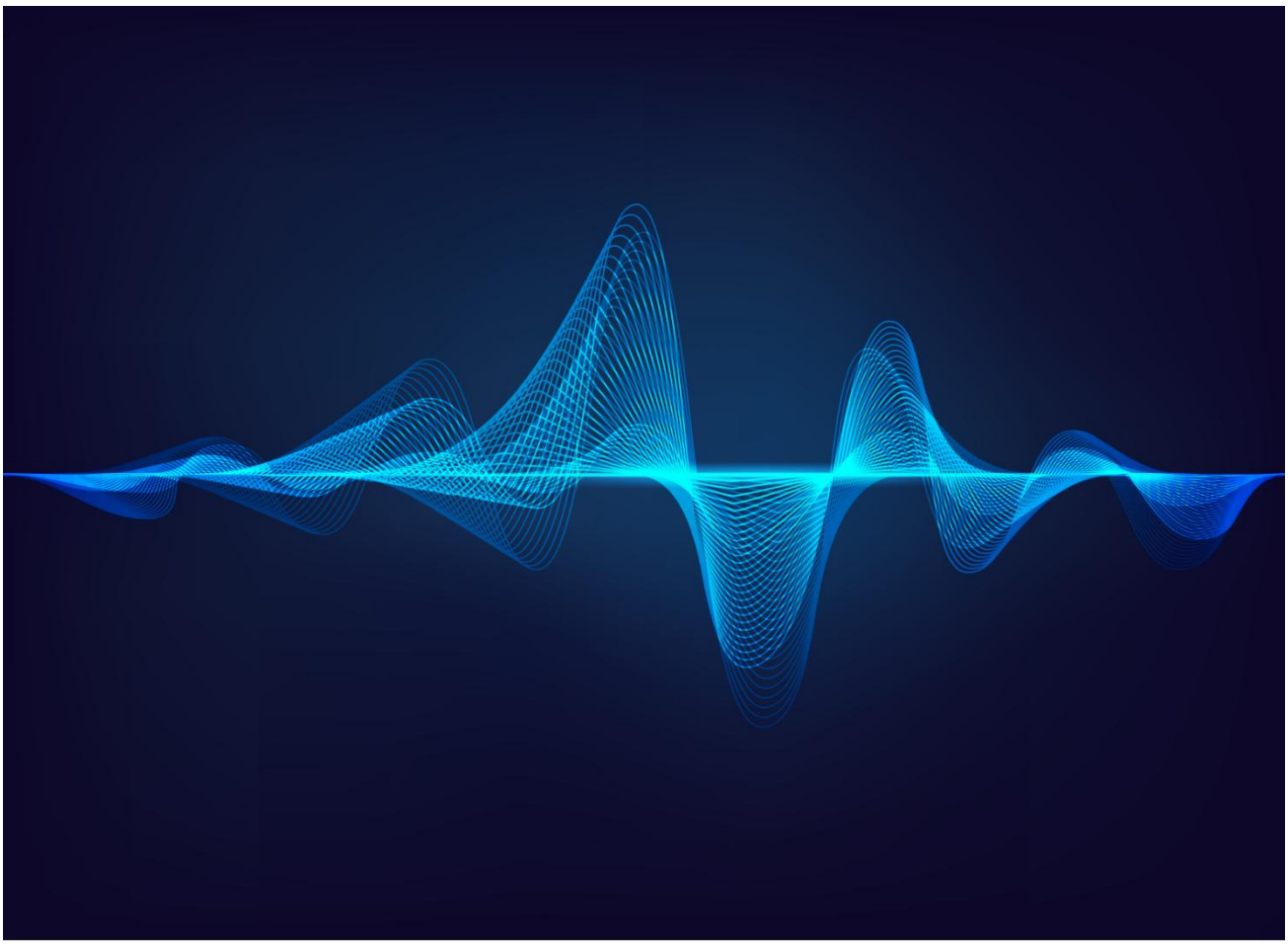


D3.5 Pilot study on ESG assessment in European music ecosystems

OpenMusE

An open, scalable data to-policy pipeline for European music ecosystems

Funded by the European Union

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Project Factsheet

Acronym:	**OpenMusE**
Title:	**An open, scalable data to-policy pipeline for European music ecosystems**
Coordinator:	SINUS Markt- und Sozialforschung GmbH
Reference:	101095295
Type:	Research and Innovation Action
Program:	Horizon Europe
Start:	1st January 2023
Duration:	36 months
Website:	https://www.openmuse.eu/
Consortium:	**SINUS Markt- und Sozialforschung GmbH,** Germany (SINUS), Coordinator **TURUN YLIOPISTO,** Finland (UTU) **UNIVERSITEIT VAN AMSTERDAM,** Netherlands (UVA) **Scuola Superiore di Studi Universitari e di Perfezionament,** Italy (SSSA) **EKONOMICKA UNIVERZITA V BRATISLAVE,** Slovakia (EUBA) **Reprex B.V.,** Netherlands (REPREX) **SYNYO GmbH,** Austria (SYNYO) **MUSIC INNOVATION HUB SPA IMPRESA SOCIALE,** Italy (MIH) **Slovenský ochranný zväz autorský pre práva k hudobným,** Slovakia (SOZA) **Aloaded AB,** Sweden (ALOADED) **Music Export Ukraine,** Ukraine (MEU) **Muzikos Eksporto Fondas,** Lithuania (MXF) **ARTISJUS MAGYAR SZERZOI JOGVEDO IRODA EGYESULET,** Hungary (ARTISJUS) **MUSICAUTOR SDRUZHENIE,** Bulgaria (MUSICAUTOR) **HEARDIS! GMBH,** Germany (HEARDIS) **CULTURE HUB POLAND, Poland (CHP)**

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Deliverable Factsheet

Number:	**D3.5**
Title:	**Pilot study on ESG assessment in European music ecosystems**
Lead beneficiary:	MIH
Work package:	Work Package 3
Task:	T3.5
Dissemination level:	Public
Submission date:	30.12.2025
Main author(s):	Tommaso Bonifazi Razzanti, MIH
Contributor(s):	Sarah Parisio, MIH
Quality check:	Luigi Cernigliaro, SSSA
	Olivia Kafka, SYNYO

Document history:

Revision	Date	Main modification	Author
0.1	30/09/2025	Headlines & Index fixed	Sarah Parisio
0.2	30/11/2025	Integration of all data and finalization of the report	Tommaso Bonifazi Razzanti
0.3	15/12/2025	Converted into project template: minor changes of layout/formatting and very small wording alignments.	Tommaso Bonifazi Razzanti
1.0	30/12/2025	Submitted to EC	SINUS

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This project has received funding from the European Union's Horizon Europe, research and innovation programme, under Grant Agreement No. 101095295.

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Glossary

ESG: Environmental, Social, and Governance

DEI: Diversity, Equity, and Inclusion

OME: OpenMusE, Open Music Europe.

MIH: Music Innovation Hub

OMO: Open Music Observatory.

ESRS: European Sustainability Reporting Standards.

GDPR: General Data Protection Regulation

GRI: Global Reporting Initiative.

CSRD: Corporate Sustainability Reporting Directive.

MSME: Micro, Small & Medium Enterprises.

FTE: Full-time equivalent (standardised measure of workload, used for headcounts and working hours).

CPA: Classification of Products by Activity (EU statistical classification of products).

NACE: Nomenclature of Economic Activities (EU statistical classification of economic activities).

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1 Executive Summary

This deliverable reports on the design and first results of the OpenMusE ESG survey carried out by Music Innovation Hub (MIH) within WP3 of Open Music Europe. The aim is to provide an anonymous, comparable snapshot of how music-sector organisations that responded to the survey describe their current environmental, social and governance (ESG) practices. The analysis is intended to support the development of the Open Music Observatory (OMO) by supplying intelligible indicators by country and organisation type, and to offer a practical baseline that micro, small and medium-sized enterprises (MSMEs) can use to orient decisions, partnerships and planning.

The questionnaire (Q1–Q20) targets organisations active in the music field (festivals, venues, promoters, labels, associations, media, education, etc.) and collects information on organisational profile, formal sustainability plans, operational practices in the E, S and G areas, workforce and working conditions, pay, incidents and conduct. In this first wave, responses were obtained from a small but diverse group of organisations, with a concentration in Italy and Austria and coverage of several other EU countries. Results are self-reported, descriptive and indicative rather than statistically representative of the wider European music sector.

Across the sample, operational actions are more common than formalised plans. Around one organisation in three reports having a governance sustainability plan, fewer report environmental or social plans, and a sizeable minority declare that no formal plan is in place. On the environmental side, reported measures cluster around transport-related actions and materials/waste management, while climate-risk planning, biodiversity and carbon-offsetting are less frequent. Social practices span Diversity, Equity, and Inclusion (DEI) strategies, fair-pay policies, health and safety, community engagement and General Data Protection Regulation (GDPR) compliance; however, two-thirds of respondents report not tracking working hours, which limits the available evidence on overtime and working-time patterns. Pay is most often reported as “around” the industry average, with a non-trivial share “below average”. In the governance domain, codes of ethics are widespread, but fewer organisations indicate assigned ESG roles, regular ESG-related audits or public ESG disclosure. Most respondents report no political contributions.

Overall, the findings point to a landscape in which many music organisations have begun to act on ESG topics, but where formalisation, measurement and transparency remain uneven, particularly in relation to working-time tracking, pay reporting and governance structures. The deliverable documents the survey instrument, methods and limitations, and prepares a first set of indicators for integration into the Open Music Observatory, where they can be updated and extended in future waves.

2 Introduction and Context

2.1 Europe's music ecosystem and current situation overview

The European music ecosystem is a complex and decentralised field, where economic and cultural value are generated by a dense fabric of micro-organisations, non-profits and freelance networks that operate across live performance, recording and publishing, education and community activity. Much of the work is project-based: teams assemble around festivals and tours, release cycles, showcases and learning programmes, and then reconfigure. This flexibility has proved a source of creativity and resilience; it has also made systematic observation difficult. Human-resources practices are often informal; accounting and data systems are heterogeneous; and comparable information on workforce, governance and environmental dimensions is scarce, fragmented or locked behind incompatible formats.

Over the past two decades the sector has navigated repeated shocks and structural shifts. The long transition from sales and downloads to micropayment streaming has rewarded scale and data advantages, concentrating revenue around globally dominant catalogues and complicating the income mix for smaller markets and independent repertoires. The 2008 financial crisis, the COVID-19 pandemic and more recent geopolitical and cost pressures have exposed vulnerabilities in a model that relies heavily on live activity and on non-standard forms of work. At the same time, new technologies – from recommendation systems to AI-enabled production and administrative tools – have reshaped discovery, remuneration and workflows at a pace that outstrips traditional monitoring.

