IRISH JOURNAL OF ARTS MANAGEMENT & CULTURAL POLICY

ijamcp

ISSN: 2009-6208 (Online). Journal homepage: https://culturalpolicy.ie/

Ever decreasing circles: how changing global music industry strategies impact film composers working in audiovisual industries in Ireland

Jim Rogers

To cite this article:

Rogers, Jim (2024). Ever decreasing circles: how changing global music industry strategies impact film composers working in audiovisual industries in Ireland, *Irish Journal of Arts Management and Cultural policy*, 10 (2), 67-81

Published online:

July 2024

Corresponding author:

Jim Rogers	Dublin City University	jim.rogers@dcu.ie	https://orcid.org/0000-0001-9327-1245

Abstract

This article examines the unfolding relationship between ‘global’ music labels and the ‘local’ audio-visual sector in the context of a changing music industry landscape. In recent years, major transnational music labels have increasingly pursued activities in local audiovisual production spaces. This reflects the evolving form and nature of these companies as they find new and more diverse ways to generate revenue and maximise their returns on the recording and music publishing rights and brands under their control. These labels have been adapting to the challenges and opportunities afforded by a rapidly evolving digital context, and, as such, have been redirecting resources to develop new, or intensify existing interests in areas beyond the direct sale or licensing of music to consumers and platforms. In this article, we are interested in a number of key developments that hold specific implications for the ‘local’ audiovisual domain. These relate to the approach taken by these labels to synchronisation rights, as well as their involvement in delivering production music libraries and bespoke composition to film, television and advertising production. The nature of the developments outlined below illustrates how recording and music publishing companies have evolved closer relationships with local audiovisual producers. While blanket music licensing agreements provide small, independent film and television production companies with access to song catalogues and music libraries that would once have been beyond their budgetary limits, the nature of such licensing arrangements carries potentially harmful implications for local film composers and those involved in (music) post-production.

Keywords: music; recording industry; synchronisation; audiovisual production

Ever decreasing circles: how changing global music industry strategies impact film composers working in audio-visual industries in Ireland

Introduction

This article proposes an inquiry into the apparent increased incursion of major transnational music labels into local audio-visual production spaces in recent years. Essentially, such a development can be seen as a response (one of many) from global record companies to a changing technological environment. As digital innovations have prompted manifold variations in music distribution and consumption practices over the past two decades, music rights owners have concomitantly evolved new and more diverse approaches to generating revenue from the recording and music publishing catalogues under their control.

ISSN: 2009-6208. https://culturalpolicy.ie/

Central here are the changes that have occurred in how major transnational music labels (primarily Sony, Universal and Warner) have modified their form and structure as to maximise their returns. The design and nature of recording contracts has changed, enabling labels to expand the range of revenue sources available to them via exploitation of the artists on their rosters (Arditi, 2019; Marshall, 2015; Rogers, 2013). In this context, major record labels have developed new, or intensified existing interests in domains beyond the sale and licensing of music recordings to its final consumers.

In the context of this article, one such key development relates to the approach taken by these labels to synchronisation rights, as well as their involvement in delivering production music libraries and bespoke composition to film, television and advertising production. It is notable that in recent years, the 'local' arms of 'global' recording and music publishing companies have developed closer and more intense relationships with local audiovisual producers. While, on one hand, synchronisation licensing deals provide small, independent film and television production companies with access to song catalogues and music libraries that would once have been beyond their budgetary limits, the nature of such contemporary licensing arrangements carries potentially harmful implications for local film composers and those involved in (music) post-production. The article will draw upon desk research, and also a small number of interviews with relevant music business personnel and key informants who operate in the Irish context, as to assess and examine the shifting boundaries between the global music business and local audio-visual production sectors.

Perceptions of transformation in the global recoding industry

Across its history, the record industry has been transnational in nature, and characterised by high concentration of ownership (see, for example, Negus, 2011; Tschmuck, 2006). A small number of large companies have always dominated the international landscape. As Tschmuck (2006) outlines, prior to World War I, recording engineers from New York, London and Paris were already being dispatched to far distant corners of the world to capture performances of local music that were subsequently pressed at US and European record plants, and then sold back to the countries of origin. Moreover, by the 1920s, take-overs and alliances had become well-established trends in the international record industry, with its two biggest players—Columbia and Victor—expanding across the continents. A century later, three major labels—Sony, Universal and Warner—wield oligopolistic power in the global market for recorded music. Combined, these three companies account for more than 70% of the global market (Gotting, 2023a).

