

BETWEEN BEATS, BYTES AND BEETHOVEN

What does a music publisher actually do?

“What does a music publisher actually do?”

This is a question my colleagues are often confronted with. It is not easy to give a short answer given the many tasks and musical styles we deal with on a daily basis.

The music publisher takes on a sensitive and often difficult task and advisory function in their role as discoverer, promoter and entrepreneur. Ideally, the shaping of cultural life and economic success are combined here.

In the following pages we briefly describe the most important functions of the music publisher. And after reading this brochure you will hear your favourite music with different ears...



Yours truly,
Dr. Axel Sikorski
DMV President



The music publisher as a
player in the music business



Figures, facts, data



Live music, recorded music,
in film and television...



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IN SHORT

Everyone knows what the tasks of a book publisher are, but very few people understand what a music publisher does. How do they differ from other players in the music industry, especially record companies (labels)? Just 30 years ago, the answer to the question “What does a music publisher do?” would have been: print sheet music. But in the course of time, the range of tasks has changed considerably.

Basically, it is the task of a music publisher to exploit and license the work created by authors (i.e. composers and lyricists). This distinguishes the music publisher from a label which primarily markets performers (singers, bands, orchestras etc.) and their recordings of the works created by the authors.

The music publisher discovers, promotes and supports authors and enables them to concentrate on the creative process. Music publishers relieve authors of the extensive administrative work associated with exploitation and licensing. They invest in new talent and accompany the entire cycle, from creating to exploiting a work (composition and text).



5 Facts about music publishers

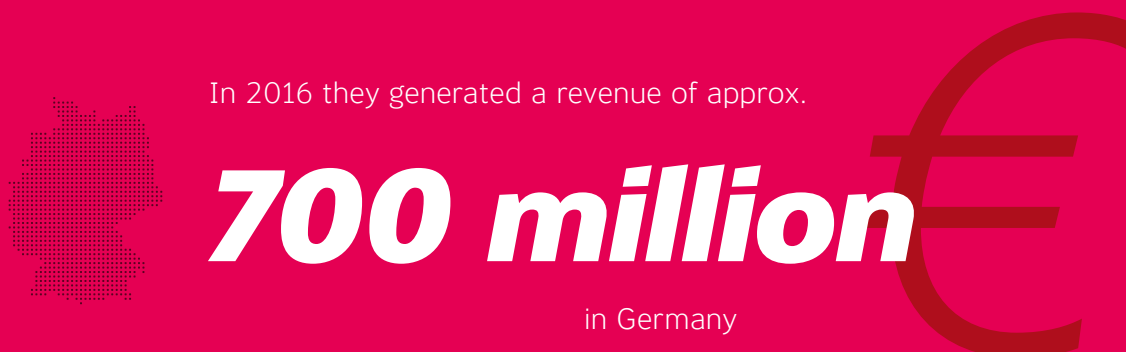
German music publishers represent over two million composers and lyricists worldwide.



They exploit over

21
million copyrights
worldwide

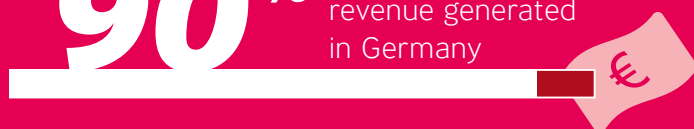
In 2016 they generated a revenue of approx.



DMV Deutscher
Musikverleger-
Verband e.V.
seit 1829

The association was founded in **1829** and is thus one of the oldest professional organizations in Germany.

The association represents
90% of all publishing
revenue generated
in Germany



since **1829**

IN SHORT

The overwhelming majority of music publishers today deal with the brokering and licensing of musical works for labels, films, TV productions, advertising etc., both offline and online, nationally and internationally. Among their business partners are radio stations, orchestras, theatres and concert stages, as the direct licensing of music for stage performances such as operas, ballet pieces, musicals and classical concerts also belongs to their range of duties. Another important area is administration for publishing partners, i.e. the processing of accounts and other administrative activities. Sheet music is still produced today, although not to the same extent as once was the case.