These dynamics intersect with rising expectations from audiences, partners, funders and public authorities concerning ethics, transparency and sustainability. Social questions – such as working time and wellbeing, pay equity, inclusion and accessibility – require clearer baselines for them to be assessed credibly. Environmental questions are dispersed across mobility, energy use, materials and waste, often documented through case studies but rarely with harmonised indicators that enable comparison. Governance questions – codes of ethics, risk and internal control, whistleblowing, payment practices and political engagement – remain unevenly formalised, particularly among very small entities that lack dedicated administrative capacity. It appears evident and urgent that the sector needs an approach to evidence that is proportionate to its structure: open, transferable and capable of turning disparate inputs into a living, comparable picture without imposing heavy reporting burdens.

OpenMusE responds to this need by proposing a completely free, open, scalable data-to-policy pipeline for European music. Rather than producing a single, static compendium, the project emphasises transparent methods, harmonised definitions and repeatability, so that indicators can be updated and extended as new data arrive. The Open Music Observatory embodies this approach: a public, online database paired with an open-source methods/toolkit, where anonymous and aggregated indicators are published in a form that is intelligible to practitioners and decision-makers, and that can be recast as sources evolve. The toolkit provides reusable code and templates, enabling stakeholders – especially micro, small and medium-sized enterprises (MSMEs) – to explore, reuse and iteratively update analyses as new data arrive. This report, prepared by MIH, contributes initial descriptive material to that shared evidence base.

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2.2 OpenMusE and MIH's role

OpenMusE (Open Music Europe, OME) is conceived as a collaborative infrastructure rather than a one-off study. Its starting premise is that the European music field – made of micro-organisations, social enterprises, non-profits and fluid networks of freelancers – requires a data architecture that is as flexible and open as the ecosystem it seeks to describe. OME therefore combines three strands of work. First, it maps the policy and data landscape with enough granularity to show where information is scarce, fragmented, hidden behind incompatible formats or simply unharmonised. Second, it develops practical ways to bridge those gaps – co-creating indicators with sector stakeholders, improving the reuse of open data, and publishing software and methods so that other actors can repeat and extend the effort. Third, it translates evidence into tools that practitioners and policymakers can use, privileging transparency and transferability over heavy reporting burdens.

The Open Music Observatory (OMO) is the public face of this pipeline. Rather than a static repository, OMO is designed as a living observatory: a free, online database where anonymous and aggregated statistics are presented through intelligible, comparable indicators by country and organisation type. New datasets and visualisations are added progressively as the project advances, allowing the evidence base to grow without forcing organisations into complex measurement regimes. For the sector, this means having a shared reference point that can be consulted to understand broad patterns and to locate one's own practice against a wider European backdrop; for researchers and public actors, it means a place where comparable, well-documented indicators can be found and reused.

Within this framework, Music Innovation Hub (MIH) contributes in two complementary ways. On the one hand, MIH works on outreach and engagement, helping to bring into view the variety of organisations active across live, recorded and educational domains. On the other hand, MIH curates and synthesises the survey evidence into a concise narrative that can be integrated into OMO. The present report is part of that contribution. It is descriptive by design and it adopts a consistent terminology to make sections easier to navigate; where helpful, it references established frameworks (such as the European Sustainability Reporting Standards, henceforth ESRS; the Voluntary Reporting Standards for SMEs, henceforth VSME; and the Global Reporting Initiative standards, henceforth GRI) as vocabulary guides, without implying that the underlying data amount to a compliance exercise. All results are anonymous and presented in aggregate form. For ESRS and VSME correspondences, please see Annex 2.

In parallel with the survey work, MIH is piloting a ledger-to-indicator workflow that connects internal accounting records to official statistical frameworks in a transparent and auditable way. Concretely, MIH compiles an accounting data package (raw ledger export, chart of accounts, unique ledger descriptions with their coded versions, and official financial statements), cleans and harmonises entries, and maps them to CPA/NACE (Classification of Products by Activity/Nomenclature of Economic Activities) classifications using machine pre-annotation followed by human review. The reconciled accounts are then embedded within Eurostat symmetric input–output tables with environmental extensions (via the Eviota/iotables toolchain) to derive indicators such as value added, employment and pollution intensities. Unfortunately, due to ongoing revisions of required Eurostat APIs/datasets, the input-output table analysis could not be incorporated into this deliverable. However, this does not

impact the descriptive survey analysis presented in this report. For links to the Eviota/iotables toolchain, please see Annex 3.

2.3 Report objectives and scope

The objective of this report is to provide a clear, comparable baseline of organisational and sustainability practices as reported by the responding organisations through the OME survey (Q1–Q20). The emphasis is on a form of evidence that suits the realities of the sector: simple enough to be reported reliably and read quickly, yet standardised enough to be placed alongside other countries and sub-sectors within the Observatory. By focusing on descriptive indicators rather than on prescriptive targets, the report aims to illuminate how organisations describe their current practices across governance, people and work, and environmental dimensions, and to identify areas where practices are heterogeneous or data are thin.

The scope is intentionally narrow. The unit of analysis is the organisation, not the individual, and the geography corresponds to the country of registration as reported in the survey. Findings reflect the organisations that chose to respond within the fieldwork window; they should therefore be read as indicative signals rather than as statistically representative measurements of the entire European music sector. Where terms used in the report overlap with those found in sustainability standards, the overlap is conceptual and linguistic – meant to help readers orient themselves – not an assertion of conformity to those standards. The analysis remains strictly aggregate and anonymous in order to protect respondents while still allowing patterns to be observed.

2.4 How to read the results

The analytical stance of the report is descriptive. Percentages are computed on the base of respondents to each specific question, which means bases can vary across figures; where relevant, the base is indicated. Because some questions allow multiple selections, totals may exceed 100 per cent without error. Responses marked as “I don’t know / prefer not to answer” and missing values are excluded from percentage calculations but are noted where their incidence may shape interpretation. Sub-group breakdowns – for example by type of organisation or by country – are shown only where the number of responses supports a meaningful reading; where sub-groups are small, the report refrains from fine-grained comparisons and states this explicitly.

References to standards such as ESRS, VSME, and GRI function here as wayfinding, not as certification. They help stabilise terminology – particularly in areas like workforce composition, business conduct or environmental practices – so that readers from different backgrounds can recognise topics and navigate sections without ambiguity. They do not mean that the data reported meet the scope, coverage or assurance requirements associated with those standards. Finally, as mentioned above, the report presents only aggregate results to preserve anonymity. The intention is to contribute material that can be absorbed into the OMO and revisited as additional datasets are processed over the course of the project, allowing the evidence base to deepen without imposing undue burden on the organisations that make up Europe’s music ecosystem.

3 Methodology

3.1 Questionnaire: scope and topics covered (Q1 – Q20)

The questionnaire is designed for organisations and stakeholders active in the music sector (for example festivals, venues, promoters, labels, associations, media and education organisations). It collects self-reported information at organisational level, focusing on policies and practices rather than on impact metrics, and is intended to generate anonymous, aggregated and comparable indicators suitable for inclusion in the Open Music Observatory. The questionnaire was designed to capture the ESRS and VSME indicators most relevant to music organisations. A mapping of the questionnaire to the ESRS and VSME indicator sets is available as *T3.5_codebook_concept_candidates.csv* at the project repository (https://github.com/openmusiceurope).

The instrument covers twenty items (Q1–Q20) structured into six thematic blocks:

- **Organisational profile (Q1–Q2)** identifies the type of organisation and the country of registration, providing the basic frame for all subsequent aggregation and cross-tabulation.

- **Policies and practices (Q3–Q6)** establish whether formal plans exist for environmental, social or governance areas (Q3) and map the operational practices reported by respondents across environmental (Q4), social (Q5) and governance (Q6) dimensions. These items use concise, sector-relevant examples (e.g. renewable energy, waste and materials management, DEI and accessibility, ethics and roles), enabling a comparable reading of what is currently in place.

- **Mission alignment (Q7)** asks respondents to indicate, on a five-point scale (1–5), the extent to which their organisation's mission supports environmental, social and governance sustainability.

- **Workforce and inclusion (Q8–Q11)** records the headcount by contractual category (permanent, temporary and non-standard workers, with a total; Q8) and the distribution of women and gender-diverse workers (Q9), the gender composition of leadership roles (Q10) and the number of workers with disabilities (Q11).

- **Working conditions and pay (Q12–Q16)** establish whether working hours are tracked (Q12), the share of full-time equivalents working more than 48 hours per week (Q13), the position of average wages relative to the industry (below / at / above average; Q14), the average annual pay (FTE) by gender (Q15) and the ratio between the highest-paid and an average worker expressed as annual amounts (Q16).

- **Incidents and conduct (Q17–Q20)** document the occurrence of incidents over the last five years in social and governance domains (e.g. discrimination/harassment, health-related incidents including mental health, severe human-rights issues, corruption/bribery; Q17), whether reviews or remediation plans exist for severe cases (Q18), political contributions by level (local, regional, national, EU; Q19) and the number of legal proceedings currently outstanding for late payments (Q20).

Response formats are categorical (single choice), multiple-choice (check-all-that-apply), numeric entries for counts and monetary values, and a Likert-type scale for mission alignment (Q7). Where

examples are provided in the question text (e.g. renewable sources such as “solar, wind”; practices such as “recycling and reuse”), they are illustrative and serve to harmonise interpretation across respondents. Items Q17 and Q18 explicitly delimit a five-year reference period; other items refer to the organisation’s status at the time of response unless otherwise specified.

The unit of response is the organisation; individual-level data are not collected. All answers are gathered and processed anonymously, and results are presented only in aggregate form.

3.2 Data flow

Survey responses are collected via Qualtrics through the online questionnaire and then exported to a secure MIH environment for analysis. Access to raw responses within Qualtrics is available to authorised OpenMusE project team members, including MIH and designated partners, for project purposes. For this report, data processing and quality checks are conducted by MIH, and results are released only in aggregate form. After collection, MIH applies a documented processing pipeline.

Ingestion and validation. Qualtrics exports (e.g. CSV/TSV with a data dictionary) are imported with record-count checks. Structural validations cover required fields, admissible ranges for numeric items and consistency of multiple-choice variables; any anomalies are logged.

