

2024/2025

Equity,
Diversity &
Inclusion
Report



IMPALA 

INDEPENDENT MUSIC COMPANIES ASSOCIATION



Co-funded by
the European Union

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FOREWORD

As we reach the fifth anniversary of the IMPALA Charter for Equity, Diversity and Inclusion (EDI), we reflect on the progress made while recognising the challenges that remain. In an environment where many businesses, organisations, and governments around the world are now deprioritising these vital areas, IMPALA and our members confirmed at our Stockholm board meeting in March our collective commitment to embed equity and inclusion as core priorities for the independent music sector.

This year, our work focused on developing practical resources to help members and highlighting the business case for action. Through new training tools, webinars, and roundtables, we continue to provide tangible solutions that respond to the realities of small and medium-sized businesses.

The introduction of a new EU-funded Equity, Diversity & Inclusion since September 2025, will expand our support to members and strengthen their capacity to take action. Revamped initiatives such as our Changemaker Award and 100 Artists to Watch showcase the innovative approaches driving meaningful change. From celebrating new initiatives to developing new platforms for training, the IMPALA taskforce remains determined to keep EDI at the heart of European's independent music sector.

A WORD FROM IMPALA EDI TASK FORCE CO-CHAIR EVA KARMAN REINHOLD



“We are committed to equipping all our members, whatever their size, with the tools to make meaningful change. This remains a key priority across our reports, social media and direct engagement. Our Changemaker Award highlights this work in practice, with this year’s winners MEWEM France and MEWEM Germany – alongside the many other nominated projects that show the powerful impact of inclusive initiatives in the independent music sector. It is also essential that EDI is part of wider debates on streaming, AI and competition. As access to markets becomes harder for smaller players and power is concentrated in fewer hands, the industry risks losing diversity and openness. Looking ahead, we are reviewing the impact of our board diversity programme ahead of elections, with a review of the second representative programme and new ways to engage underrepresented groups so that the sector reflects the full richness of Europe’s music community.”

INTRODUCTION

This is IMPALA's fifth annual Equity, Diversity, and Inclusion (EDI) report, published as part of our ongoing commitment under the IMPALA EDI charter.

Like previous editions, we are releasing this report in the week of the anniversary of our charter, 21st October. In the past year, with guidance from our taskforce adviser Keith Harris OBE, we focused on highlighting initiatives that inspire our members to take action and drive meaningful change within the sector.

One of our key milestones for 2025 is the launch of our EDI toolkit, an innovative resource made possible through our EU network grant. The toolkit brings together a self-assessment framework, a refreshed survey, and an on-demand online training platform- all tailored to our members - offering clear, practical guidance on where to focus to strengthen their EDI efforts.

We have also expanded the business case for EDI, building on earlier findings with new research and real-world examples that demonstrate how inclusive cultures unlock tangible benefits for organisations.

Over the past year, we have promoted a range of campaigns, reports, and panels on EDI topics - most notably during European Diversity Month in May 2025, when we continued our online panel discussion format. This time, industry EDI experts addressed the challenges faced by LGBTQ+ artists in Europe. In this context, Tony Ereira, Director at Come Play with Me, has contributed an article for this report, focusing on how inclusive spaces can be fostered for LGBTQ+ musicians.

Geographical representation is an important part of our EDI work. The topic of exclusion of South-East European (SEE) artists in the European music industry is explored in a new report by Bulgarian member and artist Ruth Koleva.

Another key area addressed by IMPALA is streaming. In this report, we highlight the rise of two-tier structures, how they undermine diversity, and why putting diversity at the centre of streaming reform is essential. We also draw attention to market consolidation and its impact on cultural diversity, calling for robust scrutiny of mergers and acquisitions by the European Commission to ensure the music sector remains diverse.

Our EDI task force, made up of over 21 people from 15 IMPALA members across 12 countries, has played a key role in pushing forward EDI.

In view of the upcoming IMPALA executive board elections this year, the task force has taken a look at how to promote our board diversity and reviewed our second representatives programme.

We will also explore strategies with associations to engage with more underrepresented groups across Europe. Our aim is to ensure that the independent music sector reflects the full diversity of its artists and professionals.

IMPLEMENTING OUR CHARTER, WHERE ARE WE?

Below is an update on what we have done to implement our diversity charter this year. IMPALA's work is driven by our [equity, diversity and inclusion task force and underpinned by our charter, adopted on 21st October 2020](#).

1. Measure diversity in the sector:

Our EDI task force launched a toolkit which features a reviewed survey, self-assessment tool and a training platform, that will enable organisations to evaluate their EDI practices and track progress with greater consistency. The pilot project includes also a sector-wide survey which builds on the insights of our first survey.

2. Map and share best practices in Europe:

We showcased diversity and inclusion initiatives from across Europe and amplified sector-wide campaigns to foster equity and engagement. The *Business Case for Diversity* section has been further developed with fresh examples and case studies to guide organisations in strengthening inclusive practices.

3. Appoint diversity advocates for IMPALA board and committees:

Ben Wynter from AIM was appointed EDI co-chair, bringing a strong appeal to advance board diversity. We have reconfirmed engagement welcomed new second board representatives and continue to review how EDI is embedded in decision-making across the IMPALA board and committees.

4. Celebrate diversity through award programmes:

Thanks to our EU network grant, our awards, including 100 Artists to Watch, Changemaker, and Outstanding Contribution awards were revamped this year. They celebrate and recognise artists, professionals and projects advancing inclusion in the music sector, inspiring action and contributing to greater diversity.

5. Implement outreach programmes with community organisations

In 2025, we reviewed the Second Representatives Programme (launched in 2021) and prepared to introduce a new Observer Role in October 2025, alongside updated diversity criteria for board nominations. We also created a monthly meeting slot for associations, recirculated Charter advice, and supported initiatives such as the Music Leaders Network to strengthen leadership and diversity.

6. Provide EDI training for members:

We focused on developing new initiatives, including online panel discussions and a dedicated training platform, preparing to provide accessible resources to support members in embedding equity, diversity, and inclusion across their organisations.

IMPLEMENTING OUR CHARTER, WHERE ARE WE?

7. Produce guidance for members:

IMPALA has updated its Business Case for Diversity, incorporating new research that highlights the tension between financial objectives and the authenticity of diversity and inclusion efforts. This updated guidance provides members with a nuanced framework to support the implementation of genuine and sustainable diversity practices.

8. Commit to equality and diversity in our operations:

IMPALA continues to ensure EDI practices in job adverts and recruitment practices, and we maintain paid internships to promote accessibility.

9. Support sector initiatives for social change:

In 2025, IMPALA has launched a small EU-funded scheme to strengthen joint messaging on equity, diversity, inclusion, and sustainability in the music sector, working with selected projects each year to amplify impact and showcase leadership by the independent community. Alongside this, IMPALA's humanitarian scheme partners with global aid organisations to support crisis response and promote responsible, sustainable sector development.

10. Promote EU funding opportunities:

We keep members informed about EU funding for diversity projects and provide guidance to help them successfully apply for funding that supports a diverse European music ecosystem.

11. Advocate in Brussels:

IMPALA has been on the frontline defending the cultural diversity of independent music in the ongoing UMG acquisition of Downtown Music. We met with Commissioner Glenn Micallef, European Commissioner for Education, Culture, Youth and Sport, to discuss AI's impact on creators' rights, fair competition amid consolidation, and the need to support European SMEs - key factors for Europe's cultural diversity and innovation.

12. Work with offline and online media and music services to boost diversity.

IMPALA continues to challenge the negative effects of market dominance on diversity, including trends dubbed "Streaming 2.0," where consolidation and algorithmic control reduce visibility for underrepresented artists.

[Read our charter in full here](#)



TIMELINE

Here's a summary of key events related to our equity, diversity, and inclusion efforts October 2024 - October 2025.

24.10.24: We published the fourth EDI report, [\[statement\]](#).

18.03.25: IMPALA and WIN launch new EU co-funded networking programme - WINHUB events programme [\[Statement\]](#).

3.12.24: IMPALA's EDI Taskforce hosted a panel discussion with Leon Diop, IMPALA Changemaker Award winner [\[Statement\]](#) and founder of [@Black_andirish](#). Video link [here](#).