Digitalization is having enormous effects on the music industry. New business models are changing the market and redefining the role of authors, e.g. in terms of remuneration. This is most evident in the so-called “value gap”. This “gap in value creation” means specifically that authors are the ones that are far worse off than everyone else participating in the remuneration of music streaming services.

Music publishers represent the rights of their composers, lyricists and arrangers as well as the rights

of their international partners. In an age of new forms of exploitation that are increasingly difficult to control, it ensures that creative performance is still protected and adequately remunerated. They register the works of authors with collecting societies such as the GEMA and monitor their accounting statements. The tasks of the music publisher also include managing and advising the authors as well as prosecuting copyright infringements and protecting personal rights.

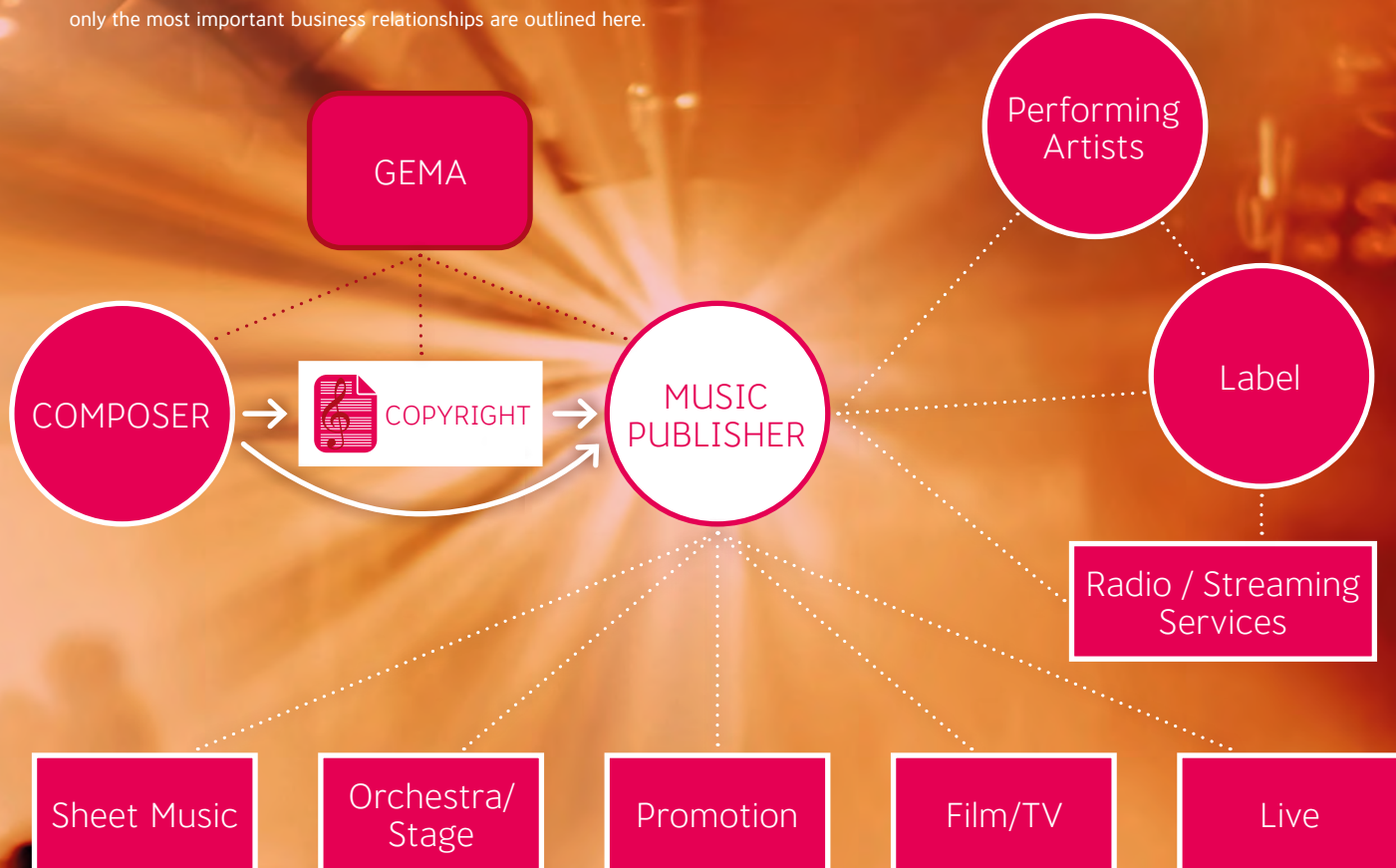
Music publishers know the market, i.e. the needs and wishes of music users, and have the competence to harmonize these with the creative potential of the individual artists and authors. They thus become an important multiplier in cultural and economic life, a link between the author on the one hand and the musicians, labels and music consumers on the other.