Cleaning and coding. Categorical and free-text fields are harmonised to the survey codebook (e.g. organisation types, country codes). Numeric entries (headcounts, full-time equivalents, salaries) are checked for obvious entry errors. Where the questionnaire allows multiple selections, responses are converted into binary indicator variables.

Derivation of indicators. From cleaned fields, MIH constructs the indicators reported in this study (for example shares of organisations reporting given practices; workforce composition; prevalence of time tracking and >48-hour weeks; pay patterns by gender and role; incidents and remediation; political contributions; legal proceedings). Indicator definitions are kept stable across releases.

Aggregation and confidentiality. Outputs are computed at aggregate level (totals, shares, distributions). To preserve anonymity, results are presented at a level of disaggregation that supports a meaningful reading without enabling straightforward re-identification.

Quality assurance. MIH re-runs indicator scripts from a clean environment to confirm reproducibility, cross-checks percentage bases and totals, and inspects outliers and implausible values with conservative handling (documented exclusions rather than imputation for this descriptive release). Monetary figures are shown in EUR; headcounts as absolute numbers; rates as percentages, with one-decimal rounding unless otherwise stated.

Documentation and versioning. Processing steps, indicator definitions and any exclusions are recorded in an internal methods log. Each release is versioned and time-stamped to allow traceability to a specific dataset snapshot.

Preparation for OMO. Final outputs consist of anonymous, aggregated and comparable indicators prepared for publication within the Open Music Observatory. If subsequent waves or corrigenda occur, MIH will re-run the pipeline and note revisions in the release documentation.

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3.3 Scope, assumptions, and limitations

Scope

This report presents a descriptive snapshot of what organisations self-report through the OpenMusE survey (Q1–Q20). The unit of analysis is the organisation (not individual workers). Geography follows Q2 (country of registration); results are shown at aggregate level and, where appropriate, by organisation type (Q1). The questionnaire focuses on policies and practices across environmental, social and governance domains, mission alignment (five-point scale), workforce composition and working conditions, pay patterns, and incidents and conduct over a defined five-year period (for Q17–Q18). The time reference is the status at response unless a question specifies otherwise. Monetary values are reported in EUR, headcounts as absolute numbers, and rates as percentages.

Assumptions

The analysis proceeds on a small set of explicit assumptions designed to make responses comparable without over-interpreting them. First, we assume that respondents answered at organisational level and that the categories provided by the instrument (e.g. permanent/temporary/non-standard workers; environmental/social/governance measures) were interpreted in their plain meaning. Second, we treat "gender-diverse" as a self-identification category distinct from women and men; where organisations do not collect this information, non-response is recorded and not imputed. Third, leadership is read as decision-making or senior management roles as understood by the respondent; definitions may vary across organisations and are flagged as such in interpretation notes. Fourth, working hours and overtime (>48h/week, full-time equivalent) reflect the organisation's own tracking practices (Q12–Q13); when tracking is absent, related percentages are not computed. Fifth, pay figures are taken as self-reported averages (full-time equivalent) by gender or role as asked (Q15–Q16); the report does not adjust for contractual heterogeneity beyond what is captured in the questionnaire. Finally, brief references to ESRS/GRI serve wayfinding only (terminology and topic grouping) and do not imply that the underlying data satisfy those frameworks' scope or assurance requirements.

Limitations

Findings are indicative rather than statistically representative of the European music sector. Participation is voluntary, so the sample is subject to self-selection; organisations with greater capacity or interest in sustainability and organisational topics may be over-represented. Responses are self-reported and may be affected by measurement error, recall limits (e.g. incidents over five years), or social desirability. Several items allow multiple selections, so totals can exceed 100 per cent; item-level non-response further reduces the effective base for certain estimates. Because the survey is administered across countries and organisational forms, there is heterogeneity in practices and definitions (for example what constitutes "leadership", or how disability status is recorded), which constrains cross-country and cross-type comparability beyond a descriptive reading. The analysis is cross-sectional and non-causal: it does not measure trends over time and does not test causal relations.

To preserve anonymity, the report presents aggregate results and only shows disaggregated breakdowns where the number of observations supports a meaningful reading; very small sub-groups may be omitted or mentioned only in qualitative form. For details on data handling, access rights and confidentiality safeguards, see §§3.2 and 3.4.

3.4 Ethics, privacy, and data protection notes

The survey and the analysis presented in this report were designed and conducted in line with general principles of research ethics and with European data-protection requirements. The unit of analysis is the organisation, not the individual; the questionnaire does not request names of specific persons, and the analytical dataset used by MIH contains no direct personal identifiers.

Participation in the survey was voluntary. Organisations were contacted through existing professional networks and project partners and were informed that the questionnaire was anonymous and that results would be used in aggregate form for research and for the development of the Open Music Observatory. Some items explicitly offer “I don’t know / prefer not to answer” as a response option, and item-level non-response is reflected in the bases reported in the analysis.

Several questions touch on sensitive topics (for example incidents of discrimination or harassment, workplace-related ill health including mental health, severe human-rights issues, or corruption and bribery). These are framed at organisational level and over a five-year window; responses are reported only in aggregate and never in a way that would allow individual organisations, workers or specific cases to be identified.

As described in §3.2, survey responses are collected via Qualtrics and then exported to a secure MIH environment for analysis. Access to raw responses within Qualtrics is restricted to authorised OpenMusE team members for project purposes. For the present report, MIH processes the data into derived indicators and publishes only anonymous, aggregated statistics (for example percentages of organisations reporting a given practice, distributions of headcounts or pay ranges). Breakdown tables are reported only where cell sizes support a meaningful and non-identifying reading.

In line with the principles of data minimisation and purpose limitation, only variables necessary to describe organisational profiles and ESG-related practices are retained for analysis. Contact details used to send out the survey invitations are managed separately by the relevant partner organisations and are not part of the analytical dataset. No attempt is made to link survey responses to external identifiable information about individual organisations beyond the high-level categories reported (country of registration and organisation type).

Together, these measures ensure that the descriptive insights provided in this report are obtained in a way that respects respondents’ confidentiality, limits re-identification risks, and remains proportionate to the size and capacity of the organisations that make up the European music ecosystem.

4 Sample profile

4.1 Types of responding organisations – Q1

Among respondents, the most frequent categories are festivals and associations (each 20.0 per cent), followed by concert halls/venues, promoters, agencies & management, and education (each 10.0 per cent). Orchestras & ensembles and broadcasters account for 5.0 per cent each. Percentages are computed on respondents to this item; base: n = 20.

Method note. Single-choice item. Categories follow the official survey labels; percentages may not sum exactly to 100 per cent due to rounding.

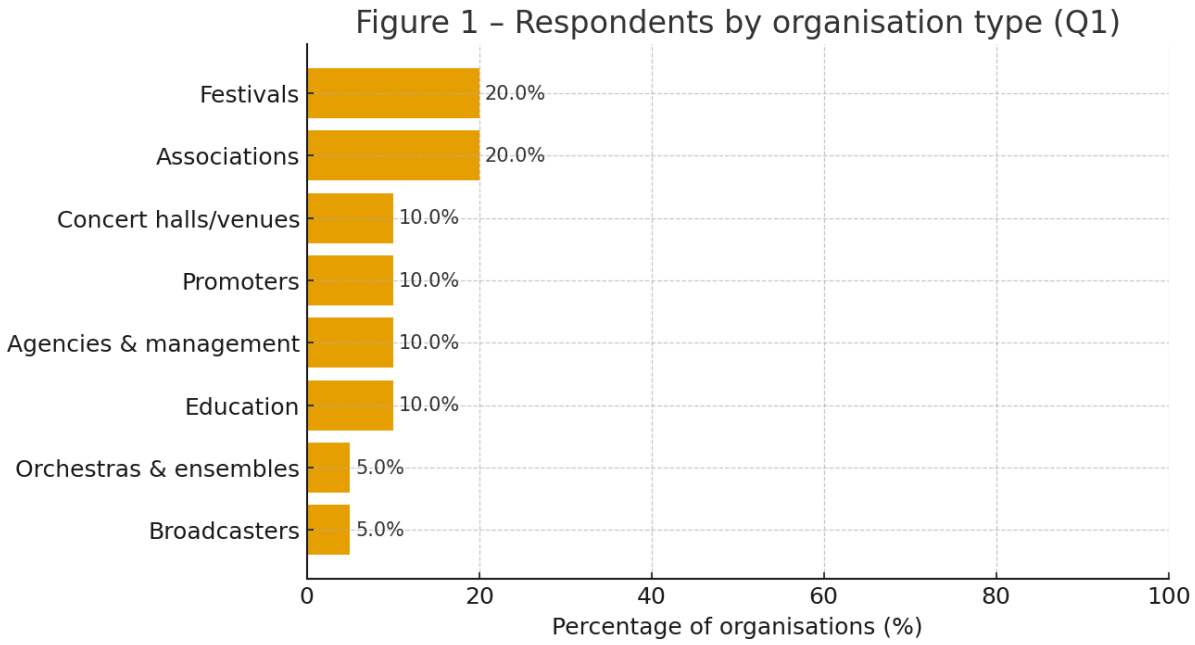


Figure 1 – Respondents by organisation type (Q1). Note: single-choice item. Percentages are based on respondents to Q1 (n = 20). Results are descriptive and indicative of the responding sample only.

4.2 Country of registration / geographic distribution – Q2

Respondents are registered primarily in Italy (31.6 per cent) and Austria (26.3 per cent), with additional organisations from Belgium, Germany, Hungary, Poland, Slovakia and Sweden (each 5.3 per cent), and "Other" (10.5 per cent). The placeholder "Select Country" was treated as non-response and excluded from the base. Base: n = 19.

Method note. Single-choice item. Country names follow the official survey labels; "Select Country" is excluded from the denominator.

