

# LIVE MUSIC CHALLENGES IN EUROPEAN CITIES

PUBLICATION FEBRUARY 2025 | RESEARCH & WRITING BY CÉCILE MOROUX



LIVE  
DMA



Co-funded by the  
Creative Europe Programme  
of the European Union

Credit: Behangmotief - Lander & Adriaan at Wintercircus (BE, Flanders)

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# Context, objectives and purpose

This paper, produced in December 2024, is the result of a commission by the Live DMA network to provide tangible insights and qualitative feedback on the situation of small and medium-sized urban music venues across Europe. The aim is to gain a clearer understanding of the current state of these venues and to better grasp the challenges they face on a European scale.

The initial request was to focus primarily on factors such as gentrification, inflation, and noise disturbances. However, the interviews also revealed additional issues, such as human resources or changes in audience behavior, which we will address in this analysis.

The findings presented in this paper are based on input from 16 small and medium-sized music venues, two national federations, a European platform of music venues, and two stakeholders actively involved with European institutions or closely collaborating with them.

Each testimony was gathered through interviews, most of which were conducted individually, except in one case where the interview involved the entire team of a venue. The interviews lasted between 45 and 60 minutes.

# Introduction

The latest major studies on the live music sector in Europe commissioned by the EU date back to 2020<sup>12</sup>. These reports already highlighted several challenges, including economic concentration, urban gentrification, and regulatory constraints on sound and noise management. Four years later, many of these issues persist: the sector remains concentrated, urban centers are increasingly gentrified, and strict sound regulations continue to affect venues. However, new challenges have emerged following a series of global crises, such as the COVID-19 pandemic, the war in Ukraine, inflation, the climate crisis, and political and democratic instability. These compounded pressures have reshaped the landscape for the live music sector, creating both immediate and long-term challenges for its sustainability.

In a Live DMA report from January 2023, it was stated that: “The impact of the restrictions related to Covid-19, climate emergency, and the invasion of Ukraine have shaken all of us in a short-time. The live music scenes are barely recovering from the impact of Covid-19, and they are facing rapidly increasing costs, rough competition, staff crisis, ecological concerns, and less predictable audience behaviours (no-shows, last-minute tickets purchase, etc)<sup>3</sup>» What are the immediate challenges that small and medium-sized European live music venues are facing, four years after COVID-19 and two years after the inflationary surge triggered by Russia’s invasion of Ukraine, alongside the increasing threats of the climate crisis?

To address these questions, we will explore the key factors affecting these venues, while also providing examples of strategies implemented by some respondents to address these challenges.

.....  
1. European Commission: Directorate-General for Education, Youth, Sport and Culture, Le Gall, A., Jacquemet, B., Daubeuf, C., Legrand, E. et al., [Analysis of market trends and gaps in funding](#) – Final report, Publications Office, 2020  
2. European Commission: Directorate-General for Education, Youth, Sport and Culture, Jacquemet, B., Le Gall, A., Saraiva, N., Kern, P. et al., [Music moves Europe – A European music export strategy](#) – Final report, Publications Office, 2019  
3. Live DMA. (January 23, 2023). Report : [post covid-19 challenges in the live music scenes across Europe](#).

# Choice of methodology and limitations

## A. A PANEL OF RESPONDENTS FROM DIVERSE GEOGRAPHIC REGIONS WITHIN THE EU

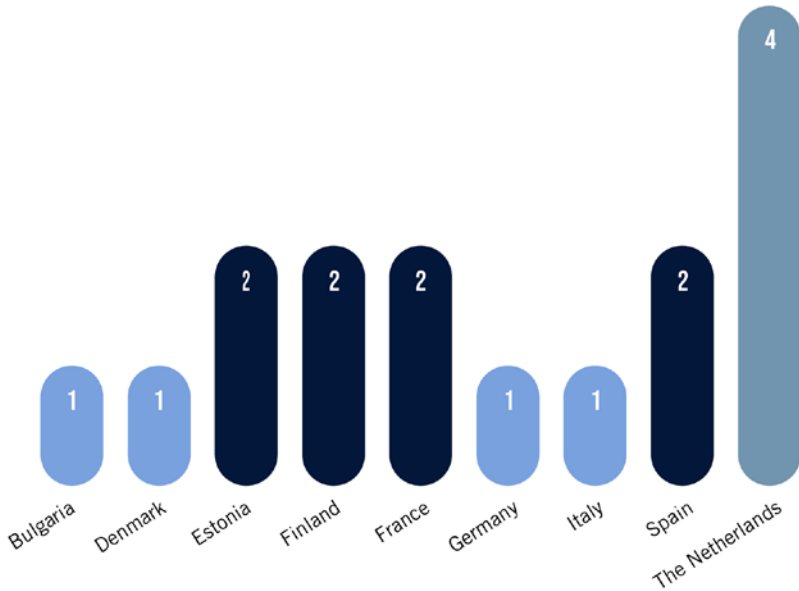
This research takes a qualitative approach, aiming to collect insights from a variety of European regions. By capturing perspectives from diverse countries, the study seeks a comprehensive understanding of the challenges faced by small and medium-sized music venues. However, significant obstacles arise from the heterogeneity of venue models across regions and the distinct national contexts. These challenges are compounded by varying levels of cultural adaptation among stakeholders and the biases tied to their respective agendas. The diversity in local policies, economic conditions, and cultural attitudes further complicates comparisons between different environments. Another major limitation of this study lies in its focus on venues located in European capitals or major cities. Consequently, the challenges identified are inevitably specific to urban contexts, leaving out issues faced by venues in rural or less densely populated areas.

Respondents were primarily drawn from national or regional federations within the Live DMA network, except for two clubs. This selection offers a broad representation of the sector while reflecting the diverse operational models across Europe. The survey includes testimonies covering the full range of challenges faced by 15 small to medium-sized venues in Europe, and a multi-venue establishment with a total capacity of approximately 3,000 people. In addition to the 16 concert venues, we also consulted the federations Clubcircuit (the federation of music clubs and concert organizers in Flanders) and Court-Circuit (the federation of venues and organizations for contemporary music in Wallonia and Brussels), as well as the coordinator of the European platform Liveurope. Liveurope is a pan-European initiative based in Brussels that supports concert venues in their efforts to promote European music diversity.

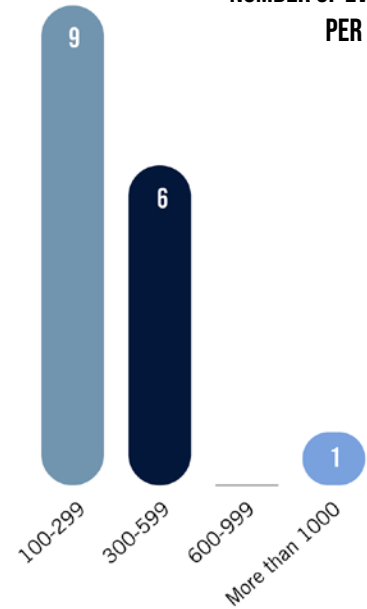


Credit: Laurens Wille, Portland at N9 (Huysmanhoeve, BE Flanders)

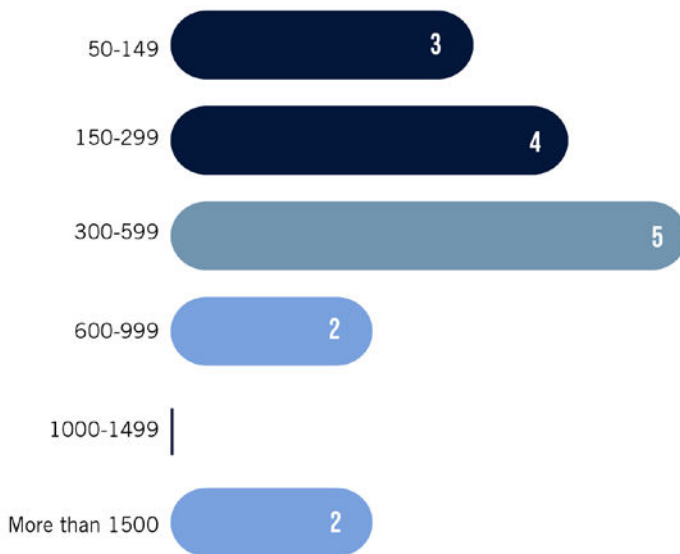
## COUNTRIES REPRESENTED



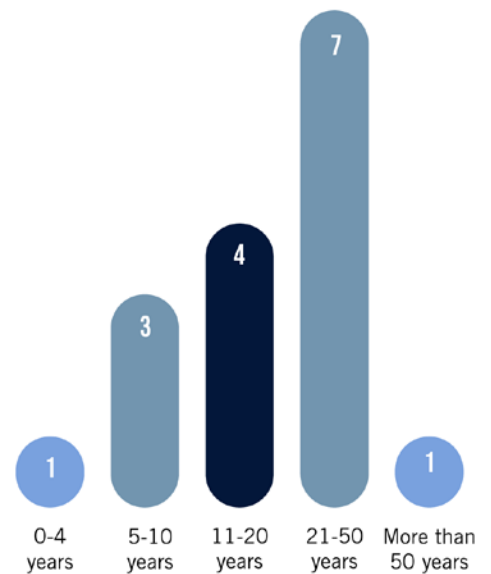
## NUMBER OF EVENTS PER YEAR



## VENUES CAPACITY



## VENUES AGE



## B. THE SEMI-STRUCTURED QUALITATIVE INTERVIEW AND QUESTION SELECTION

The questionnaire was designed to structure the exchange while allowing respondents flexibility in their answers. The initial questions aimed to identify the venue (location, capacity, age, economic model, ownership or rental status, etc.) as well as the role and background of the interviewee(s) (current position, tenure, and any evolution within the venue or the live music sector).