The record industry in the early twenty-first century is frequently conceptualised as a dystopian universe, where digital innovations have emerged and advanced with severe ramifications for labels and artists alike. The compact disc (CD) had proved to be a real boom technology for the sector, and provided the platform for a decade-long period of super-profits driving global retail revenues to a record high of US$38.7 billion in 1999, with trade revenues approaching $27 billion that same year (IFPI (International Federation of the Phonographic Industry), 2000). However, the dawn of the new

ISSN: 2009-6208. https://culturalpolicy.ie/

millennium saw the record industry issue sad and sorry revenue returns by comparison. In the context of burgeoning peer-to-peer file sharing technologies, which saw the extensive availability of 'free' (illicit) music fields online, a decade-and-a-half of declining sales ensued. The industry's professed trade revenues demonstrated an overall downturn of almost 44%, to below $15 billion by 2014 (IFPI, 2015). In the Irish context, the pattern was broadly similar. Here, record sales revenues peaked in 2001, when they reached a value of €145.6 million (IFPI, 2002)—a year which also saw Ireland ranked as the eighth largest exporter of recorded music in the world (Music Board of Ireland, 2003). However, across the decade that followed, revenues in the territory reportedly fell by more than 50% to a value of just over €72 million (IFPI, 2011).

As technological platforms have evolved, the scope and potential for altering and redistributing power and wealth in the recording sector has been much debated in media, academia and the policy domain alike. Such accounts frequently privilege the capacity of technology companies (and the new and evolving music platforms they design and administer) to deliver a 'new music order'—one in which, almost exclusively, the control and influence of major record labels is deemed to have been curtailed. Technology is the 'villain', with illicit platforms for the free sharing of music undermining the economics of the industry and threatening the livelihoods of artists and performers—this narrative held sway in the media for almost two decades (see, for example, Rogers, 2013, p. 4-9 for an overview of such accounts across the 2000s).

Such a narrative was also reinforced by academia (for example, Blackburn, 2004; 2007; Liebowitz, 2006; 2008; Zentner, 2006), with few (for example, Burkart and McCourt, 2003; 2004) posing questions regarding the validity of record industry claims relating to 'piracy'. Here, it is important to consider the emphasis we place on technology as a transformative force in society. There is a long tradition of scholarly literature (McLuhan, 1962; 1964; Toffler, 1970; 1980; Bell, 1973, to the 'digital age gurus' such as Kevin Kelly, 1999; 2010; and Nicholas Negroponte, 1995—to name some of the most prominent and lauded authors) that celebrates, and also bemoans the 'impacts' and 'effects' of radical technological innovation on our social world. However, such techno-centric visions are robustly rejected by scholars who advance a 'social shaping' perspective, urging us to be attentive to sites of 'matching' innovation (for example, Preston, 2001; Winston, 1998). As such, in the context of the perceived digital turmoil foisted upon the record industry by digital innovations, it is critical to recognise the institutional and organisational innovations taking place within that sector in response to technological evolution. To this end, let us briefly consider some of the ways in which major record labels responded to the evolving digital landscape.

Record industry innovation

Pursuing the producers and suppliers of file-sharing technologies through the courts (and subsequently the users of these digital platforms) proved 'a successful stalling tactic' that enabled the major record labels 'to reorganize their business relationships and sort out on-line delivery

ISSN: 2009-6208. https://culturalpolicy.ie/

systems in a way that will preserve their de facto oligopoly of production and distribution' (McCourt and Burkart, 2003, p. 345). Such a strategy also serves as a 'public relations foil', deflecting attention from the fact that the major labels were themselves, at the same time, coming under intense political scrutiny on both sides of the Atlantic, in relation to anti-trust issues (ibid).

The first decade of the twenty-first century would see the record industry not only pursue file-sharing sites, but subsequently the users of these sites, and ultimately the internet service providers that hosted such platforms. However, the most significant response of the record industry came not in the form of legal actions, but rather, a more fundamental reconfiguring of its own core structures (Preston & Rogers, 2010; 2016), and in particular, the emergence of a new set of 'norms' regarding the nature of contractual arrangements between labels and artists (Marshall, 2013; Arditi, 2014; 2019).

For David Arditi, the afore-mentioned narrative of industry decline at the hands of digital piracy is 'a rhetorical construct that helps to obscure the material reality of the recording industry' (2014, p. 14). Such a narrative enabled the record industry to significantly expand the spectrum of spaces and places where it could usefully exploit the intellectual property rights it managed and controlled. As Arditi subsequently advances:

> [B]y arguing that digital music harmed musicians, record labels successfully convinced musicians, music listeners, journalists, legislators, and the general public that the recording industry needed to develop new sources of revenue in order for musicians to be able to eat (2019, p. 3).