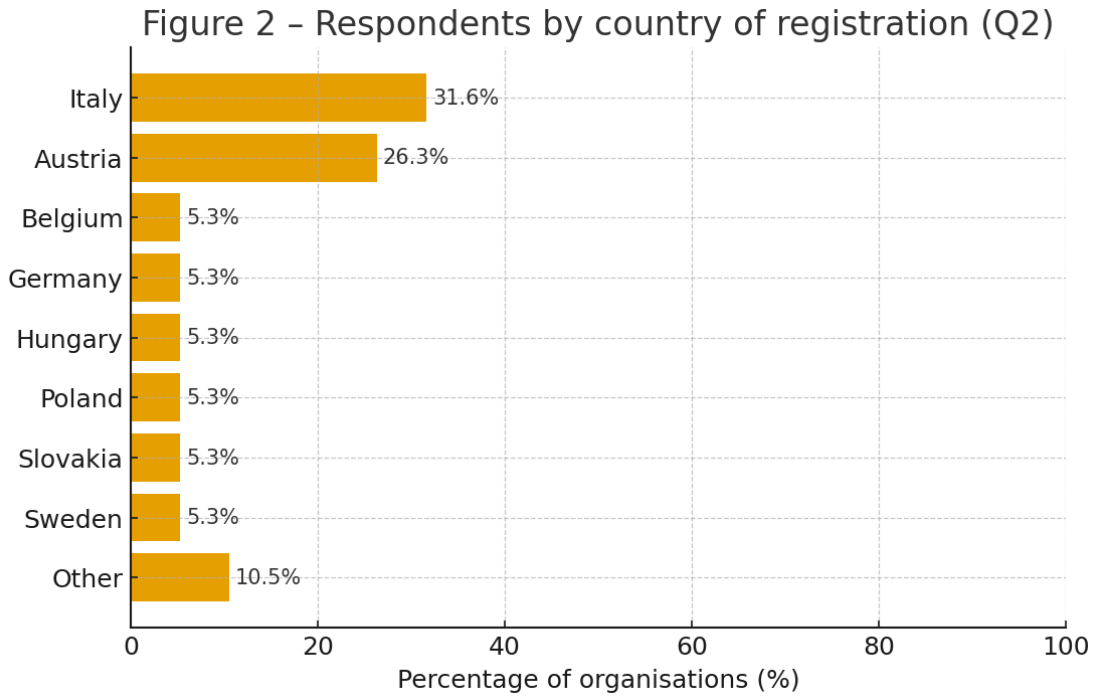


Figure 2 – Respondents by country of registration (Q2). Note: single-choice item. Percentages are based on respondents to Q2 (n = 19). "Select Country" responses are treated as non-response and excluded from the denominator.

4.3 Workforce: contractual composition – Q8 (perm/temp/non-standard) & total

This section summarises the organisational headcount by contractual category: permanent, temporary and non-standard workers (e.g. freelancers), plus the reported total. Values are self-reported at organisational level.

How to read. We present distributions (for example the share of organisations with non-standard workers) and summary statistics for headcounts (median and interquartile range, IQR) by category. Where totals and component counts diverge due to reporting practices, this is noted explicitly. Outliers (very large organisations) are handled conservatively: no imputations are applied; graphs may use visual caps for readability, with a clear note, while tables keep the full values.

Interpretive note. Given the project-based nature of much music-sector work, non-standard arrangements can be structurally important. Comparisons across organisation types (festivals, venues, promoters, associations, etc.) are shown only where sample sizes support a meaningful reading.

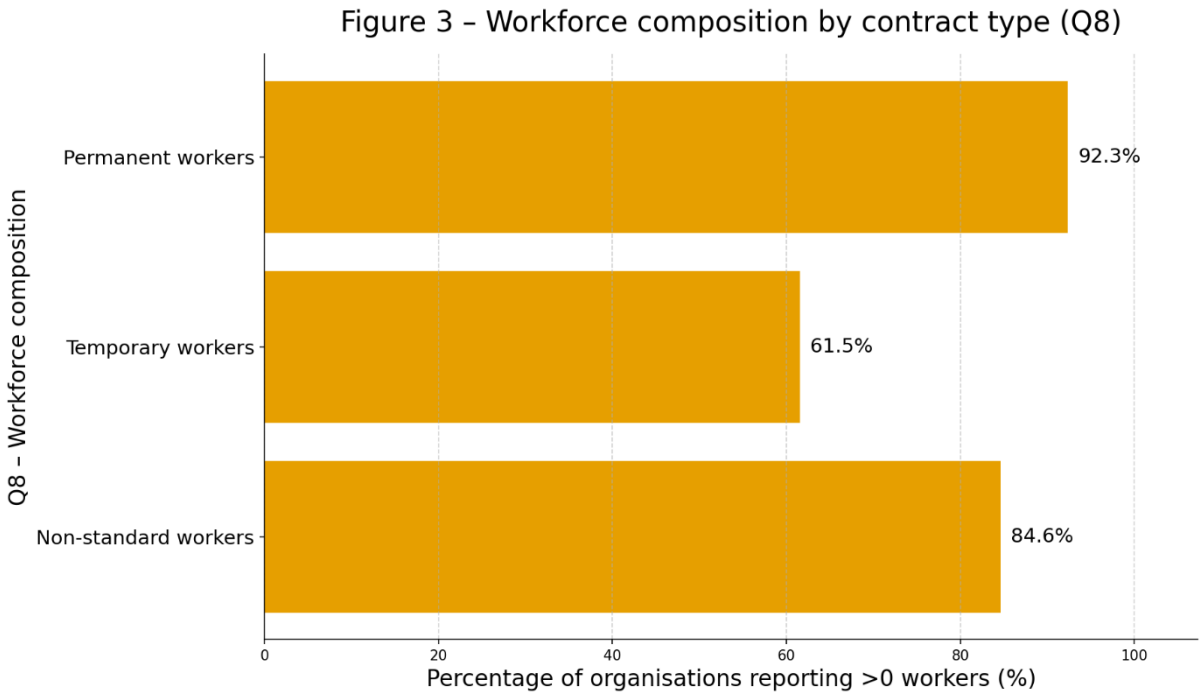


Figure 3 – Workforce composition by contract type (Q8). Note: numeric-entry item. Percentages show the share of organisations reporting at least one worker in each category (permanent, temporary, non-standard). Percentages are based on organisations with valid workforce entries for Q8 (n = 13). Results are descriptive and indicative of the responding sample only.

4.4 Leadership and diversity — Q9 (female & gender-diverse employees), Q10 (leadership), Q11 (workers with disabilities)

This section reports (i) the number of women and gender-diverse workers, (ii) the number of women and gender-diverse persons in leadership-level roles, and (iii) the number of workers with disabilities, as self-reported by organisations.

How to read. We show shares of organisations reporting at least one member in each group, and summary statistics (median, IQR) on counts where meaningful. “Gender-diverse” is treated as a distinct self-identification category; where organisations do not collect this information, item non-response is noted rather than imputed. Leadership refers to decision-making or senior management roles as understood by the respondent; heterogeneity of definitions is acknowledged.

Interpretive note. Results should be read as signals rather than precise sector benchmarks, given the small bases and heterogeneity of practices for recording gender identity and disability status.

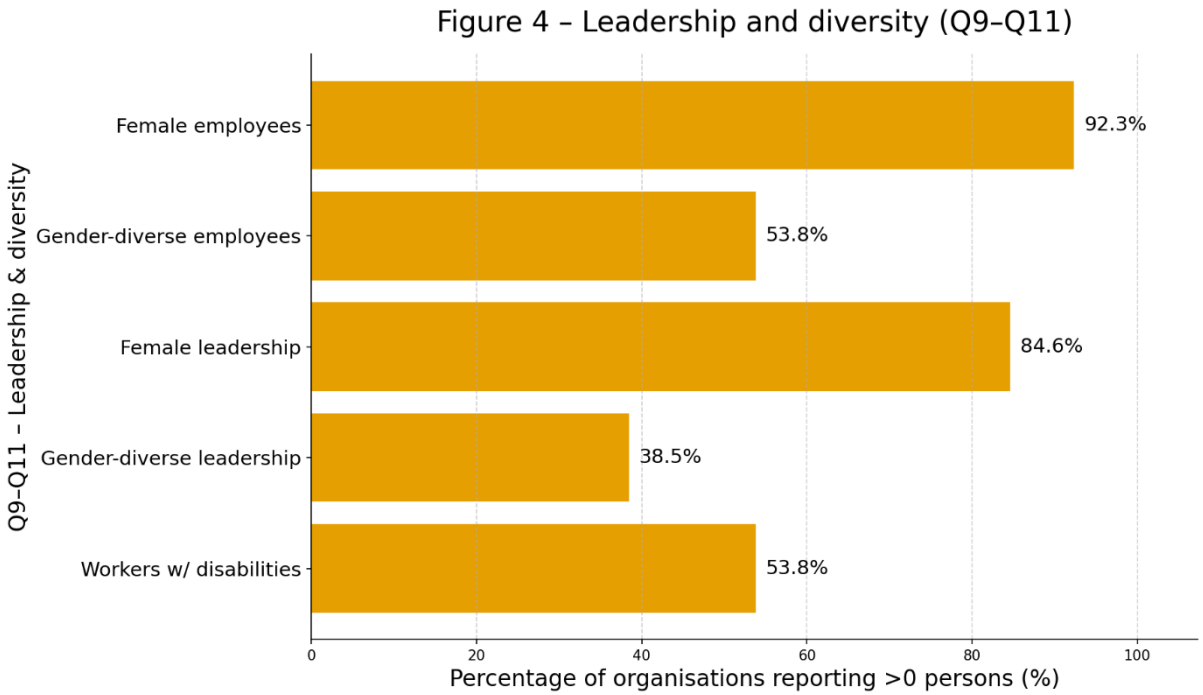


Figure 4 – Leadership and diversity (Q9–Q11) *Note: numeric-entry items. Bars show the share of organisations reporting at least one person in each group (women and gender-diverse employees; women and gender-diverse in leadership roles; workers with disabilities). Percentages based on respondents with valid entries for the relevant items (n = 13). Results are descriptive and indicative of the responding sample only.*

5 Environment

5.1 Declared sustainability plans – Q3 (environmental plan)

On formal plans and policies, respondents most commonly report a governance sustainability plan (e.g. ethics code) (33.3 per cent), followed by social (23.8 per cent) and environmental plans (14.3 per cent). 23.8 per cent indicate none of the above, and 4.8 per cent prefer not to answer. Base: n = 21.

