bit like France in the Euro championships or the Olympics. Its main characteristic is intra-national: Paris has completely lost the French leadership, contrary to what people are trying to make us believe.

This is good news!

The scene is much less centralized and thus more fragmented, with intense heartlands, notably in Lyon.

◆ What are the challenges for tomorrow?

To ensure that truly independent cultural stakeholders are supported in their economic, territorial and social development. Because in 2016's cultural landscape, they are the only insurance for the preservation of diversity, general interest, creativity and cultural innovation for the next 20 years. This challenge won't be met by either the institutional cultural sector, way too busy with securing their assets and surviving the current (relative) decrease in public funding, or by the capitalistic cultural entertainment sector, investing the creative sector not with a preoccupation for general interest, but with a hope of profitability. Just like the media, culture is an instrument of soft power. It is thus no coincidence that the large corporate groups that we all know are showing interest.

CONCLUSION

As the 3rd decade of our young millennium is approaching, while one may state without hesitation that cultures related to electronic music permeate and even transform all the societies around the world, one must also recognize that they cover various realities and practices.

Many musical styles coexist with more or less permeability under the banner of electronic music, too encompassing to reduce its practices and “tribes” to a uniform system. While avoiding the opposite pitfall of a fragmentation to which the myriad of musical styles may lead, one easily notes **the coexistence of two different, even antagonistic segments: techno/house on one side, dance music on the other.** The term EDM has been carefully avoided throughout this survey, in preference for dance music, not in order to dismiss it but because it has become a banner for tensions and aesthetic divisions that this survey does not aim at solving. Stylistic agnosticism has been chosen in order to present the electronic music ecosystem with as much objectivity as possible, so that everyone may have the clearest understanding possible.

As a result these two segments operate along their own characteristics, which do not currently overlap, even though one cannot tell whether this will still be the case in the future, due to the highly evolutionary nature of these very young and connected cultures. In France, one observes that the economy of the techno/house world is, in the main, based on live performance (festivals and clubs), consumed by a growing audience, young, connected and educated. Its broadcasting is on the contrary close to nil (across general media and discos) and its sales are residual in an economy of mainly free streaming. Inversely, dance music generates many authors’ rights through broadcasting in traditional media and discos, but is barely a presence in live performance in French festivals and clubs. While it displays good economic health, it isn’t impossible for its recent and spectacular development to reach a plateau, let’s not talk of a bubble, as the recent stagnation of its sales and several unfortunate experiences with large international festivals tend to show.

One of the upcoming French challenges is the harmonization and sustainability of the national fabric of festivals and clubs, a genuine catalyst for the development of tomorrow’s artists in the long term.

The other big challenge is of course connected to streaming. The digital disruption that brought about new forms of music distribution opens many possibilities, for as long as financial strength can be assured. There is better news on this front even though drawing up a reassuring roadmap on the subject would amount to a wild guess.

The array of possibilities provided by digital cultures nevertheless promises many prospects for the future. All the assets are present to allow innovation in a country with a rich culture of dynamic start-ups. Cultural structures reinvent themselves through European networking and collaborative incubators. Breakthroughs in big data collection and micro-tracking give us a glimpse of better identification of and remuneration for musical works. The increasingly intuitive evolution of technologies simplifies creation and artist collaboration, even remotely. The era of connected objects finally offers new perspectives for distribution and broadcasting, the new proposals for collaborative music consumption or remote live broadcasting may already be shaping the behaviours of the future.

If the millennium bug can be an ironic symbol for a difficult entry into the 21st century for the music world in general, the power takeover by digital natives offers, for the first time in this new millennium, optimistic perspectives on modern societies. Electronic music may be its best vehicle.

WORKING GROUP

BRUNO BLANCKAERT

After having worked as a lawyer specialized in author's rights, Bruno Blanckaert takes over the reins of Grand Rex with Philippe Hellmann in the 80s.

They decide together to open Rex Club's programming to electronic music and to Laurent Garnier in the 90s, acting on an impulse by Christian Paulet, director of Rex Club and his successor Fabrice Gadeau. In parallel to this activity, Bruno Blanckaert, after having served as Secretary General of CSCAD (Artistic Cabarets and Discos Trade Association) becomes its president in the early 90s.

Within CSCAD, Bruno Blanckaert and Rebecca Le Chuiton, general delegate, manage to unify the sector and to obtain the recognition of the role and importance of discos, cabarets and concert halls as venues with a cultural mission, ensuring the touristic outreach of Paris and of France (French Touch). Bruno Blanckaert has been the administrator and treasurer of Cinémathèque Française alongside Costa Gavras for several years.

JEAN-CHRISTOPHE BOURGEOIS

Jean-Christophe Bourgeois joins Sony Music Publishing France (SM Publishing) in 1994 in order to create the Synchro and Marketing service within the company. In 1998, he also takes up the role of Artistic Director. He develops a large artist catalogue - from Kyo to DJ Laurent Wolf - all the while heading the Synchro service, in close collaboration with the Euro-RSCG BETC agency for five years in order to build a brand image for Orange around various synchronizations of the Beatles. In 2004, Jean-Christophe Bourgeois is promoted to General Manager. In this position, he remains responsible for the Synchro and Marketing services and keeps on signing and developing artists with an international dimension such as Zaz. In 2010 he adds the role of A&R Director, Continental Europe, as which he coordinates European artistic services and favours collaborations between authors/composers from different territories as well as their cross-border development. Jean-Christophe Bourgeois now holds the position of General Manager for Sony/ATV - EMI Music Publishing France. In addition to the exploitation of the market leading catalogue he oversees, he ensures the development of the repertoire, signing with global artists such as Yann Tiersen, Gesafellstein, Yuksek, and Kadebostany, as well as establishing partnerships with local (PlayOn, NRJ publishing) or foreign (Reverb Music, Reservoir Publishing) stakeholders. He also continues his collaboration with artists he has been supporting since their debuts such as Zaz, Kyo, and Fredrika Stahl.