The past decade has seen a body of literature emerge that describes the nature of this record industry expansion, and the implications and outcomes for labels themselves, artists and music users alike (see, for example, Marshall, 2013; Rogers, 2013). Here, we become aware of the (economic) value of music as both a primary and a secondary medium. On one hand, music represents a stand-alone media form—one that sees rights owners sell and licence recordings to their final consumers via a range of physical and digital distribution and retail platforms (CDs, vinyl, licensed download and streaming services etc.). In particular, the value of streaming to the major labels has snowballed across recent years, with global revenues from this source alone estimated to be $17.6 billion in 2022 (IFPI, 2023).

However, what is equally significant, but much more recent, is the growing range of revenue streams feeding back to major record labels from sources beyond the sale and licensing of music to end-users. It is necessary to consider how domains such as live concert performance, artist merchandise, and, more significantly in the context of our core interests here, the licensing of music rights to the gamut of audiovisual outlets (film, television, advertising, games, etc.) have come to form more routine areas of activity and profit-generation for Universal, Warner and Sony. The fundamental nature of recording contracts between these companies and artists has changed across recent years, with the labels now entering 'multi-rights' agreements with those acts on their rosters. As such, recording, publishing, touring, merchandise, sponsorship, and other areas relating to the brand

ISSN: 2009-6208. https://culturalpolicy.ie/

of an artist are all frequently on the table for negotiation in context of the contract. Universal, Warner and Sony have been 'reorienting themselves towards this new approach, utilising various combinations of acquisition and internal reorganisation to support the model' (Marshall, 2013, p. 83).

In this context, the three major labels have demonstrated robust economic health. Universal's reported revenues for 2022 exceeded $10.3 billion (UMG, 2023), more than 21% higher than the previous year, and more than double what that figure was in 2011 (Gotting, 2023a). Warner Music Group revenues exceeded $6 billion for the first time in the company's history in 2022 (Warner Music Group, 2023). This, effectively, marks a doubling in value across the previous decade (Macrotrends, 2023). Sony Music Entertainment posted record returns of $10.2 billion for recording and publishing in 2022, up a staggering 24% year-on-year increase from 2021 (Dilts Marshall, 2023). Overall record industry revenues for 2022 were $26.2 billion (IFPI, 2023), thus exceeding the record high of 1999. Combined, these three major labels accounted for more than 70% recorded music market share worldwide in 2022 (Gotting, 2023b). Moreover, the music publishing arms of these three same corporations held approximately 70% of the global music publishing market in 2022 (Music & Copyright, cited in Dredge, 2023). As such, the 'digital revolution' has not, ultimately, affected pre-digital market oligopolies, let alone the capacity of major transnational music companies to reap profit. Rather, they are stronger and more profitable than ever.

So, as such, the restructuring process has yielded significant dividends for the music industry's most prominent actors enabling them to maintain dominance in recording and music publishing, negotiate revenues from artists' live performance, and grow their presence in music merchandising. But, central to our interest in this article, this reimagining of what a major record label is, has also come with intensified focus on the provision of music/music services to the audiovisual sector, and the reaping of revenues from same. Let us briefly consider some key developments here, and in particular, some implications arising from aspects of this in an Irish context.

Local ramifications of global record industry strategies: the evolving relationship between music and audio-visual sectors

Here, we are concerned with specific aspects of how major labels have evolved strategies for advancing their interests in the audio-visual space. They are becoming more aggressive at pursuing synchronisation opportunities; but also, they are significantly expanding their interests in 'production' music—i.e., libraries of recorded music made available for licensing to audiovisual producers. Furthermore, in a relatively new development, transnational music labels are encroaching on the territory of domestic audiovisual production, where the major music companies act as investors in 'local' productions. Let us consider at headline-level how all of this is unfolding.

ISSN: 2009-6208. https://culturalpolicy.ie/

Synchronisation

First, let us focus on the sphere of synchronisation licensing—where revenue is generated by rights holders (primarily music labels) when works (music/songs) they control and administer are acquired by music users (in this instance, film, TV, advertising, games companies, etc.). Such agreements are often negotiated between the rights holder and the licensed user independently of any existing performing rights licensing agreement.

The interest of major labels, and the scale of their activities in this area has expanded in recent years. According to David Harris, Director of Marketing at Universal Music, Ireland:

> Syncs are massive, very important. We are very active on that front. It has become a massive part of what we do … It is a growth area for revenue … Since 2013 we have employed dedicated sync people in-house … We are joining the dots between brands, artists and music … We need to make sure that we are on top of this, because otherwise we are losing revenue, and losing opportunities to have our music used and associated with brands (personal interview).