26.03.25: IMPALA announced the fourth edition of 100 Artists to Watch across Europe in collab with YouTube [\[Statement\]](#).

10.01.25: IMPALA shares registration link for Keychange Leader Programme for women and gender-diverse individuals.

23.04.25: IMPALA engages with Commissioner Glenn Micallef on the Future of Europe's cultural sectors and the key role of music [\[Statement\]](#).

19.2.25: IMPALA opened the nominations for the 2025 Changemaker Award, for which we received over 20 nominations.

May 2025: IMPALA celebrated [EU Diversity month](#).

21.02.25: IMPALA announced CEE Independent Music Academy [\[Statement\]](#).

13.05.25: IMPALA announced an online roundtable, "Amplifying voices: supporting LGBTQ+ musicians in the face of discrimination," ahead of International Day Against Homophobia, Biphobia and Transphobia [\[Statement\]](#).

08.03.25: An interview with IMPALA EDI Taskforce co-chair, Eva Karman Reinhold for International Woman's Day 2025. Also marking 5 years of the EDI Taskforce [\[Statement\]](#).

14.05.25: IMPALA announced the nominations for the 2025 Changemaker Award.

13.03.25: At the Board Meeting in Stockholm, IMPALA's Board agreed there is an urgent need for a strong collective message that EDI work is a priority for the music sector in the current climate.

15.05.25: IMPALA launched a new EU-funded support scheme aimed at boosting sector-led initiatives working on equity, diversity, inclusion (EDI), and environmental sustainability [\[Statement\]](#).

13.03.25: IMPALA presents the Outstanding Contribution Award to Eva Karman Reinhold at Manifestgalan in Stockholm [\[Statement\]](#).

28.5.25: IMPALA announced the MEWEM as the 2025 Changemaker winner [\[Statement\]](#).



COLLABORATIONS

On top of IMPALA's own work, we collaborated with members and stakeholders on different initiatives and campaigns that accelerate awareness for equity, diversity and inclusion in the music industry

Panels & Workshops

Linecheck Music Meeting and Festival

"Italy: Gateway to Central & Eastern Europe"
18th–23rd November 2024

- With Kees van Weijen (STOMP)

IMPALA's EDI Taskforce is hosted a panel discussion with Leon Diop

IMPALA Changemaker Award winner and founder of @Black_andirish
3rd December 2024

With:

- Eva Karman Reinhold (IMPALA EDI taskforce co-chair)
- Ben Wynter (IMPALA EDI taskforce Co-chair, and PowerUp)

RUNDA Digital Day 6.0 IN Zagreb

"From Local Roots to Global Stages: Breaking Artists Beyond Borders"
10th December 2024

- With Rory Brown (IMPALA)

ESNS

"How to create fairness in a digital and tech driven industry?"
17th January 2025

- With Ben Wynter (AIM UK/PowerUp)

Ment

"Amplifying Talent & Mentorship: The State of Music Business Education in Europe"
14 February 2025

With

- Karla Rogozar (IMPALA)
- Dario Draštata (RUNDA/IMPALA)

Manifest

"State of the Independent Nation – Global independent values, market consolidation and the power of collaboration."
13th March 2025

With

- Helen Smith (IMPALA)

Tallinn Music Week

"IMPALA & SOM Present: Indie Roundtable"
4th April 2025

With

- Eva Karman Reinhold (IMPALA/SOM)
- Kees Van Weijen (STOMP)
- Karla Rogozar (IMPALA)

Music Leaders Network

"Q&A Sessions"

9th April, 30th April & 20th May

With

- Remi Harris
- Tamara Gal-On

"Amplifying voices: supporting LGBTQ+ musicians in the face of discrimination"

22nd May 2025

with:

- Moderator: Antonia Lines (Come Play with Me)
- Fintan Warfield (LGBTQ+ Advocate, musician and former Irish senator)
- Lana Culig (Aquarius Records/RUNDA)
- Eva Karman Reinhold (IMPALA)
- Ben Wynter (PowerUP)

Full video [here](#) (IMPALA members only)

RUNDA POP UP

16th June 2025

With

- Dario Draštata (RUNDA/IMPALA)
- Natalee Turković
- Nika Turković

Entertainment Business

Discussion Afternoon on the State of Diversity and Inclusion in the Sector
29th August 2025

With

- Kees Van Weijen (STOMP)

REINFORCING ACTION ON EQUITY, DIVERSITY & INCLUSION



Five years ago, IMPALA took an important step forward by establishing its Equity, Diversity and Inclusion (EDI) Charter and setting up a dedicated taskforce, responsible for ensuring EDI remained high on the association's agenda.

This move set the foundation for advancing equity and inclusion across the independent music sector, with initiatives such as the Changemaker Award celebrating those driving progress throughout Europe.

Today, the role of the taskforce has become even more significant. At its Executive Board meeting in Stockholm in March 2025, IMPALA underlined the importance of redoubling efforts on EDI. Ben Wynter, Co-Chair of the EDI taskforce, found clear words:

“More than ever, it is crucial that we, as an industry, stand united on the side of what is right. As a sector, we have a responsibility to lead, not only within our industry but in the wider world by setting an example as inclusive innovators, early adopters, and trendsetters.”

The board mandated the taskforce to step up its activities, set new concrete goals, and provide practical tools to support members in their work.

Strengthening board diversity - IMPALA has already made measurable progress in board representation since introducing the second representative programme, particularly when it comes to gender balance. To build on this, we are considering a board survey to assess diversity in all its dimensions and establish a clearer baseline for future action.

In addition, the board and taskforce have reviewed the second representative programme, suggesting the introduction of diversity criteria - framed as inspiration rather than obligation (see the infographic [here](#)).

A practical tool for members - The EDI toolkit, launched as a pilot in September 2025 and co-funded by the EU, helps members across Europe strengthen diversity in their organisations. It combines a self-assessment tool, sector survey, and training platform, offers concrete, actionable support with tailored recommendations, case studies, links, and training content.

Building inspiration and accountability - IMPALA recognises the importance of fostering authentic dialogue. Inspirational panel discussions and spaces where diverse voices can be heard will remain central to our approach, ensuring that EDI is not embraced as an obligation, but as a driver of growth and innovation.

THE BUSINESS CASE FOR EQUITY, DIVERSITY AND INCLUSION 2025

The IMPALA EDI Business Case 2024 showed that EDI is both ethical and practical, helping small teams improve decisions, creativity, retention, and audience reach. In 2025, we'll build on this with new research and examples to show how inclusive cultures unlock these benefits.

WHY EDI MATTERS



Inclusion boosts performance

Inclusive teams innovate more, share ideas freely, and engage audiences effectively.



Diversity strengthens talent and creativity

Broader perspectives → better problem-solving & stronger connection with diverse audiences.



Risk reduction & sustainability

Fair workplaces → lower turnover, higher morale, long-term resilience.

KEY INSIGHTS FROM 2025

- Diverse teams don't automatically perform better – inclusion is essential.
- Psychological safety + fair processes + strong leadership = high-performing small teams.
- Inclusion amplifies experimentation, idea-sharing & audience engagement.

HOW SMALL TEAMS CAN STRENGTHEN THE BUSINESS CASE



Focus on an inclusive climate

Promote psychological safety and fair processes to encourage creativity, collaboration and knowledge sharing. Small teams can quickly create inclusive practices, for example in meetings, project planning and feedback routines.



Target complex & collaborative work

Diversity has greatest impact in creative tasks, e.g. music production, artist development & audience engagement.



Embed skills & systems

Multi-part, hands-on workshops are more effective than one-off events. Integrate inclusion into daily operations: hiring decisions, promotions, and team feedback.



Measure what matters

Track retention, engagement, representation, and team satisfaction.



Celebrate real progress

Recognise successes beyond business metrics – fairness & collaboration matter.

