LET THE MUSIC PLAY GAMES

Relationship between the music industry and the video game industry:

A market approach to industries widespread conceptions and misconceptions

From interactive soundtracks to virtual concerts, the fusion of music and gaming is creating some of today's most innovative cultural experiences (e.g., the *Arcane* TV show, based on the *League of Legends* videogame from Riot, that features Pomme and Stromae's song, *Ma Meilleure Ennemie*). Yet, this type of collaboration remains largely unexploited. The 'Let the Music Play Games' [www.letthemusicplaygames.eu] consortium, launched in 2025 for 36 months, sought to move beyond perceived barriers by mapping how these complementary industries can use their unique strengths. The consortium is being led by Music Innovation Hub and is composed of SpielFabrique, the Centre National de la Musique, Music Austria, and Music Finland. Rather than focusing on historical tensions, the consortium is exploring how shared understanding could unlock new creative possibilities and business models for both sectors.

Over a month (May-June 2025), many various key players were interviewed to create an in-depth market mapping, not to say the “right” to the “wrong”, but to look at the diverse perspectives that define this relationship. It’s in their divergence and diversity that lies the answer to creating more efficient pathways and bridges between the video game and the music industries. Resulting from that mapping, a deliverable was given to the European Commission by the LMPG consortium. The paper you are reading is an executive summary that highlights the important ideas and conclusions of the 45-pages original report.

In this summary, two types of interaction between the music and the videogame industries will be addressed:

- Music in videogames, which is the one that raises the most voices and concerns. It is the music and sounds you hear when you play.
- Videogame music, which is all musical products (albums, vinyls, performances, etc) extracted from videogames.

This music can take two primary forms: synchronized scores (pre-existing music licensed for videogames) and original soundtracks (composed specifically for a video game's world and gameplay).

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The fundamental distinction between the two industries lies in their creative ecosystems: in music, the composer typically stands as the central artistic voice, with the song itself as the primary product. In videogames, however, composers function as specialists within larger development teams, where music serves as one critical layer among many in an interactive experience. Alas, persistent misunderstandings continue to shape how each industry perceives the other. The music industry often views videogame studios' preference for flat-fee buyouts as undervaluing creative work, while developers (particularly the vast majority creating indie videogames) see these arrangements as practical solutions given their limited resources. This isn't about disrespect but about fundamental operational differences and priorities.

The terminology itself creates confusion, with terms like "publisher" and "studio" carrying completely different meanings across industries. The technical reality of videogame music, where composers spend significant effort on adaptive scoring and engine implementation rather than pure composition, is rarely reflected in standard contracts. In here, there is a clear distinction between traditional music composers and videogame music composers in terms of tasks and roles in the creative process. Videogames need composers who understand interactive audio systems and technical implementation, but traditional music education rarely covers these requirements. Studios seek hybrid creators who can bridge artistic and technical domains, but formal pipelines to develop such talent remain underdeveloped. Opportunities exist from adaptive soundtracks to in-game events, but realizing them requires better alignment between education, industry practices, and professional networks.

Financial realities also need examination. While the videogame industry generates billions, 68% of AAA revenue concentrates in blockbusters, leaving most studios with tight budgets. After platform and publisher fees, a €40 videogame might yield only €11-15 for developers, limiting music budgets for future projects. The industry's reliance on word-of-mouth networks (73% of composers find work this way) creates both opportunities and barriers for new talent.

Collective Management Organizations (CMOs) face particular challenges in this landscape. While designed to protect creators, their traditional licensing models often conflict with videogames' global and perpetual release cycles. Many studios avoid CMO-affiliated composers due to territorial licensing complexities, though progressive organizations like Finland's Teosto show that more flexible approaches are possible. The videogame trailer market demonstrates both opportunities and challenges in adapting existing systems to new media realities.

The narrative that frames these industries as competitors needs to change. The music industry generates royalties from various sources, but performance royalties from videogames remain underdeveloped. With the average gamer being 33-36 years old, there's potential for live events and cross-industry collaborations. Music experts could serve as

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ambassadors for videogames, as demonstrated by Sanfall Interactive's media strategy with their live performances of *Clair Obscur: Expedition 33* in the Opening Night Live of Gamescom, and the opening concert of the Zevent, a French streaming charity event.

Despite this, effective collaboration requires more than good intentions. These industries operate under different rules and lack shared data and neutral dispute resolution spaces. Stronger European policy is essential, with dedicated observatories needed to provide comprehensive data about the videogame market and music's financial share within it. Funding and regulation must also evolve. Dedicated funds should support videogame music as an art form in its own right, without pitting it against traditional music. New regulations adapted to their shared space are needed, building on initiatives like the EU AI Act. Neutral mediation would help find common ground between these different professional cultures.

Both industries also have to create collaborative paths. Some CMOs, previously known for aggressive policies, are now creating spaces for exchange. The music industry and the videogame industry each have their own organisations, but they also overlap in some ways. Creating a shared professional space for specialists in both music and videogames industries (not only music in videogames) would open the door for people from both sides who have long wanted to collaborate. In this space, it will be essential to answer the question “Who do I talk to?”. Creating the right channels between key players with equivalent roles will help balance negotiations and discussions. Small indie videogame studios have often been held accountable by large music corporations or CMOs without going through intermediaries like music labels, game publishers, or publishing platforms with legal teams able to manage these discussions. To address this, it is vital to involve legal teams or “industry translators”, such as Music supervisors, in discussions to avoid later disputes.

Music in videogames, and videogame music, are sitting at the crossroads of two colossal industries that define culture across generations, yet this intersection remains underexplored. Building bridges through knowledge, policy, funding, and mediation will unlock both business opportunities and creative innovation. In a time of unprecedented crisis for all creative sectors, this is no longer a possibility to consider: it is imperative to act.

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