Similarly, Rory McPartland, an Irish-based music supervisor (who previously worked in licensing at EMI Music Publishing) advances: 'Synching is definitely lucrative… [and] it's become more and more important' (McPartland, cited in Power, 2018). Ailish McKenna, a Legal Affairs Manager at Domino Records (but a practising music lawyer at the time of our interview) reinforces this point, saying 'synchronization is a much more valuable tool in terms of getting an artist started and getting a serious wedge of cash' (personal interview). Moreover, McKenna speaks to the growing presence of sync agents in the music business.

Supporting evidence for such comments comes in the form of recently published music revenue statistics. In the US market alone, the Recording Industry Association of America (RIAA) reported a year-on-year increase of 30% in synchronisation revenues from 2021-2022 (RIAA, 2022), very much reflecting overall growth trends in the broader recorded music arena over recent years. In terms of the global music publishing industry, 17% (totalling more than one billion dollars) of this sector's total revenues came from synchronisation fees in 2020 (Warner Music Group, 2021). While still a relatively small contributor to the overall global recorded music market, the value of sync revenues within this sector grew by 22.5% across 2022 (IFPI, 2023).

Recalling his days working as a sync manager with EMI in the US, Rory McPartland outlines how he witnessed a marked expansion in the scope for sync licensing over the past two decades, as a result of the proliferation of media outlets and platforms that use music. He describes syncing as an activity that once focused almost exclusively on film, television and advertising, to one that grew to encompass gaming, and ultimately the multiplication of spaces and places in the online environment and social media world. The use of popular songs in these spaces can yield large dividends for rights holders. As McPartland explains:

ISSN: 2009-6208. https://culturalpolicy.ie/

> With legacy artists, where the real value of the song increases over time, you can see that the fees that have to be paid for them are astronomical, particularly for film trailers. Those sync fees pay so much money … As a revenue stream, it can be huge … For really big artists like the Beatles, you could be talking half a million per side [i.e., recording and publishing]. So, think of it, a million dollars for the sync fee alone. Half a million for the publishing and half a million for the recording (personal interview).

Recent examples that illustrate McPartland's point regarding film trailers include David Bowie's *Starman* in Disney's *Lightyear* (2022), The Rolling Stones' *Beast of Burden*, which is used in Channing Tatum's *Dog* (2022), and Three Dog Night's *Mama Told Me (Not To Come)* from Universal's rom-com *Ticket to Paradise* (2022). But in essence, there is a seemingly endless conveyor-belt of examples to draw upon.

Earlier research (Rogers, 2017) highlights the increasing presence of popular songs from established artists in the domain of advertising, citing Woody Guthrie, Bob Dylan, and Lennon and McCartney (among others) as artists whose songs have been appropriated by the advertising industry in a manner that 'goes against time honoured trends for authenticity in folk and rock music culture' (ibid, p. 157). McPartland also advances that major labels are showing themselves to be increasingly flexible in this context, making songs on their respective catalogues available to smaller, independent audio-visual producers at more affordable rates, thus 'hoovering up' business in places that once might have been the preserve of smaller music labels and composers.

But, such activities are not just the preserve of legacy acts on major labels. In a recent interview with *Billboard*, Golnar Khosrowshahi, CEO of independent music label Reservoir Media advances that his company saw licensing revenues rocket by 70% in the second quarter of 2021:

> As the film and TV industries have not only recovered from COVID disruptions and production delays, but also thrived in an era where consumption has grown significantly, the music industry has also benefitted from this upswing (cited in Peoples, 2022).

Aside from the use of music in professional audio-visual productions, the licensing of music rights for user-generated content on platforms such as YouTube generated approximately €1.2 billion for the music industry across 2021 (Songtradr, 2022). The three major labels have also allocated additional personnel and resources to syncing activities. Sony's sync licensing department, for example, now comprises some 125 people, worldwide, operating in the areas of music supervision, production and licensing, and catering to 'content producers' local and global (Sony Music Publishing, n.d.).

Production music

Related to the area of synchronisation is the domain of production music—i.e., stock/library music available of licensing to audiovisual producers. Universal, Warner and Sony have all expanded their activities in this area over the past decade, in some instances, growing and evolving their own 'in-

ISSN: 2009-6208. https://culturalpolicy.ie/

house' libraries and services, but much more so, acquiring existing independent production music operations. All three labels effectively profess to offer 'off the shelf' solutions to the music composition needs of film, television and advertising producers. As Warner's production music website (WCPM) proclaims: 'Hear us on the likes of BBC, ITV, RTÉ Television, Netflix, and many more. WCPM will take the stress out of finding music solutions for your projects' (WCPM, 2022).