List of sources:

[IMPALA \(2024\). The Business Case for Equity, Diversity and Inclusion.](#)

[Culture Amp \(2024\). The State of DEI in European Workplaces.](#)

[Wallrich et al. \(2024\). Team Diversity Meta-Analysis.](#)

[Systematic Reviews of Diversity & Anti-Bias Training \(2022–2024\).](#)

[PMC Article \(here\)](#), [Population Review \(here\)](#) and [ScienceDirect Article \(here\)](#)

Inclusive teams
=
the engine for
lasting impact

INSPIRING CHANGE: EXAMPLES FROM THE WIDER SECTOR



Spotify Supporting creators' well-being

Through Heart & Soul, Mental Health for Creators, Spotify is deepening its commitment to the well-being of artists, songwriters, and their teams. This global effort isn't a campaign – it's a lasting, 360 commitment to the people behind the music. In 2025, we partnered with leading organizations that provide mental health and wellness support to the music community—including Backline, MusiCares, Music Health Alliance, Music Minds Matter, and Noah Kahan's The Busyhead Project. Together, we are expanding access to care, funding therapy grants, and helping launch a multilingual global resource hub to make support easier to find worldwide.

We are also meeting artists in the spaces they work and perform with wellness activations and self-care tools. And we're normalizing mental health conversations as part of creative life across Spotify for Artists, an on-platform hub, and songwriter gatherings.

“Artists and songwriters face immense pressure, and their mental health can't be an afterthought. Supporting creators' well-being is essential to sustaining a vibrant music ecosystem.”

Lauren Siegal Wurgaft, Spotify's Head of Social Impact.



SonoSuite Driving inclusive leadership

At SonoSuite, we believe that fostering inclusive leadership is key to long-term growth and innovation. This year, we took a decisive step by establishing a new Growth & Market Strategy branch, led by Henriette Heimdal, an experienced industry professional. Her appointment as Chief Commercial Officer reflects our commitment to broadening the perspectives that guide our strategy, while opening new pathways for female leaders to thrive at senior levels.

Our leadership team is close to gender parity, with women currently representing 42% of our senior management positions. Across the company, we have already achieved full gender parity, with women making up 50% of the team, ensuring that diversity remains a living reality rather than an aspiration.

For SonoSuite, equity, diversity, and inclusion are not isolated initiatives but the foundation of our company culture. By creating space for women to lead and by embedding inclusive practices in everyday decisions, we aim to contribute to a music industry where female voices and leadership are visible, valued, and empowered.

“We continue to prioritize attracting female talent, which remains a significant challenge in our industry, and supporting them once they join, with a focus on professional development, career progression, and the balance between personal and working life.”

Francisca Carreno, Chief People Officer, at SonoSuite

INSPIRING CHANGE: EXAMPLES FROM THE WIDER SECTOR

Saffron



Saffron is a pioneering non-profit organisation addressing the stark gender imbalance in the music technology sector, where fewer than 5% of professionals are women, non-binary or trans, and less than 1% are people of colour.

Founded in Bristol in 2015, Saffron creates safer, more inclusive spaces for underrepresented people to learn, create and connect through its music production, sound engineering, DJing and radio programmes, as well as global membership, artist development initiatives and independent record label.

Over the past decade, Saffron has supported thousands of creatives, helping to build visibility, confidence and career pathways that challenge systemic inequities across the industry.

“At Saffron, we believe music technology is a powerful tool for self-expression and agency. By equipping underrepresented communities with access, skills and platforms, we’re not just rebalancing representation - we’re reshaping the cultural landscape,”
founder Laura Lewis-Paul.

REVAMP OF IMPALA'S BOARD SECOND REPRESENTATIVE PROGRAMME

IMPALA's Equity, Diversity & Inclusion (EDI) task force suggests considering concrete diversity criteria when choosing a second representative, which are shared as inspiration to promote diversity.

APPOINTING A SECOND REPRESENTATIVE IS AN OPPORTUNITY TO BRING IN FRESH IDEAS AND PERSPECTIVES:



Fresh thinking

New ideas & creativity



Future leaders

Preparing the next generation



Inclusive representation

Making sure all voices are heard and valued

The IMPALA EDI taskforce suggests the following optional diversity criteria to inspire your choice of second representative.

GENERATIONAL DIVERSITY

Consider professionals at different stages of their career

GENDER BALANCE

Encouraging balanced gender representation incl. LGBTQ+

BACKGROUND, EXPERIENCE & NEURODIVERSITY

Welcoming non-traditional pathways & innovation

CULTURAL, ETHNIC & GEOGRAPHIC DIVERSITY

Reflecting regions, languages, religious, ethnic or cultural backgrounds

DIVERSE PROFESSIONAL ROLES

Bringing in expertise from diff. fields marketing, legal, digital, etc.

COMMITMENT TO INCLUSION

Interest in collaboration and EDI

These suggestions are here to help spark ideas as we believe that every new voice strengthens IMPALA.

We encourage members to think about who within their organisation could bring a fresh perspective and contribute to building a more inclusive, forward-looking community together.

TRAINING FOR MEMBERS

As part of our ongoing commitment under the IMPALA EDI Charter, we continue to provide free training opportunities for members, with the aim of raising awareness, fostering reflection, and encouraging concrete action.

Building on the feedback gathered in recent years, our training programme now focuses on shorter, more practical panel discussions, with authentic voices at the centre of the discussion. As a new addition to this format, we launched a new on-demand training platform as part of the EDI toolkit, co-funded by the EU network grant.

In 2024–25, we organised two online panel discussions:



IMPALA Changemaker Award Panel with Leon Diop (December 2024) – A conversation with Leon Diop, founder of Black & Irish and recipient of this year’s IMPALA Changemaker Award, moderated by taskforce co-chairs. Members had the opportunity to hear first-hand about Leon’s work and engage directly in a Q&A.

Watch the recording of the session [here](#).



Ben Wynter, EDI task force co-chair

“Our goal is to create training that is both inspiring and actionable. By inviting voices like Leon’s, we connect members directly with lived experiences that make the issues real and urgent.”



IMPALA EDI Roundtable: “Amplifying voices – supporting LGBTQ+ musicians in the face of discrimination” (May 2025) – A closed, invitation-only roundtable addressing the challenges faced by LGBTQ+ artists in Europe. Speakers and members explored how the industry can move from reactive responses to proactive strategies, with a focus on practical, sustainable solutions. Find out more [here](#).



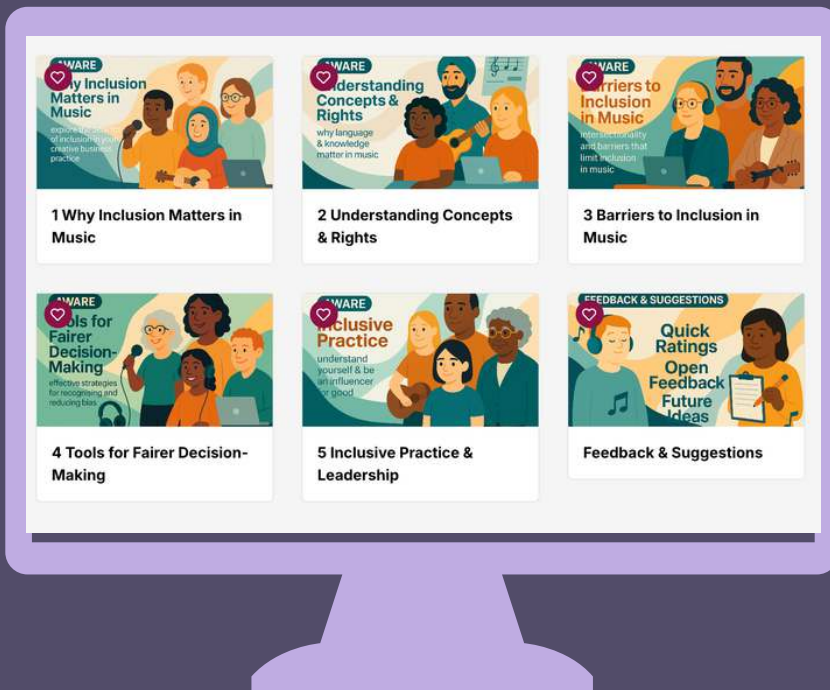
Lana Culig
Aquarius Records/RUNDA

“This roundtable offered a vital space to listen, reflect, and share experiences around the challenges LGBTQ+ artists face. By centring authentic voices, we are reminded that real change begins with dialogue and collective responsibility across our sector.”