The second part of the questionnaire focused on the challenges faced by the venues. Respondents were first invited to provide spontaneous answers—based on the assumption that their willingness to participate indicated a personal or professional interest in the subject. They were then asked about a pre-established list of challenges identified by Live DMA (gentrification, noise complaints and inflation), which was updated and refined as interviews progressed.

- Gentrification
- Noise complaints
- Rising costs related to general inflation (energy, real estate, etc.)
- Rising costs related to concert production (artist fees, transportation, etc.)
- Struggles with maintaining programming independence
- Competition within the music industry
- Growing difficulty (or even impossibility) in achieving a balanced budget
- Human resources
- Changes in public behavior and habits
- Lack of or withdrawal of political support
- Others

Initially, we hypothesized that European venues were being heavily impacted by three identified factors: gentrification, inflation, and noise complaints. While this hypothesis proved accurate, the interviews revealed not only the factors themselves but also their consequences. Furthermore, the discussions brought to light other significant aspects—such as the issue of fair artist remuneration and the changing habits and behaviors of the 18-25 age group compared to their predecessors. These additional elements underscore the broader challenges faced by the live music sector today.



Credit: Quentin Perot, 39 Bermuda at La Ferme (Louvain La Neuve, BE)

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## ANALYSIS OF RESULTS



# I. Venues undermined by the lack of urban planning

## The never-ending gentrification process

**Gentrification** is the process in which local communities are gradually displaced from their neighborhoods. This often happens when an area becomes attractive to higher-income groups. Gentrification is also fueled by political decisions and urban planning efforts aimed at «sanitizing» or revitalizing certain parts of a city, a process commonly referred to as **regeneration**. Beyond displacing individuals, gentrification alters the character of an area, leaving it without its traditional community members.

Gentrification is an ongoing issue with a **large range of consequences** for cultural spaces. Respondents mention rising neighborhood costs, higher expenses for concert production, audience changes, and difficulties for local and artistic communities. A testimony from Italy provides a clear example of how these **interconnected issues** impact their work:

### Respondent from Italy, Bologna - 99-capacity venue



*For us, for instance, much of our work revolves around engaging with the local community in our neighborhood. The challenges we face are deeply rooted in social issues. Bologna, like Barcelona and other major European cities, is grappling with the impacts of Airbnb proliferation, over-tourism, and similar phenomena. It is undergoing significant transformation due to urban regeneration efforts initiated years ago, which are now affecting rental prices and the overall character of the area.*

*Bologna, once a diverse and vibrant working-class neighborhood with a strong presence of second-generation immigrants, is experiencing rapid gentrification. As is common in many cities worldwide, the process begins with the emergence of upscale bars and trendy establishments like sushi restaurants, gradually altering the cultural fabric of the area. This shift raises questions about potential changes in our audience.*

*Currently, our audience comprises roughly equal parts musicians and local residents who value a sense of normalcy and community. We do not cater extensively to tourists or transient visitors, so the immediate impact on our audience may be limited. However, the broader issue lies within the community itself. As long-time residents of Bologna, we are finding it increasingly difficult to live and work here due to rising costs. For example, accommodating visiting musicians has become a logistical and financial challenge. The cost of hotels in the city has risen to the point where it is almost impossible to secure affordable options.*

*This issue is not unique to us; many other clubs face similar struggles in finding reasonably priced accommodations. These changes are happening at an alarmingly rapid pace, creating a host of challenges for both the cultural scene and the local community.”*

**Real estate speculation** is closely tied to the phenomenon of gentrification. For two venues in the panel (in Germany and Finland), this factor could prove fatal, as the situation has reached a point where opening new cultural spaces is no longer feasible:



### Respondent from Germany, Berlin - 250 capacity-venue



*Berlin has become highly speculative, making it nearly impossible to find a location like we have with the same atmosphere and purpose. Thirteen years ago, it was a different story—there were plenty of vacant spaces and abandoned buildings in the city center that no one wanted. Now, those opportunities are gone. If we were to start looking today, the chances of finding a similar place are slim to none. Recently, several iconic clubs in Berlin have shut down due to investors buying the properties, leaving no prospect of relocating. It's a tough and uncertain situation for the scene.”*

### Respondent from Finland, Tampere - 200-capacity venue



*The last place was losing money for so long that we couldn't find any other option than this building, which was soon to be demolished. I think that's a perfect example of gentrification – having to move into a building knowing it's going to be torn down. The consequences are clear: you can see it in the disappearing small venues. There are only one or two small venues left in the city center of Tampere, besides us, while all the others have moved to the suburbs.»*

Part of the irony lies in the fact that **cultural entrepreneurs often find themselves as pioneers of the gentrification process**. Unable to remain in their current locations, they may be compelled to move further and further from city centers, thus inadvertently contributing to the expansion of the phenomenon:

### Respondent from The Netherlands, Amsterdam - 150-capacity venue



*When we first arrived in this neighborhood, we were likely at the forefront of gentrification in the area. To some extent, we contributed to the process, as the neighborhood is traditionally a socially diverse one, with a significant amount of social housing. However, just across the street, a new residential area was emerging, with a focus on homeownership rather than rental properties. This stark division is evident, with social housing on one side of the street and homeowners on the other. When we first moved in, the section occupied by homeowners was largely empty, with vacant buildings and areas devoid of construction activity. Although the plans for development were already in place when we arrived, it's clear that our presence has played a role in shaping the transformation of this area, whether intentionally or not.”*

Underground spaces that foster cultural diversity and inclusion can initiate the phenomenon that will ultimately kill them. By drawing attention and revitalizing an area, these venues attract commercial interests that prioritize profit over community values:

### Respondent from Estonia, Tallinn - 300-capacity venue



*At that point, it was located next to the old city of Tallinn, just on its outskirts, and was the only club in the area. In the first years, Sveta was quite popular because it was also the first openly LGBT-friendly venue in Tallinn, something the city didn't have before. So, the first few years were quite successful with parties, gigs, and events, which naturally influenced the area. More bars and mainstream clubs started opening nearby, which ultimately had a negative impact on us. Fast forward five years, and it became the main party area in Tallinn, with a lot of restaurants, clubs, and bars. In short, gentrification happened.”*

The Sveta club in Tallinn had to close its doors in 2023. The shift toward mainstream nightlife diluted the unique identity that initially made the area appealing, marginalizing the very community it sought to uplift. This highlights a recurring challenge in urban development—preserving the authenticity and inclusivity of cultural spaces amidst the pressures of economic growth.



Credit: Kaie Kiil, Svetaa Bar (Tallinn, EE)

### What can venues do?

Three primary strategies emerge from testimonies in response to this gentrification phenomenon. A first important factor is **the support from public authorities** in preserving these spaces despite ongoing changes. It is challenging to speak of a strategy solely implemented by the venues themselves, rather a dynamic between the venues and public authorities, largely influenced by the vision and policies established by local governments.

#### Respondent from Denmark, Aalborg - 110-capacity venue

“Gentrification happens around our place all the time. We’re 200 meters from the harbor, where they’ve built all these beautiful buildings, though I wouldn’t necessarily call them beautiful. I think the people who built them believe they are beautiful. So, there’s this contrast between our small, unique venue in the midst of all this mainstream development. (...) We have political support, even though they’ve built everything around us... I would say that all venues in Aalborg enjoy significant political support. I think we receive it because we perfectly fit into what they want to be as a university city that needs a space like this.”

A second effective strategy is **building a strong and recognizable project identity, or «DNA», that fosters a loyal and engaged community**. This approach helps secure an audience even if they don't live near the venue. It also attracts individuals willing to work and invest their time in the space, despite the increasing difficulty of living in the surrounding neighborhoods.