The tasks of the music publisher are varied and differ in the individual ways in which musical works are exploited. These are mainly the recording of music, digital exploitation, classical sheet music production, live performances, music in film and television productions as well as in advertising.

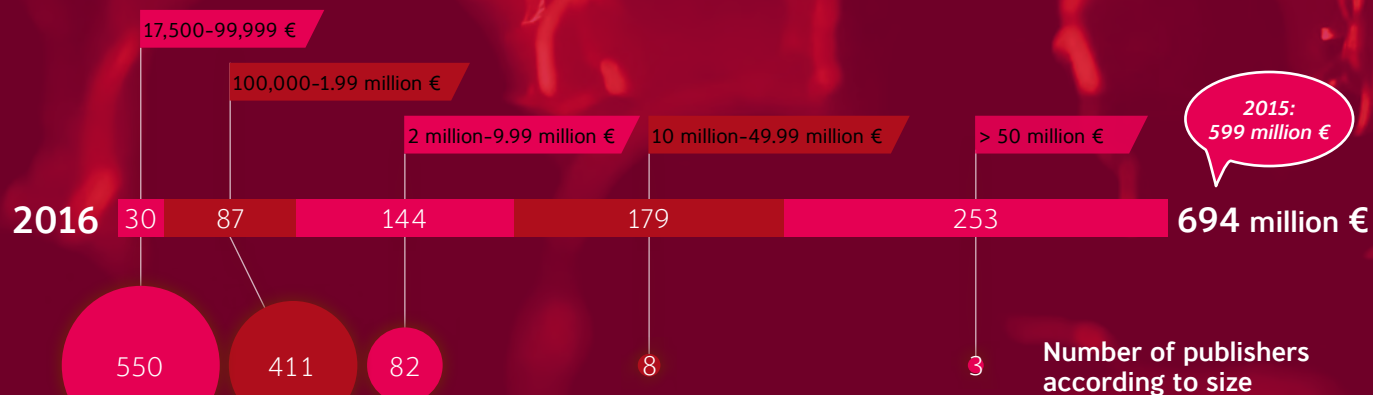


The GEMA, as a collecting society, is the most important economic partner of German music publishers and represents its members' claims to remuneration worldwide whenever their copyrighted musical works are used. Its three professional member groups, the so-called curiae, represent composers, lyricists and music publishers. There are currently approximately 72,000 GEMA members in Germany.

The music industry from the point of view of the music publisher: Who are they in contact with, what are the points of contact? The focus is on the publisher, the author and the work, accompanied by the GEMA. Of course, this overview cannot be complete, only the most important business relationships are outlined here.



Revenues of music publishers by sales in Germany



Source: DMV 2018



MUSIC

MUSIC PUBLISHERS & LABELS

When you listen to a song, a radio programme, a music stream etc., it is usually based on a recording of a work. Music publishers play an important role in the recording of musical works. They are involved in the crucial stages of the recording process, in close cooperation with the author, the performer, the producer and the label. The central figure is the so-called A&R-Manager (Artist & Repertoire) of the music publisher. He has the creativity, experience and know-how to turn the raw material of a work into a hit. With his feeling for trends, he ensures the correct connection of the individual components. He is in close contact with the record label, suggests suitable works of his authors to producers and performers and supervises the collaboration.