In terms of domestic audiovisual production, their concentrated focus on licensing their wares to these contexts sees these labels increasingly 'muscle in' on the territory of smaller independent music producers and composers. Through blanket licensing arrangements, such libraries represent a cost-effective way of accessing a broad range of pre-recorded score music for audio-visual productions, and they also give the production company significant latitude when it comes to editing the music content they acquire.

Let's briefly consider the scale of activity of each of the 'big three', and how they have widened their reach in this area recently. UMG's Universal Production Music has enlarged to encompass some twenty-one global music libraries (comprising in-house and partnership labels), following its recent acquisition of independent production music companies such as Focus. Across these combined outlets, Universal boasts the release of forty-five production music albums each month that purport to support 'all genres, moods, emotions and project types', and designed to 'create emotional and memorable audio visual experiences' (Universal Production Music, n.d.). As such, it claims to be the biggest production music company in the world. Its catalogue can currently be accessed and licensed (via customised websites) in sixty-eight countries, including Ireland.

Sony Music Publishing has also been escalating its production music activities through a number of significant acquisitions and strategic partnerships. Most notably, in 2018 the European Commission approved (under the EU Merger Regulation) Sony's takeover of EMI Music Publishing (European Commission, 2018). This deal saw Sony pay $2.3 billion to acquire an additional 60% stake in EMI Music Publishing, on top of its existing 30% interest in the company (Sisario, 2018). This doubled the size of Sony's song catalogue to 4.4 million, but also gave it control of EMI's production music repertoire — KPM Music, one of the UK's oldest and most established libraries. It contains more than 30,000 recordings, and includes numerous BBC and ITV productions, past and present. Sony had previously entered the realm of production music through its purchase of Extreme Music, from Viacom—a company that provides music services to audiovisual producers on both sides of the Atlantic. Another significant development saw Sony partner with composer Hans Zimmer, and producer Russell Emmanuel to form the Bleeding Fingers Custom Music Shop. This is effectively a 'composer collective' that primarily targets the reality television production market (Bleeding Fingers, n.d.).

While Warner has maintained interests in production music libraries since the 1980s, the WMG formed its own in-house production music company in 2012. Its overall catalogue available for

ISSN: 2009-6208. https://culturalpolicy.ie/

licensing exceeds 100,000 tracks (WCMP, 2022). A 2021 'rebranding' of the label saw it expand both its personnel and facilities (Stassen, 2021).

It is also notable that the other big transnational operators in the area of music publishing, beyond the realms of Universal, Warner and Sony, have targeted local production music markets with vigour. In particular, BMG Rights Management, the fifth largest music publisher in the world, has been making a steady series of acquisitions across the past decade, bringing a host of production music companies around the world under BMG's ownership and/or control. One of its most significant purchases include Dynamic Music—a UK/US label with more than 3,500 tracks in its repertoire that had more than doubled its revenues across the two years prior to its takeover by BMG in 2020 (Stassen, 2020). This followed its 2019 partnership with Red Bull Media House (Stassen, 2019), and a string of procurements across the 2014-2017 period (*Music Business Worldwide*, 2017).

In light of such developments, the plight of local composers is outlined by Sarah Glennane, CEO of the Irish Screen Composers Guild:

> [Big publishing] companies [like Sony-ATV] are very active in this area now. [They are] very interested in soaking up this work. They are visiting production companies on a regular basis, essentially taking a music supervision role, where they will help find the track that you are looking for, and help cut and splice it according to your needs. For production companies, availing of the blanket licenses [can] seem a lot more economical … This is really affecting [local] composers (personal interview).

Strategic investment in local productions

A more recent development in the strategy of major recording and music publishing companies regarding the audiovisual sector relates to their role as investors in smaller, domestic productions. Despite the increased prevalence of licensed songs and score music via blanket licensing agreements, interviewees Sarah Glennane, Rory McPartland, and Wicklow-based composer, Ray Harman all emphasise that many, or most, local film and television productions still employ a composer. However, the conditions within which they work are evolving. This relates to changes in contractual arrangements between composer and content producer in instances where major music publishers or labels are involved as investors in the project. In such circumstances, the label will usually receive an upfront payment from the music label, in return for which they will assign publishing rights (or administration rights) to that music company. This is attractive to the producer as it provides an early injection of cash for the production. However, this may come with ramifications for the composer hired for the project.