#### Respondent from The Netherlands, Amsterdam - 2000-capacity venue



*I think our position in the industry places us at the top in the Netherlands for venues of our capacity. We operate professionally, but at the same time, there's a strong non-profit, DIY ethos that shapes our approach. (...) Our autonomy is crucial. It's a significant part of our legacy and one of the reasons we're popular among bigger artists. Sometimes, an artist who could easily sell out a 5,000-capacity venue chooses us explicitly because of how we operate, as well as our history and legacy. In some cases, it's also because we supported those artists when they were still emerging, which fosters a sense of loyalty."*

The third one is **embracing mobility and incorporating the exploration of new territories into the venue's core identity**. In this approach, extreme gentrification serves as a signal for operators to shift their focus toward emerging areas. This dynamic of displacement can be interpreted through two opposed perspectives. On one side, cultural operators risk being perceived negatively as «active» agents of gentrification, contributing to the transformation of previously affordable neighborhoods into highly desirable areas, thereby causing the displacement of existing communities. This critical view highlights the potentially destructive role of cultural initiatives in urban transformation. On the other side, gentrification as an almost inevitable phenomenon that would develop as neighborhood revitalization is planned by local authorities. From this perspective, these operators play an essential role in rehabilitating neglected urban areas and transforming them into dynamic and attractive districts. In this context, public authorities should recognize their significant contribution, and integrate specific measures into urban policies to preserve and support these cultural actors.

#### Respondent from France, Lyon - 800-capacity venue and 100 000-capacity festival



*We are often welcomed by some people who tell us they're glad we're finally bringing attention to their neighborhood. They hope that now, garbage collection will be more regular or that public restrooms might be installed. For example, I recently received an email forwarded by the city from a local resident. She complained about public restrooms being installed, arguing that during events people urinated outdoors. But the truth is, this happens every day, not just during events. There's a canal nearby, and fishermen frequently visit the area. Isn't it the city's responsibility to install public restrooms? It's not up to us to manage public spaces or set up perennial facilities. But we have to do it as far as possible and with our means, even in public spaces, during our events. What we realize is that by using transitional spaces, we highlight existing issues in these neighborhoods. Initiatives like ours inadvertently pave the way for gentrification—though I find the term a bit negative. Still, they help address problems that stem from a lack of municipal investment.*

This dual perspective illuminates the complex interactions between urban planning, cultural involvement, and the broader social and economic impacts of gentrification, which are often inadequately addressed by protective public policies. Urban planning is one of the key tools available to public authorities in mitigating these effects. A good example of poor urban planning mixed with gentrification is the rise in noise complaints, which often happens when cultural venues aren't taken into account in strategies to maintain lively urban spaces.

## Noise complaints as a direct consequence of a inadequate urban planning

The testimonies collected during this study highlight that **noise complaints** represent a significant challenge for live music venues, impacting both their operations and general environment and ambiance within the venue, which can become strained or negative due to tensions and restrictions associated with noise-related issues. A single determined neighbor with the resources and persistence to initiate legal action can pose a threat to any venue over time. The stakes are high, as venues found in violation of building codes or activity standards may face forced closures or the need for prohibitively expensive renovations.

This vulnerability underscores the precarious position of urban music venues, which must constantly adapt—often at great expense—to evolving regulations and community expectations. Furthermore, public financial support is far from guaranteed and often remains minimal in comparison to the substantial investments that venues must make themselves. Among the respondents, two venues were in the process of implementing soundproofing measures:

### Respondent from The Netherlands, Amsterdam - 2000-capacity venue

“*To safeguard our operations and avoid the potential loss of permits or even closure, we devised a comprehensive master plan two years ago during the COVID-19 pandemic. This ambitious project involves a substantial renovation and expansion of our building, with a primary focus on sound insulation. Simultaneously, it aims to preserve and modernize the historic structure, ensuring it is fit for the future. The scale of the undertaking is significant, with an estimated timeline of at least a decade for completion and projected costs running into millions. However, we believe this is the only viable path to secure the venue’s long-term sustainability.*”

### Respondent from Denmark, Aalborg - 110-capacity venue

“*We don’t have the equivalent of 2 million Danish kroner, which is a challenge for us. This situation stems from a complaint made by a neighbor. Two years ago, the owner of the apartment building next to our venue raised an issue. While the residents love our venue, the owner wants to soundproof the building because he realized there was too much noise. However, his building was constructed almost ten years after our venue, and it was poorly built compared to the original plans. Despite this, we are the ones who have to bear the cost of the situation.*”



Credit: Mind Palermo, Keepon Fest at I Candelai (Palermo, IT)



The cost of such an operation is exceedingly high. Faced with this significant challenge, two main strategies emerged: **fundraising and solidarity within the venue's community and with other concert halls, and long-term investment by a venue with substantial resources and the ability to diversify activities and revenue streams.** In all cases, it is evident that without public support and when required to undertake such renovations to remain operational, these projects represent a significant threat to the survival of the venue, akin to a sword of Damocles hanging over their future.

As highlighted by several testimonies, what are frequently referred to as noise complaints often include concerns about a wider range of issues: **nighttime disturbances** such as public disorder, street racing, or urban rodeos, as well as the state of public spaces after late-night activities (e.g., litter, urine, and other waste left behind by crowds). These interconnected issues often blur the distinction between legitimate sound-related conflicts and dissatisfaction with the overall impact of nightlife on local neighborhoods. **The blame frequently falls on easily recognizable central-city concert halls or clubs,** which can become targets for a variety of concerns. These dynamics or perceptions are sometimes further intensified by the actions of public authorities themselves:

#### Respondent from Spain, Barcelona - 140-capacity venue



*During the pandemic, a campaign was launched by the Spanish government, known as the «pin-pad ad».<sup>4</sup> The campaign was structured like a children's game, with a sequence of images: first, there is a party at a club, then people kissing, and finally, an elderly person dying. It essentially criminalizes venues, despite the fact that during the pandemic, we were forced to close. What does this «ping-pong» mean? It seems they are working on the public's subconscious, associating our venues with negative and harmful imagery.*

Beyond the challenge of soundproofing the building, venues are often **compelled to allocate significant resources to mediation efforts** with their audience, neighbors, and public authorities. Managing dissatisfaction frequently falls primarily on concert halls and other spaces perceived as noisy, which requires substantial financial and human resources and demands a significant investment of time and energy from venue directors.



Credit: Miikka Varila, Tavara-Asema (Tampere, FI)

#### Respondent from The Netherlands Utrecht, 300-capacity venue



*When I reflect on my main tasks over the past three years, I realize that I have spent significantly more time mediating and communicating with neighbors, as well as liaising with the municipality. One major challenge is that the regulations for residents renovating their buildings are less strict, making it easier for them to do so. As a result, buildings are increasingly being constructed closer to our venue. This creates a dual issue: nuisance from the industrial activity near us and sound from our hall affecting the nearby residences. It's a very complex and difficult situation to navigate.*

4. Campaña #EstoNoEsUnJuego: «Pito, pito gorgorito...» «Pin, pan, fuera...»



*Trying to bring together the entire nightlife sector across different neighborhoods, forming associations, and signing contracts with various parts of the city council. This involves working to reach agreements, such as funding and deploying security personnel and civic workers to patrol the streets. These teams engage with the public to prevent large gatherings, public drinking, noise, and other disturbances. Additionally, collaborations include maintaining a cleaning team in partnership with the city council. For instance, ensuring cleaning staff work during the night so that by seven in the morning, the streets are spotless. This ensures that when residents step out, the streets are clean, with no visible signs of the previous night's activities.*

### Are people becoming less tolerant?

Several testimonies report an increase in noise complaints since the lockdowns implemented during the COVID-19 pandemic, attributing this to a **perceived decline in tolerance among local residents**. In his book *This Must Be the Place*, Shain Shapiro provides a broader, structural perspective, **attributing these tensions to a lack of urban planning** that fails to incorporate considerations for nightlife, and even less so for live music venues. This oversight highlights a systemic issue where urban development often disregards the cultural and economic importance of such spaces, exacerbating conflicts between venues and residential communities.

*It was patently obvious that the way planning law was interpreted, implemented and governed [in the UK] was one of the reasons why venues were closing at an accelerating pace. In 2015, in an effort to fast-track housebuilding, the UK government tweaked the planning rules to create the "permitted development rights" framework. Permitted development rights impact all manner of land uses and, in many respects, allow for changes in how land is used without going through planning permission, which takes time and money. In this case, the changes allowed offices to be converted into residential premises, without seeking full planning approvals. Much of these conversions happened in business parks and have led to homes being created out of office blocks. (...)*

*In addition, offices above pubs were converted to housing, with no additional soundproofing, and on high streets housing developments emerged where there were once offices and commercial premises. As these developments were built, sold and inhabited, a number of issues became apparent. When residents can't sleep due to pounding bass, single-glazed windows or the dispersal of a nightclub across the street at 4am, tensions rise, noise complaints increase and venues are blamed.<sup>5</sup>*

### Effective measures to prevent conflicts and reduce disturbances.

**Noise complaints arise from a combination of factors**, including gentrification, urban densification, and demographic shifts in the surrounding population. Additional contributing elements include older buildings without proper soundproofing being repurposed as concert venues, poor urban planning, and new constructions that fail to adequately address noise mitigation. These factors often intersect, exacerbating conflicts between music venues and nearby residents. The situation is further complicated by inconsistent enforcement of regulations and the lack of comprehensive strategies to integrate live music spaces into urban development plans. It is very challenging to completely prevent complaints, but the risk of closure can be mitigated through **robust soundproofing and genuine consideration for nearby residents**.