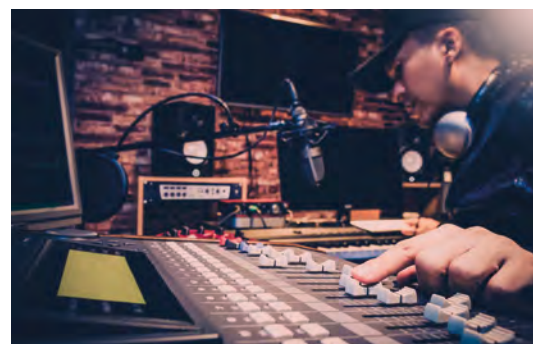
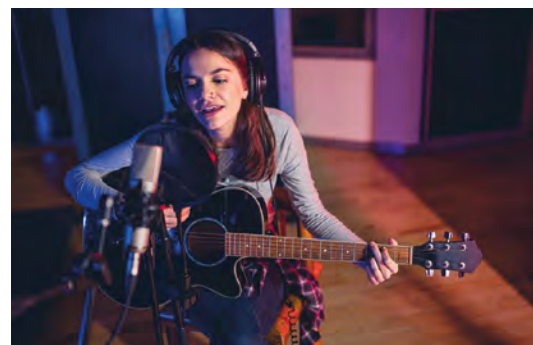


» With advances in the millions, the music publisher ensures that authors can fully focus on their creative work. «

When recording classical works (serious music), music publishers provide the orchestras and ensembles with the corresponding sheet music and take over the drafting of the licensing contract. They are also responsible for checking whether all types of exploitation are covered by the contract.

The authors (composers and lyricists) are the people behind the work. They rarely appear on stage and, in contrast to the performing musicians, singers, bands or orchestras, are often unknown. And so one of the main tasks of a music publisher is to have the works of its authors recorded by successful artists.

In addition to marketing their own authors to labels and performing artists, networking among authors is becoming increasingly important. Here, music publishers create the necessary environment for an exchange among authors. They organize so-called songwriter camps, in which creative people write songs together, often with specific tasks, i.e. for a specific performer or occasion.





MUSIC PUBLISHERS & DIGITAL MUSIC

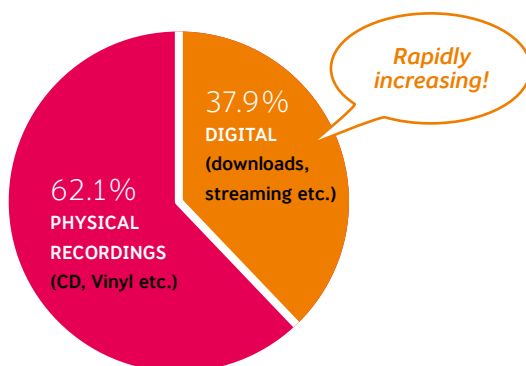
Since the introduction of the CD in the early 1980s, at the latest, digitization has had a major influence on the music industry. With the compression of music data in MP3 format, it became possible to share music on the Internet in large quantities. While this happened mainly illegally at first via peer-to-peer platforms, over time legal business models on a licensing basis were established. However, the authors were no longer treated equally in the implementation of these new business models. In this context, it was and is the task of the music publisher to ensure that get a fair share in the revenues. In addition, the music publisher must check whether there is any violation of copyright law in online use and take appropriate steps if necessary.

In addition, new licensing models must be developed and every new form of online use of music must be reviewed. Together with the collecting societies, tariffs must be drawn up and their accounting implemented, monitored and assigned to the corresponding authors. The number of potential digital licensees is constantly increasing.



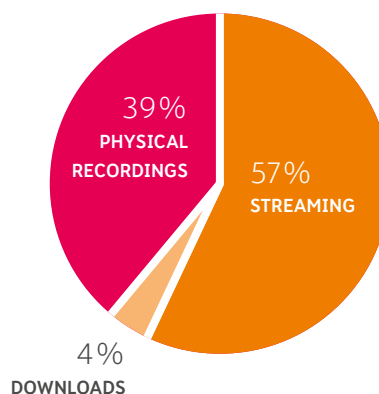
The Internet, especially social networks, offers undreamt-of possibilities for creative people and thus also for music publishers. Collaboration with other musicians and authors all over the world is suddenly possible from a studio at home. Online channels of all kinds offer new forms of marketing for all kinds of music, not just the mainstream, as is the case with linear mass media. In the meantime, marketing measures for artists and works involving opinion leaders in social networks, so-called influencers, have become the order of the day. The discovery of new talents has also been positively influenced by the possibilities offered by the Internet.