IMPALA EDI TRAINING PLATFORM

A major milestone this year has been the launch of IMPALA's online training platform, funded by our EU network grant. This platform marks a new chapter in our training programme:

- **On-demand and flexible:** members can access resources anytime, at their own pace.
- **Practical and tailored:** content includes case studies, tips, and adaptable tools that organisations can integrate into their frameworks.
- **Linked to the EDI toolkit:** training modules will be connected directly to the new self-assessment tool, ensuring that members are guided to the most relevant resources for their identified priorities.
- **Growing resource:** the platform will expand over time, with new modules and updates reflecting the evolving challenges and opportunities around EDI in the music sector.



The platform's first pilot edition features 5 courses with a total of 43 lessons, each lasting around one hour.

Designed for accessibility, the courses include visuals, audio, videos, flashcards, and quizzes, and each concludes with a 30-minute assignment.

A feedback survey is live on the website, with additional topics to follow. Member feedback will be key in shaping future content.



Roger Dorresteyn,
Managing Director,
Epitaph Europe

“Striving for Equity, Diversity, and Inclusion (EDI) is more than applauding a written charter, more than appointing a Diversity VP. EDI involves everyone’s daily work, one every level. Impala’s mission has been to identify where we stand as a music sector and offer practical levers to initiate real change. Impala’s EDI toolkit is an essential step forward. Let’s get to work.”



Sophie Netter, AIM UK

“Connecting the training directly to the EDI toolkit means members can identify their priorities and immediately access the most relevant guidance. It makes the learning experience more focused and practical, helping organisations build real momentum in their EDI journey.”

IMPALA'S EDI TOOLKIT - INTERVIEW WITH THE DEVELOPERS

A conversation with Andrew Lansley and Vick Bain on the launch of IMPALA's new EDI Toolkit.

IMPALA has launched a new **EDI Toolkit** for members, combining self-assessment and training in one. Co-funded by the EU, this pilot project aims to benchmark progress across the music sector. We spoke to the two developers behind the toolkit – Andrew Lansley (self-assessment tool) and Vick Bain (training platform).



Andrew Lansley

Andrew Lansley is a project lead for the Green Events Code of Practice Pilot in the UK, testing progressive live event policies. He applies his research and policy expertise as Innovation Manager for Cheltenham Festivals, Senior Academic at the University of Gloucestershire, and consultant for Attitude is Everything. A trustee for Youth Music and Global Local, he also plays double bass in Thrill Collins as a proud AIM member. With almost 30 years' experience across culture, events, academia and politics, he leads intersectional, regenerative projects in the UK and international collaborations. www.andrewlansley.org



Vick Bain

Vick Bain has nearly 30 years' experience in the creative industries across leadership, consultancy, research and advocacy. Former CEO of the Ivors Academy, she is now a freelance music business consultant with clients including UK Music, AIM, IMPALA and the Association of Independent Festivals. She is completing a PhD on women's careers in music at Queen Mary University London, lectures widely, and founded The F-List for Music. Vick is also a Fellow of the RSA, a Companion of LIPA, and a Past President of the Independent Society of Musicians. <https://vbain.co.uk/>

Q: What is the idea behind the EDI Toolkit?

Andrew: The aim is to give members a clear picture of their current EDI practices and where they can improve. The self-assessment tool is integrated into the IMPALA EDI survey, so members can evaluate themselves while contributing to our wider sector snapshot. It will generate instant feedback and help organisations track progress over time.

Vick: And that's where the training platform comes in. Once the members understand their strengths and priority areas, they need practical support to make progress.

The platform, launched in September 2025, offers five short courses packed with music industry resources and case studies, all linked directly to the results of the assessment tool. It's about turning awareness into action. As this is still a pilot, we are actively inviting ideas and suggestions for future courses and so there's even a simple feedback feature built in on the training platform. This way, the next stage will be guided by what members most want and need.

IMPALA'S EDI TOOLKIT - INTERVIEW WITH THE DEVELOPERS

Q: How is this different from other diversity tools?

Andrew: Most available tools are very corporate and not adapted for our sector. This one is designed by music industry experts for music companies of different sizes, from self-releasing artists to small-medium size labels.

It's confidential, accessible, and linked directly to the IMPALA EDI Charter, so it speaks the language of our members.

Vick: Also, it saves money. External training and consultancy can be prohibitively expensive. By providing these resources for free, we make sure every member can access high-quality guidance, no matter their size or budget.

Q: What can members expect in practice?

Andrew: Once members complete the assessment, they'll receive instant results: what they're doing well and where they could do better. That feedback will be confidential, and anonymised results will feed into IMPALA's sector survey to help shape collective strategies.

Vick: At the same time, the toolkit will automatically signpost relevant training from the platform and to other relevant external resources. So, if for example, the tool shows that an organisation needs to improve inclusive recruitment, they'll be directed straight to guidance and resources that can help.

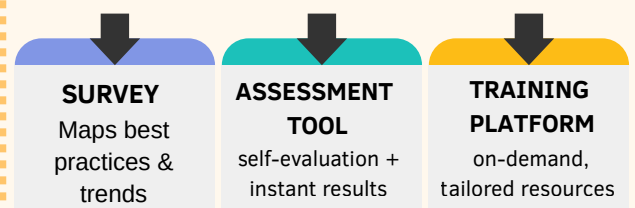
Q: What's the bigger picture?

Andrew: It's about benchmarking progress. By combining quantitative and qualitative data, we can help members prioritise resources and take a strategic approach.

Vick: Ultimately, the toolkit sets a new standard for the music industry. It's practical, it's collaborative, and it's designed to move us all forward together.

How the EDI toolkit works

3 core elements:



Benefits for members



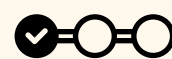
Bespoke design for music companies



Confidential and free to access



Tailored feedback + training links



Tracks progress over time

Benefits for IMPALA



Aggregated data for sector-wide insights



Stronger evidence base for EDI Charter



Sets benchmark across the industry

COLLABORATION ON MESSAGING, SUPPORTING HUMANITARIAN ORGANISATIONS



IMPALA has launched a very small new EU-funded scheme to collaborate on joint messaging on equity, diversity and inclusion (EDI) and sustainability across the music sector. Part of IMPALA's work as a recognised EU cultural network, the scheme collaborates projects already delivering meaningful change by working together to amplify shared messaging.



IMPALA aims to boost common messaging and show how the independent sector can lead by example. Timed with milestones such as European Diversity Month and EU Green Week, this work also boosts visibility and mobilises wider action.

Each year, we will work with two initiatives. The EDI task force will select one project through IMPALA's Changemaker Award, spotlighting innovative work advancing equity and inclusion across Europe. In parallel, the sustainability task force will also work with a project tackling environmental challenges in the music ecosystem.



IMPALA has a Humanitarian scheme. This includes putting in place an arrangement with broad reach aid organisation(s) as part of our corporate social responsibility (in the same way as we compensate for our carbon emissions through Murmur).

Contributing to the work of aid organisations dealing with multiple crisis situations in the world is part of helping our sector develop capacity in a sustainable and responsible way.

This year, we partnered with the two humanitarian organisations UNICEF and Médecins Sans Frontières, following the advice of the responsible working group.

IMPALA CHANGEMAKER AWARD

The Changemaker Award is an annual initiative that honours projects and organisations dedicated to driving meaningful change and fostering a more inclusive environment within the music industry. This recognition highlights the vital work being done to ensure that marginalised voices are heard and supported across communities. Each year, IMPALA members nominate outstanding initiatives, and the final selection is made by IMPALA's EDI task force.



Winner 2025: MEWEM

In May, IMPALA revealed MEWEM as the recipient of its revamped Changemaker Award. A pioneering mentoring programme that supports women and gender minorities, including female, trans, and non-binary talents, encouraging them to become entrepreneurs and to increase representation within the music industry.