.....  
5. Shapiro, Shain. *This Must Be the Place: How Music Can Make Your City Better*. Repeater, 2023.

This involves measures such as ensuring streets are cleaned before residents wake up and establishing ongoing mediation and communication throughout the year. Some cities have implemented the [Agent of Change principle](#), first introduced in Australia (notably at The Tote), adopted in San Francisco in the 2000s, and more recently in London in 2016. This principle dictates that the entity causing the change (such as an investor or developer) is responsible for minimizing its impact on the surrounding neighbors. In practical terms, if new housing is built near an existing bar or concert venue, it is the responsibility of the developer or landlord to ensure the building is soundproofed adequately.

Unfortunately, this is a principle rather than a law, and it has not been applied in any of the cases we encountered during this study. **Operators are left to handle the situation themselves** by making their presence known, reaching out, and raising awareness among developers building near their venues. This risk is significant, and its consequences further strain structures already weakened by the current economic climate.



Credit: Ludo Leleu, La Lune des Pirates (Amiens, FR)



## 2. An economically challenging environment for small and medium-sized concert venues

Respondent from Germany, Berlin - 250 capacity-venue



*Gentrification also brings rising costs across the board. We recently reviewed our contracts to update prices in response to this year's inflation and the upcoming increase in the minimum wage. We're mindful of not becoming an expensive venue, as our capacity is limited to 250 people for concerts. Balancing our break-even point is challenging, considering energy expenses, operational base costs, and other overheads. These are all factors we need to carefully account for.*

### A record inflation limiting the effects of the post-COVID-19 recovery.

**Inflation and gentrification are interconnected mechanisms.** While we will not revisit the latter concept, we will focus on the other dynamics driving the general increase in prices.

After being forced to close for nearly two years due to the pandemic, concert venues faced the full force of Europe's inflation crisis following Russia's invasion of Ukraine. The European Union experienced an **inflation peak of nearly 12%** at the end of 2022. Energy and alcohol—two critical components of venue operations—were particularly affected during this period, alongside rising rents, wages, and other costs. While inflation has now stabilized at +2.6%, it remains a persistent challenge for the sector.

There is not only the general inflation of prices but also a **specific inflation within the live music sector itself**. Indeed, in the current streaming-dominated market, live performances have become an essential income stream for artists. With recorded music generating less revenue, **live shows are a primary way for artists to monetize their work**, driving up the demand for well-paid gigs. As the cost of living increases, artists demand higher pay to cover their expenses, leading to more expensive performance fees. With **high travel and logistics costs**, artists and their teams may find it unsustainable to tour extensively without significant compensation. Post-COVID, many artists have also been cautious with tour schedules, focusing on fewer, more lucrative shows rather than extensive tours.

Respondent from Finland, Oulu - 300-capacity venue



*Well, artist fees have risen significantly since COVID. I think this is especially challenging for us because we are quite far from Helsinki, where most Finnish artists are based. Helsinki is home to all the major media outlets, agencies, and big labels, so when an artist breaks through, they usually move there and travel from that hub. For us in Oulu, which is over 600 kilometers from Helsinki, organizing gigs is more expensive. We need to cover hotel rooms, travel costs, and other expenses. So, yes, we are definitely feeling the impact of these rising costs. However, I think this is a challenge everyone in the industry is facing.*





Credit: Laura Vanzo, G Livelab (Tampere, FI)



Credit: Bernard Butler, Sala Mardi Gras (Barcelona, CAT)

Finally, **high demand from audiences eager to return to concerts has increased competition among venues, festivals, and booking agencies.** This demand can raise artist fees, as event organizers pay a premium to secure popular acts. The combination of these factors has created a challenging environment for venues and festivals, particularly smaller ones, which are now facing a «talent cost crisis» as they struggle to afford top-tier or even emerging artists without straining budgets.

#### Respondent from Spain, Barcelona - 3000-capacity venue



*We need to address the issue of artist fees, which has become another significant problem post-pandemic, particularly with international fees. The amounts being demanded by artists and their international agencies have been absolutely insane.*

#### What tools can be used to address inflation?

To address this widespread increase in prices, **there are as many strategies as there are venues.** Each venue relies on its strengths and toolkit: flexibility in staffing or the number of activities organized throughout the year, the ability to diversify activities and revenue streams, collaborating with production companies and external promoters to host concerts, changing locations to increase capacity, reducing artistic risk, etc. Inflation has also impacted **salaries and the legal minimum wage** in several countries. While this is a necessary development for artists and professionals working in the live sector, it is a very difficult factor for small and medium-sized venues to absorb, as we will see in the following section.

#### Respondent from France, Lyon - 250-capacity venue



*We focus mainly on responding to project calls and, more recently, working extensively with producers. This is because, at present, producers often have substantial resources due to tax credits and specific subsidies for production. As a result, we find ourselves in more of a hosting role rather than being in a position to take the lead in proposing artistic and human choices. That said, this situation is fairly recent.*

## Respondent from Denmark, Aalborg - 110-capacity venue



*So, costs are rising. But I think, again, one of the benefits of our place is that we only have two people on staff, and we get paid very little. And, again, if we're struggling economically, we can just stop doing shows. We don't have to do shows because it's people's desire to create that keeps the place running. If they don't want to do it, then we just won't have shows, or we'll have fewer. So, for us, it's easier to navigate the situation and make adjustments along the way if we're facing economic difficulties. In our city, there's this huge venue with 30 people on staff. For them, this economic situation is much more challenging because they have so many people on payroll and have this whole operation running.*

## Respondent from Finland, Tampere - 200-capacity venue



*Basically, the economic structure of the venue—and of any venue—based on restaurant sales, has changed dramatically in the past two years due to the Russian attack on Ukraine and the financial crisis, or financial recession, that we've been living through. In other words, our venue was too small to operate profitably, or even break even. We were losing a lot of money because people couldn't or wouldn't buy as many drinks from the bar anymore, so we needed to upscale. We moved to a location about three times bigger. We're trying to cope with the economic challenges by increasing sales, so right now, we need double the amount of people to achieve the same sales we did before the war and inflation.*



Credit: Plon, Nist Nah at Le Florida (Agen, FR)



## Lack of recognition of the live music sector by public authorities

Despite its social value, including promoting diversity, supporting artist development, revitalizing city centers, driving economic growth, and contributing to soft power, the live music sector struggles with insufficient recognition from public authorities, leading to several key challenges. One of the main issues is that urban planning often overlooks the needs of live music venues, resulting in **inadequate protection against gentrification, noise complaints, and real estate speculation**.

Shain Shapiro's reflection highlights how far we are from a truly comprehensive and ambitious approach to urban, political, and cultural planning. He thinks that that a music ecosystem policy is not just about music but also about how it intersects with other urban policies, such as housing and environmental regulations. It argues that music's external impact on communities must be considered when shaping policies, particularly in urban planning. A key example is affordable housing—if new homes near music venues are not built to appropriate standards (e.g., soundproofing, insulation), they may generate noise complaints, negatively affecting both residents and businesses. The Agent of Change principle is highlighted as a policy ensuring that new developments near existing entertainment areas incorporate necessary protections, rather than placing the burden on music venues or other industries like agriculture or manufacturing. Ultimately, he advocates for integrated policies that support both the music industry and urban development, ensuring that vibrant communities can thrive while maintaining social cohesion and economic sustainability.



Credit: Tim Schrijnemakers at ClubAFF24 (BE)

The **absence of targeted tax incentives or protections** also leaves venues and event organizers financially vulnerable, depriving them of mechanisms that could alleviate the financial strain.

### Clubcircuit, network of professional live music venues in Flanders, Belgium



*Our first demand is for greater recognition of the current role played by live music venues in our cultural landscape. We are calling for an end to the chronic underfunding of the sector. Current subsidies are significantly lower compared to those allocated to other cultural sectors, such as theater or classical music. This discrepancy highlights the need for tools like the Tax Shelter to be extended to our sector. The Tax Shelter allows investors to support cultural projects in exchange for tax reductions. While this mechanism is available for theater, it has not yet been implemented for contemporary music, and we believe it is time for this to change.*

Several respondents from different countries report experiencing **unfavorable changes in taxation policies** affecting their activities.

### Respondent from Finland, Tampere - 200-capacity venue



at the moment.

*The government has decided to increase VAT on alcohol and food. While ticket prices have not risen yet, plans are underway to implement a 60% increase in VAT, raising it from 10% to 14%. This significant jump in the government's share of taxes is causing a lot of concern*

### Respondent from Estonia, Tallinn - 450-capacity venue



*In Estonia, VAT is applied uniformly to everything. The issue is that, unlike most European countries, cultural events and tickets here are not eligible for reduced VAT rates. Previously set at 20%, VAT was raised to 22% last year, and another increase to 24% has already been announced, set to take effect in 2025. For us, this means that nearly a third of each ticket's price is consumed by taxes: 24% VAT, PRS (performing rights fees), and the ticketing commission. In fact, I haven't fully researched this yet, but I suspect that ticketing commissions in Estonia might now be the highest in Europe.*

These challenges are exacerbated by the evolving political landscape across Europe, where an increasing number of **governments lean toward conservatism or far-right ideologies**. This shift is reflected in **reduced prioritization of cultural initiatives** and a more hostile environment for creative expression. These dynamics create an environment where the live music sector struggles to survive, let alone thrive, in the face of mounting economic and political pressures. This trend can be observed in countries such as Italy, where a far-right party leads the executive branch, as well as in the Netherlands and Finland, where they are part of governing coalitions.