Figure 5 – Declared sustainability plans (Q3)

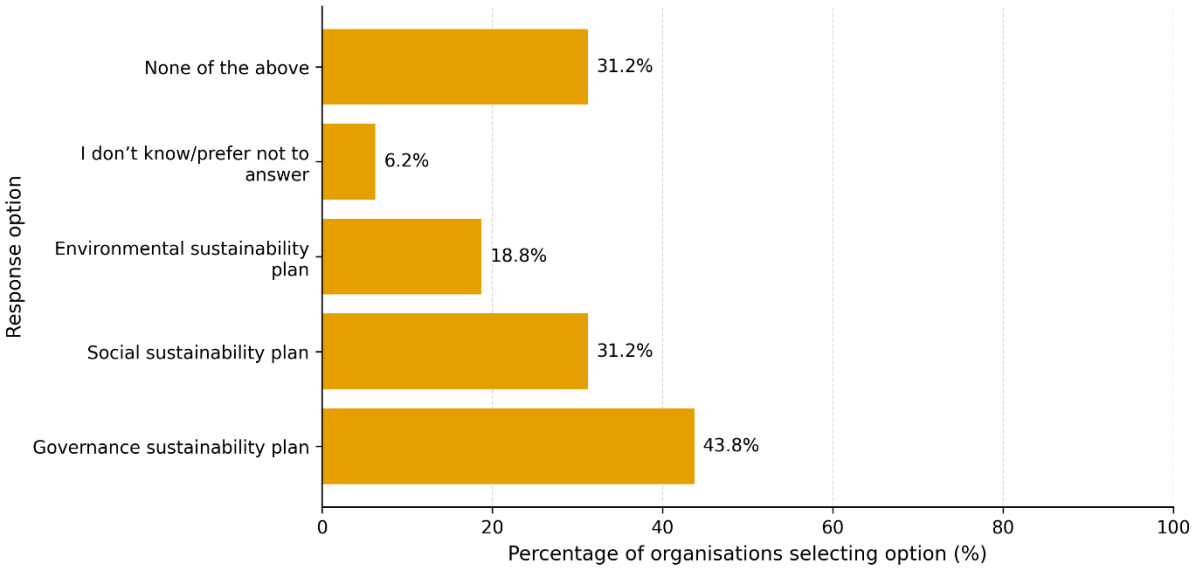


Figure 5 – Declared sustainability plans (Q3). Note: single-choice item. Percentages are based on respondents to Q3 (n = 21). Results are descriptive and do not imply compliance with any specific reporting standard.

5.2 Operational practices (energy, materials, waste, mobility, water, biodiversity) – Q4

Among environmental measures, the items most frequently selected are reduced carbon emissions from transportation (e.g. green touring, shared logistics) (14.3 per cent of selections), recycling/reuse systems and reduction of single-use/plastics (each approximately 11–12 per cent of selections). Renewable energy, ethically certified sourcing, pollution monitoring, and public tracking/reporting cluster around 7–8 per cent of selections; water efficiency, climate risk/resilience plans, and biodiversity assessment are less frequently selected. Base (sum of selections): 42.

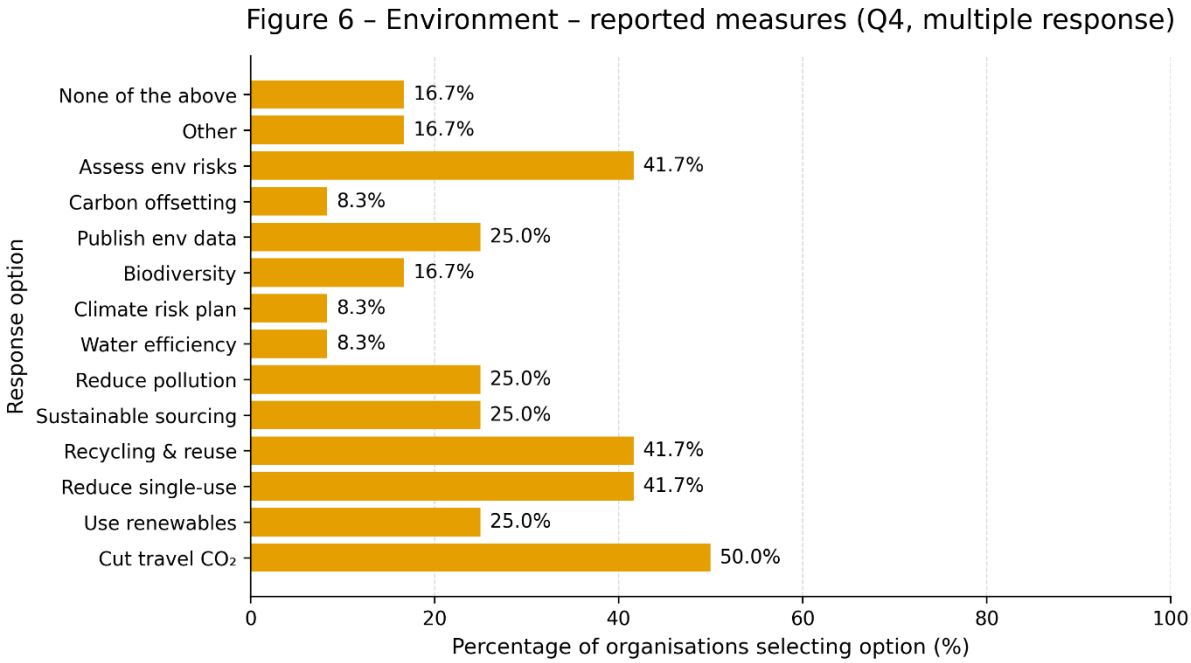


Figure 6 – Environment – reported measures (Q4, multiple-response). Note: multiple-response item. Percentages show the share of organisations selecting each environmental measure at least once; totals may exceed 100%. The denominator is respondents to Q4 (n = 12). Results are descriptive and not mutually exclusive.

Method note. This is a multiple-response item: the dashboard reports counts of selections (base = total selections), so percentages describe the distribution of selected practices, not the share of organisations. In the analytical tables, we report the share of organisations adopting each practice (denominator = respondents to the item); where applicable, we indicate this explicitly.

5.3 Climate risks, resilience; transparency/reporting – Q4 (where applicable)

Signals on climate-risk planning and public reporting are present but less frequent than core operational measures. A subset of respondents indicates developing a climate risk and resilience plan and tracking/publicly sharing environmental performance (e.g. greenhouse gas emissions); these practices appear less widespread than transport, energy and materials actions in this snapshot. Given the limited base and the multi-select structure, figures should be read as descriptive.

5.4 Supplementary analysis of data

This supplementary section offers lightweight contrasts designed to add context while respecting sample-size constraints and anonymity.

- **By organisation type** (festivals, venues, promoters, associations, etc.): selected indicators are shown where the number of respondents per subgroup is sufficient to support a meaningful reading.
- **By country**: where the number of respondents per country is sufficient; otherwise countries are pooled into an "Other" category.
- **Co-occurrence of practices**: simple descriptions of environmental measures that tend to be adopted together, expressed as percentages of organisations within the item base.
- **Sensitivity to item non-response**: for key indicators, we report the range obtained when using stricter or more inclusive bases, to illustrate the effect of missing data.

Method guardrails. No statistical tests are reported in this release. All contrasts are descriptive; where numbers are small, results are either pooled or discussed qualitatively to preserve anonymity and avoid over-interpretation.

6 Social (people & work)

6.1 Social practices (DEI, rights, privacy, community, accessibility) – Q5

Social measures reported include DEI strategies and monitoring, fair and transparent pay practices, health, safety and wellbeing programmes, human-rights due diligence, supplier codes of conduct, community engagement (for example development projects, staff volunteering), GDPR compliance, product/service safety, inclusive and non-discriminatory marketing, and accessibility at events. The dashboard shows a broad distribution across items; detailed organisation-level adoption rates are presented in analytical tables with clear bases and multi-select notes.

Figure 7 – Social – reported measures (Q5, multiple response)

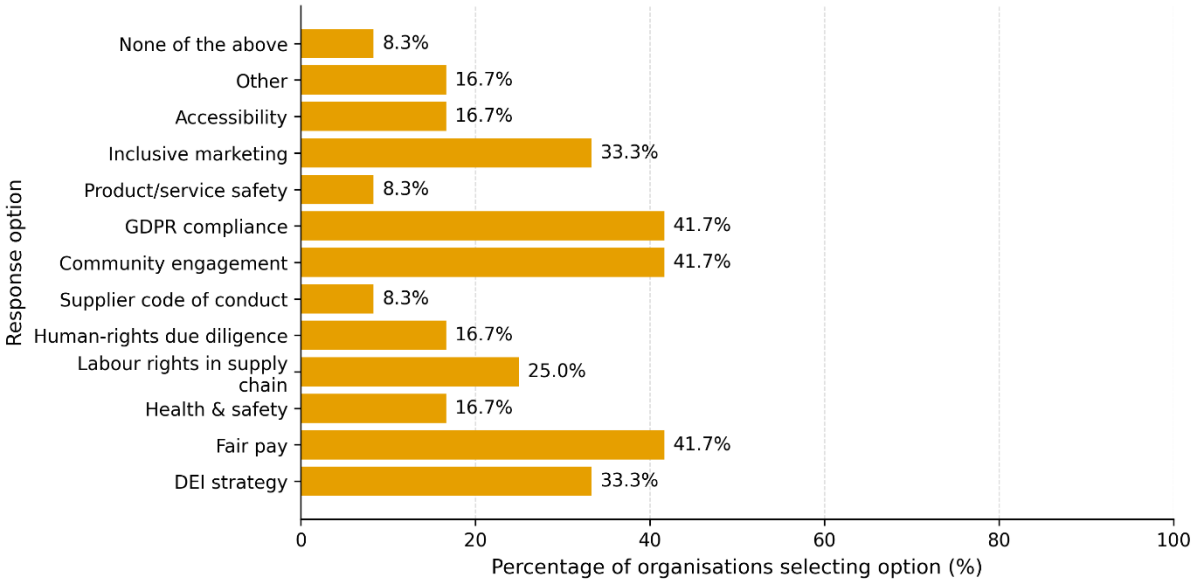


Figure 7 – Social – reported measures (Q5, multiple-response). Note: multiple-response item. Percentages show the share of organisations selecting each social measure at least once; totals may exceed 100%. The denominator is respondents to Q5 (n = 12). Results are descriptive and not mutually exclusive.Method note. Multiple-response item; dashboard percentages reflect the distribution of selections. In our tables we compute the share of organisations selecting each practice.

6.2 Working conditions (time tracking; >48h) – Q12–Q13.

Time tracking (Q12). A majority report not tracking working hours: 66.7 per cent “No” versus 33.3 per cent “Yes”. Base: n = 12.