The programme is currently operated through two national branches, MEWEM Germany, organised by VUT and Initiative Musik, and MEWEM France. Originally founded in Berlin in 2015 by VUT under a different name, MEWEM was launched by FÉLIN in 2018. The project expanded across Europe between 2020 and 2022 with MEWEM Europa, a transnational mentoring programme that built on MEWEM's successes in France and Germany. It created synergies and brought together partners including MIM – Mujeres de la Industria de la Música in Spain (a fellow 2025 Changemaker nominee), WBI – Wallonie-Burxelles International (Belgium), MICA – Music Austria and Raw Music (Romania).

More Changemakers

- 2025**
- [Musik Für Alle](#)
 - [Come Play With Me](#)
 - [SoAlive Music Conference](#)
 - [FMB 2019](#)
 - [Mimmi Label](#)
 - [Finesse Foreva](#)
 - [Black Lives in Music](#)
 - [White Hut Studios](#)
 - [Black Funding Network](#)
 - [The Midi Music Company](#)
 - [Saffron](#)
 - [MIM](#)
 - [Small Green Shoots](#)
 - [Ezra Collective Foundation](#)
 - [Rafael Serrallet](#)
 - [SheCanPlay](#)
 - [My City, My Voice](#)
 - [Another Life](#)
 - [La Gustav](#)

Previous Winners

2024

- [Black and Irish](#)

2023

- [Women in CTRL](#)

2022

- [POWER UP](#)

MEWEM creates a network that connects emerging professionals (mentees) with experienced mentors across all areas of the music industry. The programme addresses the challenges of diversity and underrepresentation in leadership roles, while also tackling structural precarity by fostering sustainable careers and long-term professional and personal development.

From the Mentees

"For me, MEWEM was and is a program that has positively influenced not only my career path, but also my perception of the music industry and my self-perception as part of it, and will continue to do so through the network I have built up. I am incredibly grateful that I was able to have this experience" -

MEWEM Germany Mentee



"MEWEM's impact on the industry is significant. I'm convinced that, in the long term, we'll see powerful changes in the music industry. MEWEM makes the industry more human" - Sarah Gaeesler, MEWEM France Mentee

"I came looking for tools and networking, but I found so much more: a real community, sincere exchanges and a new impetus in my entrepreneurial journey" -

Margot Fouks, MEWEM France mentee



"The program absolutely exceeded my expectations. The exchange with the mentees and mentors was truly more than I could have imagined. I believe the program can really help every FLINTA+ move forward and empower us to affirm ourselves" - MEWEM Germany Mentee

100 ARTISTS TO WATCH 2025

IMPALA's 100 Artists to Watch showcase award scheme, in partnership with YouTube, continued in 2025, co-funded by the EU. The programme was revamped this year and supported by a dedicated campaign, highlighting Europe's rich diversity of emerging independent talent. Each Spring, members nominate artists recognised for diversity, innovation, and commercial success. Check out our dedicated webpage to read each artist's card. Listen to the full 100 playlist here.



Dan Chalmers, Head of Music Youtube EMEA

“At YouTube Music, we’re proud to continue our collaboration with IMPALA on the 100 Artists to Watch initiative. This award is not just about recognising emerging talent, but about supporting the future of music itself. Independent labels and artists are the driving force behind innovation and cultural evolution, and we are committed to amplifying their voices. Through our long-standing Friends partnership with IMPALA, we’re helping to ensure these artists have the platform, tools, and visibility to reach audiences worldwide. The 100 Artists to Watch programme is a powerful reminder of the diversity, creativity, and resilience within the independent music community. Together with IMPALA, we celebrate and support the next generation of music pioneers, fostering an environment where independent voices can thrive and lead the way forward.”

IN THE SPOTLIGHT: ASSOCIATIONS

In this section we highlight best practices from IMPALA members -associations and companies-driving equity, diversity, and inclusion in the independent music sector. From grassroots projects to industry-wide collaborations, these initiatives showcase how our network is working to support underrepresented communities and build a fairer, more inclusive music ecosystem.



AIM remains committed to advancing diversity, equity, and inclusion (EDI) within the UK music industry. Through strategic partnerships and initiatives, AIM helps ensure the independent music community continues to foster a more equitable and inclusive environment. These efforts focus on creating meaningful change and opportunities for underrepresented groups. Key projects and collaborations include:

Amplify Apprenticeship Scheme: Partnership with Amazon Music and Women In Ctrl offering opportunities for underrepresented talent. Second year announced for 2025.

Power-Up Initiative: Led by Ben Wynter (EDI task force co-chair) and PRS Foundation with AIM support to uplift Black musicians and professionals. AIM provides benefits, resources, and speaking opportunities for participants.

UK Music's 'Five Ps' & 'Ten-Point Plan': AIM helps drive diversity and inclusion by supporting these key initiatives and guiding members on implementation.

UK Music Diversity Workforce Survey: AIM contributes annually via UK Music's Diversity Taskforce.

Partnership with She.Said.So: Collaboration to empower underrepresented communities through knowledge-sharing and networking.

Music Week's Women in Music Awards: AIM and UK Music are key partners. Gee Davy introduced a new 'Entrepreneur' award (2022). In 2024, Esta Oram joined the steering group alongside Gee.

AIM team and board DEI survey: AIM audits its board and team to better understand and address under-representation, feeding anonymised data into wider DEI improvements.

AIM EDI Working Group: Relaunched in 2024, chaired by Áine Markey (Blue Raincoat). Supports members with DEI best practice through information, advice, and training. Led by Nina Radojewski and Sophie Netter.

UK Music Diversity Taskforce & IMPALA EDI Working Group: AIM actively participates, sharing best practice. In 2025, Ben Wynter became Taskforce co-Chair and contributes expertise through IMPALA webinars, reports, and board updates. Sophie Netter also participates.

IN THE SPOTLIGHT: AIM & DUP



Conferences: AIM integrates DEI across all conferences, ensuring diverse speakers, topics, and access. DEI-specific panels in 2025 included:

- Beyond the M25 (AIM Sync)
- Regions, Nations, Legacy (Ammo Talwar)
- Creative Leadership (Women in Music Award winners)
- Future Independents

Regional Roundtables: Initiated in Manchester (2022), expanded to Liverpool and Bristol in 2025 by Gee, Ben, Nina, and Sophie to support local music scenes, including DEI needs.

Cre8ing Vision: AIM sponsors this not-for-profit, giving young people access to industry insights via the Ultimate Seminar, A&R Focus Sessions, and Industry Takeover days.



Danish Independent Record Companies

Code of conduct for equal access and wellbeing

Through Musiklivets Partnerskab for Bæredygtig Udvikling (The Music Life Partnership for Sustainable Development), the Danish music sector has developed a Code of Conduct aimed at ensuring equal access, wellbeing, and inclusion across the industry. This initiative provides a shared framework to promote respectful, fair, and inclusive environments for all music professionals. Find more information [here](#).

Industry standard for safe work communities

A coalition of music professionals has also launched the Industry Standard for Safe Work Communities (Branchestandard for trygge arbejdsfællesskaber). This standard outlines sector-wide guidelines and commitments designed to foster safe, supportive, and inclusive workplaces. It provides practical tools and shared expectations that organisations can adopt to raise standards of equity, diversity, and wellbeing across the music industry. Find the standard document [here](#).

Collective commitment

At an international level, Danish stakeholders, including DUP, have joined the Industry Standard to further embed these principles into practice. This collective commitment reflects a broader cultural shift in the sector towards creating sustainable, inclusive, and safe working environments. More information: [Commitment Document](#)

IN THE SPOTLIGHT: FÉLIN & INDIESUISSE



French Federation of Independent Labels and Distributors

Commitment to gender parity in governance

FÉLIN has formally embedded gender parity objectives in its 2025 statutes, ensuring diversity and inclusion are anchored at the structural level of the association.

Active support for mentorship & women's leadership

Through its continued participation in MEWEM - represented by Céline Lepage on the Board of Directors - FÉLIN contributes to mentoring initiatives that empower women and foster equitable leadership in the music sector.

Visibility & representation in communications

The association integrates EDI principles into its communication strategy, actively promoting women's visibility across its platforms and highlighting role models within the industry.

