

ITALIAN MUSIC ABROAD

— 2022
REPORT

SIAE DALLA
PARTE
DI CHI
CREA

Italia
Music
Lab

Italia
Music
Export

TABLE OF CONTENTS

07	Preface <i>Gianni Sibilla</i>	43	The growth of the Italian recording industry internationally: the numbers from FIMI
08	Italian music as seen from outside its borders <i>Carlo Pastore</i>	44	Italian rap conquering the world <i>Riccardo Primavera</i>
10	The most successful Italian music artists worldwide: a look at the data from SIAE	48	Institutional support for the export of Italian music
16	Italia Music Export: numbers and strategies to support our music around the world	52	Unity is strength: mapping export activities in Italy
32	Italian music as seen from the official charts <i>Paolo Madeddu</i>	54	Italian music around the world: where we are, where we will be <i>Nur Al Habash</i>
40	Case Study: Måneskin <i>Nur Al Habash</i>		

PREFACE

by Gianni Sibilla

The perception of Italian music among both national and international insiders has changed, but most crucially, it has shifted especially among the public. It is a question of both numbers and reputation; Italy is no longer perceived as a country capable of producing only limited musical genres, which outside its borders can only work in certain culturally similar contexts. This change has not just been possible thanks to Måneskin, nor is it the mere result of having successfully staged the world's biggest musical event, the Eurovision Song Contest, in Turin. **Italian music has an international value** on an artistic, production and communication level, made up of solid relationships with other markets and their operators. All of this, however, is the result of long, hard work behind the scenes, starting well before the event and the band that generated an infinite number of pages, posts, and comments on digital and social media around the world.

This first report by Italia Music Lab was created to tell the story of how we achieved this reputation and these numbers. Therefore, it is not just a portrait of the current situation of Italian music internationally; instead it is a series of snapshots that allow us to understand how we have arrived here.

Italia Music Lab is a central character within this story. The Foundation was launched in 2021 to support **the promotion of Italian music abroad, which SIAE started in 2017 with the creation of Italia Music Export**: a specific department to promote local artists internationally. Among its activities, Italia Music Export provides support for international touring, organizes songwriting camps between Italian and foreign music creators, and finds opportunities for music creators and music professionals in Italy to meet their international counterparts.

The mission of Italia Music Lab is twofold: on the one hand, to continue and expand on this work, through calls for tenders and initiatives that in this first year have allowed 165 artists to perform internationally; on the other hand, to create awareness and knowledge regarding the mechanisms of the sector, through training and dissemination in a simple and inclusive manner, while promoting collaboration with as many operators and players in the music business as possible. The objective of this report is to create knowledge,

in an in-depth, yet accessible manner, by analyzing Italian music internationally from several points of view. We start with quantitative data coming from SIAE on international copyright, analyzed to observe the growth of the sector in recent years, highlighting the most successful Italian songs and the countries where they are most listened to. The numbers from FIMI, on the other hand, show the growth of international revenues for the Italian record industry. We also examine Italian music over the last six years, seen through the charts and from the point of view of Paolo Madeddu – a journalist specialized in reading sales and streaming data.

The report doesn't only focus on numbers but it also offers a qualitative approach to Italian music. This comes in the form of overviews of the industry, such as that found in Carlo Pastore's analysis on the perception of our music internationally, or Riccardo Primavera's discussion regarding the new role of Italian rap in the international arena, through the point of view of A&R and managers, and from case histories such as that of Måneskin's transformation from an Italian to an international band, told through the first hand stories of those who worked on the project.

These different perspectives are joined by an overview of all the active music export initiatives in Italy, and a detailed report by Italia Music Export, which tells of the origins and work of this office both in terms of data, work with institutions such as the Ministry of Foreign Affairs and International Cooperation and ITA (Italian Trade Agency), and networking initiatives with European partners and the commitment to a music industry that is increasingly more focused on inclusion and diversity. We hope that this will be just the first edition of a report that we would like to release annually, with data and overviews that are increasingly more precise. **Our aim is to create a tool that will help the entire industry** and perhaps provide a cue for new initiatives and policies, and more importantly, a new way of thinking about Italian music.

ITALIAN MUSIC AS SEEN FROM OUTSIDE ITS BORDERS

A PICTURESQUE PRESENT, A PROMISING FUTURE

by Carlo Pastore

March 2022-Milan. I invited Weirdcore, Aphex Twin's visual artist, who was in town at the time for an installation together with Lorenzo Senni, to a bizarre event called 'Festival di SanNolo'. A sort of hyperlocal gala but with national ambitions (pure Milanese style) of pop music & queer cabaret organized in a former strip club on the multicultural Via Padova.

I couldn't imagine what his reaction would be to seeing Ambra Angiolini - a 90's Italian teen star, on stage performing her teenage hit "T'appartengo". After all, he's the man in charge of the image of one of the five most important producers of contemporary electronic music. Knowing him, I was sure he would have been delighted to see so much "Italian-ness" in one go, but the risk of ruining his week was very high.

Inside that dark club that still exuded the hormones of promiscuous evenings gone by, I saw his eyes light up. Stunned, but extremely fascinated by a strange context. A scene that reminded me, in a more charming way, of that sense of estrangement recounted by Sofia Coppola in "Somewhere", when suddenly Simona Ventura appears on the screen, conducting a TeleGatti award ceremony, a famous television award show in the 1980s and 1990s. Things that, in short, only happen in our country.

I put myself in his shoes and I thought: this is actually picturesque.

Italy has always been able to pride itself on this adjective. It nicely describes its most famous places, its most remote nooks and crannies. This applies, too, to its local music, which is probably picturesque for an international audience.

In fact, there is a huge **gap between how Italians perceive their music and how Italian music is perceived internationally** (where it is often not perceived at all, which is precisely the problem).

For decades - especially after the advent of free radio in the 1970s (which later became commercial radio) and

the advent of MTV in the 1990s - our country suffered passively from the aggressiveness of Anglo-Saxon music export to the point of developing a true love for everything foreign, that expressed itself in the form of a fierce and constant self-criticism of the music produced in our country. Regardless of what it was.

There was a time when, if you were young, making Italian music or singing in Italian was lame.

Many things have changed since the advent of the internet on a mass scale and streaming services. When faced with a choice, Italians have chosen to listen to music with lyrics they understand. Digital music has thus brought to light a new generation of artists who have been able to modernize the perception of Italian music abroad, without losing that picturesque touch that exists and that makes a nation three-dimensional - not counting those hipsters who decide what should be listened to and what should not, as Frank Zappa would have said.

The Italian language has been able to carve out a reputation even in contexts where it previously struggled, and indeed become popular among Generation Z and part of the Millennials. Nowadays, it is very likely to find more Italian than international music on their playlists.

Since 2005, I have been curating the lineup of the MI AMI festival (Important Music in Milan), an event dedicated to new musical experiences in our country. Thanks to my role, I have been lucky to assist in and witness these changes, which at first were slow, then steeper and more sudden. The listening audience has widened, and that is a positive aspect for everyone. Part of the identity that used to bind communities to artists has certainly been lost, but this is because technology has completely reformulated the mechanisms that make us leave home to seek out others.

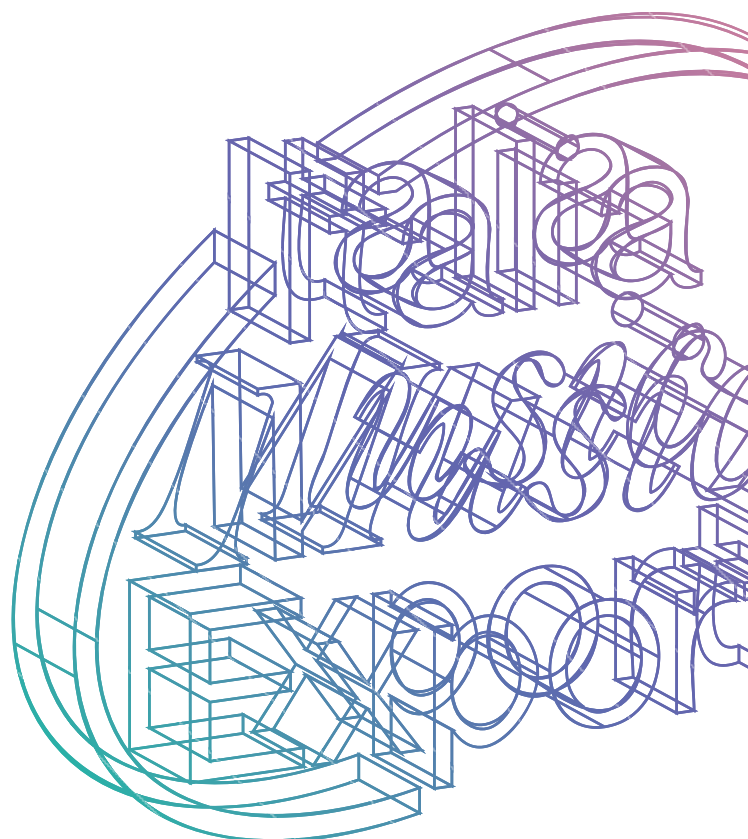
The most striking fact is recent. You know who I am

talking about: the rock group Måneskin. The funny thing is that it took a Danish word to make Italian rock famous around the world. If rock is a classic genre, they adhere to it with perfect *phisque du role*. They embody the classic and timeless beauty of Rome. Such situations are as rare as the passage of a comet. Therefore, there is the risk that this “moonlight” (the meaning of the name Måneskin) will not have the power to shed a light on those who have so far remained hidden in the darkness of our country’s musical night.

So let us try to do it ourselves. We can divide the new Italian musical context into three major strands. Three macro-areas that are often contiguous and fluid, a fact that is certainly of great interest and denotes the public’s desire not to rigidly choose only one genre.

The genre that has definitely attracted the youngest (the largest and most responsive segment) of listeners is urban/rap/trap. After a very combative and underground first phase in the second half of the 1990s, with groups like Sangue Misto and Articolo 31 acting as the devil and holy water, Italian rap experienced a real diaspora in the dark years of mainstream discography, those of the turn of the century. It took Fabri Fibra, in 2006, to bring Italian rap back onto the charts, and after him, Club Dogo. From there, it was a real escalation. In 2016, the generation that grew up listening to these artists gave birth to Italian trap, partly linked to the Atlanta sound, which then was mixed with pop (think of Mahmood’s sound) resulting in a chart domination. Today, artists such as Sfera Ebbasta, Rkomi, Lazza, Ernia and Madame are hitting big numbers; Salmo filled the San Siro stadium and fashion brands have a love relationship with Ghali.

The other important development was the rediscovery of Italian songs, a real cultural revaluation starting from the bottom. Great singer-songwriters such as De Gregori and Venditti, although very different from each other, have inspired a host of highly successful authors such as Tommaso Paradiso and Calcutta, who also emerged in the especially magical year that was 2016. What is called ‘indie pop’ in our country is simply Italian music written and arranged with contemporary and innovative references. The song most played on the radio during summer 2022 was “Giovani Wannabe” by Pinguini Tattici Nucleari, a band from Bergamo that grew up in the wake of this new writing tradition. If we are to identify a turning point, we can go back to 2008, when Le luci della centrale elettrica, Dente and Brunori SAS gave life to a new singer-songwriter scene, taken up and then brought into more avant-garde territory by the Roman band I Cani. I then like to think of Andrea Laszlo de Simone’s small cult following in France as a significant indicator. Lastly, in a less exposed but



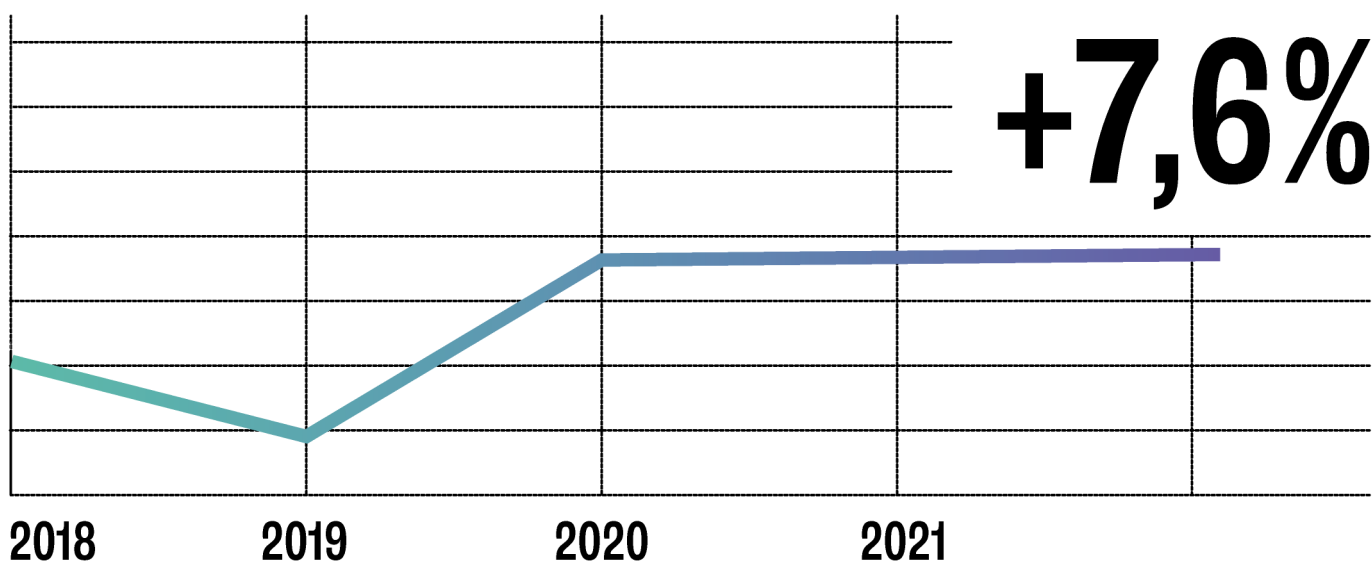
certainly no less relevant manner, we are witnessing a powerful and interesting movement in electronic music. In the more underground sphere, the aforementioned Lorenzo Senni is releasing on Warp, while the Berlin-based multi-instrumentalist Caterina Barbieri is the star of ambient music. Mogul Donato Dozzy plays at the best international boutique festivals. Here the language issue is more marginal. DJs more devoted to techno clubbing like Marco Carola or Joseph Capriati are still in demand, and Meduza from Milan are the authors of numerous global hits. Our country’s electro-pop tradition is indeed mighty: from Italo-disco to Italo-dance, via Giorgio Moroder’s disco production or the more commercial hits of Sabrina Salerno (much loved by the 2manyDJs), we can count on a huge stack of millions of records sold and, therefore, on a reputation that is increasingly more solid. If these three macro-areas, in an admittedly simplistic and partial manner, describe a little of what Italian music is like today, it must be said that we are currently experiencing a particularly important moment of transition. The 2016 generation has now been established; and it is therefore culturally creating a model. The pandemic hiatus has thus been strong and thundering, and it is not yet clear what the future trends will be. It is, therefore, very interesting to dive into new projects that seek their own meaning and dimension while remaining outside the box. Italy, it seems strange to say, is still a young country in many respects: it has a great desire to discover and be discovered.

THE MOST SUCCESSFUL ITALIAN MUSIC ARTISTS WORLDWIDE: A LOOK AT THE DATA FROM SIAE

FROM TIMELESS CLASSICS TO UNEXPECTED NEWCOMERS, NUMBERS FROM SIAE OUTLINE THE BEST PERFORMING ITALIAN MUSIC WORLDWIDE

The Italian music industry is growing. Not only on a national scale, but also in terms of exports. It is not only the incredible global success of Måneskin that confirms this, but also the numbers and statistics that, in terms of copyright, come directly from SIAE¹.