Outside of his activities for SM Publishing, Jean-Christophe Bourgeois is president of the Variety Commission at Sacem. He has also been a teacher at l'EDHEC (Lille) since 1998 and is currently heading the "Entertainment" program as part of the Master of Science, Creative Business delivered to 3rd year students.

VINCENT CARRY

A stakeholder on the independent musical scene from 1988 to 1997, Vincent Carry becomes a cinema, culture and politics journalist in 1997. He becomes the director of Arty Farty in 2002 and creates the Nuits Sonores festival in 2003. Its first edition gathers about 16,000 participants in the heart of the City of Lyon. A decade later, it gathers over 130,000 participants.

In 2007, Vincent Carry becomes coordinator for Lyon's candidacy to the title of European Cultural Capital 2013. One year later, he becomes artistic advisor for the Gaité lyrique project in Paris, three years prior to the venue's inauguration in March 2011. Also in 2011 Nuits Sonores is officially granted a label and supported by the European Union, allowing the implementation of the European Lab project, an international forum dedicated to the future of culture. In 2013, he creates the Culture Next society and Sucre, an independent cultural venue set on the rooftop of a 1930s building, the Sucrière. The following year, he aligns Arty Farty with the Parisian organization Alias to give birth to a new production enterprise called AKA.

2015 sees the launch of We are Europe, a large cooperative European project, supported by the European Union, grouping 8 festivals and forums in a three-year exchange and co-creation program driven by Arty Farty. He is currently working on the Hotel 71 project, a creative hub that will launch in 2017.

MICHEL PILOT

A music aficionado, Michel Pilot begins his career at 16 in Blois as radio host on radio Val de Loire, with the liberalization of the FM band in 1981. He presents "Le hit des clubs" that leads him to join the nightlife world. After discovering DJing in Greece in 1985, he comes to Paris where, after a short time at France Inter, he becomes director of FG radio, during the prosperous years of the techno station, from 1990 to 1994.

Then he creates his booking agency Out Soon, which introduces him to the greatest DJs while organizing rave parties from 1992 to 1995. He then joins the Omnisons label distributed by Polygram later taken over by BMG in 1998. In 2000, he creates Technotuner web radio, whose success will paradoxically shut it down, due to the then prohibitive bandwidth costs. He then takes charge of digital technologies for the distributor Nocturne, as well as for the Jazz comic collection. Thus naturally when Nocturne closes in 2004, he joins publishing house BD Glénat, where he is in charge of the events sector until 2011.

Additionally, being very close to Jack Lang, who he met in Blois, he has become his permanent advisor for electronic music, from the very first deliberations about Techno Parade in 1996. When Jack Lang wishes to bring electronic music into the Institut du Monde Arabe that he has been directing since 2013, Michel Pilot aligns with Surprize (Concrete, Weather Festival). He joins the structure in late 2014 and is now its Secretary General and advisor to the president Aurélien Dubois.

CHRISTIAN DE ROSNAY

Holding a Master of Private Law degree following studies at Paris XII Diderot and Paris I Sorbonne, and an MBA specialized in “luxury brand marketing and international management” (Sup de Luxe/EDC - Paris), Christian de Rosnay joined ADAMI in 2000 where he held positions of legal consultant, acting general counsel and deputy general counsel for international affairs.

In 2007 he creates, with Grégoire Corman, RIGHTBACK, a society specialized in the collection of related rights.

He is also the founder of the ETENDARD MANAGEMENT company, specialized in artist management (Justice, Kavinsky, Sebastian, Dj Pone, Woodkid, etc.).

TOMMY VAUDECRANE

From DJing around the world to event organization, Tommy has been an activist with a passion for electronic music for more than 20 years. He starts his career as a DJ in 1993, and then forms the band BudBurNerZ in 1997, producing around twenty singles and 6 albums. Performances in the biggest events follow and the band quickly becomes a reference in French hardcore techno.

His unquenchable desire for spreading the virus of alternative electronic music leads him to organizing events with the Party Uniq collective which he creates and through which he will organize about one hundred events between 2005 and 2015, notably the Megarave nights at Élysée Montmartre, Le Grand Méchant Beat at Glazart and many other projects at La Java, at Cabaret Sauvage, in provincial cities and in Belgium and Spain.

In 2010 Tommy is elected co-president of the Technopol association alongside Henri Maurel, renowned electronic music activist and founder of Radio FG. His involvement in music becomes political and he will hold the association presidency with a will for change and development, through in particular the creation of Paris Electronic Week, the first French events publication dedicated to electronic music professionals.

In September 2016, he also becomes Program Officer at Gaité Lyrique, after supporting the new team selected by Ville de Paris throughout a 10-month tendering process.

Tommy also holds the post of Group General Director of communications and marketing at Revolution 9.

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