Advocacy & sector awareness

- Publication of the article "Les femmes dans l'industrie de la musique" for International Women's Rights Day, raising awareness of systemic challenges and solutions ([link](#)).
- Public advocacy for mentoring and inclusive initiatives through an interview at the Ministry of Culture's Forum "Entreprendre dans la Culture" ([video](#)).



Association of Swiss Independent Music Labels & Producers

More diverse board representation

For the first time in its history, IndieSuisse has achieved a more diverse board composition. At the latest General Assembly, four new members were elected: Caroline Edwards, Hilke Ros, Léa Aimée Birrer, and Margot Voisin. Their election means the board is no longer white male dominated, marking a significant milestone for equity, diversity, and inclusion within the association. The board now consists of President Andreas Ryser, Vice-President Chris Wicky, alongside Christian Fighera, Fabienne Schmuki, Marlon McNeill, and the four newly elected members.

SPOZZ: fair and inclusive music platform

[SPOZZ](#) is a new platform from Switzerland designed to empower artists and fans through direct licensing, fair pricing, and instant payouts. By removing intermediaries and offering exclusive content, SPOZZ creates a decentralised, transparent, and accessible music ecosystem - owned by artists and powered by fans. Find their manifesto [here](#).

IN THE SPOTLIGHT: STOMP

The logo for STOMP, featuring the word "stomp." in a lowercase, yellow, sans-serif font on a black rectangular background.

Dutch Association of Independent Music Producers

STOMP Development Team

Founded four years ago, the STOMP Development Team was established to promote diversity and support the growth of young industry professionals within the Dutch independent music sector. While the STOMP board focuses on management-level strategy, the Development Team addresses day-to-day topics such as diversity, mental health, social media, marketing with DSPs, and data analysis.

As a junior advisory board, the team is made up of young independent music professionals with limited board experience, ensuring fresh perspectives. The chair of the Development Team holds an official seat on the STOMP board, providing a direct link for input and advice. The team has a strong emphasis on gender balance and currently maintains at least 50% women members.

The Development Team runs workshops, contributes to the expansion of STOMP events, collaborates with universities, and presents its own annual STOMP Young Achievement Award.

Collective Responsibility

In August 2025, STOMP's Kees van Weijen participated in an [Entertainment Business panel discussion](#) on diversity and inclusion in the Dutch music industry, held in Hilversum. The panel was moderated by a member of [The Mental Crew](#) and included representatives from NVPI, Blue Skies Publishing, Avalon Music, and BMG, exploring key challenges and opportunities for greater inclusion across the Dutch music landscape.

The discussion concluded that:

- diversity leads to mutual **curiosity, empathy, and stronger connections**
- inclusion still has **limits at leadership levels**
- broader and **more diverse talent pools** lead to a more varied workforce
- the industry lacks **comprehensive data** on diversity
- EDI is a shared, **industry-wide duty**, not just an internal HR issue

“The question is, what’s the current situation? Do we have data? How many people work in these companies, and what’s the ratio? Only if we know where we stand can we measure real progress one, two, or five years from now.”



Kees van Weijen,
President, STOMP

GEOGRAPHICAL UNDERREPRESENTATION & DIVERSITY



Bridging the Gap: Systemic Exclusion of South-East European Artists from the EU Music Ecosystem

A new report by Bulgaria's SoAlive Music Conference and Flat Line Collective, the record label by artist Ruth Koleva, sheds light on the stark underrepresentation of South-East European (SEE) artists in the European music industry. The report highlights the damaging creative, cultural and financial implications of neglecting SEE artists, and explores why such a territorially vast, populated and culturally rich area is nearly invisible on the European music map.

Despite the EU's values of inclusivity and cultural exchange, the Balkan (South East European) region - which encompasses over 55 million people across Albania, Bosnia and Herzegovina, Kosovo, Montenegro, North Macedonia, Serbia, and EU member states Romania, Bulgaria, Greece, Slovenia, and Croatia - faces fundamental barriers to participation in major music festivals, digital platforms, and funding initiatives. At a time when Europe advocates for inclusion and equality, the Balkans' systemic ostracisation perpetuates harmful stereotypes and weakens regional solidarity.

Beyond the wealth of creative talent on offer, the Balkan region is among the fastest growing global music markets, making it a valuable untapped market.

The Bulgarian music industry grew by 44% in 2023 - the highest growth of any European country last year [source IFPI Global Report 2023].

Key findings from the report include:

- ❖ Major showcase festivals like The Great Escape, WOMEX, ESNS and JazzAhead have repeatedly excluded artists from the Balkans, citing "limited applications" and "quality" issues, despite evidence of robust submissions.

- ❖ SEE artists made up just 0.6% of acts across 6 major EU showcase festivals in 2025. Of 1,731 artists across festivals like Reeperbahn, Tallinn Music Week, Womex, Jazz Ahead, Linecheck and The Great Escape, only 11 were from the SEE region, highlighting stark underrepresentation compared to the rest of Europe.

- ❖ Selection processes for prominent festivals are heavily influenced by Western European gatekeepers, with SEE applicants facing language requirements and other barriers.

- ❖ The disparity in musical equity between the Balkans and the rest of Europe is underscored by a disregard for the diverse music genres evolving within the SEE countries, such as jazz, synth, indie and electronic.

GEOGRAPHICAL UNDERREPRESENTATION & DIVERSITY

- ❖ Streaming platforms like Spotify lack regional curators for the Balkans, causing Balkan artists to be virtually absent from editorial playlists and heavily disadvantaged by the 1,000-stream monetization threshold.

- ❖ Financial and structural challenges, compounded by biases in agency practices, hinder SEE promoters and artists from accessing equitable opportunities.

- ❖ There is a lack of well-established music export offices in the SEE region, with only a handful currently operational (such as Kosovo, Croatia's We Move Music, Slovenia's unofficial SIGIC, Serbia Creates, Bulgarian Music Association).

- ❖ Between 2014–2020, SEE countries secured 36.7% fewer Creative Europe music projects per capita compared to a group of similarly populated Western/Northern countries.

In addition to exploring the root causes of this underrepresentation, such as deep-seated stereotypes and cultural biases, the report offers data-driven recommendations to foster more balanced representation and address these disparities.

Proposed actionable steps towards change within the media, policymakers and industry leaders include:

- ❖ Reform festival selection - Update the selection processes to reduce language and barriers and cultural biases.

- ❖ Appoint regional curators on digital platforms - With an understanding of the unique music ecosystem of the Balkans.

- ❖ Strengthened music export support - Expanding EU funding and fostering collaboration among regional music export offices to better support local artists.

- ❖ Expand funding for music export initiatives - And support the development of music export offices in SEE countries.

- ❖ Expand mobility funding - Increasing financial resources for SEE artists to participate in international showcases.

- ❖ Prioritise SEE representation in EU cultural programs - ensuring equitable access to Creative Europe and other funding opportunities.

Ruth Koleva, SoAlive Music Conference and Flat Line Collective Founder and lead author of the report said, “This report is more than an exposé; it’s a wake-up call. In an era when we strive for equality and representation, it’s unacceptable for the Balkans to remain sidelined. The EU’s neglect of this region leaves room for harmful stereotypes to persist and opens the door for external forces, like Russian propaganda, to exploit these gaps. The Balkans are brimming with talent, innovation, and creativity. It’s time the global industry recognizes and invests in this region—not as an afterthought, but as an essential pillar of Europe’s cultural diversity and future stability.”

With the release of this report, SoAlive Music Conference and Flat Line Collective aim to spark institutional change and amplify the voices of Balkan artists. Alongside platforms like SoAlive, showcasing 40 regional acts annually, and recent award nominations for acts like Bulgaria’s WOOMB, the region is proving its creative value on the international stage.

OUTSTANDING CONTRIBUTION AWARD

IMPALA's Outstanding Contribution Award continues to celebrate individuals whose work leaves a profound and lasting mark on the independent music community. Over the past year, two very different but equally inspiring voices have been honoured.



Horst Weidenmüller - K7! Music

In December 2024, the award went to Horst Weidenmüller, founder of !K7, recognising his vision, resilience, and long-standing dedication to the independent sector. In his acceptance, Horst underlined the importance of collective action in building a stronger and more sustainable future for independent music. His leadership, both as an entrepreneur and as a voice in wider cultural debates, has been instrumental in shaping the sector's growth and global influence.