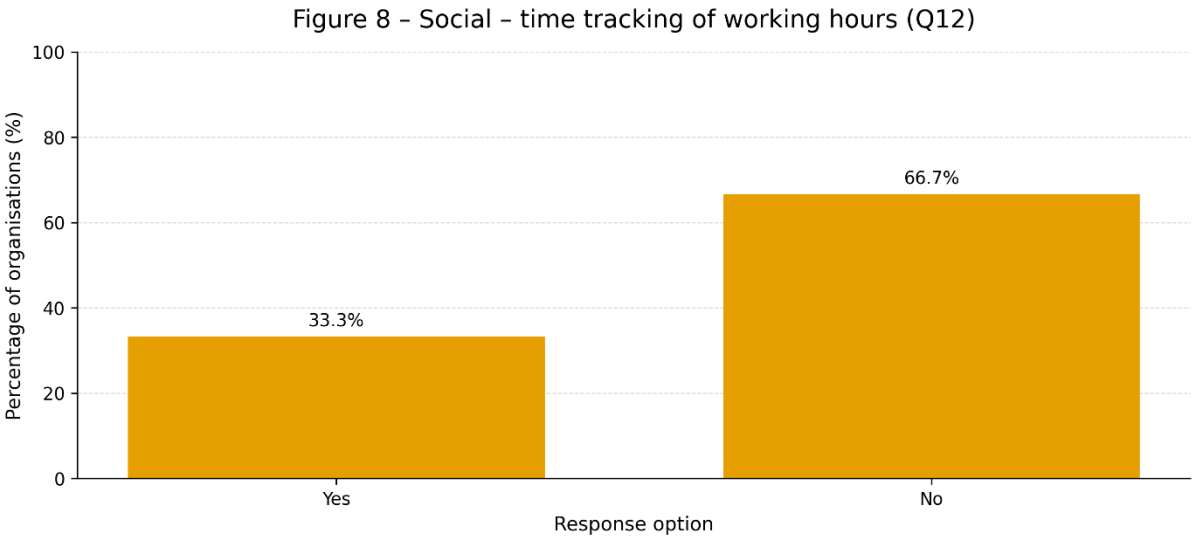


Figure 8 – Governance – political contributions by level (Q19). Note: single-choice item. Percentages are based on respondents to Q19 (n = 12). The "No contributions" category indicates organisations that report no political contributions at any level.

Overtime >48h/week (Q13). This is interpretable only for organisations that track working hours. In the tables we compute the percentage of workers (full-time equivalents) exceeding 48 hours per week among organisations that report time tracking, and we report the base conditional accordingly.

Method note. Overtime is only interpretable where time tracking exists; we therefore restrict the base to Q12 = "Yes" and flag the conditional denominator.

6.3 Pay (overview and gender comparison) – Q14–Q16

Position vs industry average (Q14). 61.5 per cent report paying around the industry average, 30.8 per cent below average, 7.7 per cent above average. Base: n = 13.

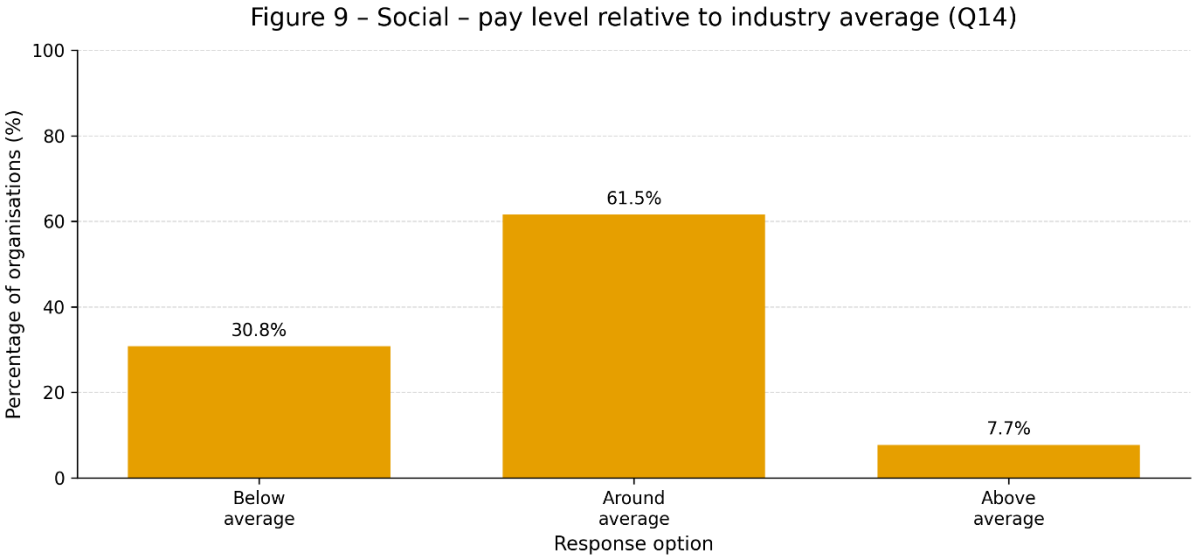


Figure 9 – Social – pay level relative to industry average (Q14). Note: single-choice item. Percentages are based on respondents to Q14 (n = 13). Values reflect self-assessment by organisations and are descriptive only.

Average annual salary by gender (Q15). (Dashboard panel for Q15 not present in the export provided.) Where available in the raw data, we report median and IQR by gender (FTE), apply visual caps in charts to preserve readability, and include a note where extreme values exist.

Highest-paid vs average (Q16). (Dashboard panel for Q16 not present in the export provided.) We summarise the reported amounts and the implied ratio as median [IQR], with the same conservative handling of outliers.

Method note. Self-reported values at organisational level; no imputations are applied in this descriptive release. Monetary values are shown in EUR.

6.4 Health, safety, wellbeing / incidents – Q17–Q18 (as relevant to Social)

Incidents over the past five years (Q17). The dashboard indicates a small number of incident reports across categories; the most frequent response is "None of the above". Bases are reported in the analytical tables.

Remediation (Q18). Among respondents with reported incidents, 20.0 per cent indicate reviews or remediation plans, 80.0 per cent "None of the above". Base (conditional on incidents ≠ "None of the above / I don't know / prefer not to answer"): n = 5.

Method note. Items refer to a five-year window; conditional bases are used for remediation. Results are descriptive and subject to item non-response.

7 Governance & conduct

7.1 Brief compliance considerations

This report does not assess compliance with any specific legal or regulatory framework. References to ESRS, GRI or other standards are used for terminology and topic grouping only. The indicators presented here may nevertheless be relevant for organisations that wish to reflect on their alignment with such frameworks, particularly in areas such as organisational structure, codes of conduct, incident management and disclosure practices.

7.2 Plans and policies (governance) – Q3 (governance plan)

As noted in §5.1, 33.3 per cent of respondents report having a governance sustainability plan (e.g. a code of ethics). Base: n = 21.

7.3 Governance measures / roles & responsibilities – Q6

Reported governance practices include codes of ethics and compliance, board or leadership diversity and independence (where applicable), assigned ESG responsibilities, internal audits or risk assessments (including ESG and financial risks), ESG goal-setting linked to performance, anonymous reporting channels, public sharing of ESG policies and practices, and disclosure of political contributions. The most frequently selected item in the dashboard is "Have a code of ethics and ensure compliance with legal and ethical standards" (28.0 per cent of selections); assigned ESG responsibilities, audits/risk assessments, and whistleblowing channels each account for approximately 12 per cent of selections; board/leadership diversity, public sharing, goal-setting, and disclosure of political contributions appear less frequent in this snapshot. Base (sum of selections): 25.

Figure 10 – Governance – reported measures (Q6, multiple response)

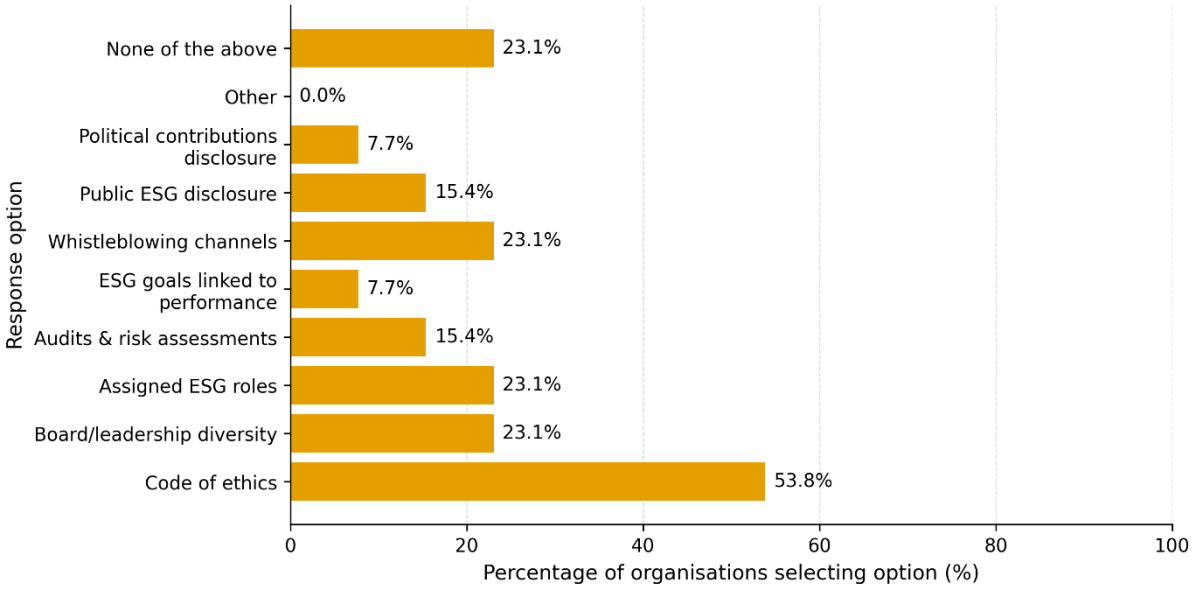


Figure 10 – Governance – reported measures (Q6, multiple-response). Note: multiple-response item. Percentages show the share of organisations selecting each governance measure at least once; totals may exceed 100%. The denominator is respondents to Q6 (n = 13). Results are descriptive and not mutually exclusive.Base: respondents to Q6 (n = 13).

Method note. Multiple-response item; dashboard percentages describe the distribution of selections. In the analytical tables we report the share of organisations adopting each practice (denominator = respondents to the item).

7.4 Political contributions (level) – Q19

A majority reports no political contributions: 66.7 per cent "No". Positive responses include communal level (16.7 per cent) and regional level (8.3 per cent). (The dashboard table includes an artefact "AnswerDisplayOrder" at 8.3 per cent; this is ignored in analysis.) Base: n = 12.