FOREIGN COPYRIGHT REVENUE



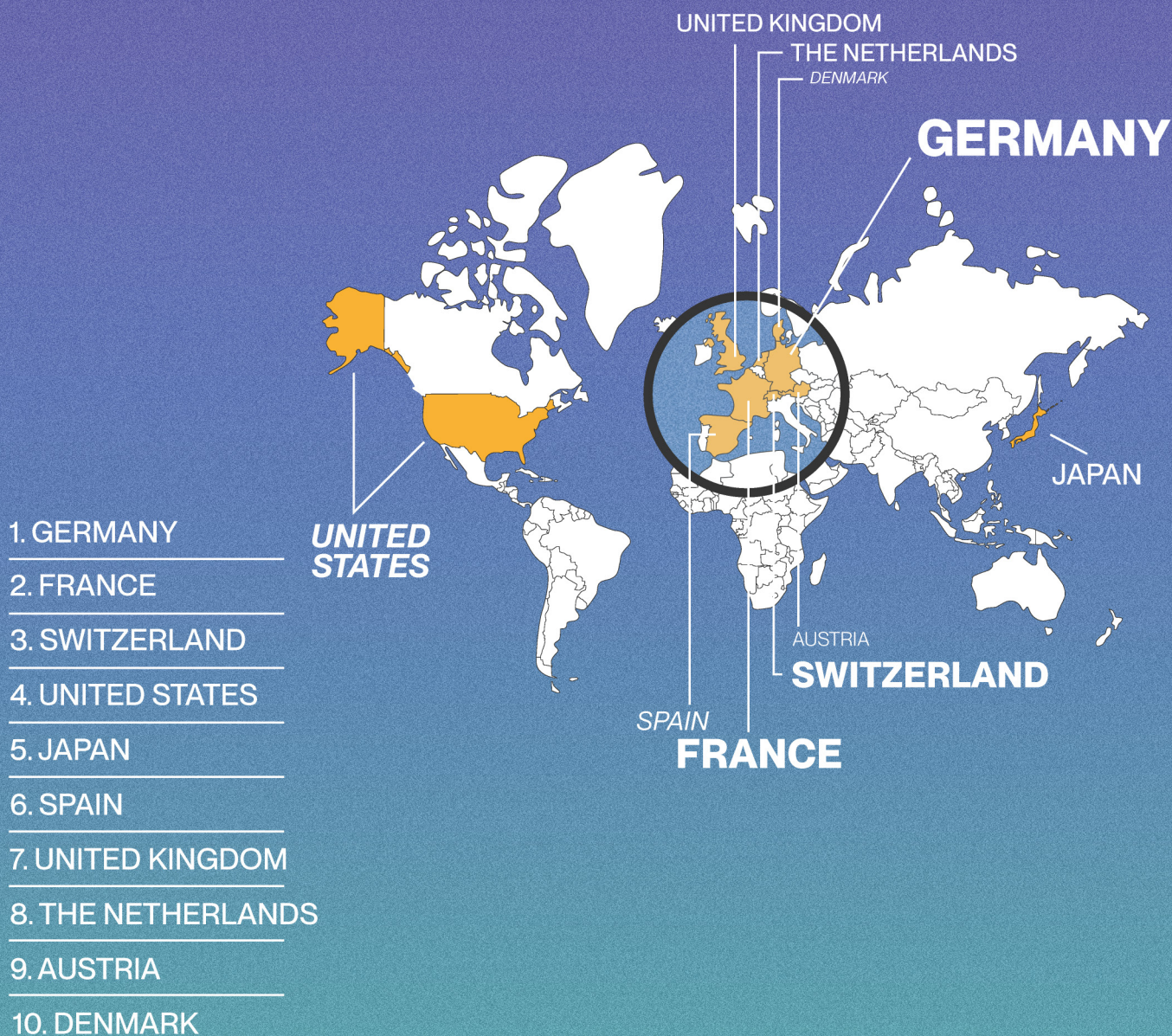
NOTE ON METHODOLOGY

To calculate the data relating to foreign countries (World), the revenues of Italian authors registered with SIAE relating to the DEM (musical performance rights) and ORM (performance fees) in the jurisdictions of the most important collecting societies in the world with which SIAE has reciprocal representation contracts were used. The complete list of partner organizations is available at: <https://www.siae.it/it/chi-siamo/siae-nel-mondo/> The online data, on the other hand, comes from the revenues collected directly by SIAE through European territory licenses with streaming platforms (Spotify, Amazon Music, Apple Music, YouTube, Deezer, etc.).

¹SIAE data compiled by Italia Music Lab

Between 2018 and 2021, for example, there was a 7.6 % growth in revenues from copyright abroad. A marked increase, which was the result of an internationalization process involving everyone: from surprising new acts, such as Måneskin with "I Wanna Be Your Slave" to artists who are committed to increasing their international profiles, such as Ultimo, who collaborated with Ed Sheeran in 2022, and Sfera Ebbasta. At the same time, we should not forget Italian songwriters and performers who have always been a constant presence in the world, such as Eros Ramazzotti, Zucchero, Eiffel 65, Umberto Tozzi, Paolo Conte, Toto Cutugno, Riccardo Cocciante, and Gigi D'Agostino.

WHICH COUNTRIES ARE LISTENING TO ITALIAN MUSIC THE MOST?



2021 was a year in which Italian music traveled across the globe.

If, in terms of foreign markets, the European states are the majority, there is no shortage of countries more geographically distant from ours.

The fourth country on the list is the United States,

closely followed by Japan. Germany, France, and Switzerland make up the podium in this 'export ranking', but our music production also garners acclaim in Spain, the United Kingdom, the Netherlands, Austria and Denmark.

WHO ARE THE MOST STREAMED ITALIAN SONGWRITERS IN EUROPE?

MÅNESKIN

FUNBEAT (PASQUALE DIFONZO)²

EROS RAMAZZOTTI

ULTIMO

TROPICO (DAVIDE PETRELLA)

ROCCO HUNT

DARDUST

EIFFEL 65 (MAURIZIO LOBINA)

ZUCCHERO

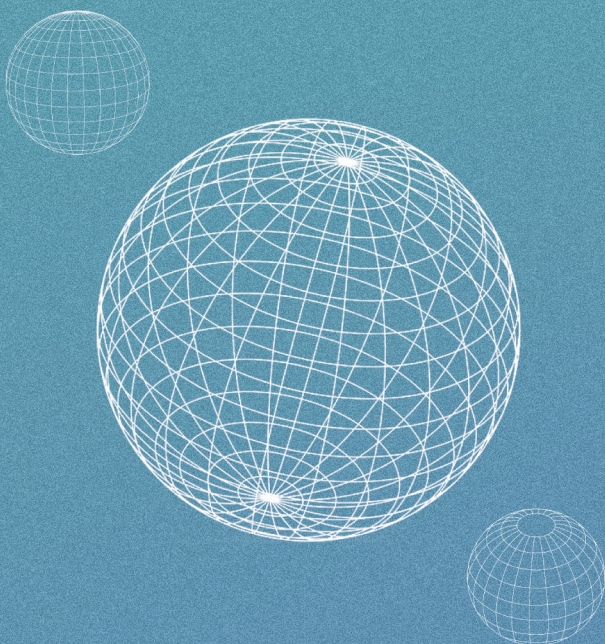
MARCO SISSA³

TIZIANO FERRO



On the European **streaming** platforms, **Måneskin confirmed their position as the number one songwriters**. Right behind them is Pasquale Di Fonzo, who released "1,2,3,4" under the Funbeat moniker, a track that quickly went viral on TikTok. In the top 10 we then find both young songwriters and icons of Italian music, such as Eros Ramazzotti, Ultimo, Zucchero and others.

WHO ARE THE TOP PERFORMING ITALIAN SONGWRITERS GLOBALLY?



MÅNESKIN

EIFFEL 65 (MAURIZIO LOBINA)

EROS RAMAZZOTTI

ZUCCHERO

DOMENICO MODUGNO

PAOLO CONTE

LUCIO DALLA

RICCARDO COCCIANTE⁴

FUN BEAT (PASQUALE DIFONZO)

MATIA BAZAR (PIERO CASSANO)

UMBERTO TOZZI

Expanding our focus to the **top-performing Italian songwriters globally** (not only on streaming platforms, but also on radio, TV, soundtracks, etc.), **Måneskin continues to lead the rankings**, while the younger artists leave room for legendary names such as Eiffel 65, Domenico Modugno, Paolo Conte, and Umberto Tozzi, just to name a few.

²Artist of the viral song on TikTok "1,2,3,4 (One, Two, Three, Four)" by Funbeat.

³Producer, songwriter, multi-instrumentalist who has worked on songs by artists such as Rovazzi, Benji&Fede, Il Pagante, Rochelle and Mr Rain. Under the moniker LA VISION, he enjoyed considerable success for the song "Hollywood" in collaboration with Gigi D'Agostino.

⁴Music artist for the reworking of Victor Hugo's popular opera Notre-Dame de Paris, rewritten by Canadian poet Luc Plamondon.

WHO ARE THE TOP PERFORMING UNDER 35 ITALIAN SONGWRITERS GLOBALLY?

The presence of urban and rap is very strong, especially when analyzing the ranking of the top performing under 35 Italian artists in the world. Måneskin leads here too, Rocco Hunt follows in fourth place, in fifth place Zef (he has collaborated on several international hits, but he is also a leading producer in the Italian music industry), thasup, Charlie Charles, Mahmood, Capo Plaza, Sfera Ebbasta, Ghali, Fred De Palma, Geolier and many others, demonstrating the constant maturation and growth of the genre in Italy.

MÅNESKIN

ULTIMO

DEEP CHILLS⁵

ROCCO HUNT

ZEF⁶

THASUP

MICHELE MORRONE⁷

YAKAMOTO KOTZUGA⁸

CHARLIE CHARLES

MAHMOOD

CAPO PLAZA

SFERA EBBASTA

PINGUINI TATTICI NUCLEARI

MERK & KREMONT

CARL BRAVE

MATTEO ROSSANESE⁹

GAZZELLE

GHALI

FRED DE PALMA

GEOLIER

AVA¹⁰

CALCUTTA

LAZZA

EMANUELE LONGO¹¹

IRAMA

SICK LUKE

⁵Gianmaria Sanna is a DJ and producer, among the most important names in the tropical house scene.

⁶Stefano Tognini is a producer who has worked with the likes of Guè, Marracash, Rkomi and Joan Thiele. He has recently enjoyed success after producing several tracks for Rocco Hunt, including "Un bacio all'improvviso" and "A un passo dalla luna" both in collaboration with Spanish singer Ana Mena.

⁷He is an actor, singer, model, and fashion designer. In 2020, he released his first album "Dark Room", which contains some of the songs from the soundtrack of the film "365 Days". The project was quite successful, especially in Poland, where it reached number two on the album charts.

⁸Giacomo Mazzuccato, is a musician, composer, producer and sound designer. He is best known for creating the soundtrack for the Netflix series "Baby".

⁹Author of the viral song on TikTok "Sunny Day".

¹⁰Francesco Avallone is a young multi-platinum producer best known for his artistic partnership with rapper Capo Plaza.

¹¹Producer and member of the DJ duo Marnik, together with Alessandro Martello. Among his hits, he has collaborated with Marco Sissa (LA Vision) and Gigi D'Agostino on the track "Hollywood".



WHICH ITALIAN SONGS WERE MOST LISTENED TO WORLDWIDE IN 2021?

Måneskin and Eiffel 65 also dominate the ranking of the best performing songs worldwide, with "I Wanna Be Your Slave", "Some Say", "Blue" and "Zitti e Buoni". From fifth position down, several strongholds in the history of Italian music are held in high regard internationally; Domenico Modugno, Andrea Bocelli, Gigi D'Agostino are just some of the most popular outside of Italy.

I WANNA BE YOUR SLAVE

MÅNESKIN

SOME SAY

NEA - EIFFEL 65

BLUE

EIFFEL 65

ZITTI E BUONI

MÅNESKIN

1,2,3,4 (ONE,TWO,THREE,FOUR)

PASQUALE DI FONZO

NEL BLU DIPINTO DI BLU

MODUGNO DOMENICO

CON TE PARTIRÒ

BOCELLI ANDREA

RHYTHM OF THE NIGHT

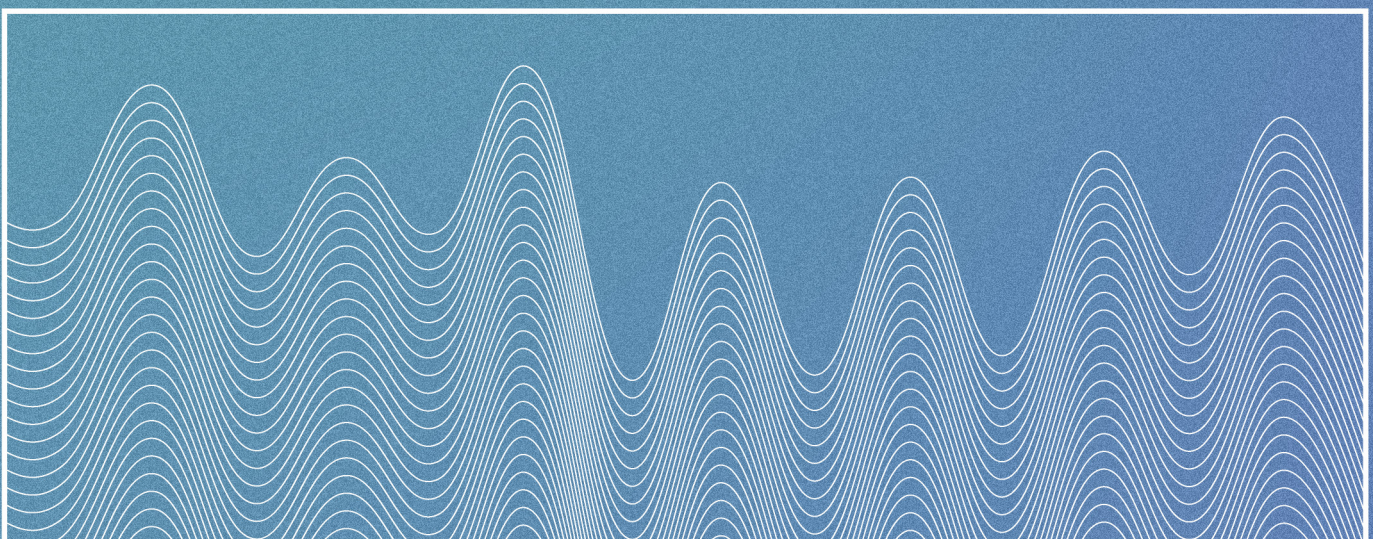
CORONA - BLACK EYED PEAS

HOLLYWOOD

LA VISION & GIGI D'AGOSTINO

TU VUÒ FA L'AMERICANO

RENATO CAROSONE



THE MOST STREAMED ITALIAN SONGS IN EUROPE

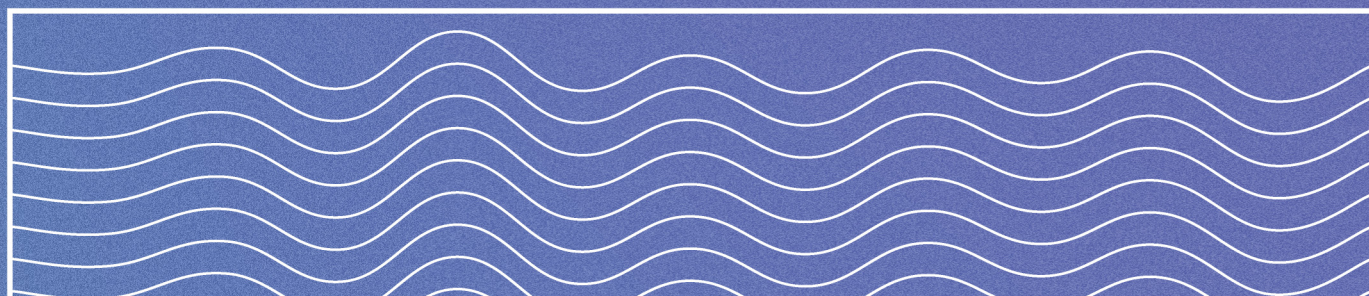
Taking into account streaming platforms in Europe, Måneskin's "I Wanna Be Your Slave" and "Zitti e Buoni" take the top two places, followed by the viral "1, 2, 3, 4". **Lots of classics** make up the rest of the chart: "Blue" by Eiffel 65, "Freed from desire" by Gala, "Tu vuò fa l'americano", and "Nel blu dipinto di blu".

I WANNA BE YOUR SLAVE	Måneskin
ZITTI E BUONI	Måneskin
1,2,3,4 (ONE, TWO, THREE, FOUR)	Funbeat (Pasquale Di Fonzo)
BLUE	Eiffel 65
THUNDER	Gabry Ponte, LUM!X, Prezioso
FREED FROM DESIRE	Gala
HOLLYWOOD	La Vision & Gigi D'Agostino
L'AMOUR TOUJOURS	Gigi D'Agostino
RHYTHM OF THE NIGHT ¹²	Corona
RUN FREE	Deep Chills
TU VUO FA L'AMERICANO	Renato Carosone
NEL BLU DIPINTO DI BLU	Domenico Modugno
ITALIANO	Toto Cutugno
SATURDAY NIGHT ¹³	Whigfield
TORNERÒ	I Santo California
SOME SAY	Eiffel 65
CARUSO	Lucio Dalla

According to the data, the **growth trend of Italian music abroad is positive**. A new generation of performers and songwriters, driven by the global success of Måneskin, is increasingly expanding the boundaries of Italian music. At the same time, great classics and legendary artists continue to cross national borders, demonstrating the specific weight of our music in the global market.

¹² "The Rhythm of the Night" is a single by Italian singer Corona, released on 5 November 1993. In 2019, the Black Eyed Peas and J Balvin, included in the soundtrack of the film *Bad Boys for Life*, sampled the song for the track "Ritmo" (*Bad Boys for Life*). The song's original writers also include Italian producer Francesco Bontempi and Giorgio Spagna, the brother of singer-songwriter Ivana Spagna.

¹³ "Saturday Night" is the debut single by Danish singer Whigfield, released in 1994 and produced by Italian producer Alfredo "Larry" Pignagnoli.



ITALIA MUSIC EXPORT: NUMBERS AND STRATEGIES TO SUPPORT OUR MUSIC AROUND THE WORLD

A SNAPSHOT OF ITALIA MUSIC EXPORT'S WORK, FIVE YEARS AFTER ITS INCEPTION.