Eva Karman Reinhold - SOM

On International Women's Day in March 2025, the award recognised Eva Karman Reinhold, co-chair of IMPALA's EDI Task Force. Five years on from helping launch the Task Force, Eva reflected on the progress achieved and the work still to be done. She emphasised that advancing equity and inclusion requires constant vigilance, collaboration, and the courage to challenge existing structures. Eva's contribution exemplifies how diversity and innovation are inseparable in building the future of the music industry.

Send your nominations

Looking ahead, IMPALA is reimagining the award to reflect the breadth and diversity of the community it serves. A revamped edition of the Outstanding Contribution Award will be presented in November 2025, aligned with this year's International Women's Day theme, "Accelerate Action". The new format will move beyond recognising one single individual to celebrate multiple winners, spotlighting a wider range of voices and achievements across the sector. This evolution is designed to boost representation, amplify under-recognised contributions, and make the award itself a platform for change.

Nominations are still open, and members are warmly encouraged to put forward candidates whose work embodies impact, innovation, and inclusivity. Please send all nominations to Rory - rbrown@impalamusic.org.

CREATING INCLUSIVE SPACES FOR LGBTQ+ MUSICIANS

COME
PLAY
WITH
ME

Insights and initiatives from Come Play With Me CIC

Come Play With Me is a UK-based organisation dedicated to giving LGBTQ+ musicians a platform, promoting inclusivity in the music industry, and supporting the wellbeing of artists through research, advocacy, and community-driven initiatives.

Most IMPALA members will be aware of the struggles faced as small/medium independent companies to succeed or sustain themselves - but challenges are often magnified for those unable to be their authentic selves in the workplace, as is often the case for LGBTQ+ individuals working in music.



Our LGBTQ+ Musicians Insights report, published in conjunction with Musicians Union / Help Musicians, surveyed 5,867 musicians working in the UK last year and found:

→ 1,090 participant musicians (18.5%) identified as LGBTQ+

→ 37% had experienced or witnessed discrimination based on sexuality whilst working as a musician

→ 44% had witnessed or experienced sexual harassment

→ 24% of trans respondents have been sexually harassed while 41% have witnessed it

→ 43% of LGBTQ+ musicians reported poor mental wellbeing and 30% poor physical wellbeing

→ there is a pay gap of around €4,610 less earned p.a. for LGBTQ+ musicians vs non LGBTQ+ musicians (that deficit is a shocking €11,530 for trans musicians/)

CREATING INCLUSIVE SPACES FOR LGBTQ+ MUSICIANS

We know that these difficulties are consistent in all music industry roles and often further exacerbated for those existing at multiple intersectionalities of other identities - i.e. those that are also Global Majority, neurodivergent, disabled etc.

Across Europe, worrying regressions have occurred in LGBTQ+ rights. As Katrin Huguendubel of ILGA Europe notes: “A coordinated global backlash [is] aimed at erasing LGBTI rights, cynically framed as the defence of tradition or public stability, but in reality designed to entrench discrimination and suppress dissent.”

Much can be done as allies to enable LGBTQ+ people to feel safe as their authentic selves in the workplace, whether as performers, industry professionals, audience members or employees.

Allyship can take many forms: creating safe, welcoming environments; understanding why pronouns and inclusive language matter; ensuring staff and audiences feel confident to constructively challenge transphobia or homophobia;

or reviewing policies which may inadvertently undermine inclusivity.

There’s extensive research to suggest that in most cases enabling people to be their authentic selves in the workplace not only creates happier workplaces, but also more productive ones!

So even if it feels there is little that you can do to help, just taking time to understand why someone with different protected characteristics to you may experience the world in a different way can make us all more empathetic humans - and this industry a more inclusive, trusting place.



Tony Ereira
Director
Come Play With Me CIC
Executive Committee
member, Reset!

WHY DIVERSITY MUST BE AT THE HEART OF STREAMING REFORM

What's at Stake

The consequences of inaction are clear. Genres with smaller but passionate audiences (jazz, classical, folk, regional traditions) may become economically unsustainable. Emerging artists from underrepresented cultures and languages will find it harder to gain visibility, as algorithms and monetisation systems funnel resources toward what already dominates. Listeners too will lose out: instead of discovery and surprise, the streaming experience risks becoming narrower, flatter, and less reflective of the world's richness. Music's value lies not only in scale but in its diversity. It is through diversity that music reflects different styles and identities, while connecting audiences across borders. Without it, the industry risks cultural homogenisation on a global scale and fails to be competitive.

"The streaming market is at a crossroads. The future path risks deepening inequality, where diversity is sidelined, and scale decides who gets heard. Urgent action is needed. We need a system that champions inclusivity, drives innovation and encourages discovery and circulation to ensure all music can thrive, not just the commercially dominant. Scale obviously matters, but it cannot be the only measure of success. Without diversity, we don't just lose culture; we limit audience choice, stifle artists, and hold back the businesses that sustain them."

Dan Fowler, industry expert and co-author



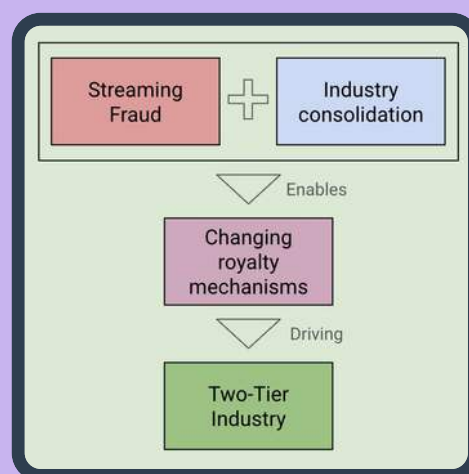
Bloomberg explores challenges for independent music in streaming, highlighting report with quotes from AIM CEO Gee Davy.



Industry expert Dan Fowler presenting the findings of his recent report at Indie Week New York's AGM.

WHY DIVERSITY MUST BE AT THE HEART OF STREAMING REFORM

In June 2025, IMPALA commissioned a report entitled "Combating the Emergence of a Two-Tier Music Streaming Market", authored by Dan Fowler and Katherine Bassett. Following the introduction of payment thresholds by Deezer, Spotify, Apple Music, and more recently, Amazon Music, the report warns of "a widening gulf between large rights-holders and independent actors, driven by market consolidation, opaque platform policies, and emerging monetisation practices that increasingly favour scale over diversity." This warning is more than a commercial observation: it is a cultural alarm.



A Commentary on Diversity

As Dan Fowler highlights in the report, the effects of a two-tier system are already being felt hardest by those working within non-mainstream, regional, and non-English repertoires: classical, jazz, traditional music, or regional language content. These musical forms often struggle for visibility and resources under the best of circumstances, but when de-monetisation thresholds, algorithmic boosts, and opaque pay-for-play tools tilt the playing field toward scale, they are the first to suffer. Fowler stresses that "cultural homogenisation is on the rise" and that "innovative creativity" risks being stifled in favour of what is easiest to scale. He also warns that generative AI is intensifying the problem by placing original creativity in competition with widespread imitation, raising the risk that music diversity could be actively and commercially suppressed. His research reminds us that diversity is not incidental, it is essential.

How Diversity Is Being Undermined?

The report sets out a number of mechanisms by which diversity is being structurally undermined:

- De-monetisation thresholds and royalty boosts that are stripping revenue from independent labels and niche genres, disproportionately impacting classical, jazz, regional and non-English repertoire.
- Pay for play-boost tools like Spotify's Discovery Mode, which extract revenue from artists while offering unclear benefits and limited transparency.
- Technology-driven pressures, such as the rise of generative AI and streaming fraud, threaten to devalue human creativity and siphon earnings from legitimate creators.
- The mass oversupply of music, driven by low barriers to entry and incentivised volume uploads, is contributing to dilution in royalty pools and weakening the market visibility and sustainability of legitimate creators.
- Subscription prices continue to lag behind inflation, despite some recent rises.