Figure 11 – Governance – political contributions by level (Q19)

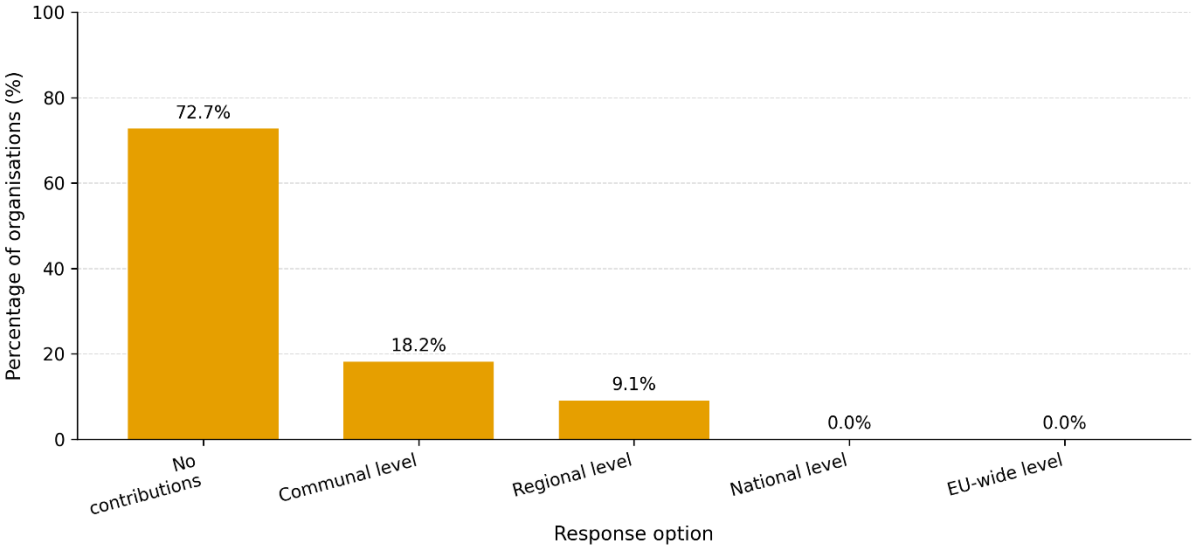


Figure 11 – Governance – political contributions by level (Q19, multiple-response). Note: multiple-response item. Percentages show the share of organisations reporting political contributions at each level; totals may exceed 100%. The denominator is respondents to Q19 (n = 12). "No contributions" indicates organisations reporting no political contributions at any level.

7.5 Events/incidents and management (high level) – Q17–Q18

See §6.4 for incidents and remediation.

Figure 12 – Social – incidents in the last five years (Q17, multiple response)

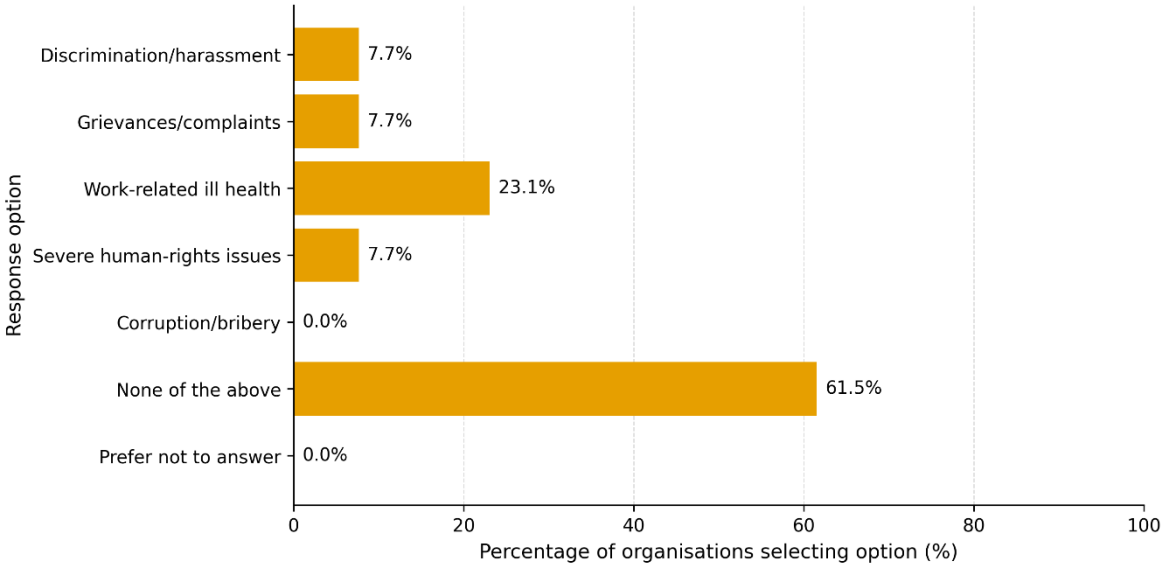


*Figure 12 – Social – incidents in the last five years (Q17, multiple-response**).** Note: multiple-response item. Percentages show the share of organisations selecting each incident type; totals may exceed 100%. The denominator is respondents to Q17 (n = 13). The item refers to the five-year period preceding the survey. "None of the above" indicates no incidents reported.*

Legal proceedings for late payments (Q20). (Dashboard panel not present in the export provided.) Where available in the raw data, we report counts as totals and distributional ranges; bases and any small-cell suppression are indicated.

8 Mission & alignment

8.1 Alignment of the mission with ESG – Q7(Dashboard panel for Q7 not present in the export provided.) We report the mean and median values (1–5) for environmental, social and governance alignment, with the full distribution where informative. These items are descriptive self-assessments and should be read as indicative signals.

8.2 Cross-cutting observations and internal coherence

Across sections, reported plans are less frequent than operational practices, suggesting that some organisations implement actions without formalising them in written plans. Reported governance practices concentrate on codes of ethics and basic risk controls, while assigned ESG roles and public sharing are present but less widespread. On working conditions, the prevalence of no time tracking limits the interpretability of overtime across the full sample. Pay positioning centres around the industry average in this snapshot, with a non-trivial share below average, suggesting room for further inquiry once gender-segmented pay data are consolidated. These patterns are descriptive and reflect the composition and size of the responding sample.

9 Conclusions

9.1 Interpretive synthesis

This first descriptive snapshot confirms several structural features already highlighted in prior work on the European music ecosystem. The responding organisations are mostly festivals, associations and other MSMEs operating in project-based modes. Against this backdrop, the survey suggests that practices often precede formalisation: many actors report concrete actions, especially on environmental and social topics, while formal plans, codified procedures and systematic measurement remain partial.

On the environmental side, the most common actions concern mobility and materials/waste (for example transport-related emissions, reduction of single-use items, recycling and reuse). By contrast, more strategic or data-intensive elements – climate-risk assessment, water management, biodiversity impacts, and public environmental reporting – are rarely mentioned. This pattern is consistent with a context where organisations respond first to visible, funder- or audience-facing issues, while lacking the resources or standards needed to develop comprehensive environmental management systems.

On the social dimension, the picture is more articulated. Respondents mention a wide range of social practices (DEI initiatives, health, safety and wellbeing programmes, supplier codes of conduct, community engagement, data protection, accessibility at events), indicating that social concerns are well recognised in principle. However, the survey also reveals important blind spots. A majority of organisations do not track working hours (66.7% “No” vs 33.3% “Yes”; Q12, n = 12), and only a subset provides usable information on overtime or detailed pay levels. Wage positioning is most often reported “around the industry average” (61.5%), with a non-trivial share “below average” (30.8%) and

a small share “above average” (7.7%) (Q14, n = 13). For compensation-related items, response bases are lower than for core profile items (e.g., Q14 n = 13 vs Q1 n = 20), which limits interpretability and highlights a gap in structured salary/employment reporting in this descriptive snapshot. This reduction in base may reflect sensitivity and/or limited administrative capacity to provide structured pay and employment information; the survey does not allow us to distinguish between these explanations. These gaps are consistent with a sector characterised by non-standard employment, irregular time-sheets and structurally weak bargaining power for many workers.

In governance, the most widespread tool is the code of ethics/compliance; comparatively fewer organisations report assigned ESG responsibilities, whistleblowing channels, internal audits or public disclosure of ESG information. Responses and conversations around the survey indicate that governance is often understood primarily as legal compliance rather than as a broader framework for accountability, risk management and stakeholder engagement. This helps explain why the governance block attracts fewer and more heterogeneous responses than environment and social, and why questions about political engagement or legal proceedings elicit limited detail.

Across the three pillars, the survey also reflects a lack of shared standards and benchmarks at national and European level. Organisations interpret similar concepts in different ways, and often lack guidance on what “good practice” looks like in ESG for the music field. In recent years, more attention has been paid to visible aspects such as gender balance on stage or in teams, while underlying governance structures (roles, processes, documentation) and financial transparency have progressed more slowly. The combination of fragmented standards, precarious employment and concentration of revenues in a small number of large players contributes to a situation where smaller organisations carry significant social and cultural responsibilities with limited institutional and financial tools.

Overall, the findings are indicative rather than statistically representative, but they converge on a coherent message: within this sample of music-sector MSMEs, there is evidence of genuine effort and experimentation on environmental and social issues, coexisting with weak formalisation, limited measurement capacity and patchy governance architectures. This reinforces the rationale for lightweight, open and transferable tools – such as the Open Music Observatory – that can help make existing practices more visible, support peer learning and gradually stabilise a common language around ESG in the European music ecosystem.

9.2 Implications for operators and stakeholders

For operators and MSMEs, three practical implications emerge:

1. **Document what already exists.** Many organisations are already taking action on transport, waste, accessibility, DEI and community engagement, but often in an informal way. Even short written policies, basic procedures or internal checklists can make these practices more robust over time and easier to communicate to funders, partners and staff.

2. **Invest selectively in measurement.** Given limited resources, it is unrealistic to build full ESG reporting systems. However, the survey suggests that a few core metrics – time tracking, basic pay reporting by role and gender, simple incident registers and follow-up notes – would

significantly improve internal awareness of risks (overwork, low pay, discrimination) without imposing heavy administrative burdens.

3. **Clarify responsibilities and governance.** Where governance is understood only as legal compliance, important aspects remain uncovered. Assigning explicit responsibilities for ESG (even on a part-time basis), setting minimal rules for conflict of interest and incident handling, and opening channels for whistleblowing can help transform individual goodwill into organisational practice.

For networks, intermediaries and funders, the results point to the value of:

- **Shared standards and micro-tools.** Ready-to-use templates (e.g. codes of ethics, simple policies on working time, pay transparency, incident reporting) and small open-source tools (for time tracking, salary registers, carbon/transport logs) can lower the entry barrier for MSMEs and foster convergence towards compatible practices rather than proliferating bespoke requests.
- **Data-light reporting aligned with OMO.** Where reporting is required, aligning it with indicators used in the Open Music Observatory can minimise duplication, reduce survey fatigue and gradually build comparable datasets across countries and subsectors.