Sales shares from music sales 2016



Source: GfK/BVMI

Sales forecast 2021





MUSIC PUBLISHERS & LIVE BUSINESS



Performances of classical concerts, operas and ballets are unthinkable without sheet music. Accordingly, the extensive activities of the music publishers are particularly visible here. The music publisher often follows the path of a work from the very beginning: as a close partner of the composers, he arranges commissions for compositions, proof-reads and produces the printed editions or printed sheet music, and makes them available for the performances for a fee. Ahead of upcoming world premieres, he also makes the necessary corrections time and again.

*The professional orchestral landscape in Germany comprises as many as **130** publicly financed theatre orchestras, concert orchestras, and radio and chamber orchestras.*

*More than **9.500** events in the 2015/16 season attracted around **5.4** million visitors.*

Source: MIZ: Concert events and visitors of publicly financed orchestras

Most Performed Works 2016

(Source: GEMA)



POPULAR MUSIC

1. Atemlos durch die Nacht (original interpreter: Helene Fischer)
Composition and text: Kristina Bach | Publisher: Musikverlag Frankyboy, EMI Music Publishing Germany
2. Highway to Hell (original interpreter: AC/DC)
Composition and text: Ronald Belford Scott, Angus McKinnon Young, Malcolm Mitchell Young |
Publisher: BMG Rights Management
3. I sing a Liad for di (original interpreter: Andreas Gabalier)
Composition and text: Andreas Gabalier | Publisher: Edition Stall, Edition BMG Klanggold Drei



SERIOUS MUSIC

1. Carmina Burana
Composition and text: Carl Orff | Publisher: Schott Music
2. Peter and the Wolf
Composition and text: Sergei Prokofiev | Publisher: Musikverlag Hans Sikorski
3. English Folk Song Suite
Composition: Ralph Vaughan Williams | Publisher: Boosey & Hawkes Bote & Bock

At all other concerts, such as rock, pop, jazz, hip-hop, the music publisher is just as important, but less visible. The financing of concerts, the organization of showcases and the placement of artists at festivals are just a few examples of the music publisher's live activities. In 2017, 21.7 million people in Germany attended music events and 71.1 million tickets were sold.

The club scene is of fundamental importance for the creative musical ecosystem. Without a lively club scene, there would be no opportunities for up-and-coming artists to perform. Regardless of the musical style, the organizer pays a license fee to a collecting society for copyright-protected repertoire at every music event. In 2016, the GEMA received a total of 111.6 million euros for music events.

In connection with operas, ballets and musicals, however, the so-called Grand Rights apply: here, both the contractual licensing of the performance and the royalties are handled directly by the music publisher.



BEST CONCERT PROGRAMME OF THE SEASON

With the prize "Best Concert Programme of the Season" the DMV awards one orchestra every year for outstanding programming, including contemporary composers and education projects.



The Bamberg Symphony Orchestra, here with artistic director Marcus Rudolf Axt (centre), Dr. Axel Sikorski (right) and Bamberg's mayor Andreas Starke, received the award for the best concert programme of the 2017/2018 season.



MUSIC PUBLISHERS & SHEET MUSIC PRODUCTION

Since the 18th century, the production, reproduction and distribution of sheet music have been the classical core task of a music publisher. And even today, sheet music is indispensable in many areas when it comes to active music-making. For this reason, music publishers print sheet music materials. These include educational works for teaching, playing material for soloists and ensembles as well as editions for scholarly purposes. At present, more than 300,000 editions of sheet music are available for sale in Germany and about 7,000 new editions are added annually. Digital sheet music is increasingly complementing the classic print edition. In fact, the change in the music publisher's field of work is most noticeable in this area. Indeed, the share of the printed music business accounts for at least 10 percent.

*The DMV has been awarding the
German Music Edition Prize
"Best Edition" for outstanding
publishing achievements in
printed music since 1991.*





The production of sheet music for larger ensembles and orchestras, especially for stage works (operas, ballets) is particularly complex. In close cooperation with the composers, the music notation is prepared and edited. The finished printed material then consists of the score and voices for all the instruments and other parts such as piano excerpts or extensive choir vocals.