CONCENTRATED MARKETS: THE IMPACT ON DIVERSITY

Overview

Market concentration can cause economic imbalance in the music sector, but it also poses a direct threat to EDI values, as well as to cultural diversity more broadly. When dominant players consolidate power across key parts of the music value chain, it reduces opportunities for independent artists and smaller businesses to access the market, limits consumer choice, and stifles innovation. This undermines the diverse ecosystem that EDI efforts seek to protect and promote. As control becomes concentrated in fewer hands, the industry risks becoming less open, less representative, and less responsive to the wide range of voices and cultures that make up the music landscape in Europe.

Previous cases

The last time the EC looked at concentration in the recorded music market, it concluded that consolidation would likely result in higher licensing costs passed on to consumers, reduced innovation, and a decline in cultural diversity. It determined that digital services would face more disadvantageous terms, leading to fewer options for consumers and less support for emerging platforms. The EC also confirmed, as did the court in the Sony/BMG appeal led by IMPALA, that under the EC treaty and its commitments under the UNESCO convention on diversity of cultural expressions, the impact on cultural diversity must be assessed in each decision.

UMG/Downtown

Similarly, Universal Music Group's proposed acquisition of Downtown Music holdings is also going through an in-depth investigation into the effects of the transaction on competition, with Valdis Dombrovskis, Commissioner for Economy and Productivity; Implementation and Simplification stating, "*...Opening an in-depth investigation will allow us to assess more carefully whether this acquisition would have a negative impact on artists, labels and, ultimately, European consumers.*"

The acquisition would give UMG additional control over significant routes to market, digital services, and competitors' data and ultimately reducing access to market for independents and harming both cultural diversity and competition.

CONCENTRATED MARKETS: THE IMPACT ON DIVERSITY

Concerns from the wider creative sector

Concerns surrounding concentration and its impacts on the independent sector have been highlighted in op-ed pieces by leading independent music figures [Kees van Weijen](#), [Noemí Planas](#), [Ruth Barlow](#), [Dr Birte Wiemann](#) and [Helen Smith](#). Professor [Amelia Fletcher](#), former Chief Economist of the UK competition authority, as well as renowned artist and independent label co-founder, also raised issues in June this year in an [open letter](#). Many other parts of the sector have also spoken up on the topic, such as [authors and composers](#), [managers](#), [featured artists](#) and [independent publishers](#).

Impact on cultural diversity shown in reports

Similar concerns are echoed in the aforementioned IMPALA commissioned report "[Combating the Emergence of a Two-Tier Music Streaming Market](#)", by industry experts Dan Fowler and Katherine Basset. The authors identified "*...a widening gulf between large rightsholders and independent actors, driven by market consolidation, opaque platform policies, and emerging monetisation practices that increasingly favour scale over diversity*". These developments limit opportunities for independent voices and threaten the inclusive development of the music sector.

New work we have done in this area shows there is a direct line between concentration and a negative impact on cultural diversity, due to fewer resources leading to a reduction of releases, particularly impacting smaller genres and countries including non-English language music. We will be publishing the results soon, watch this space.

Risks to sector-wide progress on EDI

If the independent sector is squeezed by consolidation, this risks lowering the bar for the entire sector regarding EDI, as independents are leaders in this area. IMPALA believes these efforts are vital for growth, competitiveness, and cultural relevance. We continue to advocate for strong scrutiny of mergers and acquisitions by the EC to ensure that EDI, cultural diversity, and market access for small music businesses and emerging artists are protected and prioritised in all competition assessments.

OUR EDI TASK FORCE

These are the people that drive our work forward

(alphabetical order – chairs and adviser first):

1. Eva Karman Reinhold, Co-chair
2. Ben Wynter, Co-chair
3. Keith Harris OBE, Adviser to task force
4. Burak Tanyolaç, BMYD
5. Céline Lepage, FELIN
6. Ciaran Conroy, AIM Ireland
7. Dan Waite, Better Noise Music
8. Fabienne Schmucki, Indiesuisse
9. Francesca Trainini, PMI
10. Helen Smith, IMPALA
11. Jörg Heidemann, VUT
12. Kees van Weijen, STOMP
13. Lana Culig, Aquarius Records/RUNDA
14. Laureen Kornemann, VUT
15. Lina Burghausen, VUT
16. Luciano Winter, Stormi Capital/ STOMP
17. Mark Kitcatt, Everlasting Records
18. Nastasja Prévost, IMPALA
19. Roger Dorresteyjn, Epitaph
20. Rebecka Sjöström, Playground Records
21. Sophie Netter, AIM UK

IMPALA'S DIVERSITY ADVOCATES

List of IMPALA's diversity advocates

Executive Board – the co-chair of our task force acts as our diversity advocate Eva Karman Reinhold (SOM)

Committees and external groups

- Management committee – Eva Karman Reinhold, SOM
- Membership committee – Nastasja Prévost, IMPALA
- National association network – Eva Karman Reinhold, SOM
- Collecting societies committee – Francesca Trainini, PMI
- Digital committee – Dan Waite, Better Noise Music
- Emerging tech Group – Gee Davy, AIM UK
- Sustainability task force – Karla Rogozar, IMPALA
- EU projects committee – Nastasja Prévost, IMPALA
- Friends working group – Nastasja Prévost, IMPALA
- Copyright committee – Helen Smith, IMPALA
- Finance committee – Helen Smith, IMPALA
- Livestreaming committee – Gee Davy, AIM UK
- PR and awards committee – Roger Dorresteyjn, Epitaph Europe
- RAAP working group – Helen Smith, IMPALA
- Streaming committee – Francesca Trainini, PMI
- Touring committee – Helen Smith, IMPALA
- Vinyl pressing Group – Helen Smith, IMPALA
- WIN board members, European representatives – Jörg Heidemann, VUT
- Central and Eastern Europe, CEE group – Kees Van Weijen, STOMP

RESOURCES FOR MEMBERS

On our website, we continued to update our [equity, diversity and inclusion resources](#) to share best practices and references. IMPALA members can access guidance, training and more.

Quick links for IMPALA members

- IMPALA's [Charter](#)
- [EDI toolkit hub page](#)
- [Practical tips for members](#)
- [Guidance for associations](#)
- [Business case for being diverse and inclusive](#)
- [One pager](#) summarising our work
- "Towards a more diverse and inclusive independent music sector"- [Report](#)
- [Video message from Keith Harris](#)

News articles – some examples

- On International Women's Day, IMPALA's EDI Task Force Founder & Co-Chair Talks Of Her Work Five Years In - [Celebrity Access](#)
- IMPALA pilots Equity, Diversity and Inclusion toolkit for independent labels - [Music Week](#)
- Impala-backed project boosts industry in Central and Eastern Europe - [Music Ally](#)
- IMPALA presents Outstanding Contribution Award to Eva Karman Reinhold - [Music Week](#)
- MEWEM mentorship program wins IMPALA Changemaker award - [Music Ally](#)
- IMPALA presents 12 recommendations to boost revenues and diversity - [Creative Industries News](#)

CONCLUSION

REFLECTIONS FOR THE FUTURE

KEITH HARRIS OBE

ADVISER TO IMPALA'S TASK FORCE



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Seeing IMPALA's executive board underlining the importance of EDI work as a priority for the sector sends the right message at a time when EDI is being pushed into the background elsewhere. We must not lose sight of how easily these issues can slip down the agenda. I am also pleased to see how the second representative scheme is being revamped, this sends the right message and I hope it will produce results in due course.

The launch of IMPALA's new EDI toolkit is a major step forward, setting out clear and practical actions. By combining self-assessment, benchmarking and training in one place, it gives members a straightforward way to understand their position and concentrate on the areas where change will make the most difference.

Progress in this area is never immediately visible- it comes gradually, through steady and consistent effort. This report highlights once again a range of projects from across our industry that can guide and inspire us. The challenge now is to put the tools to use, to share our progress openly, and to keep up the pressure for a fairer and more inclusive sector. Just because some parts of society have started to slide backwards, it doesn't mean that we should not continue to keep our eyes focused on a better future. By doing so, we ensure that diversity is not treated as a side issue but recognised as central to the growth and success of our community.”