HOW, WHEN AND WHY ITALIA MUSIC EXPORT WAS BORN

In November 2017, **SIAE launched Italia Music Export**, the first Italian office aimed at supporting the dissemination of Italian music beyond national borders and promoting a positive image of young, fresh and contemporary music made in Italy. Another objective of Italia Music Export consists in supporting the many companies (record labels, booking agencies, publishers and others) operating in this sector, which have been helping to shape Italy's music industry for years. In the summer of 2021, the export office became part of Italia Music Lab, a new hub created by the collecting society SIAE to support Italian music, both within the local market (increasing awareness of the mechanisms of music business and copyright) and internationally.

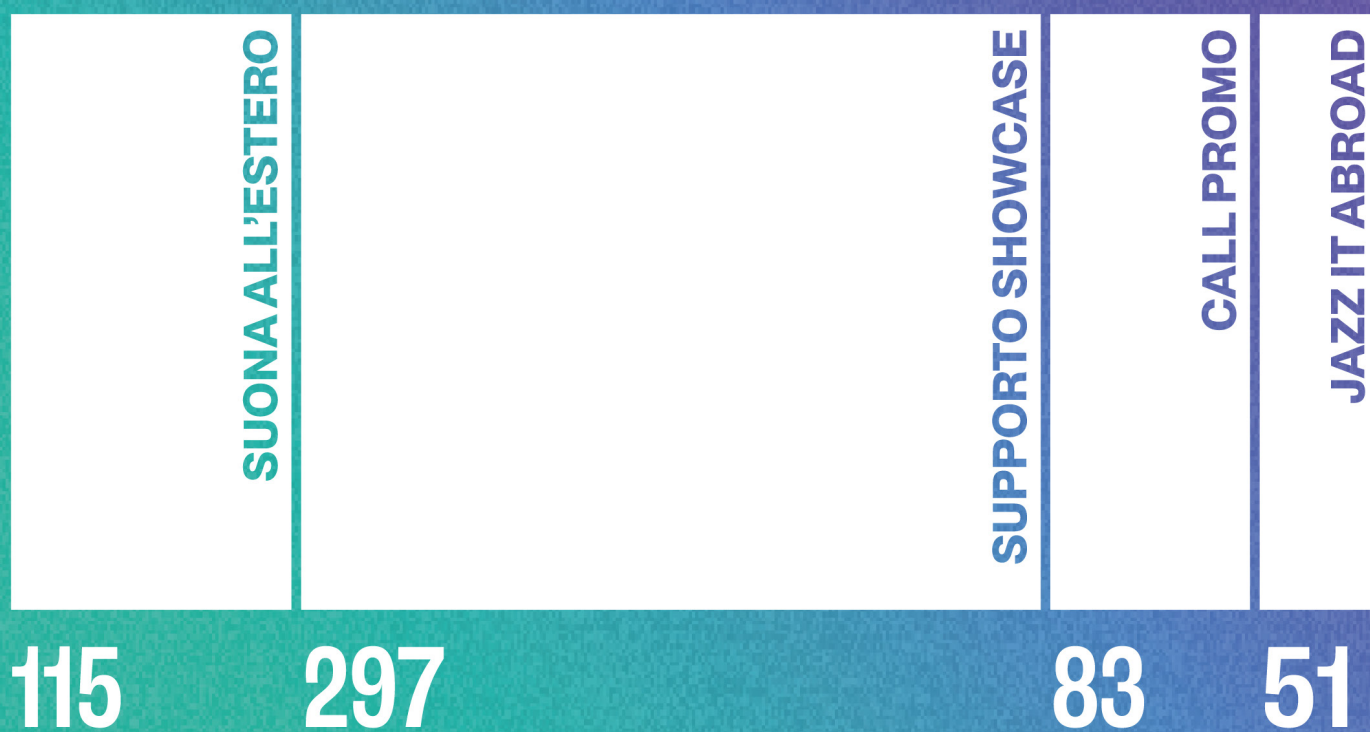
As it is the case with other European countries, the Italian music export office works on two fronts: on the one hand, it supports Italian professionals, artists and performers on an economic, institutional and strategic level; on the other hand, it builds an important network of contacts with foreign bodies and organizations, which find in Italia Music Export a unique partner in promotional, commercial and diplomatic contexts. The office supports the export of Italian music through a bilingual (Italian and English) networking platform, financial support to promote Italian talent abroad, training events for Italian music industry professionals, partnerships with festivals and events, and the careful and constant monitoring of visibility opportunities.

Over the past years, Italia Music Export has been able to achieve many milestones: more than 450 artists and more than 180 professionals have received financial support for their work abroad, while more than 400 have received training and customized assistance on their export strategies. Measuring the effectiveness of the support received over the years, the vast majority of the beneficiaries stated that they had seen an increase in their export activities, and experienced tangible results in terms of both business and creativity. This fundamental support, **flanked by painstaking work to develop promotional and diplomatic networks**, has put Italy back on the map of international music. The success of our music should in fact also be measured in terms of our reputation and cultural influence in the world: these last five years have been incredibly intense for Italian music, full of surprises and new discoveries. Italian artists and the professionals who work with them have been able to distinguish themselves, attract audiences and establish their careers. The path towards a full internationalization of our market and repertoire has only just begun; many projects still need to be implemented and many strategies need to be perfected. This report represents an opportunity to improve and plan future support for Italian music in the world, based on the achievements of Italia Music Export and the many steps that SIAE has taken to further support Italian songwriters.

SUPPORT PROVIDED BY *ITALIA MUSIC* EXPORT FROM 2018 TO 2022

546

musicians supported,
including:



**TOTAL FUNDS USED
TO SUPPORT THE
EXPORT OF
MUSICIANS AND
COMPANIES FROM
2018 TO 2022:**

**1.5
MILLION**

INITIATIVES

- FINANCIAL SUPPORT

Italia Music Export launched several programmes to financially support artistic projects and professionals, updating and fine-tuning them according to the needs and feedback received from participants over the years. Applications can be submitted quickly and easily by filling in a form and sending it by email. The first programmes, launched in 2017, were the Call Artisti (which is now called Suona all'Estero) **to fund international tours**, Call Operatori to reimburse part of the expenses incurred by professionals for **business trips abroad**, and Supporto Showcase, a financial support for artists selected to play at **industry events**. To date, three programmes are active on a regular basis: Call Promo, Suona all'Estero and Supporto Showcase. Italia Music

Export has designed these three programmes to help music creators and music professionals on three different fronts: promotion, touring and networking.

CALL PROMO is launched twice a year and aims to provide financial support to **promote Italian music internationally**. Applications are evaluated by an independent commission of music industry experts and are selected based on the experience of the applicant, the quality and experience of the third parties involved in the project, and the quality of the promotional project and strategic coherence with the artist's career. Among the various expenses for which reimbursement can be requested there are: a press office in a foreign country, a featuring with a foreign artist, a press kit, promo photos and adv on social networks targeting one or more foreign countries.

[52]
SUPPORTED
A C T S

83
MUSICIANS
AVERAGE AGE 33 YEARS

70%
M E N

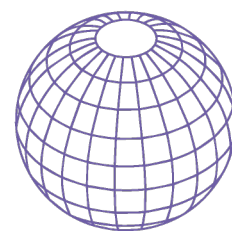
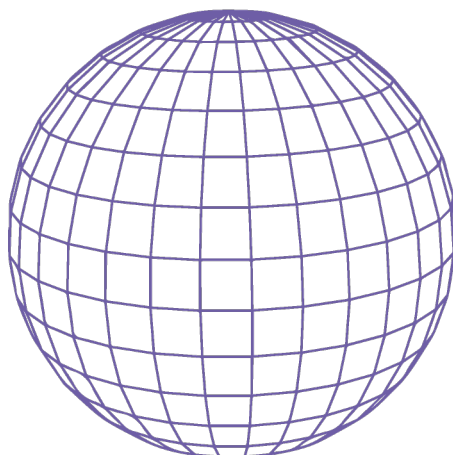
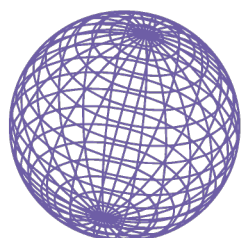
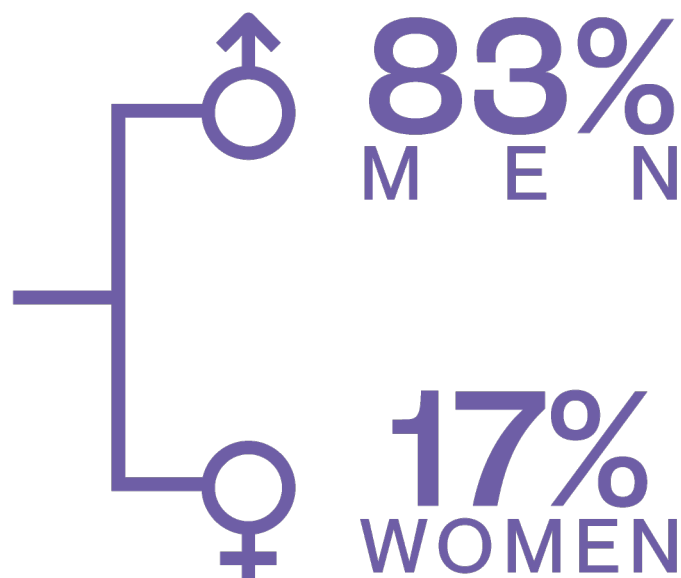
30%
WOMEN

SUONA ALL'ESTERO is the programme created by Italia Music Export aimed at **reimbursing expenses for the performance of concerts or tours abroad.**

The programme is structured in two different phases, so that the contribution can be equally distributed between tours and concerts organized during the summer/spring and autumn/winter concert seasons. An external committee evaluates the applications based on the export strategy, the quality of the third parties involved and the structure of the tour. It is possible to apply for reimbursement of travel, accommodation and meals. Starting in 2022, babysitting support has been introduced, i.e., the possibility to include in the budget an additional lump sum reimbursement for each day of travel for each parent who needs to cover the expenses for child care in Italy or in the country where the tour takes place.

37
S U P P O R T E D
A C T S

115
MUSICIANS
AVERAGE AGE 34 YEARS



COUNTRIES WHERE ITALIAN ARTISTS PLAYED THE MOST

COUNTRIES TOURS

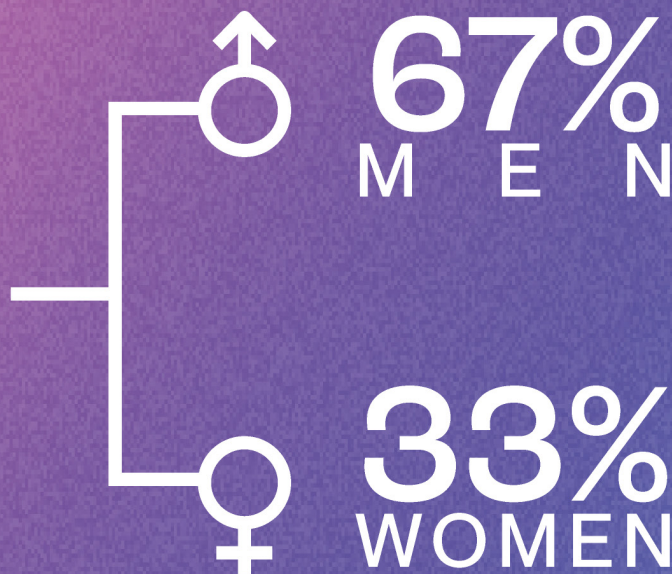
FRANCE	13
GERMANY	13
UNITED KINGDOM	10
BELGIUM	8
SWITZERLAND	7
SPAIN	5
CZECH REPUBLIC	4
THE NETHERLANDS	4
AUSTRIA	3
UNITED STATES	3
COLOMBIA	2
SLOVENIA	2
SWEDEN	2
BRASIL	1
BULGARIA	1
CHILE	1
FINLAND	1
IRELAND	1
LUXEMBOURG	1
MEXICO	1
PERÙ	1
PORTUGAL	1
POLAND	1
HUNGARY	1

SUPPORTO SHOWCASE, developed in two phases, aims to financially support Italian artists selected to perform at major international showcase festivals, identified by Italia Music Export as events of strategic interest. **Showcase festivals** are events during which the artist performs in front of an audience of **professionals** and are therefore especially important from a business point of view. Participating can be a heavy investment as the logistical costs are borne by the artist and their team, and there is no compensation for performances: hence the need to set up a support programme.

89 **SUPPORTED**
A C T S

297

MUSICIANS
AVERAGE AGE 29 YEARS



TOTAL
CONCERTS



134

Countries

Showcases

16 COUNTRIES

26 DIFFERENT SHOWCASES

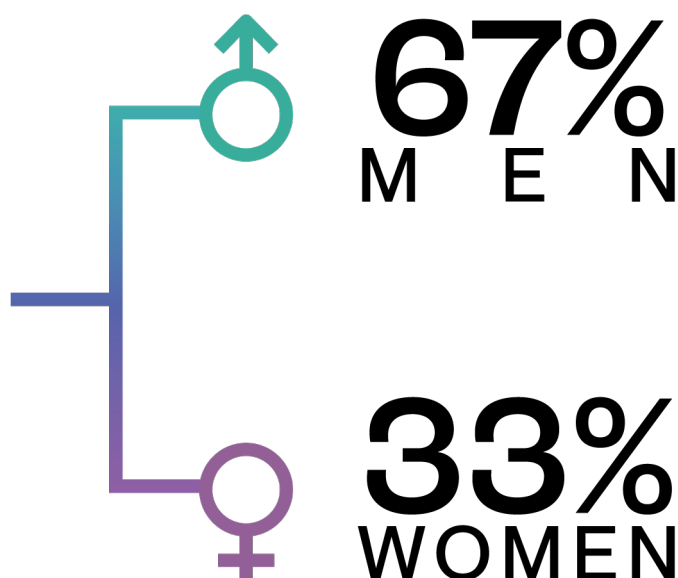
AUSTRIA	Waves Vienna
CANADA	Indie Week
CHINA	IMX
KOREA	Zandari Festa
FRANCE	MaMa Festival
GERMANY	Reeperbahn Festival
GERMANY	Jazzahead!
ICELAND	Iceland Airwaves
THE NETHERLANDS	ESNS
THE NETHERLANDS	New Skool Rules
THE NETHERLANDS	So What's Next?
THE NETHERLANDS	Classical:NEXT
PORTUGAL	MIL
PORTUGAL	MEETsss
UNITED KINGDOM	Liverpool Sound City
UNITED KINGDOM	The Great Escape
SLOVAKIA	Sharpe
SLOVENIA	MENT
SPAIN	Primavera Pro
SWEDEN	Live at Heart
SWEDEN	Future Echoes
TAIWAN	LUCfest
USA	Mondo.NYC
USA	Folk Alliance International
USA	SXSW
USA	New Colossus Festival

JAZZ IT ABROAD is a project promoted by the **Ministry of Foreign Affairs and International Cooperation** (MAECI) and managed by Italia Music Export, which provides artists in the jazz sector with financial support for international concerts. Projects are assessed by a committee according to the criteria mentioned above.

19

**SUPPORTED
ACTS**

51 MUSICIANS
AVERAGE AGE 42 YEARS



- INTERNATIONAL SONGWRITING CAMP

Since 2019, Italia Music Export has included among its initiatives **songwriting camps between Italian and foreign music creators**.

The various editions of the camp have been organized together with several important foreign entities such as CNM (Centre National de la Musique), Buma Cultuur and the Dutch Music Export. The aim is to bring together in the recording studio Italian and foreign songwriters, musicians and producers to create new tracks destined for publication, soundtracks for films, TV series and commercials.

During the different editions, the camp emerged not only as an excellent networking opportunity, but also and above all as a valuable chance for participants to grow artistically and be influenced in a positive

way by different cultural backgrounds. Italia Music Export is already working on the organization of the next co-writing sessions with a focus on two foreign territories: France and Spain. Italian artists who have participated in the past three editions include Andre Blanco, Cecilia, Ceri, Carlo Corbellini (Post Nebbia), Simone D'Avenia (Bluem), Alessia Labate, Elasi, See Maw, Domenico Finizio (Tropea), Delmoro, Plastica, Voodoo Kid, Kharfi, Hân, Machweo.

Foreign artists include: Clou, Coco Bans, Clémence Gabriel, Kofi Bae, Sutus, Tallisker, Anoraak, Romane, Thérèse, JOKO, James BKS, Joseph Kamel, Belle van Doorn (CUT_), Koen vd Ward (Klangstof), Mathias Janmaat (Bombay) and Tjeerd Bomhof (Dazzled Kid, Voicst).

- PROMOTION

During these years, Italia Music Export has worked to **increase the visibility** of Italian artists, performers, and musical works abroad: Italian music **concerts** have been organized at some of the best showcase festivals around the world, and **foreign press offices** have been engaged to ensure the highest attendance of foreign professionals and maximum exposure of our artists in the international media.