As McPartland explains, composers get paid a fee for their contribution, but historically, have also been in a position to negotiate publishing rights for the music they write for a project. This may vary on a project-by-project basis and will be influenced by the amount of money the composer is paid in the fee. Point being, composers have been able to retain ownership and control over the music they

ISSN: 2009-6208. https://culturalpolicy.ie/

write for specific audiovisual productions, thus leaving them in a position to benefit from the future use of that music. However, where the production company has already assigned rights of bespoke compositions to a major label in return for financial support, that option is removed for the composer. As Sarah Glennane advances, that potential 'back end' from the future publication or use of the score music was seen as being part of the composer's payment. Not only is that outcome now less possible, additionally, such arrangements are driving down the 'up-front fees' available to composers (personal interview). McPartland ultimately observes: '[T]his is something they [major labels] are seeing that they can make some money on, so they are quite aggressive in this field' (personal interview). Moreover, music composers in the audiovisual sector have encountered fresh challenges with the proliferation of streaming, as such platforms have impacted the ways that revenue is generated and distributed, especially regarding residuals.

Summary and conclusion

The internal restructuring of major record labels, and the normalising of 'multi-rights' contracts with the recording artists on their rosters in the context of the challenges posed by the transition to digital distribution since the turn of the century, has opened up new and lucrative sources of revenue for these companies. They are now in a position to exploit the range of copyrights, trademarks and brands they control and administer across a much broader spectrum of activities than previously possible.

One key strategic shift on the part of the labels relates to an intensified interest in the exploitation of music rights in audio-visual productions. All of these developments outlined above, come with important implications for local composers and those smaller local businesses providing music post-production services. We have seen the intensified pursuit of blanket licensing agreements by major labels with audiovisual producers, making large catalogues of songs available to 'content producers', big and small, in a more flexible and affordable manner. Likewise, there has been significant growth in the production music sector, and major transnational rights holders come to control larger swathes of the content available in these music libraries.

Through such strategies, the transnational labels are increasing their 'local' presence, and encroaching on terrain that was historically more associated with local composers. While production music libraries may provide opportunities for composers, in the form of a 'shop window' to get their work promoted and licensed to audio-visual productions, these facilities also represent an intense form of competition for composers as library music offers greater efficiency to the audio-visual sector.

Furthermore, the participation of transnational music publishers as investors in audio-visual productions constitutes a potential diminution to the rights and earning capacity of composers working on film and television (or other) productions. In sum, we are witnessing new forms of corporate appropriation of local cultural industries.

ISSN: 2009-6208. https://culturalpolicy.ie/

References

Anderson, Tim (2014). *Popular Music in a Digital Music Economy: Problems and Practices for an Emerging Service Industry*. New York: Routledge.

Arditi, David (2014). Downloading is Killing Music: The Recording Industry's Piracy Panic Narrative. *Civilizations (The State of the Music Industry)*, 13, 13-32.

Arditi, David (2019). Music is everywhere: setting a digital music trap. *Critical Sociology*, 45(4-5), 617-630.

Bell, Daniel (1973). *The Coming of Post-Industrial Society*. New York: Basic Books.

Blackburn, David (2004). *Does File Sharing Affect Record Sales?* Department of Economics Working Paper. Cambridge MA: Harvard University.

Blackburn, David (2007). *The Heterogeneous Effects of Copying: The Case of Recorded Music*. Department of Economics Working Paper. Cambridge, MA: Harvard University.

Bleeding Fingers (n.d.). *About*. Available at: https://www.bleedingfingersmusic.com/about/info. [Accessed 31 January 2024].

Bowie, David (1972), Starman from *The Rise and Fall of Ziggy Stardust and the Spiders from Mars*. New York: RCA.

Dilts Marshall, Elizabeth (2023). Sony Music Posts $10B in Annual Revenue as Profits Jump 25%. *Billboard* [online], 28 April. Available at: https://www.billboard.com/pro/sony-music-fiscal-2022-earnings-revenue-profit/. [Accessed 08 January 2024].

Dog (2022). Directed by Channing Tatum and Reid Carolin. USA: FilmNation Entertainment.

European Commission (2018). Mergers: Commission approves acquisition of sole control over EMI Music Publishing by Sony. European Commission Press release [online], 26 October. Available at: https://ec.europa.eu/commission/presscorner/detail/en/IP_18_6225. [Accessed 24 January 2023].

Glennane, Sarah (2019). CEO - Screen Composers Guild of Ireland: Interview with author, 16 July.

Gotting, Maria Charlotte (2023a). *Universal Music Group Revenue 2004-22.* Statista [online]. Available at: https://www.statista.com/statistics/273044/universal-music-groups-annual-revenue/#:~:text=In%202022%2C%20Universal%20Music%20Group,billion%20in%20the%20previous%20year. [Accessed 24 January 2023].

Gotting, Maria Charlotte (2023b). *Total Recorded Music Share Worldwide, by Label, 2022.* Statista [online]. Available at: https://www.statista.com/statistics/422926/record-companies-market-share-worldwide-physical-digital-revenues/#:~:text=In%202022%2C%20the%20total%20revenue,rate%20compared%20to%20recent%20years. [Accessed 24 January 2023].