This music material for orchestra is not sold by the music publishers, but is rented out for a limited period of time. The main reason for this is that due to the expensive production, a purchase would be uneconomical for the orchestras or opera houses. Moreover, many works are performed only a few times during a concert or repertory season.



A musical foundation is indispensable for our culture and social life. That is why the advancement of active music-making is something that music publishers are particularly committed to.

9.5 million people in Germany regularly play an instrument.

Every third person between 9 and 24 years
plays an instrument.

1.4 million pupils are registered in public music schools.

Source: Music Information Centre (MIZ)

A photograph of a film set. A large, bright, rectangular light fixture is suspended from the ceiling by ropes. Several people, likely crew members, are visible in the background, some standing and some working. The scene is dimly lit, with the primary light source being the overhead fixture. A semi-transparent red banner is overlaid across the middle of the image, containing the title text.

MUSIC PUBLISHERS & FILM/TV PRODUCTIONS

The German film and television market is a large field for music publishers and their authors. In 2016, for example, GEMA's television revenues amounted to 171.6 million euros. In the past years, a lot of new stations, media libraries or video streaming platforms have been added. The demand for music is also growing continuously here. At the same time, the conditions in this massively changing market are often unclear to the authors.

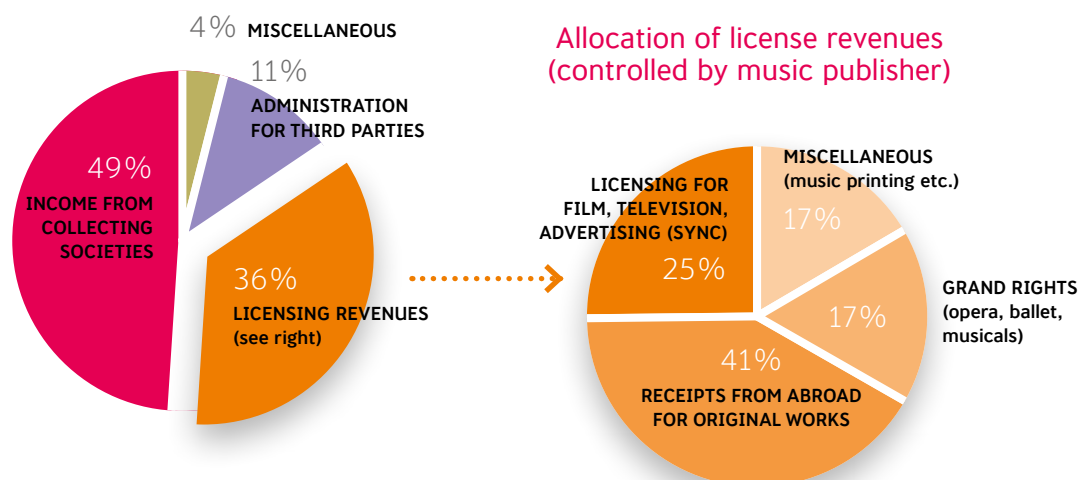
Music publishers are in the midst of this new playing field - in different positions: as representatives of film composers, as supervisors of individual television or cinema productions or as providers of music libraries that offer existing titles to broadcasters or production companies by means of an indexed catalogue. In order to place authors and works in film and television productions, music publishers take on the role of music consultants: they work closely with the director or producer of a film and advise on the selection of songs, the clarification of rights - the so-called sync rights - and the conception of the soundtrack.

Within the framework of film production, the music publisher supports their composers in many ways: in contract and budget negotiations with the film producer, in booking and cooperating with all kinds of ensembles (whether orchestras, big bands or soloists) and in the correct registration of the works with the collecting society. In 2016, GEMA's revenue in the television sector amounted to 171.6 million euros.

After completion of the film production another task of the music publisher follows: the registration of uses (monitoring) and the control of distributions (income tracking). This is an important activity in the complex evaluation network of a film at home and abroad by linear broadcasters or in the online sector. The music publisher works closely with monitoring service providers and sub-publishers abroad.