Thanks to the numerous trips abroad by the Italia Music Export team, it has been possible to build up a **database of contacts** of foreign professionals and journalists, who periodically receive news about

Italian music, including an international press review.

During its five years in operation, Italia Music Export has kept track of the growing international interest in Italian music by sharing numerous articles on Italian artists and performers, which have been issued in the most important international publications in the industry. Italia Music Export has also organized several **networking opportunities** between Italian and foreign professionals, both in Italy and during international events, and has presented the Italian music scene at numerous trade fairs and festivals.

- TRAINING AND CONSULTANCY

Offering financial support to artists and companies is not enough to adequately boost Italy's music exports: when approaching an international market, it is often necessary to provide help in terms of knowledge and strategy. **Italia Music Export has provided personalized, free and long term assistance to around 400 professionals, songwriters and performers** who have turned to the export office for information, contacts and support on export strategies. Over the years, Italia Music Export has published numerous tutorials and informative content on its website that delve into various issues related to music export and shared various opportunities for support. All content has been regularly sent via newsletters to the email inboxes of hundreds of Italian professionals. In addition, the Italia Music Lab YouTube channel features several videos in which the Italia Music Export team explains how the export office works and the ways in which Italian music can be exported internationally. Italia Music Export also organized several free workshops aimed at songwriters, performers and professionals from the Italian music industry.

During the workshops held in Milan, Rome and Bari, the basics of music exporting were covered with the help of professionals from the industry who discussed various topics, including everything from management to promotion, distribution, publishing, synchronization, and live performance. As part of the Milano Music Week and Linecheck Festival, since 2018 Italia Music Export has promoted a series of events (conferences, lectures, and networking opportunities) on the topic of music export, directly involving foreign professionals. **The initiatives were also developed thanks to the valuable contribution of ITA (Italian Trade Agency)**, with which the export office has been collaborating over the years. Italia Music Export's expertise has also been called upon by the Catholic University of Milan, the LUISS Guido Carli University of Rome, and the Napier Academy to add lessons regarding the internationalization of Italian music to educational courses.

- SYNERGY AND COLLABORATION

Over the years, Italia Music Export has been able to create numerous synergies and collaborations, both at European and national level, most notably the partnership with **EMEE**. The European Music Exporters Exchange is an association that brings together all the European music export offices and in which Italia Music Export has been a member of the advisory board. Through EMEE, Italia Music Export has worked on several studies, analyses and reports concerning European music export on behalf of the **European Commission**.

The Italia Music Export office is the representative for Italy in **ESNS Exchange**, the longest-running support programme for music funded by the European Commission, which aims to facilitate the movement of musicians in the territories of the Union.

Moreover, since 2020 Italia Music Export has been collaborating with the **Ministry of Foreign Affairs and International Cooperation** on projects regarding the dissemination of Italian music abroad and the training of its diplomatic staff. These programmes have involved the network of **Italian Cultural Institutes** worldwide and featured

young Italian musicians from all over the country. In particular, the "Futura" project was set up to support the promotion of Italian music abroad: it is a music video-archive covering a wide range of genres and providing a vivid snapshot of Italian music, which can broaden its horizons and experiment beyond its geographical borders. The video archive features performances by Italian artists who have played in the digital editions of many showcase festivals around the world over the past two years. As of 2022, the Ministry also promotes "Jazz IT Abroad", the project managed by Italia Music Export that provides financial support to jazz artists to perform concerts abroad.

Lastly, since March 2022 Italia Music Export has been a partner of **Liveurope**, an initiative that encourages venues that are part of its network to book emerging artists from different European countries, receiving special financial support. The venues can subsequently foster the circulation of music creators in Europe, without having to face major financial risks, while remaining independent in the choice of the line-up. This project provides additional international support for the Italian music scene, enabling artists to perform in some of the

most popular and legendary European venues.

The export office has also obtained discounted rates reserved for Italian music industry operators for all major showcase festivals, fairs and international conferences.

Moreover, Italia Music Export has initiated an interesting collaboration with **ITA (the Italian Trade Agency)**, which has enabled the co-financing of networking activities between Italian and foreign music professionals and the coverage of travel and accommodation expenses to invite international music industry professionals to Italy.

Finally, Italia Music Export works closely with the

Municipality of Milan and the Regions of Emilia-Romagna (**Emilia-Romagna Music Commission**) and Puglia (**Puglia Sounds**): three administrations that are actively implementing music development policies in their regions, most importantly with respect to music export.

- DIVERSITY AND INCLUSION

Italia Music Lab and Italia Music Export are committed to build a more representative and inclusive music industry, in which each person feels safe and valued, considering the diversity of artists and professionals and respecting everyone. This commitment is realized through a series of partnerships and initiatives aimed at achieving real change within the industry.

Since 2022, Italia Music Lab has been a sponsor of **Keychange**, an initiative co-funded by the European Union that is transforming the future of international music by encouraging festivals and music organizations to commit to the goal of including 50% women and under-represented genders in their artistic programming and workforce. Our offices provide financial support that will help ensure that year after year female artists and professionals can continue to benefit from the training programme. In addition, every year Italia Music Lab supports the Keychange Talent Development Programme, an initiative that selects 76 female artists and professionals and offers them the opportunity to participate in international festivals, networking events, training programmes and much more. Thanks to Italia Music Lab's sponsorship, every year 6 Italian female professionals and artists take part in the Keychange Talent Development Program and thus have the opportunity and the financial support to perform on the stages of major showcase festivals in Europe and Canada, participate in the international training programme, be involved in panels and workshops at major music conferences, mentoring programmes and international networking events. Furthermore, Italia Music Lab has signed the Keychange Pledge, committing to achieve gender balance among its workers and panelists, and to

encourage evaluating committees to consider a fair representation of women or minorities in the evaluation of the calls for proposals.

Italia Music Lab is also an institutional partner of **Mission Diversity**, the project promoted by Music Innovation Hub, Keychange and PRS Foundation with the aim of combating gender discrimination and enabling equal professional opportunities within the music industry. Each year, the programme supports 6 artistic projects involving under-represented talent: each project receives a grant for the development of a final audio-visual output and the production of a documentary that will be promoted on the partners' communication channels and screened during the UN SDGs Campaign Festival.

In addition, as of March 2022, Italia Music Lab and Italia Music Export have decided to set up an **advisory committee on diversity and inclusion** issues, to pursue the goal of inclusiveness in all their initiatives, including issues that range from the language and communication used to the development of specific support programmes: the first member of the committee is **Equally**, an Italian organisation that deals with gender equality within the music business. Other anti-discrimination organisations will soon join the committee to support and advise the Foundation on these issues.

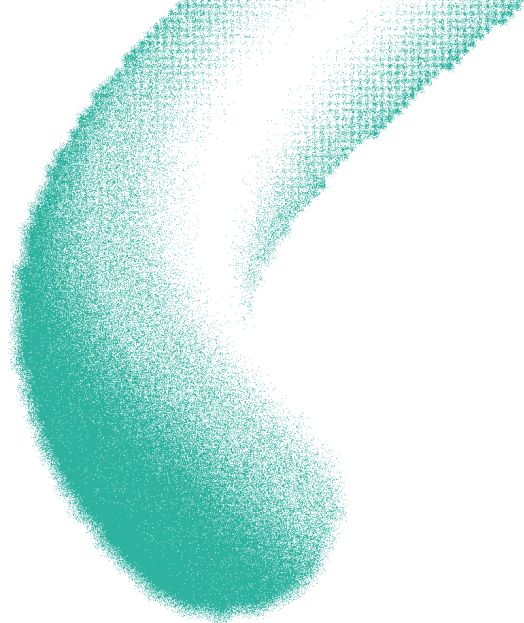
Hundreds of artists have been supported over the years by Italia Music Export, on several levels, in synergy with several partners and with strategies developed on a case-by-case basis tailored to the individual artistic project.



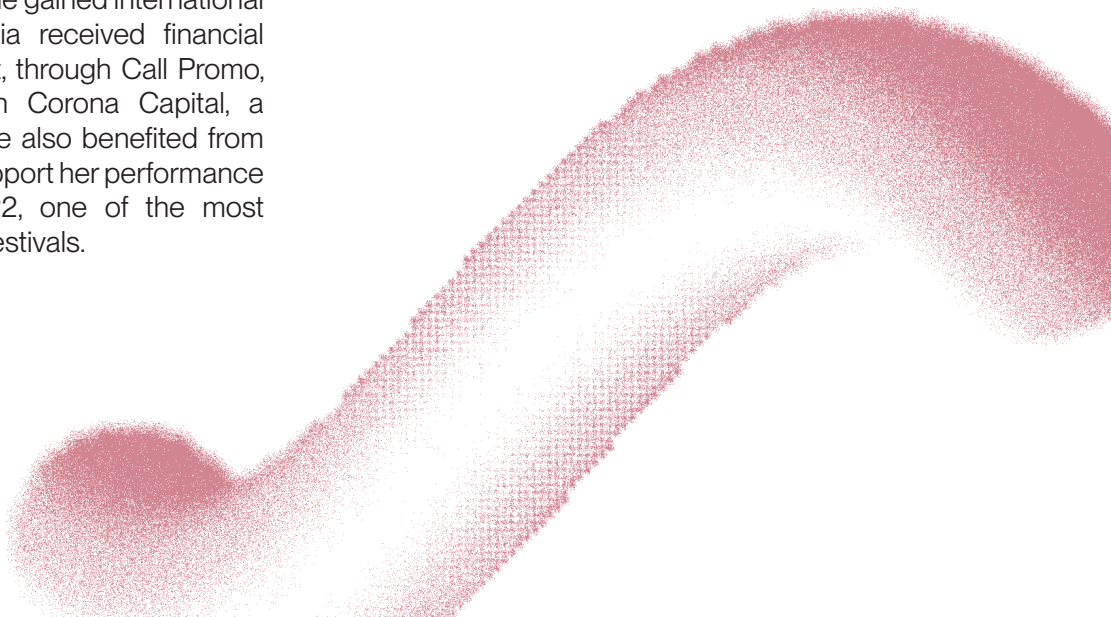
Madame, stage name of Francesca Calearo, is an Italian singer-songwriter and rapper born in 2002. In 2018, she attracted the attention of the general public with her singles “Anna” and “Sciccherie.” She has emerged since then as one of the brightest talents of the current Italian rap and urban scene. In 2022, she embarked on her international career, forging a partnership with Capitol Music France, and released the single “Tu m’as compris” in collaboration with French rapper Hatik. The music video of the song was funded through Call Promo, the financial support programme aimed at funding global promotion for Italian artists. In 2023, she was selected to play at Europe’s largest showcase festival, Eurosonic Noorderslag.



Gaia Gozzi, simply known as Gaia, is a young singer-songwriter. Born to a Brazilian mother and an Italian father, Gaia draws from her vibrant cultural background and mixes typical South American sounds with more European rhythms, using both Italian and Portuguese in the writing process. In 2021, as she gained international recognition for her career, Gaia received financial support from Italia Music Export, through Call Promo, to support her participation in Corona Capital, a major festival in Mexico City. She also benefited from Supporto Showcase funds to support her performance at Eurosonic Noorderslag 2022, one of the most important European showcase festivals.



LNDFK is a producer and singer-songwriter with a rich background from two different cultures, Italian and Arabic. Her music combines jazz, neo-soul and hip-hop influences, all filtered through her wealth of experience and sensibility. Critically acclaimed since her debut, LNDFK has been supported by numerous international radio stations, including BBC and Worldwide FM, and has reached more than one million listeners on digital platforms. Thanks to Italia Music Export’s Call Promo, in 2020 and 2021 she benefited from financial support to hire an international press agency to support her in promoting her project globally. She has also performed on some of the most important international stages, taking advantage of Supporto Showcase funding: in 2022, she performed in the Netherlands at the Eurosonic Noorderslag, in Slovenia at MENT, and at the MaMa Festival in Paris. Finally, thanks to the “Suona all’estero” funding scheme, LNDFK received a grant to reimburse expenses from her tour in Belgium.





ANNA

Anna Pepe, aka ANNA, is a young rapper born in 2003. As a child, she was drawn to the world of music by her father, a DJ, cultivating a strong passion for rap and urban culture. After attracting attention by posting some freestyle music on Instagram, Anna debuted with the single “Bando”, climbing all the charts and staying at the top for weeks: in fact, she is the youngest artist to have reached the top of the Italian Top Singles chart. “Bando” reached radio stations overseas and, in 2022, she made her mark on the international music scene by being nominated for the Music Moves Europe Awards and performing at the Eurosonic Noorderslag, thanks to Italia Music Export’s Supporto Showcase.

M¥SS KETA

An irreverent performer, pop diva and rapper with a punk attitude, M¥SS Keta has been able to carve out her own space in the Italian music scene over time with a series of hits acclaimed by even the most hostile critics, thanks to her provocative writing and her unmistakable sound that ranges from psychedelic to techno and even reggaeton. She has been taking her music to Europe’s most iconic clubs for years and, given the growing international interest in her music, she was able to perform at MIL in Lisbon in 2019 and at the Eurosonic Noorderslag in Groningen in 2021, receiving financial and strategic support thanks to Italia Music Export’s Supporto Showcase. In 2022, Myss Keta’s autumn European tour was funded by Italia Music Export’s live support scheme Suona all’Estero.

MARTA DEL GRANDI

Marta Del Grandi is an Italian musician, jazz vocalist and singer-songwriter. Over the years, she has brought together influences from all over the world in her songs, creating a distinctive style that spans genres and explores new compositional and sonic horizons. In 2020, she took part in PUSH, the consultancy and matchmaking programme by Italia Music Export and Linecheck Music Meeting and Festival, tailor-made to boost the export of Italian music. Thanks to this initiative, Marta took part in Linecheck, Italy’s most important showcase & conference festival, performing in front of an audience of international professionals, among whom she found her current manager. She subsequently signed with the British label Fire Records, releasing her first album “Until We Fossilize”. In 2021, her project was awarded financial support through Call Promo for the promotion of the album in the international press and media. In addition, in 2022 she performed digitally for Eurosonic Noorderslag, benefiting from Supporto Showcase for the live performance. Between 2021 and 2022, Marta Del Grandi performed all over Europe, and her winter tour was one of the projects selected for Jazz IT Abroad, for which she received funding to cover part of the logistical expenses related to her international concerts.



BEE BEE SEA

Bee Bee Sea are three guys from the province of Mantua who together form one of Italy's and the world's most brazen underground music acts. Having become famous overseas after playing extensively around the world, the Bee Bee Sea are particularly popular in the United States: not only was their song "The Garage One" included in the soundtrack of the popular TV series "Shameless", but their songs have also been played several times by Iggy Pop on BBC Radio. In 2020, Bee Bee Sea received financial support from Italia Music Export to promote their music abroad through Call Promo. In addition, the band was supported in 2021 through Supporto Showcase for their performances at the Eurosonic Noorderslag in Groningen and the Reeperbahn Festival in Hamburg.

HER SKIN

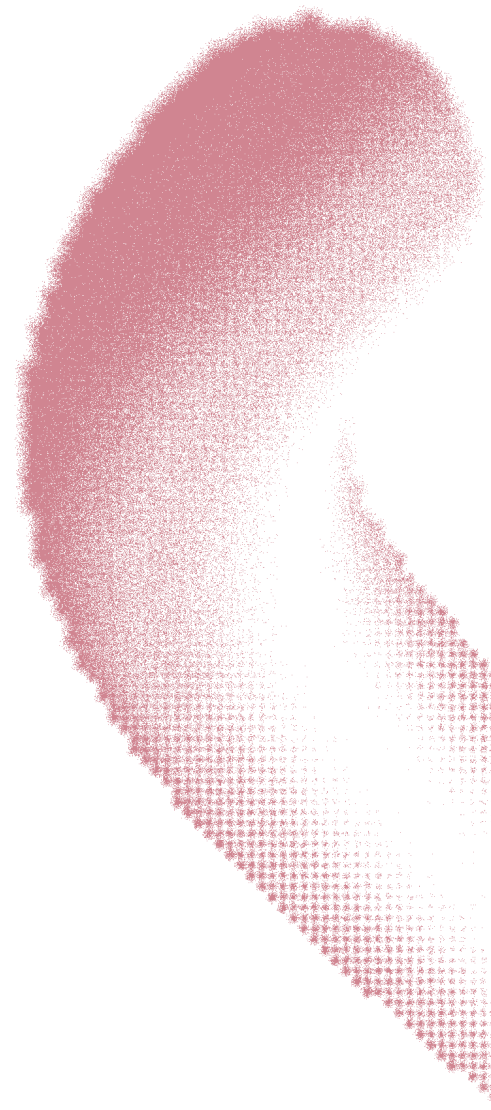
Her Skin is the project of Sara Ammendolia, a young singer-songwriter from Modena who debuted in 2018 with the album "Find a Place to Sleep". Since her debut, she has taken her dreamy folk-rock project to the likes of Hamburg's Reeperbahn Festival, Brighton's The Great Escape and Barcelona's Primavera Pro. After a tour in India in 2019, in 2022 she was among the beneficiaries of Italia Music Export's Suona all'estero, obtaining financial support for her tour that included France, Belgium, Germany and the United States, where she performed at SXSW in Austin. At the end of 2022 she performed at Mondo NYC festival and the same year, through Call Promo, she received financial support to promote her new album "I Started A Garden" released by the Italian-American label WWNBB in the USA, UK and France.