Credit: Mads Suhr Pettersen, Sami Easter festival (NO)

### Respondent from The Netherlands, Amsterdam - 2200-capacity venue



*A pressing and urgent challenge has emerged due to recent changes in tax laws introduced by the far-right government currently in power in the Netherlands. These new measures pose significant issues for cultural institutions. One particularly concerning change is the planned increase in VAT. Currently set at 9% for the activities we undertake, this rate is slated to rise to 21% starting January 1, 2026. Such an increase represents an effective income reduction of approximately 11% unless measures are taken to mitigate its impact. As a result, we will likely be forced to raise ticket prices, reduce the attractiveness of offers extended to artists, and distribute the financial burden among our audiences, our organization, and the artists we collaborate with. These adjustments will be critical to navigating the financial strain imposed by this policy change.*



At the European level, support for the music sector remains limited, particularly when it comes to small and medium-sized concert venues. The recent [Music Moves Europe](#) program operates under the framework of the [Creative Europe](#) initiative, which supports cultural and creative sectors. Its budget has historically been small relative to the scale of the European music industry. The preparatory actions of Music Moves Europe were allocated €1.5 million in 2018 and €3 million in 2019. In comparison, the average annual budget for a single contemporary music venue or music festival in France amounts to €1.2 million and €1.5 million, respectively.

This raises questions about the actual impact such a limited budget can have at a European scale. It seems unlikely that such modest funding could provide substantial and effective support to the sector. Additionally, music-related projects received only 3.5% of the overall Creative Europe budget, itself a modest portion of the EU's total financial resources, representing 0.16% of the entire EU budget<sup>7</sup>. In stark contrast, cinema funding under Creative Europe exceeds €1 billion over the same seven-year period, reflecting a persistent imbalance in cultural funding priorities. Despite the well-documented economic, cultural, and social value of the music sector, it continues to receive disproportionately low recognition and support. This is why mobilization and organized structuring of the sector at both national and European levels must persist, emphasizing its significance and advocating for the protection of its vulnerable yet essential stakeholders. The COVID-19 pandemic further exposed the fragility of the live music ecosystem, significantly weakening it. However, this crisis also forced the sector to organize itself and think collectively about its future.

### Court-circuit, network of professional live music venues in Wallonia & Brussels, BE



*We gradually expanded until, in 2020, we became a true professional federation of concert venues. With the Covid crisis, we increasingly took on roles in social dialogue, union activities, and representation to political authorities—something we had not really done before 2020. This was a real revolution, largely imposed by the global context, which required interlocutors for every profession within the performing arts and the music sector.*

Although some countries implemented financial support for venues during lockdowns and industry players demonstrated unprecedented unity, these lessons have had minimal influence on shaping current public policies. Without sustained effort and investment, the sector **risks being perpetually marginalized** within the broader cultural landscape.

Positive progress has been made through efforts by national and European organizations like Live DMA, which continue to collect data and raise awareness among policymakers and the public about the challenges faced by venues. Similarly, the UK's Music Venue Trust has been at the forefront of advocacy, popularizing terms like «grassroots venues,» championing the «agent of change» principle, and leading initiatives such as taxing stadium and arena tickets to support smaller venues<sup>79</sup>. However, political will remains insufficient, both nationally and at the European level, especially when compared to more established and structured sectors like cinema and audiovisual media. This lack of robust support underscores the need for further advocacy and systemic changes to bolster the live music industry's sustainability.

7. Open letter : [Music Sector calls on MEPs to support a strong budget for the 3rd edition of Music Moves Europe](#) | Liveurope. (September 19, 2019).

8. Music Venue Trust [instagram](#) post (November 14, 2024).

9. Stock, O. (November 14, 2024). [UK Government backs ticket levy on stadium and arena shows to help grassroots venues](#). DJ Mag.

## Human resources: when fair pay is unfair for small and medium-sized live venues

The cultural and live music sectors face significant challenges related to human resources, stemming from financial and structural constraints. Chronic understaffing and high turnover rates, exacerbated by low salaries that fail to keep up with the rising cost of living, particularly in gentrified urban areas, create instability.

### Respondent from France, Lyon - 400-capacity venue

“ Even if as a cultural venue we respect our collective agreement, we don't pay well enough. Indeed, the cost of living in a large city like Lyon compared to the standard salary, if we don't adjust for the cost of living, is too low. I have colleagues who moved to Saint-Étienne to work here... However, we have quite a strong appeal to still attract employees who want to stay, even if the pay isn't great. But it has to be... The project has to be interesting. They have to really find something there.

Recruitment is further hindered by **shifts in work preferences**, as younger generations increasingly reject night shifts and prioritize work-life balance. Burnout and a loss of motivation are pervasive among staff, who often feel overwhelmed by financial pressures and systemic neglect.

### Respondent from Germany, Berlin - 250 capacity-venue

“ But with the younger generation... I feel that it's a bit harder. And of course, because it's nightlife... so it's mostly people over 30, around 35-ish. It's less likely to find younger people working at night. So, yes, it's a bit of a struggle for that generation—the one typically more inclined to work in pubs, like university students in their 20s. There's a bit of a shift now. But we're all kind of hoping they'll return to their habits, going out and needing money.

Payroll remains one of the highest and most constrained expense categories, often unable to be adjusted in response to fluctuations in activity levels or revenue streams. In times of crisis, this rigidity further hampers the ability of small and medium-sized concert venues to increase wages or hire new staff, exacerbating their financial and operational challenges. At the same time, **operating budgets are becoming insufficient** to cover salaries, forcing reliance on project-based funding. The **shift from operating on general operational funds to project-based funding** has been noticeable in many parts of Europe, particularly in the cultural and nonprofit sectors. This evolution is due to several factors, including tightening budgets, increasing demands for transparency, and a move towards funding specific outcomes or activities rather than broad operational support. This model is seen in how grants and subsidies are allocated based on specific, measurable outcomes rather than general support for day-to-day activities.

### Respondent from France, Lyon - 250-capacity venue

“ Although we received exceptional aid during the Covid crisis, the specific SMAC<sup>10</sup> subsidies were not increased to offset inflation. Even with a significant increase in our SMAC funding, our model remains very specific, relying on substantial project-based funding but lacking a solid operational base. In practice, our SMAC subsidies do not cover either the venue or the team, creating a shortfall. Even when considering only the team working on the SMAC, excluding the project funding, this lack of basic funding remains a problem. This is a situation shared by some of my colleagues, so it's not an isolated case.

10. SMAC: A Scène de Musique ACTuelle (Contemporary Music Scene) is a French designation for venues or organizations dedicated to supporting and promoting contemporary music across a wide range of genres through live performances, artist development, and community engagement.

In Wallonia for example, there are **increased requirements for accessing public funding**, creating an imbalance between the rise in funding allocations and the expanding scope of responsibilities. Funding is project-based, yet adequate resources are lacking. Additionally, hiring is necessary, often requiring further training.

### Court-circuit, network of professional live music venues in Wallonia and Brussels, BE.



*The primary challenge, unsurprisingly, remains employment. Although we have benefited from an increase in multi-annual funding agreements for the majority of members, this increase is insufficient to enable new hires. This is because the additional funding is coupled with demands to expand activities. Furthermore, we are already facing a general rise in costs, including salaries, energy expenses, and artist fees. As a result, these budgetary adjustments merely allow us to absorb these increases, or, at best, to operate with greater caution. However, only in very rare cases do they provide the means to hire additional staff. Beyond these financial constraints, each member is expected to meet significant dissemination requirements, in addition to the activity targets outlined in their respective contracts.*

The Netherlands have started promoting **fair pay for cultural workers** to strengthen these jobs, especially in response to inflation and rising prices.

### Respondent from The Netherlands, Utrecht - 450-capacity venue



*"We have an issue with people working here as independents; they operate their own companies, such as sound engineers and lighting technicians. The government wants to reduce this practice because they are concerned about exploitation, as these workers often don't earn much per hour—which is true, to some extent. However, we can't afford to pay them more or hire them as full-time employees, as that would significantly raise our costs. With budget cuts across the board, these rising costs are a major issue for us."*

### Fair pay for artists without putting small and medium-sized concert venues at risk

**This fair pay** principle also concerns artists and has raised an important debate in the country at the moment. On this topic, the conclusion of the report FairPACCT<sup>11</sup> highlights significant income disparities faced by pop musicians in the country. It reveals that musicians' earnings from live performances are only about one-third of the social minimum income and one-fourth of what would be considered fair pay. The report emphasizes that current revenue from ticket sales and other income streams in the pop sector cannot sustain this adjustment.