Revenue structure music publishers



Source: DMV 2018

MUSIC PUBLISHERS & ADVERTISING

Music in advertising has become an essential element for successful brand communication. Whether in advertising campaigns for sporting goods, car brands, fashion or other consumer goods: the right choice of music in a commercial ensures a high brand recognition value.

For many composers and lyricists who have given their works to a music publisher for exploitation, the licensing of their works in advertising campaigns has become an important part of their collaboration. The granting of usage rights generates (often high) license fees.

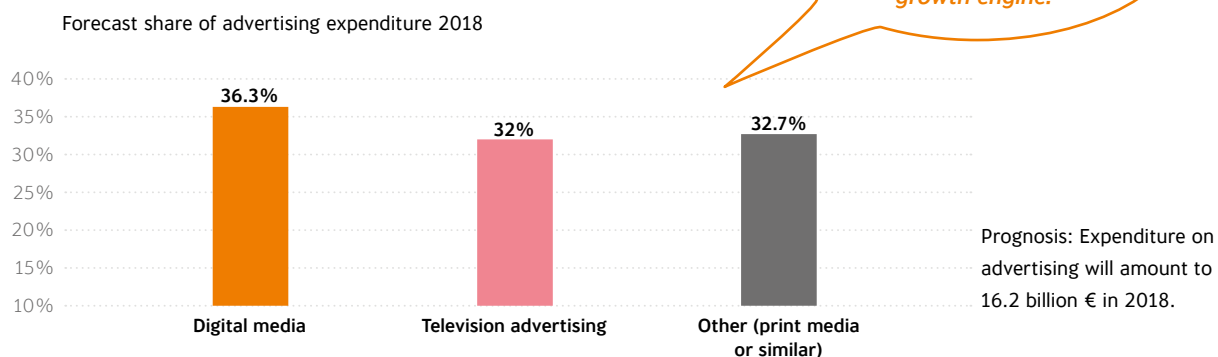




For many years, the music publisher has been the first point of reference for agencies and brands in order to find the right music for their commercial. If a specific work has already been selected, the music publisher will clarify the possibility of use and licensing with the author. In many cases, the music publisher also acts as a consultant. By means of a briefing they offer either titles from their catalogue or works composed specifically for this use.

Finally, the music publisher ensures that the royalties are distributed correctly to everyone involved in a work.

German advertising market - current market data



Source: Dentsu Aegis Network (DAN), Agency Group for Communication and Media Consulting

TIMELINE

- 1829 23 May: Foundation of the German Music Publishers Society, at that time still called “Verein der Musikverleger gegen musikalischen Nachdruck” (*Association of Music Publishers Against Musical Reproduction*), in Leipzig.
- 1889 The “Verein gegen musikalischen Nachdruck” (*Association of Music Publishers Against Musical Reproduction*) becomes the “German Music Publishers Society”.
- 1903 Music publishers are involved in founding the “Anstalt für musikalische Aufführungsrechte” (*AFMA Association for Musical Performance Rights*), which later becomes the GEMA.
- 1934 The Nazi regime integrates the association, which is renamed the “Reich Association of German Music Suppliers”, into the Reich Music Chamber.
- 1947 Foundation of the “Deutscher Musikalien-Wirtschaftsverband e.V.”.
- 1949 Change of name to “Deutscher Musikverleger-Verband e.V.” (*DMV German Music Publishers Association*).
- 1991 The “German Music Edition Prize” is awarded for the first time by the DMV.
- 1993 For the first time, the DMV awards the prize for the “Best Concert Programme of the season”.
- 2004 175 years DMV – Ceremony on 29 September in Berlin.
- 2015 Relocation of the office from Bonn to Berlin.



Musikhandel und Musikpflege

2. Jahrgang



CONCERT

für das

Pianoforte

Music publishers in Germany are well positioned and do everything in their power to master the upheavals in the music business and to ensure that their authors will continue to make a living from their creative work in the future.

A strong copyright in favour of the creative and a political commitment to the cultural and creative industries in Germany and Europe is indispensable to this end.

Eine durchweg neue

Nova pro 19

ist soeben im Verlage von

IMPRINT

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**Dedicated to the initiator of this brochure,
Prof. Dr. Rolf Budde (1956–2018), DMV President
from 2014 to 2018**



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