JULIA BARDO

An Italian girl transplanted to Manchester, Julia Bardo is the latest incarnation of Giulia Bonometti, a young singer-songwriter who mixes folk, pop, and old-school rock influences with a modern twist. After gaining experience playing in bands such as Own Boo and Working Men's Club, Julia devoted herself entirely to her own music and released two EPs on the UK label Wichita Recordings in 2020 and the album "Bauhaus, The Apartment" in the following year, performing all over the UK in support of the record. In 2021, Julia then played at the Eurosonic Noorderslag thanks to the Supporto Showcase funding provided by Italia Music Export. In the same year, she was one of the eight winners of the Music Moves Europe Talent Awards 2021, the European Union award that celebrates the brightest emerging talent in Europe every year.

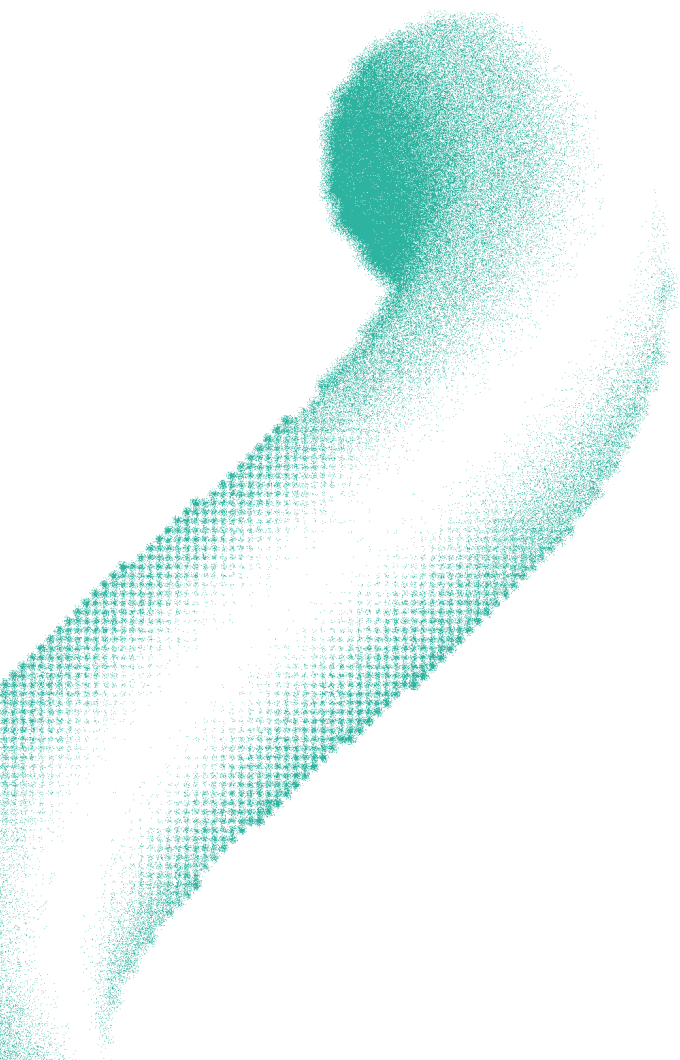
POST NEBBIA

Post Nebbia is a band born from the imagination of Carlo Corbellini. The band takes elements from the international psychedelic wave, remixes it with an electronic sound and a tighter rhythm which serves as a backdrop to lyrics depicting evocative emotions with surreal overtones. Right from the start with their first releases, the group has received positive feedback from industry insiders, who define it as one of the most promising projects to come from the Italian music scene. In 2022, Post Nebbia brought their music to the stage of the MaMa Festival in Paris, thanks to Supporto Showcase funding provided by Italia Music Export. In the same year, the group's frontman Carlo Corbellini took part in the International Songwriting Camp organised by Italia Music Export in collaboration with CNM, working together with French and Italian artists.



ELASI

Elasi is a singer-songwriter, guitarist, and producer whose musical style is steeped in journeys across real and imaginary worlds. Throughout her career, Elasi has collaborated with musicians from all over the world, from Mali to Brazil, India to Armenia, creating an eccentric sound with fluid and colourful geographical and stylistic boundaries. In 2021, Elasi participated in the International Songwriting Camp organised by Italia Music Export and CNM, working with Italian and French artists; a single, in collaboration with a French artist, was released shortly afterwards. The export office also supported Elasi's career through Supporto Showcase, which provided her with funding to perform at Zandari Festa in Seoul, the biggest showcase festival in South Korea, in 2022.



ITALIAN MUSIC AS SEEN FROM THE OFFICIAL CHARTS

IN THE LAST 6 YEARS, ITALIAN MUSIC HAS GONE THROUGH A RADICAL TRANSFORMATION: HERE IS WHAT IT LOOKS LIKE TODAY, ACCORDING TO THE FIMI/GFK SALES CHARTS.

by Paolo Madeddu

In the last six years, Italian music has gone through a radical transformation. It has changed voice, customs, looks, acquaintances, inspirations. Those who followed it until 2016 and then lost sight of it would find it hard to recognise it today.

Here is a photo of it, taken six years ago by FIMI (Italian Music Industry Federation), through the official Top of The Music charts, which collect data on physical, digital and premium streaming products in Italy on a weekly basis and provide an official reference for the music market. Weekly charts are currently available for Albums and Compilations (physical, digital and premium streaming), Singles (download and premium streaming), Vinyl (physical).

TOP 100 ALBUM COMBINED

Sample of 3,500 outlets representative of hypermarkets, consumer technology specialists, entertainment specialists, supermarkets, e-commerce, digital downloads and independent shops

POSITION	TITLE	ARTIST	LABEL	DISTRIBUTOR
1	LE MIGLIORI	MINACELENTANO	CLAN CELENTANO SRL - PDU MUSIC	SONY
2	IL MESTIERE DELLA VITA	TIZIANO FERRO	UNIVERSAL	UNIVERSAL MUSIC
3	MADE IN ITALY	LIGABUE	ZOO APERTO	WMI
4	VASCONONSTOP	VASCO ROSSI	UNIVERSAL	UNIVERSAL MUSIC
5	VIVERE A COLORI	ALESSANDRA AMOROSO	COLUMBIA	SONY
6	LAURA XMAS	LAURA PAUSINI	WM ITALY	WMI
7	PASSIONE MALEDETTA	MODÀ	ULTRASUONI	ULTRASUONI
8	A HEAD FULL OF DREAMS	COLDPLAY	PLG UK	WMI
9	BLACK CAT	ZUCCHERO	UNIVERSAL	UNIVERSAL MUSIC
10	0+	BENJI & FEDE	WM ITALY	WMI

(2016)

TOP 100 SINGLE COMBINED

Sample of 3,500 outlets representative of hypermarkets, consumer technology specialists, entertainment specialists, supermarkets, e-commerce, digital downloads and independent shops

POSITION	TITLE	ARTIST	LABEL	DISTRIBUTOR
1	CHEAP THRILLS	SIA	RCA INT.	SME
2	FADED	ALAN WALKER	SMW SWEDEN	SME
3	SOFIA	ALVARO SOLER	AIRFORCE1	UNI
4	HYMN FOR THE WEEKEND	COLDPLAY	PARLOPHONE UK	WMI
5	VORREI MA NON POSTO	J AX & FEDEZ	EPIC	SME
6	DUELE EL CORAZON	ENRIQUE INGLESIAS	RCA RECORDS/SONY MUSIC INT	SME
7	I TOOK A PILL IN IBIZA	MIKE POSNER	ISLAND	UNI
8	ONE DANCE	DRAKE FT. WIZKID & KYLA	MOTOWN	UNI
9	7 YEARS	LUKAS GRAHAM	WBR	WMI
10	GINZA	J.BALVIN	UNIVERSAL MUSIC	UNI

(2016)

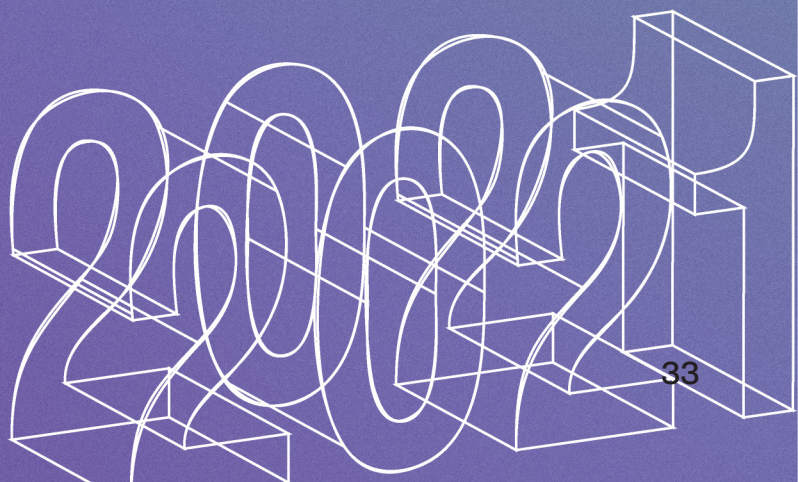
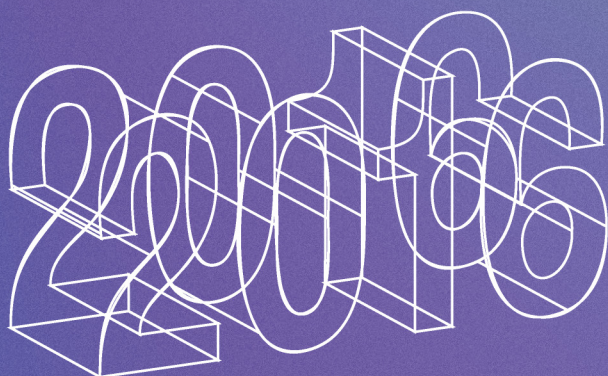
2016: NOT ONLY POP AND MATURE MUSIC (RAP IS MAKING ITS WAY)

These are the 2016 most listened to albums and singles according to the official charts. Looking at the top 10, two songs belonged to bands (one is Italian and one is not) and two others to women (but one of them is just a featuring): minimum quantities, destined to diminish even more in the following years. If we take a look at the singles chart, we see that **only one song was Italian** (Fedez and J-Ax's) and it was, at the same time, the only rap (definitely commercial) track on the list. **The average age** of the artists of the albums chart **was high**.

The record market, however, was not at a standstill. The market had woken up (+21%) and revenues were increasing amidst the global recovery. Even in

Italy, streaming service subscribers for the first time exceeded free users. Physical supports were following this positive trend too, mainly thanks to instore tours and meet-and-greets, which were based on the purchase of CDs/vinyls.

This was 2016: a year of mature music, a lot of international pop (Coldplay, Justin Bieber and Drake were the most listened to artists by Italian Spotify users), and a substantial but not dominant share of Italian rap, quite diversified. Despite the viral success of Fabio Rovazzi's "Andiamo a comandare", Italian musicians and record companies were not in constant search of Latin-sounding summer hits, as is often the case today.



In this respect, too, the landscape of 2021 and the first half of 2022 has very little in common with that of six years ago. It may seem strange to outsiders, but for twenty years the music scene was not dominated by "italdisco" or the lyrical pop of Andrea Bocelli and Il Volo, but by Italian rock (Vasco Rossi, Ligabue, Litfiba). Today, curiously enough, Måneskin (a rock band) is an outlier loved by young people who did not live through that period; rather than rock, **the main players of the music scene are Italian rap and a hybrid genre often referred to as urban pop.**

In Italy, the adjective (urban) is devoid of the racial connotations that have placed it under attack in the US, and instead refers to a combination of synthetic sounds, autotune and flow that is more spoken than sung, as well as to the increasing thematic focus on big cities compared to small towns. Its weight in a market that has been growing for six years is indisputable.

MKT IT 2021

2021 vs 2020

MUSIC REVENUE (€ MILLIONS, TRADE VALUE) IFPI NUMBERS	2021	2020	DELTA
SINGLES	450.5	250.7	79.68%
VINYL	26,896.3	15,026.7	78.99%
CD	26,718.2	24,156	10.61%
OTHER AUDIO	686.4	198.5	245.76%
TOTAL ALBUM	54,300.1	39,381.3	37.89%
MUSIC VIDEO	489.5	434.5	12.67%
TOTAL PHYSICAL	55,240.1	40,066.5	37.87%
DOWNLOAD	5,224	6,380.4	-18.12%
MOBILE & OTHER	81.8	105.1	-22.13%
SUBSCRIPTION AUDIO STREAM INCOME	141,717.5	104,541.2	35.56%
AD - SUPPORTED AUDIO STREAM INCOME	33,763.3	40,218.6	-16.05%
VIDEO STREAMS INCOME	32,984.1	22,553	46.26%
TOTAL STREAMING	208,465.8	167,312.8	24.60%
TOTAL DIGITAL	213,771.6	173,798.3	23%
TOTAL PHYSICAL & DIGITAL	269,012.6	213,864.8	25.79%
SYNCHRONIZATION	10,355.9	7,595	36.35%
PERFORMANCE RIGHTS	52,731.8	38,434.4	37.20%
TOTAL MKT	332,100.3	259,894.2	27.78%





2017: THE FIRST (TIMID) BEGINNINGS OF A (BIG) REVOLUTION, PARTLY THANKS TO STREAMING

The five-year period of **renewal began in 2017**, the year that laid the foundations for the great change in Italian music. The Sanremo Festival, the longest-running and most popular music contest in Italy, was won by a music artist (Francesco Gabbani) who had deviated enormously from the musical sound that had dominated until then. Previously, there had been a standard made up of great melodies and little rhythm, songs about love with a sound that belonged to that of a couple of decades before.

In 2017, another small revolution occurred in Italian music: **streams began to have an impact on the official charts**. This measurement, which arrived slightly later than in other markets, was the tool that allowed a new generation of musicians to take over the stages and the charts within a few months.

This helped change the perception of Italian music. At the end of the year, four of the ten most listened to albums were Italian rap. Among the singles released, behind the global hits "Despacito" and "Shape of you", the number of Italian tracks rose to three; YouTube, on the other hand, not officially counted for the charts, showed a complete domination of Italian tracks, mostly urban pop, from Ghali to J-Ax & Fedez.

MOST USED PLATFORMS FOR LISTENING TO MUSIC IN ITALY

 YouTube	74%
 Spotify®	54%
 music	34%
 Apple Music	9%

(Data: Prima Comunicazione, 2021)

In 2018, the 25-year-old Sfera Ebbasta from Cinisello Balsamo (Milan) took the throne of the most listened to album of the year with his second official record, "Rockstar". The national media discovered for the first time trap, a sub-genre of rap that was already successful worldwide at the time. At the end of the year, among the 10 most listened to artists of 2018 (again according to the FIMI charts), only two were over 30 years old, and one of those was a rapper. Some of the most important names in Italian pop of the previous decade were left out of the top 10, a sign of the great change taking place in the listening habits of the Italian public. New faces were also projected to the top of the charts by talent shows, such as Amici and X Factor, or by the always-popular Sanremo Festival.

ITALIANS LIKE THEIR MUSIC IN ITALIAN: THE IMPACT OF INTERNATIONAL HITS IS REDUCED

In the annual top 10 single chart, the number of foreign artists dwindled to three, and the US or UK top 10 (as evidenced by the mediocre performances of Drake's hit "God's plan" or Dua Lipa and Calvin Harris' "One kiss") was no longer a guarantee of popularity. On the other hand, the number of summer hits with Latin sounds in the charts was growing, five overall, and record companies began to invest more and more in this genre: as with rap and trap, the latter is also strongly linked to social networks and the chance to go viral on these platforms as well as on digital listening players.

However, while listeners on digital platforms focus on the novelties brought to the forefront by the latter, concerts and live music reward other names, showing great growth in the live sector as well.

The top 10 most attended concerts of 2018 is in fact dominated by artists over 30 years old and, above all, sees the presence of several international superstars: Eminem, Guns & Roses, Foo Fighters and others stand alongside Italians such as J-Ax & Fedez and Vasco Rossi, a true icon of Italian rock from the 1980s who is still popular today.

The awards, however, continue to go to the young and, more importantly, national names: at the 2019 Sanremo Festival, the final is between Mahmood and Ultimo, both under 30 and unknown to the general public until then. Mahmood, who fully embodies the definition of Italian urban pop, wins, while Ultimo, who is more closely linked in style to the tradition of Italian pop, ends the year with two albums in the top 10 best-sellers list.