To address this, the report estimates that an additional €7.8 million annually is needed to ensure fair compensation for artists in the early stages of their careers. This financial gap risks undermining the viability of smaller venues and limits equitable artist compensation, particularly for less established performers.

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11. Vinkenburg, Bastiaan, et al. "[fairPACCT De kloof tussen inzet en inkomsten van popmusikanten.](#)" vn timer.nl, 16 01 2023, . Accessed 09 12 2024.

## Respondent from The Netherlands, Utrecht - 450-capacity venue



*The issue of fair pay for Dutch artists is currently a significant topic of discussion in the Netherlands. It has been estimated that the entire music sector would require around 8 million euros to ensure fair wages for artists. However, this burden is unsustainable for smaller venues, which would face bankruptcy within a year if they were required to meet these standards. For instance, under fair pay guidelines, a starting artist would receive 150 euros per band member, meaning a six-member band would earn 900 euros in total. Currently, venues generally pay 250 euros for such performances, highlighting a substantial gap between what is considered fair pay and what venues can afford. The fair pay calculations are based on minimum wage standards in the Netherlands, but many small venues simply lack the financial capacity to meet these requirements.*

To address this issue, a sector-wide discussion is underway in the Netherlands to develop a **classification system** based on professionalism, popularity, and other relevant factors. This initiative aims to create more equitable pay scales that reflect the diverse contributions and market value of artists.

## Respondent from The Netherlands, Amsterdam - 150-capacity venue



*So far, we are just trying and piloting a new program in collaboration with other venues, not only our own, where they classify artists more effectively. They've created five classifications for artists, ranging from 'starting' to 'developing a career' to, well, 'stars'—or something along those lines. This is really relevant for us because, initially, they said, 'You have to pay everyone fairly.' But if an artist is just starting out, they don't attract a big audience and might not yet have the quality or experience of a more established artist. So, in those cases, fair pay should actually be lower than for more developed artists. Now, they are piloting these classifications based on specific criteria—things like the number of streams, albums released, performances in the Netherlands, and gigs abroad. We think these classifications are really interesting because they allow us to evaluate our acts based on these criteria. For example, we can determine that a particular act is a 'starting artist' based on these benchmarks, which then helps us establish what fair pay for them would be.*

By establishing clear benchmarks for compensation, stakeholders can address disparities more effectively and ensure artists are fairly remunerated for their work. This framework would offer a nuanced approach, ensuring that emerging and less commercially established artists are compensated in line with their career stage, without placing an unsustainable financial burden on smaller venues and cultural organizations. Ultimately, it seeks to preserve diversity, support the programming of new talent, and ensure that remuneration requirements remain adaptable to both artists' profiles and the financial capacities of smaller venues.

Meanwhile, rising operational costs, including tax increases without exemptions for cultural activities, compound financial instability. It is urgent to create an environment where artists and cultural professionals can be fairly compensated without placing undue financial strain on venues. These spaces are vital, but they should not rely on the sacrifice of the economic and mental well-being of their staff.



Credit: Diana Martin at Association du Salopard (CH)



### 3. A shift in market structure with impacts on consumer behaviors and a growing concentration of revenue

Changes in audience behavior and increased unpredictability that weaken small and medium-sized concert venues.

Although the root cause of the issue has not necessarily been identified, **all respondents seem to agree on observing changes in audience behavior**, particularly among younger generations. These changes include being less predictable in their ticket purchasing habits, less interested in regular club nights, spending less at the bar, and showing less motivation to work night shifts when it comes to recruitment.

Respondent from Estonia, Tallinn - 450-capacity venue



*Regarding the bar and food and beverage side, there's a challenge because many people don't want to work nights anymore. So, it's quite difficult to find quality staff who can do the job. (...) And the other problem with the production department is that we are heavily understaffed due to budget issues. Basically, people are burning out quickly because they have to handle a packed schedule, such as preparing for a concert on Friday morning, soundcheck, the concert itself, and then a party afterward. This often results in a 24-hour shift, followed by a few hours of sleep, only to repeat a similar schedule on Saturday.*

Respondents frequently highlight that events offering high production value, thematic elements, and engaging visuals have become pivotal in attracting attendees. This reflects a shift in consumer behavior where **people prioritize memorable, impactful events over traditional formats**.

Respondent from Finland, Tampere - 200-capacity venue



*The reason people tend to prefer nightclubs, karaoke bars, and large clubs over small live music venues is, in my opinion, their desire for more extravagant and larger-than-life experiences. While major festivals and concerts are consistently sold out, the scene for indie and underground bands is shrinking. The number of people interested in smaller, emerging bands continues to decline, as the current consumer trend leans toward larger, more flamboyant, and stadium-like experiences. Audiences are willing to pay high prices for massive, big-budget concerts, but attending performances by up-and-coming or lesser-known bands has lost its appeal for many.*

The decline in concert and club nights attendance could easily be attributed to factors such as the financial precarity of younger generations in an inflationary context or the psychological impacts of social media, the Covid lockdowns, or a growing appetite for grandiose experiences. However, much like the issue of noise complaints, it is worth stepping back to analyze this phenomenon from a broader, collective perspective rather than relying solely on these immediate explanations.

If we look at **ticket sales across the entire industry, revenues have never been higher**. However, they are increasingly concentrated on large-scale events. Beyond the behavior of audiences alone, this trend was highlighted in a report published by the European Commission in 2019 under the term «**eventisation**», defined as the increased focus on staging and on experiences surrounding the content played at an event (concerts but also sport competitions and other similar events), such as the aspect of temporality, the special equipment, and the atmosphere of the physical place:<sup>12</sup>

*The live industry is experiencing a growing trend of “eventisation”. This tendency is particularly impactful considering the growing number of festivals at European level. Music is not the sole reason which leads consumers to attend an event. Music becomes part of a global experience. Large music venues are also subjected to this change. For example, the managing director of the Ancienne Belgique (AB) explained that there is a strong tendency of the venue to develop some forms of festival events outside in the summer, and inside in the winter in order to attract new audiences through augmented experiences. This goes hand-in-hand with the growing importance of continuous communication on social media (most interviewees explain they are dealing with updates on social media streams at least every 12 hours).<sup>13</sup>*

This shift has been driven, in part, by **aggressive marketing campaigns from major promoters**, which encourage spectators to focus their spending on blockbuster shows. This consolidation of attention on large events marks a significant change in scale, reducing the visibility and viability of smaller, independent gatherings.

#### Respondent from France, Lyon - 400-capacity venue



*I believe it is important to emphasize that the spectator's choice is not necessarily entirely free. Indeed, when we look at festivals—whether large-scale or medium-sized—it is striking to observe how, in the middle of winter, the market becomes inundated with announcements and ticket sales for summer events. These festivals dominate the media landscape, monopolizing attention through massive marketing and communication strategies. This phenomenon is further amplified by the substantial budgets allocated to these campaigns, overshadowing other initiatives. It creates a vicious cycle where enormous sums are invested to generate ever-increasing revenues, fueling a dynamic of escalation that occupies an increasingly dominant position.*

Additionally, several respondents underlined noticeable change in how younger generations approach spending, adopting a «**less but better**» **mindset, favoring quality over quantity in consumption**. This applies not only to live events but also to related areas like alcohol consumption, where quality is prioritized over volume. While this shift offers long-term health benefits, it also presents challenges for venues and organizers accustomed to different consumption patterns.

However, one of the major issues is that **audience behavior has become less predictable**. Unlike in the past, when people planned their attendance well in advance, decisions are now more spontaneous. This unpredictability complicates event planning, especially for smaller venues without the resources to book high-profile headliners months ahead. Larger players, with their ability to secure big names and massive productions, gain a competitive edge in this environment.

12. European Commission: Directorate-General for Education, Youth, Sport and Culture, Le Gall, A., Jacquemet, B., Daubeuf, C., Legrand, E. et al., [Analysis of market trends and gaps in funding needs for the music sector](#) – Final report, Publications Office, 2020

13. *ibid*

## Respondent from Finland, Oulu - 300-capacity venue



*Planning has become extremely difficult compared to the pre-COVID era. Previously, we could draft a budget for the upcoming year with a reasonable degree of certainty. Sales patterns were predictable—we knew exactly what to expect, even for specific days like Fridays. It was almost like clockwork. Now, the situation is entirely different; there's a lack of certainty about anything. While well-known Finnish artists still tend to draw strong sales, the overall nightlife scene has become highly unpredictable, making forward planning much more challenging.*

### How to adapt to these changes in behavior?

These changes collectively point to an evolving live music landscape. Organizers and venues feel the need to adapt to the new demands for immersive, large-scale, and high-quality experiences while navigating the unpredictability of audience behavior. This phenomenon is further amplified by the generational gap between venue managers (in their forties/fifties) and the target audience (in their twenties). One of the solutions for venues is to **integrate a number of young professionals** into their teams, particularly in key positions such as communication, to better understand this generation and more effectively engage with them.