For public authorities and policy makers, the snapshot underlines that support for the music sector cannot focus only on artistic outputs or major industrial players. Targeted measures that strengthen organisational capacity – especially around employment stability, wage and contract transparency, and basic governance structures – can have high leverage for a large number of small actors. The survey also confirms that, in the absence of sector-specific guidelines, ESG concepts are interpreted in diverse ways. Collaborative initiatives like OpenMusE, which combine open data, shared methods and sector-specific indicators, can help bridge this gap and inform future regulation and funding schemes in a way that is proportionate to the realities of the European music ecosystem.

Annex 1 : Questionnaire (Q1–Q20): wording, response options, coding

This appendix reproduces the OME ESG survey items referenced in this report (Q1–Q20), including response formats, response options and a practical coding scheme for analysis. The questionnaire was administered via **Qualtrics** as an **internal project instrument** (**no public link available**).

The questionnaire is also available in the project repository: https://github.com/openmusiceurope

Numbering note. Items are reported here as **Q1–Q20 following the numbering used in this report**. In Qualtrics exports, internal question IDs may differ (e.g., “Q2”, “Q12”, “Q26”). This appendix should be treated as the reference for the **report’s Q-numbering**.

Coding note.

- **Single-choice** items are coded as one categorical value per respondent.
- **Multiple-response (multi-select)** items are coded as binary indicators per option (1 = selected; 0 = not selected).
- **Numeric-entry** items are coded as non-negative numeric values; percentages are expected in **0–100**; monetary values are in **EUR** where specified.

Q1 — Organization type

Question wording: Please select your type of organization.
Response format: Single choice (one option)
Response options (survey labels):

1. Festival
2. Conference
3. Concert Hall
4. Promoter
5. Association *(e.g., trade unions, collecting societies, non-profit groups)*
6. Agency & Management *(e.g., booking agents, PR agencies, artist management)*
7. Orchestras & Ensembles
8. Broadcaster *(e.g., radio station)*
9. Education *(e.g., schools, universities, etc.)*
   Coding scheme: categorical; one selected option per respondent.

Q2 — Country of registration

Question wording: In which country is your organization registered?
Response format: Single choice (one option)
Response options: Country dropdown list (country names as displayed in Qualtrics) plus **Other** where applicable.
Data handling note: A placeholder value such as **"Select Country"** may appear in exports and is treated as **non-response** in analysis.
Coding scheme: categorical; one selected country label per respondent.

Q3 — Formal sustainability plans

Question wording: Do you have a formal sustainability plan or report for one or more of the following areas?
Response format: Single choice (one option)
Response options (survey labels):

1. Environmental sustainability plan *(e.g., a plan to reduce carbon emissions)*
2. Social sustainability plan *(e.g., a plan on diversity, equity and inclusion)*
3. Governance sustainability plan *(e.g., an ethics code)*
4. None of the above

5. I don't know / prefer not to answer
   Coding scheme: categorical; one selected option per respondent.

Q4 — Environmental sustainability measures

Question wording: Does your organization take any of the following environmental sustainability measures? *(Select all that apply.)*
Response format: Multiple response (multi-select)
Response options (survey labels):

- Reduce carbon emissions from transportation *(e.g., green touring, promotion of public transport, shared logistics)*
- Use renewable sources *(solar, wind, etc.)*
- Reduce single-use items *(e.g., plastics)*
- Recycling and reuse systems
- Implement sustainable sourcing *(e.g., buy ethically certified products)*
- Monitor and reduce pollution *(air, water, soil, etc.)*
- Reduce water consumption
- Develop a climate risk and resilience plan *(e.g., assess risks and develop contingency plans)*
- Protect biodiversity *(e.g., assess impacts before starting new projects)*
- Track and publicly share environmental performance *(e.g., greenhouse gas emissions)*
- Engage in certified carbon offset / reforestation measures
- Assess and communicate climate/environment risks, including impacts on the organization's activities *(and/or the sector)*
- Other measures not listed above *(free text)*
- None of the above
  Coding scheme: one binary indicator per option (1/0); "Other" stored as open text.

Q5 — Social sustainability measures

Question wording: Does your organization take any of the following social sustainability measures? *(Select all that apply.)*
Response format: Multiple response (multi-select)
Response options (survey labels):

- DEI strategies and monitoring
- Ensuring fair and transparent pay practices
- Providing health, safety and wellbeing programs

- Respecting labor rights in supply chains
- Conducting human rights due diligence
- Providing supplier codes of conduct
- Engaging with local communities *(e.g., development projects, staff volunteering)*
- Ensuring compliance with GDPR and data privacy regulations
- Implementing product and service safety practices
- Ensuring inclusive and non-discriminatory marketing practices
- Ensuring accessibility at events *(e.g., supporting people with disabilities)*
- Other measures not listed above *(free text)*
- None of the above
  Coding scheme: one binary indicator per option (1/0); "Other" stored as open text.

Q6 — Governance sustainability measures

Question wording: Does your organization take any of the following governance sustainability measures? *(Select all that apply.)*
Response format: Multiple response (multi-select)
Response options (survey labels):

- Have a code of ethics and ensure compliance with legal and ethical standards
- Ensure board and leadership diversity and independence *(where applicable)*
- Assign ESG responsibilities and roles within the organization
- Conduct internal audits and risk assessments *(including ESG and financial risks)*
- Set ESG goals linked to performance *(where possible)*
- Have a whistleblowing mechanism *(anonymous reporting channels)*
- Publicly share ESG policies and sustainability practices *(e.g., on the organization's website)*
- Disclose political contributions *(where applicable)*
- Other measures not listed above *(free text)*
- None of the above
  Coding scheme: one binary indicator per option (1/0); "Other" stored as open text.

Q7 — Mission alignment with ESG

Question wording: Please indicate your level of agreement with the following statements:

- The mission of our organization supports environmental sustainability.

- The mission of our organization supports social sustainability.
- The mission of our organization supports governance sustainability.
  Response format: 5-point Likert scale (one response per statement)
  Response options: Strongly disagree / Disagree / Neither agree nor disagree / Agree / Strongly agree
  Coding scheme: ordinal 1–5 (in scale order), one score per statement.

Q8 — Workforce composition (FTE)

Question wording: Please state the number of employees in your organization as full-time equivalent (FTE).
Response format: Numeric entry (FTE counts), by contract type:

- Permanent workers
- Temporary workers
- Non-standard workers *(e.g., freelancers)*
  Coding scheme: numeric (non-negative). Total workforce may be derived as the sum of categories where appropriate.

Q9 — Workforce gender composition

Question wording: Please state the number of employees who are…
Response format: Numeric entry (counts)
Fields:

- Female employees
- Gender diverse employees
  Coding scheme: numeric (non-negative).

Q10 — Leadership gender composition

Question wording: Please state the number of leadership-level employees who are…
Response format: Numeric entry (counts)
Fields:

- Female leadership-level employees
- Gender diverse leadership-level employees
  Coding scheme: numeric (non-negative).

Q11 — Employees with disabilities

Question wording: Please state the number of employees with disabilities in your organization.
Response format: Numeric entry (count)
Coding scheme: numeric (non-negative).

Q12 — Working time tracking

Question wording: Do you track working hours?
Response format: Single choice
Response options: Yes / No
Coding scheme: binary categorical.

Q13 — Overtime (>48h/week)

Question wording: Please indicate the percentage of workers (FTE) who work more than 48 hours per week.
Response format: Numeric entry (percentage)
Coding scheme: numeric 0–100.

Q14 — Pay level relative to industry average

Question wording: Please indicate where you place your average wage level relative to your industry.
Response format: Single choice
Response options: Below average / Average / Above average
Coding scheme: categorical ordinal.

Q15 — Average annual salary by gender (EUR, FTE)

Question wording: Please state the average annual salary (FTE) for the following groups.
Response format: Numeric entry (EUR)
Fields:

- Male employees
- Female employees
  Coding scheme: numeric (EUR).

Q16 — Pay ratio proxy (EUR)

Question wording: Please state the annual salary paid to the following.
Response format: Numeric entry (EUR)
Fields:

- Annual salary paid to the **average employee**

- Annual salary paid to the **highest-paid worker**
  Coding scheme: numeric (EUR). A ratio may be derived as (highest-paid / average employee).

Q17 — Serious incidents in the last five years

Question wording: Has your organization had any of these serious incidents in the last 5 years? *(Select all that apply.)*
Response format: Multiple response (multi-select)
Response options:

- Discrimination or harassment
- Grievances / complaints
- Work-related ill health *(including mental health)*
- Severe human-rights issues
- Corruption / bribery
- None of the above
- I don't know / prefer not to answer *(if present as an explicit option in the instrument; otherwise treated as non-response)*
  Coding scheme: one binary indicator per option (1/0). Reference period: five years preceding survey response.

Q18 — Reviews / remediation following incidents

Question wording: Has your organization conducted reviews or implemented remediation plans following such incidents? *(Select all that apply.)*
Response format: Multiple response (multi-select)
Response options:

- Conducted reviews
- Implemented remediation plan(s)
- None of the above
  Coding scheme: one binary indicator per option (1/0). Typically interpreted conditional on Q17 indicating one or more incidents.

Q19 — Political contributions (level)

Question wording: Has your organization made any political contributions in the last year? If yes, at which level?
Response format: Single choice (one option)
Response options:

- No political contributions

- Yes, communal level
- Yes, regional level
- Yes, national level
- Yes, EU-wide level
  Coding scheme: categorical; one selected option per respondent.

Q20 — Legal proceedings for late payments (count)

Question wording: How many legal proceedings for late payments are currently ongoing?
Response format: Numeric entry (count)
Coding scheme: numeric (non-negative integer).

Annex 2: Mapping of questionnaire items to ESRS and VSME indicators

The mapping is available as *T3.5_codebook_concept_candidates.csv* at the project repository: https://github.com/openmusiceurope

Annex 3: Supplementary environmental data assessment material

The T3.5 description indicates that the task team will explore synergies with the MusicAIRE project Eviota Music, both to potentially fill environmental data gaps incapable of being assessed in other ways and to avoid risks of duplication of work.

Over the course of the project, limited work was undertaken to improve the methodological foundations of the Eviota Music approach. Details on the scope of this work will be provided in the project's final report. All Eviota Music materials are available in this repository: [dataobservatory-eu/eviota_case_study]

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