POP MUSIC CONCERTS

2017		2018		2019	
TICKETS SOLD	TICKETS SOLD	DIFFERENCE IN % FROM PREVIOUS YEAR	TICKETS SOLD	DIFFERENCE IN % FROM PREVIOUS YEAR	
3,294,327	4,499,814	36.59	5,760,767	28.02	

SPENDING AT THE BOX OFFICE		SPENDING AT THE BOX OFFICE		DIFFERENCE IN % FROM PREVIOUS YEAR	
SPENDING AT THE BOX OFFICE	DIFFERENCE IN % FROM PREVIOUS YEAR	SPENDING AT THE BOX OFFICE	DIFFERENCE IN % FROM PREVIOUS YEAR		
121,391,569	175,890,715	44.90	219,635,803	24.87	

(Data: SIAE)

2020-2022: CONCERTS STOP, BUT NOT RELEASES AND STREAMING. NEW HITS FROM SANREMO ARRIVE, BUT RAP IS STILL AT THE TOP

The trend does not change with **2020** and the pandemic. When concerts stopped, television was even more willing to launch new stars. The Sanremo Festival brought to light the ability of indie-pop to steer up the waters of the mainstream, a process that had already been underway for a few years, and which since Sanremo has seen several songs go viral on digital platforms. The social networks, on the other hand, are not yet capable on their own of establishing an artist, although they have been a great deal for Anna Pepe, who with "Bando" was the first female rapper to go to No. 1 in a chart and a genre monopolized by men.

2021 and the first months of 2022 confirm further growth in the sector (+27%, and a return to the top ten world markets, according to IFPI data), as well as audience preferences. The top 10 most listened to albums in 2021 featured no less than three albums by teenage debut artists; only Marracash, just over 40, dominates the chart with a crowning career success. In the first half of 2022, the singles chart was occupied for months by the tracks introduced at Sanremo 2022, where Mahmood made an encore with "Brividi", together with Blanco - one of the teenage debut artists mentioned earlier.

TOP 100 ALBUM & COMPILATION

RANK	TITLE	ARTIST	LABEL	DISTRIBUTOR
1	SIRIO	LAZZA	ISLAND	UNIVERSAL MUSIC
2	TAXI DRIVER	RKOMI	ISLAND	UNIVERSAL MUSIC
3	BLU CELESTE	BLANCO	ISLAND	UNIVERSAL MUSIC
4	NOI, LORO, GLI ALTRI	MARRACASH	ISLAND	UNIVERSAL MUSIC
5	IL GIORNO IN CUI HO SMESSO DI PENSARE	IRAMA	ATLANTIC	WARNER MUSIC
6	C@RA++ERE S?ECI@LE	THASUP	ARISTA/COLUMBIA	SONY MUSIC
7	SALVATORE	PAKY	ISLAND	UNIVERSAL MUSIC
8	MATERIA (PELLE)	MARCO MENGONI	EPIC	SONY MUSIC
9	CAOS	FABRI FIBRA	EPIC	SONY MUSIC
10	X2	SICK LUKE	CAROSELLO	UNIVERSAL MUSIC
11	DISUMANO	FEDEZ	COLUMBIA	SONY MUSIC
12	AHIA!	PINGUINI TATTICI NUCLEARI	COLUMBIA	SONY MUSIC
13	HARRY'S HOUSE	HARRY STYLES	COLUMBIA	SONY MUSIC
14	TEATRO D'IRA - VOL.1	MĀNESKIN	EPIC	SONY MUSIC
15	DOVE VOLANO LE AQUILE	LUCHÈ	COLUMBIA	SONY MUSIC
16	SOLO	ULTIMO	ULTIMO RECORDS	BELIEVE
17	VIRUS	NOYZ NARCOS	THAURUS	BELIEVE
18	BOTOX	NIGHT SKINNY	ISLAND	UNIVERSAL MUSIC
19	GVESVS	GUÈ	ISLAND	UNIVERSAL MUSIC
20	PERSONA	MARRACASH	ISLAND	UNIVERSAL MUSIC

(2021)

TOP 100 SINGLE

RANK	TITLE	ARTIST	LABEL	DISTRIBUTOR
1	BRIVIDI	MAHMOOD & BLANCO	ISLAND	UNIVERSAL MUSIC
2	SHAKERANDO	RHOVE	VIRGIN	UNIVERSAL MUSIC
3	DOVE SI BALLA	DARGEN D'AMICO	ISLAND	UNIVERSAL MUSIC
4	FARFALLE	SANGIOVANNI	SUGAR	UNIVERSAL MUSIC
5	LA CODA DEL DIAVOLO	RKOMI & ELODIE	ISLAND	UNIVERSAL MUSIC
6	LA DOLCE VITA	FEDEZ, TANANAI & MARA SATTEI	COLUMBIA/CAPITOL	SONY MUSIC
7	GIOVANI WANNABE	PINGUINI TATTICI NUCLEARI	COLUMBIA	SONY MUSIC
8	5 GOCCE	IRAMA FT. RKOMI	ATLANTIC	WARNER MUSIC
9	BABY GODDAMN	TANANAI	CAPITOL	UNIVERSAL MUSIC
10	CIAO CIAO	LA RAPPRESENTANTE DI LISTA	WOODWORM/RCA NUMERO 1	SONY MUSIC
11	FINCHÈ NON MI SEPPELLISCONO	BLANCO	ISLAND	UNIVERSAL MUSIC
12	PASTELLO BIANCO	PINGUINI TATTICI NUCLEARI	COLUMBIA	SONY MUSIC
13	FERRARI	JAMES HYPE & MIGGY DELA ROSA	CAPITOL	UNIVERSAL MUSIC
14	I LOVE YOU BABY	JOVANOTTI & SIXPM	CAPITOL	UNIVERSAL MUSIC
15	OVUNQUE SARAI	IRAMA	ATLANTIC	WARNER MUSIC
16	AS IT WAS	HARRY STYLES	COLUMBIA	SONY MUSIC
17	BAGNO A MEZZANOTTE	ELODIE	ISLAND	UNIVERSAL MUSIC
18	SIR!	THASUP, LAZZA & SFERA EBBASTA	ARISTA/COLUMBIA/ISLAND	SONY MUSIC
19	NOSTAGLIA	BLANCO	ISLAND	UNIVERSAL MUSIC
20	MI FAI IMPAZZIRE	BLANCO & SFERA EBBASTA	ISLAND	UNIVERSAL MUSIC

(2021)

The top 2021 album, "Taxi Driver" by the Milanese Rkomi, came close to an encore in 2022, being surpassed only by "Sirio" by Lazza, who comes from the same city and even the same neighborhood as Rkomi. This indicates very clearly that Milan, home of the headquarters of the three majors, is the city from which most of these new sounds originate from, ahead of Rome and Naples. **In the charts, women continue to be an exaggerated minority** compared to the international scene, **but it is not the case on YouTube.**

The video platform, thanks to the contribution of a more adult audience and less skewed towards male users, redistributes the balance between rap and pop. In addition to singles by Elettra Lamborghini and Annalisa, it re-evaluates the popularity of mainstream pop by Rocco Hunt and Fred De Palma. A comparison of the most listened to tracks in 2022 on three different platforms reveals different preferences according to users: those highlighted and emphasized are the few singles common among the players, with only one present on all of them.



1 BLANCO & MAHMOOD - BRIVIDI

2 RHOVE - SHAKERANDO

3 RKOMI FT. ELODIE - LA CODA DEL DIAVOLO

4 TANANAI - BABY GODDAMN

5 BLANCO - FINCHÈ NON MI SEPPELLISCONO

(2022)

6 LAZZA - USCITO DI GALERA

7 THASUP FT. LAZZA & SFERA EBBASTA - SIR!

8 PINGUINI TATTICI NUCLEARI - GIOVANI WANNABE

9 CAPO PLAZA - CAPRI SUN

10 IRAMA FT. RKOMI - 5 GOCCE



1 FEDEZ, TANANAI & MARA SATTEI - LA DOLCE VITA

2 FEDEZ, TANANAI & MARA SATTEI - LA DOLCE VITA

3 ROCCO HUNT, ELETTRALAMBORGHINI & LOLA INDIGO - CARMELLO

4 LA RAPPRESENTANTE DI LISTA - CIAO CIAO

5 SANGIOVANNI - FARFALLE

(2022)

6 IRAMA - OVUNQUE SARAI

7 BOOMDABASH FT. ANNALISA - TROPICANA

8 DARGEN D'AMICO - DOVE SI BALLA

9 ELODIE - BAGNO A MEZZANOTTE

10 FRED DE PALMA - EXTASI



1 RHOVE - SHAKERANDO

2 ROCCO HUNT, ELETTRALAMBORGHINI & LOLA INDIGO - CARMELLO

3 GIANNI CELESTE - TU COMM'A MME

4 FEDEZ, TANANAI & MARA SATTEI - LA DOLCE VITA

5 ROSE VILAIN - MICHELLE PFEIFFER

(2022)

6 FEDEZ, TANANAI & MARA SATTEI - LA DOLCE VITA

7 M¥SS KETA - FINIMONDO

8 SANGIOVANNI - FARFALLE

9 DE LA GHETTO, SOFIA REYES & JASON DERULO - 1,2,3

10 KALEB DI MASI - P RREO

ITALIANS NOT LOOKING OUTSIDE ITALY: A TREND SET TO CONTINUE?

A fact that emerges from any kind of ranking, and which is also found in the FIMI top 20 for albums and singles, is the **low impact of international entries**. The majority of the Italian public does not seem to get too excited about BTS, Taylor Swift, Adele, Olivia Rodrigo, Dua Lipa and the other IFPI-certified global recording artists. This is not a positive sign in itself, as it reveals a certain closure (also in terms of mentality). But we could also say that with all the new music sweeping the peninsula, the Italian public does not feel an urgent need to look outside its borders.

CASE STUDY: MÅNESKIN

INTERVIEW WITH ANDREA ROSI, PRESIDENT & CEO OF SONY MUSIC ENTERTAINMENT ITALY

by Nur Al Habash

Talking about the success of Italian music abroad in 2022 means talking about Måneskin. The band's triumph at all latitudes, including streaming, live performances, media appearances and major collaborations, has made them an unprecedented phenomenon in the history of our country's music. Since their victory at the Sanremo Festival in 2021, followed by their win at the Eurovision Song Contest in Rotterdam, the cavalcade of the band made up of Damiano David, Victoria De Angelis, Thomas Raggi and Ethan Torchio has never stopped. Billions of streams accumulated worldwide, major collaborations such as the one with Iggy Pop, participation in the soundtrack for the Elvis movie, opening for the Rolling Stones in Las Vegas, nominations for the Grammy Awards 2023 as Best New Artist... the list of their achievements seems endless.

How do you work, however, on a project of this magnitude? What are the pieces that add up to an unprecedented success? How do you keep a sought-after, desired and acclaimed machine under control in every corner of the globe? We asked **Andrea Rosi, President & CEO of Sony Music Entertainment Italia**, a central figure in the band's international development.

AT WHAT POINT DID YOU REALISE THAT MÅNESKIN HAD MADE IT TO THE TOP?

The whole process unfolded fairly quickly thanks to a chain of events that, between May and July 2021, accelerated everything. I'm talking about the Eurovision victory, the explosion of "Beggin" on TikTok and, in July, the explosion of "I Wanna Be Your Slave". We soon realised that the band was becoming a global phenomenon, so the next step was the involvement of Sony International.

Italy has a European operational base in Berlin that has supported us in organising promotion and release activities, which are complex because they span as many as 50 countries. Thanks to input from international colleagues, we also identified the key partners in the most important markets. In the US, for example, there is Arista, a label we chose to go with after a selection process that Columbia and others had also participated in. The decision to go with Arista was made by Rob Stringer (CEO of Sony Music Entertainment), who also made another very important decision: he left the management and ownership of the project in Italy, something that does not always happen when artists who start out in a 'second tier' country explode on a global scale. Rosalia, for example, after her first record in Spain, moved to Columbia's American division. In the case of Måneskin, however, the organisational work remained Italian, collaborating with Arista in the US, Columbia in the UK (Måneskin had two songs in the UK top ten), RCA in Germany, and then others in Latin America, Japan, Australia, etc.

At that point, we also reorganised internally because it was impossible to deal with a project of this magnitude with the same resources we had before. Valentina Bistoli, who previously managed Ultra in New York, came back to work with us and coordinate the operational part of the project - together with another person, the Berlin team and Epic's team, Måneskin's label in Italy.

Then there's all the daily planning work: at these levels you must plan up to 18 months in advance, otherwise it becomes impossible to get organised. A year and a half ago we were planning to release the new record before the summer, now it will be next year, the timeframe has expanded - at this level, it's a whole new ball game. A different sport in an entirely new league.

WHY DO YOU THINK THERE WAS A DECISION TO LEAVE THE PROJECT MANAGEMENT TO ITALY?

I don't know how to answer that. What certainly counts is the relationship we have with the band: we took them in when they were still playing on the street, during the X Factor castings, and over the years, they've become practically family.

Their manager was one of Sony's artistic directors, so there's a very strong bond. Then I think, internationally, they wanted to see how we would fare. The results in terms of shows are incredible.

WHO TAKES CARE OF THEIR SHOWS?

In Italy, it is Vivo Concerti, which has signed partnerships with the rest of the world for tours abroad.

DO YOU CURRENTLY HAVE A TEAM IN SONY ITALY WORKING EXCLUSIVELY WITH MÅNESKIN?

Not exclusively with them, but I would say more or less 90% of the time. There is a series of releases planned for 2023: the Måneskin album came out last January, and in the meantime, there are also other projects on our label that involve a strategy in foreign markets. Rocco Hunt, for example, has a big following in Spain and France, so we are also working with him.

WHAT DO YOU THINK COULD BE THE NEXT MOVES, IN TERMS OF STRATEGY, FOR MÅNESKIN? I IMAGINE IT'S A BIG CHALLENGE: IT'S BEEN AT LEAST 20 YEARS SINCE WE'VE SEEN SUCH A PHENOMENON IN THE ITALIAN RECORD INDUSTRY, MAYBE NOT EVEN WITH TIZIANO FERRO OR IL VOLO.

They are all different projects. Tiziano Ferro, for example, has a very strong grip on South America, while Il Volo or Einaudi, to name two, are internationally successful projects, but with a different nature; in pop rock, Måneskin is the only similar case globally. What will happen? The only thing I am sure of is the consistency of the concept. They are a rock band, the fanbase comes first, and the rest comes later. So, the path is based on credibility, the guys are aware and determined.

PHYSICALLY IT MUST BE DEMANDING, BUT THEIR YOUNG AGE IS AN ADVANTAGE.

They haven't stopped touring and promoting their music for a year and a half already and practically won't have a day off for as long. So, we must understand when the right time comes to allow them to absorb all their efforts. Clearly we are now in a growth phase and there is an opportunity to stabilise the phenomenon globally and make it last. They are working very hard.

ON A MARKETING AND EDITORIAL LEVEL, WERE THE TRACKS IN ITALIAN PROCESSED IN THE SAME WAY AS THOSE IN ENGLISH?

Basically, we never worked on the songs in Italian, apart from "Zitti e Buoni" which was the song that competed at Eurovision. Soon after came "I Wanna Be Your Slave" and the following songs have always been in English, that's their creative form. They will do something in Italian, but mostly as a tribute to their Italian fans.

SO, THERE IS NO PARTICULAR INTEREST IN ACHIEVING SUCCESS ABROAD BY SINGING IN ITALIAN?

What is important for everyone is to export the music, I don't even know if they have given specific thought to doing it in Italian.

WE TALKED ABOUT EUROPE AND THE US: HOW DID THINGS GO IN ASIA?

Very well, they played 10 days in Japan with several sold-out dates and promo activities, and they will return there in 2023. We have laid the foundations for an important future, even manga (Japanese comics or graphic novels) have been produced about them. Now we're planning Australia because there's room to grow there, too.

SONY'S ITALIAN TEAM HAS ACQUIRED A LOT OF SKILLS WORKING ON THIS PROJECT: WILL IT BE EASIER FROM NOW ON TO EXPORT MORE OF YOUR ARTISTS ABROAD?

Clearly, Sony Italy has acquired a credibility in the world that it did not have before. We have open communication channels because we have meetings every day with our international colleagues. Today, for example, there is a meeting dedicated to Måneskin with all the European teams. So, if we propose something else in a month's time, we will have an audience that is more open to listening. However, it's not true that international success with Måneskin means that it's easier to achieve the same success with other projects. It depends on the artists' repertoire, and the markets.

SANREMO AND LATER THE EUROVISION CONTEST WERE THE TWO KEY SUCCESSES THAT STARTED THE BAND'S INTERNATIONAL CAREER. DO YOU THINK THIS REMAINS THE EASIEST PATH FOR THE INTERNATIONALISATION OF ITALIAN MUSIC?

At the networking level, it is a remarkable accelerator, but one can also work outside of these avenues. With the shared European network that we have today within the majors, if we see that something important is about to start, we make the project a priority on a continental scale first and then, eventually, on a global scale. This meant that, for example, Måneskin's new single for Sony was Global Track of The Week, i.e., the priority for Sony in all markets. On an operational level,

it meant that all countries were 'obliged' to submit a marketing plan for the launch of the single, covering the entire priority period. Before Måneskin, this rarely ever happened to us. We had made a very serious attempt with Mengoni a few years ago, with some minor level results, but never Global Track of The Week.

HAVE YOU HAD A CHANCE TO TEST OTHER SONY ARTISTS?