ISSN: 2009-6208. https://culturalpolicy.ie/

International Federation of the Phonographic Industry/IFPI (2000). *The Record Industry In Numbers*. London: IFPI.

International Federation of the Phonographic Industry/IFPI (2002). *The Record Industry In Numbers*. London: IFPI.

International Federation of the Phonographic Industry/IFPI (2011). *The Record Industry In Numbers*. London: IFPI.

International Federation of the Phonographic Industry/IFPI (2015).*The Record Industry In Numbers*. London: IFPI.

International Federation of the Phonographic Industry/IFPI (2023). *Global Music Report: State of the Industry* [online]. IFPI. Available at: https://www.ifpi.org/wp-content/uploads/2020/03/Global_Music_Report_2023_State_of_the_Industry.pdf [Accessed 08 January 2024].

Kelly, Kevin (1999). *New Rules for the New Economy: 10 Ways the Network Is Changing Everything*. London: Fourth Estate.

Leyshon, Andrew (2014). *Reformatted: Code, Networks, and the Transformation of the Music Industry*. Oxford: Oxford University Press.

Liebowitz, Stan J. (2006). File sharing: Creative destruction or just plain destruction? *Journal of Law and Economics*, 49(1), 1–28.

Liebowitz, Stan J. (2008). Testing file-sharing's impact on music album sales in cities. *Management Science*, 54(4), 852–859.

Lightyear (2022). Directed by Angus MacLane. USA: Walt Disney Pictures.

Macrotrends (2023). *Warner Music Group Revenue 2010-2023*. Macrotrends [online]. Available at: https://www.macrotrends.net/stocks/charts/WMG/warner-music-group/revenue#:~:text=Warner%20Music%20Group%20annual%20revenue,a%2018.78%25%20increase%20from%202020 [Accessed 08 January 2024].

Marshall, Lee (2013). The 360 deal and the 'new' music industry. *European Journal of Cultural Studies*, 16(1), 77-99.

McCourt, Tom and Burkart, Patrick (2003). When Creators, Corporations and Consumers Collide: Napster and the Development of On-line Music Distribution. *Media, Culture and Society*, 25(3), 333-350.

McCourt, Tom and Burkart, Patrick (2004). Infrastructure for the Celestial Jukebox. *Popular Music*, 23(3), 349-362.

McKenna, Ailish (2014). Lawyer - Bray and Krais: Interview with author, 14 April.

McLuhan, Marshall (1962). *The Gutenberg Galaxy: The Making of Typographic Man*. New York: Mentor.

ISSN: 2009-6208. https://culturalpolicy.ie/

McLuhan, Marshall (1964). *Understanding Media: The Extensions of Man*. London: Routledge.

McPartland, Rory (2023). Founding partner, Tremolo Music Publishing: Interview with author, 24 January.

Music Board of Ireland, (2003). *The Economic Significance of the Irish Music Industry*. Dublin: Music Board of Ireland.

Music Business Worldwide (2017). BMG brings together 400,000 tracks under one brand. *Music Business Worldwide* [online], 6 February. Available at: <https://www.musicbusinessworldwide.com/bmg-brings-together-400000-production-music-tracks-one-brand/. [Accessed 24 January 2023].

Negroponte, Nicholas (1995). *Being Digital*. New York: Vintage.

Negus, Keith (2011). *Producing Pop: Culture and Conflict in the Popular Music Industry*. London: Goldsmiths Research Online [out of print book]. Available at: http://eprints.gold.ac.uk/5453/ [Accessed 24 January 2023].

Peoples, Glenn (2022). Music Synch Revenue Is Growing Faster Than Ever. *Billboard* [online], 29 September. Available at: https://www.billboard.com/pro/music-synch-revenue-tv-film-growing/ [Accessed 24 January 2023].

Power, Ed (2018). Sync and swim in music biz. *Irish Examiner* [online], 25 April. Available at: https://www.irishexaminer.com/lifestyle/arid-30839050.html [Accessed 24 January 2023].

Preston, Paschal (2001). *Reshaping Communications*. London/Thousand Oaks/New Delhi: Sage Publications.

Preston, Paschal and Rogers, Jim (2010). The Three Cs of Key Music Sector Trends Today: Commodification, Concentration and Convergence. In Jin, Dal Yong (ed,) 2010. *Global Media Convergence and Cultural Transformation: Emerging Social Patterns and Characteristics*. Hershey, PA: IGI Global. 373-396.

Rogers, Jim (2013). *The Death and Life of the Music Industry in the Digital Age*. New York: Bloomsbury.