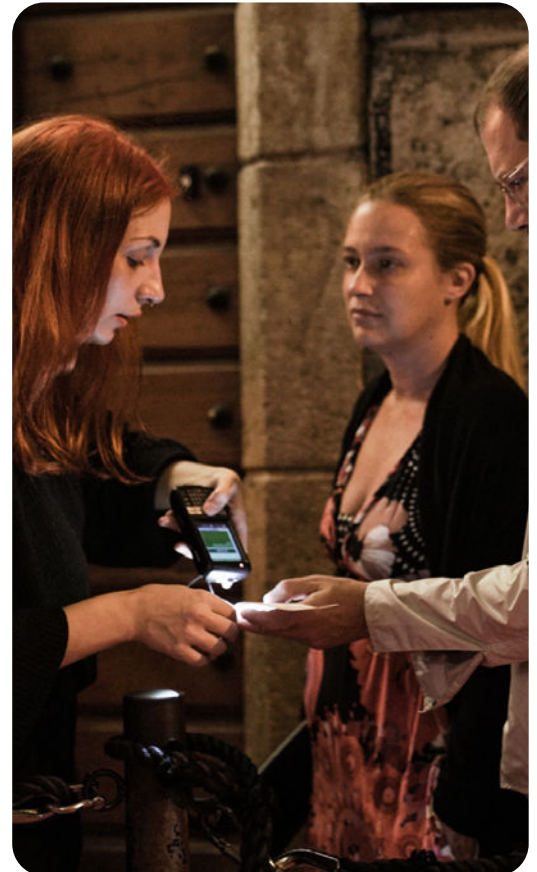
## Respondent from Italy, Bologna - 99-capacity venue



*Unfortunately every year we get older. As a result, our audience is changing significantly. We aim to adapt to this shift rather than change who we are, while also seeking new collaborators. Specifically, we are working with young professionals in areas like communication or emerging roles within our organization.*

The music industry, governed by market rules and a business-oriented approach, offers little room for adaptation by small and medium-sized concert venues. Yet, these spaces play a crucial role within the cultural ecosystem: they are hubs for artistic discovery, training grounds for emerging talents, and vital community and social connectors. Their modest scale, local roots, and operational structures make it impossible for them to compete with an industry that has long embraced entertainment values and gigantism. With audiences becoming increasingly elusive, it is imperative to **rethink the role and format of these venues.**

For younger generations, musical discovery and socialization no longer necessarily occur in physical spaces, as social media has revolutionized these practices. However, digital platforms cannot replace everything concert venues have to offer. Perhaps the traditional nighttime format, the classic concert model, or club culture no longer meets current expectations. These venues may need to be reimagined, not by chasing inflated fees or flashy lineups, but by creating an alternative. An alternative whose importance has yet to be fully understood but could restore concert venues to their status as indispensable cultural hubs of the future.



Credit: Ana Viotti at Musicbox (Lisbon, PT)

In this context, the model of one respondent, 1000Fryd in Aalborg, Denmark, is noteworthy. The venue operates on a **consensus democracy model**, where decisions are made collectively and require unanimous agreement. Every individual, from the lowest in hierarchy to volunteers, has a voice in shaping programming. This democratic approach ensures that no single leader dictates the decisions, fostering a truly inclusive environment. Unlike other venues that may have a centralized authority, this model allows for a unique and participatory experience where anyone can propose events or bands and receive support to make it happen.

#### Respondent from Denmark, Aalborg - 110-capacity venue



*I think if you look at many venues in Denmark, it's often young white men booking bands, and that's fine, but they're probably not going to be able to discover the next big thing or the next cool band because they have no understanding of what's going on with younger generations. I think that's where we excel because we have a constant influx of new people defining what's cool. This makes it organic—there's no risk of it dying out because there are always fresh perspectives coming in, and no one judges others on their music tastes.*

Especially, this approach ensures a programming that closely reflects what is truly new and relevant, as it is shaped organically by diverse voices, ensuring that the next big band or trend is discovered naturally by those closest to the community.

However, finding a different model without succumbing to 'eventisation' requires experimentation and risk-taking. The major challenge for small and medium-sized concert venues navigating this multifaceted crisis is that it directly impacts their freedom and ability to adapt.

#### An increasingly difficult economic balance that directly impacts adventurous programming.

Indeed, the current model reveals its limits, with **opportunities for artistic emergence, bold programming, and independence steadily diminishing**. This reality is reflected in the interviews we conducted: a reduction in the total number of events, fewer in-house organized dates, and a decline in the diversity of artistic styles represented in programs. In the long run, **this trend threatens the very essence of small and medium-sized venues:**

#### Respondent from Germany, Berlin - 250-capacity venue



*We have been struggling a lot because, even though we are booking good local bands, most people are not attending. This year, we are actually experiencing some of the lowest numbers for our own promotions. It's been a while since we had a sold-out event from our own programming. This is something we've been discussing for some time now: how can we reach the new generation and encourage them to come to the venue and understand why we do this? The main challenge is the constant risk of not breaking even.*

#### Respondent from Bulgaria, Sofia - 800 and 150-capacity venue



*One of our challenges is that we want to host more emerging artists, but due to insufficient support, funding, and programs, this becomes very difficult for us. Just unlocking the doors to the venue costs €1,000, so we need some form of support if we are to present more emerging talent.*



The combined impact of rising costs and declining revenues has significantly disrupted the economic balance of concert venues, **affecting their ability to invest in the future**. This strain is intensified by the **ongoing reduction in public funding**. While some venues report strong attendance and ticket sales, these successes often mask a deeper issue: the escalating costs of programming, artist fees, and overall event production.

This situation disproportionately impacts smaller venues, particularly those focused on nurturing emerging talent and maintaining diverse programming. The capacity to take risks on lesser-known or experimental artists—a cornerstone of cultural innovation—is increasingly compromised. These challenges, set against the backdrop of broader political shifts across Europe, threaten the sustainability of a vital sector and the creative risks essential for cultural growth.

Fernando Bittencourt, Former coordinator of the Liveurope platform



*Some of our venues today report excellent attendance figures and remarkable ticket sales, which is undeniably positive. However, a closer examination reveals a more nuanced reality. The costs associated with organizing a concert – including programming and artist fees – are continuously rising. While certain venues are thriving, others are facing significant challenges, particularly those on the front lines of the sector's struggles. Nonetheless, a common issue shared by all these venues, whether successful or struggling, lies in the increasing difficulty of programming emerging artists.*

*This challenge is further compounded by the intense pressure of competition, which restricts programming opportunities. For me, this represents one of the most critical points of concern: what is the current capacity of venues to program independently and to continue taking risks by supporting young talent? This issue, in my view, lies at the heart of the problem. It is a concern that affects all venues, whether public, private, non-profit, or commercial.*

If the live music sector is expected to be entirely profitable, there is little room for emergence and risk-taking. However, if no one takes these risks, profitable profiles may at best emerge through social networks but lack the stage experience and training needed, impacting the quality of performances and the sector as a whole. Simply put, failing to support the capacity to program emerging acts and take risks is akin to cutting the branch on which even the most profitable are seated.



Credit: Kultuuriklubi Tempel (Parnu, EE)

## What are the prospects for the future?

Public funding, when it exists and supports a policy of promoting culture, diversity, and emerging talent, serves as a key lever for supporting concert venue programming in many countries. However, in several cases, political shifts (national, regional, and/or local level) have led to a reduction in public resources. To enhance its support for promoting European culture and diversity, the European level could be an effective avenue to sustain these spaces dedicated to the development and dissemination of emerging musical artists. Initiatives like Liveurope demonstrate how, when structured effectively, **funding can be redistributed efficiently** and contribute meaningfully to supporting European emergence and its circulation.

Fernando Bittencourt, Former coordinator of the Liveurope platform



*“For me, the solution lies in how public funding can support programming efforts. That’s exactly what we’re doing with Liveurope: finding ways to support highly diverse venues across territories while preserving their programming independence. At the start, we had an annual grant of €500,000, which was later increased by 40% to €700,000 per year. This increase let us add 40% more members to our platform, helping more venues get the funding they need to boost the European aspect of their programmes. Over 10 years, we’ve received €5.6 million from the EU, supporting 5,000 concerts featuring emerging European artists. For what it achieves, Liveurope is very cost-effective. If we could scale it up to support not just 24 venues, but perhaps 100, the systemic impact would be significant. It would enable us to amplify the autonomy of programming in a truly ambitious way, creating concrete and effective change.”*

Liveurope is a platform that **facilitates access to European funds** for certain venues and organizations, and the majority of their venues never had access to EU funding before joining. For individual structures attempting to secure this funding as project leaders, the process is often challenging—not only due to the complexity of the application process but also because of the demanding administrative management required to oversee such projects. Independent stakeholders may feel that the activities they are already carrying out deserve support in a hostile economic and political context. The requirement to operate within a project framework can be a hindrance, as it is burdensome to manage and sometimes even counterproductive, potentially exhausting teams that are already vulnerable:

Respondent from Estonia, Tallinn - 300-capacity venue



*«Of course, what we receive from Europe is the Liveurope fund, and it’s great. It helps us a lot to organize many different concerts that otherwise wouldn’t have happened. But ideally, I think everyone would appreciate some kind of relief grant or European support for what we’re already doing. We’re already doing a lot, and taking on extra projects isn’t feasible for us. It would be ideal if someone could recognize the work we’re already doing, let us demonstrate its value, and provide financial relief for that. That would be absolutely amazing.”*

Another potential avenue lies in the **structuring and redistribution of resources within the live music sector itself**. This solution draws inspiration from the model used in football clubs and leagues, where the teams that trained top players are entitled to a percentage of their future earnings. Such a framework encourages investment in talent development while fostering a sense of fairness and sustainability within the system. This concept is beginning to gain traction, particularly in the UK, where it is being explored as a way to support smaller venues and organizations that play a crucial role in nurturing emerging artists. By redistributing a portion of the financial success of more established acts, the live music ecosystem could create a more equitable system, ensuring that those who contribute to the foundation of artistic careers are not left behind.