Yes, with Rocco Hunt, for example, and it's going well. However, there is also the question of musical genres: urban is very localised in all countries, pop is in crisis and I believe Italian lyrics are hard to export at the moment.

WHICH GENRES DO YOU THINK WILL BE MORE EXPORT FRIENDLY IN THE COMING YEARS?

Pop-dance, electronic, what can be danced to, essentially. There is no problem with identification there, we have also seen it with the success of Scandinavian or Dutch artists.

It is something that is also clear among the new artists we sign: there is a greater focus on this type of music, even in the X Factor castings. We are working on it, but to be honest, in Italy this ground has always been explored mainly by independents, who today, however, mostly acquire music from outside of Italy.

HOW DO YOU SEE ITALIAN MUSIC ABROAD FIVE YEARS FROM NOW, AT LEAST AS FAR AS SONY IS CONCERNED?

How is the music culture in Italy evolving in the next five years? In my opinion we are witnessing the beginning of a big change, the umpteenth. If we take Generation Z as a reference, the modes of consumption and the consumption itself are totally different. Probably in five years' time they will no longer make music videos, they will produce video content, but short, different ones; this on the one hand will increase the potential for internationalisation, but on the other hand we have to understand which way the music will go. It is difficult for an Italian urban artist to become popular in the rest of the world, because of a language barrier issue. However, it is also difficult for German, French, even English urban artists... even England does not export much to the US, it is a very localised world.

THE MARKET IS MORE AND MORE LOCAL AND THE SPACE FOR IMPORTS IS SMALLER AND SMALLER. DON'T YOU THINK THAT THIS LOW IMPORT CAPACITY IN DIFFERENT MARKETS ALSO LEADS TO A LOW EXPORT CAPACITY?

In recent years, this localisation has also favoured the development of non-English speaking artists in Italy, something which had never happened before. For example, Germany is now an important source of repertoire for us, as is France, which has developed artists of a certain type in Italy in recent years. In short, England no longer has the dominant role in our market that it had before. Having said that, I don't think our export capacity is limited because our import capacity is also limited; I think it is just because we have always been a country that traditionally does not export as much music at the mainstream level. But fortunately, things are changing now, there is more openness. Our difficulty lies more in the fact that since our market is very local, clearly our companies invest much more in local projects, and less in foreign ones: it is a bit of a dog biting its own tail. Then of course, there are our artists who are also known abroad, like Sfera Ebbasta, but becoming mainstream from there is another story. Latin artists are having more success.

LATIN ARTISTS ARE IMPOSING A MUSICAL GENRE, AMONG OTHER THINGS.

Yes, but that's evolving too: it's no longer just reggaeton, it's also blending with dance, mixing it with urban sounds, there's more contamination. I mean, in five years I honestly don't know how things will be, but I think Måneskin will still be around.

THE GROWTH OF THE ITALIAN RECORDING INDUSTRY INTERNATIONALLY: THE NUMBERS FROM FIMI

THE ITALIAN MUSIC INDUSTRY FEDERATION — KNOWN AS FIMI — RECOUNTS THE FLOURISHING PERIOD OF GROWTH OF THE ITALIAN RECORDING INDUSTRY GLOBALLY



After some difficult years for the music industry, 2021 marked the return of a strategy to strengthen the promotion of Italian music worldwide: it was a year that saw a strong growth in revenues for the Italian recording industry internationally, with royalty **revenues up 66%**. According to data collected by Deloitte on behalf of FIMI (Federazione Industria Musicale Italiana), **Italian music consumption generated almost 20 million euro on a global scale in 2021** compared to just over 11 million euro in 2020: this growth was driven in particular by digital revenues, which grew by 83% to 16.6 million euro in royalties.

Royalties from CDs and vinyls are also on the rise with an increase of 100% compared to 2020. Overall, between physical, digital, synchronization and related rights, the Italian recording industry **earned 19.1 million euro**.

2021 was a significant year for the export of Italian music due to the success of the Italian band Måneskin, which entered the global charts. This trend continued in 2022: local repertoire largely fuelled the 18.33% growth in the first half of 2022.

As a matter of fact, Italian production is characterized by **strong investments made by companies in the local repertoire**, which boosted the rise of Italian artists in the local year-end charts.

Related copyright and publishing revenues managed by collecting societies and music publishers are also to be added to these revenues.

ITALIAN RAP CONQUERING THE WORLD

by Riccardo Primavera

CIRO BUCCOLIERI (THAURUS), FEDERICO CIRILLO (ISLAND RECORDS) AND RUTH HAGOS (WARNER MUSIC ITALY) REFLECT ON THE EVOLUTION OF ITALIAN RAP INTERNATIONALLY AND THE RENEWED INTEREST IN THE GENRE

The relationship between rap and the Italian music industry is unique and fascinating: different from its American and European counterparts (France and England above all), it has gone through several phases, alternating between great peaks and valleys. If, after the glories of the 1990s and the subsequent collapse, Italian rap's "new beginning" is associated with 2006, the year of the release of two records that left their mark on the mainstream ("Solo un uomo" by Mondo Marcio and "Tradimento" by Fabri Fibra), the ultimate breakthrough would only come between 2015 and 2016, delivering a true golden generation of rappers to the market. To give an idea of the real impact of that period, let's just say that in Italy we talk about "2016 rap nostalgia", and *Esse Magazine*, one of the leading rap magazines in Italy, even dedicated a docuseries to that year, which then aired on Discovery+.

The evolution and stylistic maturation of the genre, which in Europe and the rest of the world had already been established for years, have strongly contributed to this transformation, but the streaming revolution has also had a considerable impact on this paradigm shift. As recounted in Paolo Madeddu's article in the report, streaming has definitely influenced the sales charts: in

fact, from 2018 onwards streaming data began to be counted with conversion rates, designed to compare streams to copies sold.

Those years have witnessed the rise of artists who are still at the top of the charts: Sfera Ebbasta above all, but also Ghali, Capo Plaza, Tedua, Izi, Ernia, Lazza, Dark Polo Gang, producers such as Charlie Charles, Sick Luke, Chris Nolan, thasup (at first a top producer and then a solo project that achieved noteworthy success). In addition to them, veterans of Italian rap also started racking up certifications and accolades that previously, in terms of numbers, had not yet arrived: Guè, Marracash and Salmo, just to give a couple of examples, have broken all kinds of records starting from those years.



NOYZ
NARCO

FROM THE FIRST, TIMID GLANCES OUTSIDE ITALY TO THE PRESENT-DAY OPENNESS

After their incredible domestic success, Italian rappers started looking outwards. Not that it was the first time: international artists such as Kool G Rap or Akon had already ended up in projects by Italian rappers – Club Dogo and Guè respectively. However, the impact of these collaborations had not been such as to stir the waters on an international scale. Neither Italian nor foreign audiences had perceived these projects as a real opening up of the frontiers of Italian rap.

One of the first to boldly do so was Sfera Ebbasta: the Milanese artist included two collaborations with SCH – one of the most prominent names in the French rap scene – on the tracklist of his 2016 self-titled album. The two tracks have accumulated nearly 40 million total streams to date, and at the time enabled Sfera Ebbasta to be the first Italian guest on Skyrock, the French urban radio station par excellence. A first step that held significant weight, and was followed over the years by many other international collaborations. Sfera himself, Capo Plaza, Ghali, Izi, Tedua, Guè, the intense England-France-Italy axis established by Rondodasosa (and then the whole Seven 700 crew) with artists such as Central Cee, Gazo, Russ Millions, Morad and others.

We asked a few questions about the development of this internationalization process to those who have followed some of these projects closely: **Ciro Buccolieri**, CEO & co-founder of **Thaurus**, **Federico Cirillo**, at the time Head of A&R and today Director of **Island Records**, and **Ruth Hagos**, A&R of **Warner Music Italy**.

“I believe that in order to do something new, you have to visualize the future, you can’t be afraid.” Buccolieri starts from the early 2000s to recount the journey that led the genre to the maturity it needed to gain recognition internationally: *“In terms of sound, partly thanks to Dogo, Truceklan and similar acts, Italian rap had strong and distinctive characteristics”*, but then it reached a climax, the one described a few paragraphs above. *“It is clear that the 2015-16 generation represented a turning point. Perhaps the change was also encouraged by the historical period in which it took place, enabling rap to reach a wider audience.”* Federico Cirillo also finds an explanation in the lyrical substance of Italian rap: *“In terms of lyrics, the quality of Italian rap has always been very high. I am a big fan of artists such as Kendrick Lamar: skilled songwriters who can write intricate lyrics are the ones I like the most, and there are quite a few of them in Italy”*.

KEYWORD: AUTHENTICITY

Quality alone, however, is not enough. It takes more than that to bind a continuous thread capable of connecting Italian rap to that of the rest of the world. From this point of view, both agree in identifying networking as the main factor in a successful artist’s export project. *“The first step is always to make contact: with the management, with the label or directly with the artist. In the past, this was always done behind the scenes, usually handled by management and record companies. Now that artists can get in touch with each other directly via social media, everything has become more immediate, faster. It is always important to seek a certain chemistry between the artists from the very beginning. Fabricated collaborations simply don’t work”*. This does not mean that, over the years, there have not been collaborations produced precisely like this. The impact they have, however, is nothing like what happens when the audience perceives the organic nature of the relationship between the artists. A couple of examples? Just look at the numbers of tracks like “Baby” by Sfera Ebbasta and J Balvin or “Movie” by Rondodasosa and Central Cee.

“The authenticity of the collaboration is crucial and is always perceived by the fanbase, which is very aware of the synergy between the artists,” explains Hagos. *“Several rappers on our roster – such as Rondo, Capo Plaza, Baby Gang, Sacky – have already formed a strong bond with many English and French rappers since their beginnings, contributing to a breaking down of the borders between European countries and creating a sort of twinning between very similar realities.”* Buccolieri confirms the thesis of the importance of the authenticity of the connection, and both he and Cirillo fully agree. *“You can arrange everything through labels and management, you can send instrumentals and verses, but without a real relationship the audience will always perceive the lack of authenticity and uniqueness – and it’s unlikely that anything relevant can come out of this. When, on the other hand, a genuine relationship is created, where there is interest from the foreign artist and their team, there is mutual respect and the desire to create something special is evident, that’s when the collaboration is successful. That’s how real songs are born, not verses put together based on what the management or the label want”*.

More and more collaborations are born out of this genuine bond. In “Virus”, the latest album by Roman rapper Noyz Narcos, legendary Wu-Tang Clan member Raekwon appears with a verse in the track “Welcome Back”. The verse was followed by active involvement and participation in the promotion of the record, a sign



that there was a connection that went far beyond the featuring itself. Taking a case that is stylistically opposite, This bond was also evident during the launch of “Che Uomo”, a borderline lol rap track involving Tuzzo, Nello Taver and bbnos\$, a Canadian rapper with over a billion streams, thanks to hits such as “Lalala” and “edamame”. The audience always rewards this connection, as was the case in the days of Sfera Ebbasta and SCH.

Cirillo himself tells us about his experience with the Canadian rapper, which is the result of the artist’s presence at the latest edition of Nameless, an Italian festival with which Cirillo has been collaborating since 2016 (a coincidence that is anything but coincidental).

“Being a guest for four days, bbnos\$ made a track in Italian specifically for the event, collaborating with Young Miles and Tuzzo. This certainly shows the kind of interest there is in our market, which seemed impossible six or seven years ago”. Buccolieri also agrees that foreign artists are interested in the Italian market, going into more detail. *“There is such a difference in economies between Italian and foreign markets – especially the US one – that, from a business perspective, investing time and money in Italy is not the deal of a lifetime for foreign companies; on the other hand, it is still an opportunity to expand into a new market. For European rappers, however, it is a different matter; they are really interested in reaching the Italian audience. It’s a challenge for everyone.”*

When an artist shows interest, the label immediately takes action, as Hagos explains. *“If a song or project seems particularly appealing to the international market, we try to identify a potential connection that can make it special - through a featuring or with an ad-hoc remix. This process can lead an Italian artist to find their place in a specific foreign market and can generate an advantage in terms of visibility and dissemination, both for local and international artists”.* There is no shortage of examples, and he cites several: *“There are the numerous and massive collaborations in Fred De Palma’s tracks – Anitta, Justin Quiles, Sofia Reyes –, and we cannot forget the success of the various international remixes by Capo Plaza: Aya Nakamura, A Boogie Wit by Hoodie, Tion Wayne, Scott Storch and others”.*

RELATIONSHIPS ARE CHANGING BOTH AMONG ARTISTS AND INDUSTRY PROFESSIONALS

As for the professionals, how is the Italian scene and its market perceived internationally? *“People are interested; perhaps because it is a growing movement, and even the numbers reflect great growth in the last period. So, there is an increasing curiosity towards a large part of the Italian mainstream. Of course, we cannot generalize: if we talk about the European scene, our repertoire is quite well known, while in the U.S. scene it depends on the artists”*, Buccolieri replies. *“Recently, our scene has been viewed as one of the coolest not only in Europe but also worldwide. Many international artists, even some of the most renowned, take their cues from what we do here now. Our international colleagues hold us in high esteem, something I could not have said six or seven years ago. Back in the days we were a purely local market that didn’t get noticed abroad, partly because we often imitated what was happening elsewhere”* adds Cirillo.

THERE HAS BEEN A REAL PARADIGM SHIFT

There was a radical change starting right from 2016, the new year zero for Italian rap. *“Before, the reaction was, ‘Ah really, you rap in Italy, too?’. However, today people know that there is a thriving local scene and they want to know more about it, because they are aware that it is a growing market and that a real culture is also developing here, with its own distinctive traits”.* There is an ongoing exchange of information and discussions, supported by the global networks that have developed in recent years, as Hagos recounts: *“I constantly receive praise and requests from international colleagues, and this generates several interesting connections. Our way of working has changed and we now have European and global networks that constantly share information, agendas and opportunities without any kind of filter or barriers”.* Recognition of this new way of working has come very recently: Rondodasosa’s live show in London, for example, was met with considerable interest among European colleagues, who immediately noticed an attitude closer to that of their local artists.

SFERA
EBBASTA

WHAT CAN WE EXPECT FROM THE FUTURE?

Despite these excellent results, there is still room for growth, especially looking at the numbers of the 'closest' scenes, such as the UK and France. Is there any chance of closing the gap? *"It seems to me that we are at the same level as those scenes in terms of the quality and quantity of proposals, but we still need to face the obstacle of the language barrier. English is a language spoken all over the world, and it can be exported virtually anywhere, not just in English-speaking countries. French is a different matter, but it is still a language more widely spoken than Italian. Rap is more rooted in the domestic music market there, it gets more radio airplay, partly because of French laws that force radio stations to always broadcast a certain percentage of French-language music. So, there is a scene that has been built and stratified for more than 30 years, and in addition to that, French music can be more easily exported in North Africa, Canada, and many other countries"* Buccolieri replies. *"I often hear people say that the French scene, for example, is light years ahead; I don't deny that it has been a strong inspiration for several Italian artists, but the difference compared to ours is precisely the language, which allows it to reach larger numbers"* adds Cirillo. According to Hagos, *"the language barrier is an objective problem, our next goal could be **to break it down with songs in Italian that have such an authentic sound that they create a process of identification abroad.**"*

"In my opinion, nothing is lacking as far as sound is concerned; on the contrary, we have an identity and a variety that, in terms of what we offer, is even wider than in the rest of Europe. Other countries are often tied to specific waves; in our case, on the other hand, it is possible to notice multiple nuances both among veterans and younger artists." Buccolieri is confident when he speaks of the strengths of the Italian scene in terms of music. The structural and organizational aspect does not seem to be a problem either; on the contrary, as Cirillo explains: *"As for my team, I do not feel that there is anything lacking in terms of organization, artistic qualities and determination. Sometimes I hear people talk about a lack of organization in our system,*

but those who say that have no idea what the American system is like. Ours is a vibrant, healthy industry, where there is some level of competition, but the kind that encourages artists. I don't think it lacks anything"

Where to go from here, then? Buccolieri is clear: *"I do not expect to see a song in Italian at number 1 in the Billboard chart, but I do expect a journey that will allow us to have more and more credibility, even in terms of numbers."* After all, something has already changed compared to a few years ago, and this change has been profound. *"Italian rap has nonetheless managed to stand out internationally. This is a fact"*. been profound. *"Italian rap has nonetheless managed to stand out internationally. This is a fact"*.

RENDO
DA SOSA

INSTITUTIONAL SUPPORT FOR THE EXPORT OF ITALIAN MUSIC

MAECI AND ITA ARE THE MAIN INSTITUTIONAL PARTNERS IN THE ACTIVITIES OF ITALIA MUSIC EXPORT

Since its inception, Italia Music Export has worked in total synergy with the institutions and organizations that manage the promotion of Italian culture and Italian companies abroad, making music its cultural vehicle.

The Ministry of Foreign Affairs and International Cooperation (MAECI) and **ITA (Italian Trade Agency)** are two of the most important partners in the activities of Italia Music Export: details about current partnerships below.