Rogers, Jim (2017). Meet the New Boss, Same as the Old Boss: Copyright and continuity in the contemporary music economy. In: Callahan, Matt and Rogers, Jim (eds.), 2017. *A Critical Guide to Intellectual Property*. London: Bloomsbury. 144-165.

Rogers, Jim and Preston, Paschal (2016). Crisis and creative destruction: new modes of appropriation in the 21st century music industry. In: Wikström, Patrik and DeFillippi, Robert (eds.), 2016. *Business Innovation and Disruption in the Music Industry*. London: Palgrave. 53-72.

Rolling Stones (1978). Beast of Burden on *Some Girls*. London: Rolling Stones Records.

ISSN: 2009-6208. https://culturalpolicy.ie/

Sisario, Ben (2018). Sony to Buy Additional 60% Stake in EMI Music Publishing. *New York Times* [online], 21 May. Available at: https://www.nytimes.com/2018/05/21/business/sony-emi-music-publishing.html [Accessed 24 January 2023].

Songtradr (2022). *Global Sync Licensing Trend Report White Paper*. Digital Music News [online]. Available at: https://www.digitalmusicnews.com/2022/07/19/sync-licensing-report-2022/ [Accessed 24 January 2023].

Sony Music Publishing (n.d.). *Synchronisation*. Available at: https://www.sonymusicpub.com/en/services [Accessed 24 January 2023].

Stassen, Murray (2019). BMG Production Music partners with Red Bull Media House. *Music Business Worldwide* [online], 24 June. Available at: https://www.musicbusinessworldwide.com/bmg-production-music-partners-with-red-bull-media-house/ [Accessed 24 January 2023].

Stassen, Murray (2020). BMG Acquires Production Music Company Dynamic Music. *Music Business Worldwide* [online], 20 July. Available at: https://www.musicbusinessworldwide.com/bmg-acquires-production-music-company-dynamic-music/ [Accessed 24 January 2023].

Stassen, Murray (2021). Warner Chappell Production Launches Global Rebrand. *Music Business Worldwide* [Online], 21 July. Available at: https://www.musicbusinessworldwide.com/warner-chappell-production-music-launches-global-rebrand/ [Accessed 24 January 2023].

Sun, Hyojung (2019). Paradox of celestial jukebox: resurgence of market control. *Creative Industries Journal*, 12(1), 105-124.

Three Dog Night (1970). 'Mama Told Me (Not To Come)' on *It Ain't Easy*. New York: ABC Records.

Ticket to Paradise (2022). Directed by Ol Parker. USA: Universal Pictures.

Toffler, Alvin (1970). *Future Shock*. London: Pan.

Toffler, Alvin (1980). *The Third Wave*. New York: Bantam Books.

Tschmuck, Peter (2006). *Creativity and Innovation in the Music Industry*. Dordrecht: Springer.

Universal Production Music, (n.d.). *About Us*. Available at: https://www.universalproductionmusic.com/en-gb/about [Accessed 24 January 2023].

Universal Production Music (2023). *Universal Music Group N.V. Reports Financial Results for Fourth Quarter 2022 and Full Year Ended December 31 2022*. Universal Music Group [Online]. Available at: https://www.universalmusic.com/universal-music-group-n-v-reports-financial-results-for-the-fourth-quarter-and-full-year-ended-december-31-2022/ [Accessed 08 January 2024].

Warner Music Group (2021). *Annual Report 2021*. Warner Music Group [online]. Available at: https://investors.wmg.com/static-files/17781830-b658-41f5-94fc-eac9cffe9edd [Accessed 24 January 2023].

ISSN: 2009-6208. https://culturalpolicy.ie/

Warner Music Group (2023). *Warner Music Group Corp. Reports Results For Fiscal Fourth Quarter And Full Year Ended September 30, 2023*. Warner Music Group [online]. Available at: https://www.wmg.com/news/warner-music-group-corp-reports-results-for-fiscal-fourth-quarter-and-full-year-ended-september-30-2023 [Accessed 23 January 2024].

Warner Chappell Production Music (2022). *About Us*. Available at: https://uk.warnerchappellpm.com/about [Accessed 24 January 2023].

Wikstrom, Patrik (2020). *The Music Industry: Music in the Cloud* (3rd edition). Cambridge: Polity Press.

Winston, Brian (1998). *Media, Technology and Society: A History from the Telegraph to the Internet*. London and New York: Routledge.

Zentner, Alejandro (2006). Measuring the effect of file-sharing on music purchases. *Journal of Law and Economics*, 49(1), 63–90.

ISSN: 2009-6208. https://culturalpolicy.ie/