## Court-circuit, network of professional live music venues in Wallonia & Brussels, BE



*I think we should perhaps look towards sports. We've seen it happening in England as well. In England, Coldplay now donates a portion of their concerts to a fund for smaller venues. In fact, I'm starting to discover the world of football because I've never been involved. When a player is transferred from one team to another, the previous team is considered to have invested in them—let's say an artist, or in this case, a football player. Therefore, the new team is accountable, at least the player owes something to the team that helped them grow. Perhaps it's a path worth exploring, especially as Coldplay shows that with venues in England, this isn't a utopian idea. Maybe artists who grow could contribute to a fund to support smaller venues that helped them at the start. This could partially address the speculation around artists.*

## Clubcircuit, network of professional live music venues in Flanders, Belgium.



*But for me, there might be another avenue to explore by seeking funding from players who have established themselves in the sector over the past 10 or 20 years. In the high-tech sector, for example, ticket providers. Previously, we went to the printer, printed our tickets ourselves, and sold them at the door through record stores. But now, there is a whole industry making a lot of money from selling tickets online.*

The urgency and necessity lie with stakeholders within the live music industry: they must recognize their place within a shared, interdependent ecosystem built on solidarity. Ideally, **redistribution mechanisms** would be developed within the industry itself, but public authorities can play a critical role in encouraging their creation.

In France, for example, the Centre National de la Musique (CNM), a government-backed organization, **introduced a 3.5% tax on ticket sales and performance rights fees** starting in January 2024. This tax applies to both paid and free performances, with the amount being calculated based on the revenue generated from ticket sales or the rights to perform a show. For paid-entry events, the tax is levied on the price spectators pay for admission, while for free events, it is based on the fees received for the rights to exploit the performance. The CNM uses the funds to finance a wide range of redistribution programs aimed at promoting the sustainability and development of live music venues, festivals, and cultural initiatives across the country. Another recent example is the UK government's initiative in November 2024 to address the increasing closures of grassroots venues. The UK government has endorsed a **voluntary ticket levy on stadium and arena events** to support grassroots music venues. Recommended by the Culture, Media, and Sport Committee, this initiative proposes that a portion of each ticket sold at large venues be allocated to smaller venues, artists, and promoters. The Music Venue Trust (MVT), a key advocate for this reform, has described it as the most significant policy change in decades for the live music sector.

Such structuring will not occur without incentives from public authorities. More importantly, it will require a new framework and time for stakeholders to accept and integrate this new kind of model. In the meantime, challenges remain significant for most of the venues we interviewed. While some do not feel directly threatened in the short term—thanks to renewed public funding for the coming year, maintained budgetary balance, or functional revenue diversification—the medium to long-term outlook remains highly uncertain for everyone. For some, the focus is on waiting for the crises to subside (following COVID-19, the war in Ukraine, and inflation). For others, major difficulties lie ahead, including the rise of far-right parties in government, revenue concentration and the climate crisis.

# Conclusion

We have seen that live music operates as an ecosystem. Small and medium-sized venues are at the start of the chain, but their model is under strain due to current developments. These observations have been made for several years, and while some battles are being won, much remains to be done and improved to maintain a healthy, dynamic, and productive ecosystem capable of discovering and nurturing the talents of tomorrow. The work of industry stakeholders, federations, and networks to address these challenges and propose solutions is more crucial than ever.

## THE ROLE OF POLICY INTERVENTIONS

Public policies at all levels of governance have a significant role to play in supporting concert venues. Even though urban planning struggles to integrate music, cities remain the most supportive level of governance and the primary interlocutor for all our respondents. For instance, implementing the «Agent of Change» principle across European cities could help mitigate conflicts between venues and urban development. However, national and European levels also have roles to play. Tax incentives and subsidies targeted at small and medium-sized venues could provide much-needed financial relief. European programs like Liveurope demonstrate how structured funding models can efficiently support diversity and circulation within the sector.

## EMBRACING THE “ARTISANAL MODEL”

Successfully advocating for the recognition of this sector—both by member states and at the European level—requires framing it not as industrial but as artisanal, deeply aligned with key European priorities: diversity and inclusion in programming, combating climate change, and ensuring the resilience of the contemporary music ecosystem. At a time when the mental health of young Europeans is deteriorating<sup>14</sup> and eco-anxiety is on the rise<sup>15</sup>, small and medium-sized concert venues can offer a critical alternative to the trend of «eventization». Unlike large-scale venues driven by industrialized entertainment, these smaller spaces provide a more human-scale, welcoming, and inclusive environment that fosters genuine social connections and authentic shared experiences. By aligning with ecological values, their artisanal model presents a tangible response to climate challenges while addressing the growing eco-anxiety.



Credit: Voodoo game at Rocksane (bergerac, FR)

14. Amand-Eeckhout, L (July 2023). [Mental health in the EU](#). EPRS | European Parliamentary Research Service.

15. Gregory, A. (April 13, 2022). [‘Eco-anxiety’ : fear of environmental doom weighs on young people](#). The Guardian.





*I think this is a big opportunity to address the music industry vs. music craftsmanship, as it is in other sectors. I'm not saying it's magical, but when it comes to food, it's clear that the industry and craftsmanship need to be rebalanced for a better world. In music, as you know, the issue often lies in the size of events<sup>16</sup>. The larger the event or venue, the harder it becomes to reduce its ecological impact. This raises questions about funding models, moving from a more industrial, profit-driven approach to one that's more artisanal and subsidized. In theatre, except for events like Avignon, the question is less critical since there are no huge audiences. It's not about opposing large events, but rather finding balance—smaller, medium-sized popular events can work too. We're not suggesting eliminating events with 1,000-2,000 seats, but we need to focus on improving the system, especially with the current trend towards larger events, as seen in the CNM's data.*

This artisanal approach, rooted in more human and localized dimensions, not only supports environmentally conscious practices but also provides a coherent alternative to the entertainment industry's reliance on gigantism. As climate concerns reshape audience expectations, these venues have the chance to position themselves as champions of sustainability and cultural responsibility.

### ADAPTING TO CHANGING AUDIENCE BEHAVIORS

To remain relevant in a changing cultural and social landscape, venues might also consider rethinking their traditional structures. If audiences are less inclined to stay out late at night, drink alcohol, or attend nighttime events—and if workers are less willing to accept nighttime schedules—these spaces could adapt to more diurnal activities. By integrating daytime programming, they could become more inclusive and accessible while maintaining their community-focused mission. Additionally, these venues could draw inspiration from models like Denmark's 1000Fryd, where the audience is actively involved. Spaces could be reimagined to encourage greater audience participation, fostering a sense of shared ownership and engagement. Venues could focus on real-life connection and collaboration—offering experiences that large-scale events or social media cannot replicate.

Finally, the current challenges facing these venues present an opportunity to reassess what wasn't working effectively in the past. Practices such as reliance on alcohol consumption for revenue and underpaid labor deserve deep reflection and reimagining. These transformations, though difficult, could pave the way for a healthier, more sustainable, and more equitable future for live music culture.



Credit: Cathy Borgions, Metlheads at Club AFF24 (BE)



Credit: Nana Osei, Helden in Het Park at N9 (Eeklo, BE)

16. [Etude Landscape sur le déplacement des publics des lieux de musiques actuelles](#), Le Périscope, oct. 2024.

## About the author



Cécile Moroux has been active in the cultural sector for nearly ten years. After earning a Master's degree from Sciences Po Bordeaux in 2015, she began her career as a press relations assistant at Phunk Promotion, an independent agency in Paris specializing in musical projects and events. At the end of 2016, she joined Pedro Booking to help develop the new agency and manage booking activities, overseeing a roster of 20 emerging artists.

In January 2019, Cécile joined the team at Arty Farty and Nuits Sonores in Lyon, where she coordinated «We Are Europe 2,» a cooperation project supported and co-financed by the European Union, bringing together eight European music festivals and cultural innovation forums.

Since 2023, Cécile has been working independently to fully dedicate herself to the variety of topics and activities she is passionate about: editorial work, research, artist management, communication... At the same time, she is pursuing training in occupational psychology at CNAM to strengthen her skills in supporting artists in an ever-evolving sector.

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