AN INTERVIEW WITH FILIPPO LA ROSA, HEAD OF THE CULTURAL PROMOTION OFFICE AND ITALIAN CULTURAL INSTITUTES, MAECI DIRECTORATE GENERAL FOR PUBLIC AND CULTURAL DIPLOMACY

THE MINISTRY OF FOREIGN AFFAIRS AND INTERNATIONAL COOPERATION (MAECI) IS AN INSTITUTION THAT ALSO WORKS ON THE PROMOTION AND DEVELOPMENT OF ITALIAN ARTISTIC PRODUCTION. HOW DOES IT CONTRIBUTE, SPECIFICALLY, TO THE INTERNATIONALIZATION OF ITALIAN MUSIC?

MAECI values the enhancement of our artistic and cultural heritage in its widest possible sense, as well as in the promotion of Italian cultural and creative industries. My experience abroad has taught me that Italian music, from classical to pop, is an extraordinary vehicle for talking about us to the world. From a business point of view, this heritage represents a living resource that, together with the historical legacy, is constantly updated and enriched thanks to the contribution of the youngest generations of artists. The music industry naturally represents a privileged territory in which important institutional efforts are invested to present an authentic image of our country internationally. MAECI's commitment to the internationalization of Italian music is carried out through a multitude of initiatives in which the diplomatic-consular network and the Italian Cultural Institutes around the world are intensively engaged, both through the organization of individual events by Italian artists, often in cooperation with partners active in specific countries, and by participating in international showcase festivals and fairs, and also by promoting residency, training and artistic exchange projects.

WHAT KIND OF EVENTS AND PROGRAMMING DO THE VARIOUS ITALIAN CULTURAL INSTITUTES OFFER WHEN IT COMES TO MUSIC?

The cultural programme of the institutes is build up through network projects - developed from the central offices of the Ministry to support the dissemination of Italian music abroad, including the "Jazz IT Abroad" and "Sanremo Giovani World Tour" initiatives - and local projects organized by the individual venues or groups of venues in response to the stimuli and interests of the countries in which they operate.

Both the more consolidated formulas of concerts dedicated to the classics of our musical tradition, interviews with artists, and workshops, and the more original experimentation and contamination, such as the recent participation of Paolo Angeli and the Surabhi Ensemble at the World Music Festival in Chicago, where traditional Sardinian music was mixed with free

jazz, post-folk music, flamenco, and Indian and Arab sounds, met with great success. Another example is the participation at the WOMAD South African Safari (South Africa) of Modena City Ramblers, who interpreted their folk-rock music to affirm the values of the fight against all forms of intolerance and social injustice.

HAS THERE BEEN A GROWTH OF INTEREST FROM ABROAD IN ITALIAN MUSIC PRODUCTION OVER THE PAST FEW YEARS?

The interest of foreign audiences in Italian music, considered in the broad sphere of live performance (music, theater, dance), has experienced a period of great expansion in recent years, recording growth from 1,882 events organized in 2017 to over 2,500 in 2019. The impact of the pandemic on the sector was, of course, very strong, but it was at the same time tackled by our network in an energetic and creative manner, stimulating the conception of new ways of enjoying music events, within the framework of the digital transition processes that characterize our era. 2021 marked a resumption of in-presence activities, which was consolidated in 2022. To have a more concise qualitative picture of the most important musical events and their success with foreign audiences, MAECI has created the italiana.esteri.it platform, a virtual place, accessible to all users, where the initiatives promoted by our cultural diplomacy, both at central level and by the diplomatic-consular network and the Italian Cultural Institutes abroad, are collected and disseminated, with news, images, and audio-visual material. The results of the digital audio-visual projects mentioned above, such as "Music for Uncertain Times" and "Futura", can also be viewed on Italiana.

CAN MUSIC BE A VEHICLE USED TO PROMOTE ITALIAN CULTURE ABROAD?

The role of music as an effective tool of cultural promotion is rooted in our past, for instance in the Italian operatic tradition. It has been consolidated as one of the pillars of cultural diplomacy due to its ability to concisely express emotions and values of our culture, together with the constant search for renewal and experimentation with new linguistic forms. The worldwide success of Måneskin, for example, has stimulated a renewed interest in our music and language, reaching the target of younger generations, and thus bringing new life to that historical role of Italian as a language capable not only of telling stories, but also of moving people.

HOW WAS THE JAZZ IT ABROAD PROJECT ORGANISED AND WHAT WERE ITS MAIN OBJECTIVES?

As part of our cultural promotion priorities, in 2022 we decided to incentivise the development and realization of concerts abroad featuring the most recent Italian music production in the world of jazz, seeking to encourage and financially support international tours, as well as the participation of our artists in prestigious festivals. This allowed us to support an important sector of our artistic sphere while contributing to conveying an image of Italy through a wide range of messages, themes, and values linked to the present day, proposing a renewed vision of the country to the international audience reached by our foreign network. In order to achieve this ambitious goal, we chose Italia Music Export as a solid partner, endowed with the necessary experience and organizational skills to deal in the best possible way with a stimulating and complex project: it required, in fact, a great deal of planning, with the preparation of a competition and the establishment of an international jury (composed, among others, of the Artistic Director of the Katowice JazzArt Festival Martyna van Nieuwland, AJC General Secretary Antoine Bos, Jazzfest Berlin Artistic Director Nadin Deventer, and Rai Radio 3 producer and author Pino Saulo). Then all the operational and administrative management related to the actual production of individual performances and tours followed.

WHAT OTHER TYPES OF EVENTS, SUCH AS SANREMO INTERNATIONAL, HAVE YOU ORGANISED TO SUPPORT THE PROMOTION OF ITALIAN MUSIC ABROAD?

Of course, “Sanremo Giovani World Tour”, with its fourth edition in 2022, represents one of the most emblematic initiatives of the type of support lavished by MAECI on the promotion of Italian music abroad. In fact, the tour, organized in collaboration with RAI, aims to promote young talent from the Italian pop music scene through the network of diplomatic-consular offices and Italian Cultural Institutes. In 2022, the Sanremo Giovani 2021 finalists Yuman, Martina Beltrami, Littamè and Samia embarked on a European tour, which opened in Madrid under the artistic direction of Maestro Maurizio Filardo.

In addition to these types of initiatives, MAECI and its foreign network are constantly nurturing the internationalization of Italian music through more targeted projects, such as the 2022 Middle East tour by Paolo Fresu (one of the most esteemed Italian musicians on the current music scene) that marked the return to the organization of logistically complex tours, at the end of the most difficult period of the pandemic.

WHAT ARE THE FUTURE GOALS OF THE MINISTRY OF FOREIGN AFFAIRS AND INTERNATIONAL COOPERATION TO SUPPORT THE PROMOTION OF ITALIAN MUSIC ABROAD?

Last June, I was impressed by the audience in Tirana that actually knew and sang the songs of Sanremo Giovani artists, who are promising talents of our music scene, not international idols. These crowds encouraged me to invest even more in promoting music, in particular young performers. Therefore, strengthened by the enthusiasm that these initiatives generate abroad, our commitment goes on with the aim of building bridges between the main players of the music world, especially the youngest, and the most prestigious international stages, in order to offer an increasingly broad, inclusive, and contemporary showcase.

ITALIAN TRADE AGENCY'S SUPPORT FOR THE EXPORT OF ITALIAN MUSIC

ITA (Italian Trade Agency) is the organization through which the Italian Government promotes the consolidation and the economic-commercial development of our firms in international markets.

This process is carried out by a wide range of promotion, information, assistance and consultancy services, following the guidelines and strategies defined by the Ministry of Foreign Affairs and International Cooperation, the Ministry of Economic Development and other (both public and private) figures responsible for internationalization.

Throughout the years, ITA has organized many initiatives in collaboration with Italia Music Export and FIMI to promote Italian music on an international level. Events in which ITA operated as a support for Italian companies and artists in 2022 include SXSW – South by Southwest (Austin, USA), Canadian Music Week (Toronto, Canada), Billboard Latin (Miami, USA) and Hit Week (Los Angeles and Miami, USA). As for events in Italy, during Milano Music Week 2022 ITA hosted a gathering with international professionals at Linecheck, a fair and festival that combines both business and creative sides, making it a meeting point for those working in the industry and music lovers. The presence of globally recognized professionals brings an added value for exhibiting companies, which have the opportunity to engage with leading international players in the music industry: record labels, editors, management agencies and financial institutions.

ITA's support for the record industry becomes increasingly valuable as the Italian (and international) market continues to grow. IFPI - International Federation of the Phonographic Industry shows how global record industry sales, after a long and steady decline that began in the late 1990s and continued through 2014 (hitting a minimum of \$14.2 billion) have experienced a very strong recovery in the last decade, reaching its peak (25.9 billion dollars) in 2021 and overcoming the previous 1999 record. The Italian music industry fits this positive trend, with revenues of \$392 million in 2021 (a 27.8% increase compared to the previous year and a 49.2% increase compared to 2017). The Italian music industry is now in the top 10 globally. The credit for this success belongs not only to the artists but also to the major and independent companies and all the entrepreneurs who support our artists abroad. This is highlighted by the 66% increase in royalty revenues between 2020 and 2021 in the Italian market. This is the high-quality industry that ITA supports with its activities.

UNITY IS STRENGTH

MAPPING EXPORT INITIATIVES IN ITALY

AN OVERVIEW OF THE VARIOUS EXPORT INITIATIVES IN ITALY WORKING ON THE EXPORT OF ITALIAN MUSIC

In addition to the work of Italia Music Export, **there are several organizations in Italy involved in the promotion of Italian music abroad.** Some were founded at a regional level and they have grown and forged international ties that have been nurtured over the years; others, on the other hand, were launched with a specific focus on a musical genre or dimension. Finally, it is worth mentioning FIMI's efforts in terms of exports, with several ad hoc initiatives.



FIMI - FEDERAZIONE INDUSTRIA MUSICALE ITALIANA

Always sensitive to the issue of increasing the international competitiveness of the Italian cultural industry, FIMI is distinguished by its wide-ranging strategy for the promotion of Italian music abroad with a permanent settlement in the most significant markets. Thanks to the collaboration with ITA – Italian Trade Agency, FIMI organizes Italian music showcases at renowned international music events, such as Billboard Latin Music Week (where Emma Marrone, Fred De Palma and La Rappresentante di Lista have played in recent years) and SXSW, where a large group of Italian musicians perform every year and where FIMI is also present with a stand. In addition, once again in collaboration with ITA, FIMI launched Hit Week, the most important festival dedicated to the Italian creative industry, which featured Italian artists such as Franco Battiato, Emma, Caparezza, Marco Mengoni, Erica Mou, Subsonica, BoomDaBash, Cosmo and Diodato. The joint action made an essential contribution to opening up a foreign market – which previously was a prerogative of a few privileged artists – successfully supporting the dissemination of the Italian cultural system.

PUGLIA SOUNDS

Puglia Sounds is an Apulia Region project supporting the music industry. Since 2010, it has offered opportunities for growth and visibility through public calls, partnerships, and communication and promotional activities. Puglia Sounds works with Apulian artists and professionals at every stage of music production: including everything from creativity and production – Producers – to publishing – Record – and live events – Tour Italia and Live – to music export. Puglia Sounds has also been organizing the MEDIMEX International Festival & Music Conference since 2011.

E-R COMMISSION/REGION OF EMILIA ROMAGNA

Since 2022, the Emilia-Romagna Region – through the E-R Music Commission and ATER Foundation – has launched a programme to develop the region's international connections, building an export office dedicated to the so-called contemporary pop music. The actions implemented covered several areas: from the mapping of the artistic and professional organizations operating in the Region, to the presence in some international events such as PrimaveraPro, during which artists from Emilia-Romagna had the opportunity to perform. In 2022, the 'SUONO GRASSO' initiative was launched, aiming to visit as many cities, scenes and types of music as possible, organizing small and large events outside Italy to support the regional scene.

I-JAZZ ASSOCIATION

The I-Jazz Association has been involved in the export of Italian jazz music since 2018 thanks to the FUS Nuova Generazione Jazz project, which supported in the first three years, and also in 2022, initiatives such as: organizing concerts in prestigious international venues and festivals in Budapest, London, Oslo, Stockholm, Reykjavik, Amsterdam, Prague, Cerkno, Barcelona, Palma de Mallorca; organizing showcases of young bands at the London Jazz Festival (2018), Toronto Jazz Festival (2019), Stockholm Jazz Festival (2021), Edinburgh Jazz & Blues (2022). The total number of concerts organized internationally in recent years is over 50 events, with an average of six bands per year to support.

ITALIAN WORLD BEAT

Italian World Beat has been carrying out significant international networking initiatives since 2017, with the aim of supporting Italian music operators in the World Music and singer-songwriter music area, participating in the leading international trade fairs in the industry such as WOMEX, Babel Med Marseille, Mercat De Musica Viva de Vic, Budapest Ritmo, Seoul Music Week; it is also an official partner of Visa for Music (Morocco) and Atlantic Music Expo (Cape Verde). Plus, it is one of the founders of the global project Music Connect, launched in 2018 in Canada.

AREZZO WAVE ITALIA FOUNDATION - ITALIAN MUSIC OFFICE IMO

The Arezzo Wave Italia Foundation, with its Italian Music Office branch, has been supporting Italian artists abroad since 2003. Negramaro, Elio & Le Storie Tese, Carmen Consoli, Subsonica, Bandabardò, Modena City Ramblers, Afterhours, Avion Travel, Tiromancino, Enrico Ruggeri and Nada are just some of the names supported by the Foundation in Europe and America over the years. They have been joined by dozens of new and up-and-coming artists: among them, in the last year, Giorgio Poi, Anna Bassy, La Scapigliatura, Piqued Jacks, Cordio, Frida Bollani Magoni (recently sold out both in London and Paris), Paolo Benvegnù, La Municipale and others.

ITALIAN MUSIC AROUND THE WORLD: WHERE WE ARE, WHERE WE WILL BE

by Nur Al Habash

In late 2017, when SIAE opened the doors of the first export office for Italian music, the landscape was quite different from the one we find today. Companies were cautious about exploring other markets outside the Italian one (which in the meantime was finally beginning a period of great recovery). Italian music was considered unsuitable by its very nature to compete internationally, and the few experiments that were carried out in this vein often resulted in nothing.

In this context, launching an office that would work only on supporting and enhancing our music export capabilities was a move met with equal parts enthusiasm on the one hand and scepticism on the other. It was certainly a challenge, not least of all because change in this field is very gradual and difficult to measure; apart from investments, which are always necessary and never sufficient, the evolution towards successful exportation is first and foremost accomplished through a change of mindset and the retraining of individual professionals. In the words of Dutch Music Export veteran Ruud Berens, whom we met at the start of this adventure: “you will see the first results in ten years”.

In the meantime, five years have passed, and looking back we cannot help but be satisfied with the work that Italia Music Export has carried out with consistency and passion in Europe and around the world, especially in terms of close links with journalists, festivals, publishers, labels, institutions, agencies, and press offices. If the reputation and exposure of Italian music in the world have radically changed in recent years, part of the credit is also due to Italia Music Export and the hundreds of trips, meetings and partnerships built over the years. Looking today at the numbers we have thanks to SIAE, the positive trend of our music bodes well for a future full of continuous growth, undoubtedly also driven by the

Måneskin phenomenon that has marked a before and after for Italian music exports in the last 20 years, and that has brought valuable and expected international attention back to our country's music production.

The other fact worth mentioning is that of the central role of electronic music, a genre to which half of the most listened to Italian artists in Europe and the world have belonged to for many years now. It follows that it is necessary to modernise (and quickly) the image of Italy's music as the exclusive homeland of the “bel canto” and melodic song, and to recognise that from the 1970s of Italo disco through the 1990s of Eurodance and the 2000s of EDM, the Italian musical identity that is most popular internationally is also and above all synthetic and electronic. It would be nice if, starting from the objectivity of these numbers, companies and institutions would work to recognise it, celebrate it, and finally strengthen it with the right support.

The importance of reports such as this, which is a first basic attempt to map the situation of Italian music exports, lies precisely in the opportunity for quantitative and qualitative analysis without which every political, cultural, and commercial strategy risks being as admirable as it is ineffective. The hope is that, year after year, we will be able to access more and more extensive and analytical data, capable of judiciously guiding the export strategy of a country as rich in music and talent as Italy.

Credits

Project by

Nur Al Habash
Riccardo Primavera
Chiara Gallerani
Francesca Conte
Simona D'Alessio

Graphics by

Collateral S.r.l.

We would like to thank the following for their valuable contributions

Gianni Sibilla
Carlo Pastore
Paolo Madeddu
Andrea Rosi
Ciro Buccolieri
Federico Cirillo
Ruth Hagos
FIMI - Federazione Industria Musicale Italiana
(Italian Music Industry Federation)
Ministry of Foreign Affairs and International
Cooperation
ITA - Italian Trade Agency

Contact Info

Italia Music Lab
@italiamusiclab
@italiamusicexport

www.italiamusiclab.com
www.italiamusicexport.com
info@italiamusicexport.com

Via Giovanni Omboni 5, 20129,
Milano
+39 0238246204
info@italiamusiclab.com