

**SYMPHONY, OPERA OR BALLET  
ORCHESTRA  
INTEGRATED MEDIA AGREEMENT  
December 1, 2023 – June 30, 2026**



**American Federation of Musicians  
of the United States and Canada  
(AFM)**

Tino Gagliardi, International President  
1501 Broadway, 9<sup>th</sup> Floor  
New York, NY 10036  
[www.afm.org](http://www.afm.org)

**SYMPHONY OPERA OR BALLET ORCHESTRA  
INTEGRATED MEDIA AGREEMENT  
TABLE OF CONTENTS**

<b>ARTICLE .....</b>	<b>PAGE</b>
I. SCOPE OF AGREEMENT .....	4
II. RECOGNITION .....	6
III. UNION SECURITY .....	6
IV. WAGES AND WORKING CONDITIONS.....	6
V. GRANTING OF RIGHTS.....	6
VI. RECORDINGS FOR PURPOSES NOT SET FORTH IN THIS AGREEMENT .....	7
VII. AUTHORITY OF THE ORCHESTRA COMMITTEE .....	8
VIII. AUDIO AND AUDIO-VISUAL NEWS AND PROMOTION.....	9
IX. GIFTS TO DONORS, CORPORATE SPONSORS AND SUBSCRIBERS .....	16
 <b>AUDIO AND AUDIO-VISUAL MEDIA .....</b>	 18
X. MULTI-PLATFORM RELEASE .....	18
XI. NATIONAL AND FOREIGN RADIO .....	23
XII. INTENTIONALLY LEFT BLANK.....	25
XIII. NATIONAL AND FOREIGN TELEVISION.....	25
XIV. REGIONAL TELEVISION.....	30
XV. REHEARSAL PROVISIONS FOR AUDIO-VISUAL PRODUCTS .....	31
XVI. AUDIO-VISUAL EDUCATIONAL RELEASES .....	32
XVII. DOCUMENTARIES, CLIP PROGRAMS, COMPILATIONS .....	33
XVIII. SPECIAL CALLS AND PATCH SESSIONS FOR AV PRODUCT.....	35
XIX. ANNUAL MEDIA COMMITMENT PAYMENT .....	37
 <b>REPORTING AND REVENUE PARTICIPATION.....</b>	 39
XX. REPORTING.....	39
XXI. REVENUE PARTICIPATION.....	39

<b>GENERAL PROVISIONS</b> .....	42
XXII. PENSION CONTRIBUTIONS .....	42
XXIII. HEALTH AND WELFARE .....	42
XXIV. ELECTRONIC MEDIA GUARANTEE (EMG).....	43
XXV. DOUBLING .....	43
XXVI. CARTAGE.....	43
XXVII. SUBSTITUTE AND EXTRA MUSICIANS .....	43
XXVIII. MUSICIANS TO BE PAID .....	44
XXIX. ORCHESTRAS WITH SALARIED AND PER SERVICE MUSICIANS.....	44
XXX. FORBIDDEN USES OF RECORDINGS .....	45
XXXI. MUSIC PREPARATION .....	45
XXXII. NOTICE TO MUSICIANS OF RECORDING.....	45
XXXIII. STEP-UP CALCULATIONS .....	45
XXXIV. GRIEVANCE AND ARBITRATION.....	46
XXXV. INTENTIONALLY LEFT BLANK .....	48
XXXVI. RELATIONSHIP TO LOCAL CBA .....	48
XXXVII. EFFECT OF NONRENEWAL OF AGREEMENT.....	48
XXXVIII. EXHIBITS.....	48
XXXIX. TERM OF AGREEMENT.....	48
EXHIBIT A: INTENTIONALLY LEFT BLANK .....	50
EXHIBIT B: INTENTIONALLY LEFT BLANK .....	50
EXHIBIT C: PRIVATE USE TAPE AGREEMENT.....	51
EXHIBIT D: THIRD PARTY PROMOTIONAL USE.....	53
EXHIBIT E: SIDE LETTER RE: NON-CLASSICAL FEATURED ARTISTS .....	55

# **SYMPHONY, OPERA OR BALLET ORCHESTRA INTEGRATED MEDIA AGREEMENT**

The American Federation of Musicians of the United States and Canada (the “Federation”), and the undersigned Symphony, Opera or Ballet Orchestra Institution (the “Employer”) which is an employer located in the United States of America and which employs musicians under the terms and conditions of a Collective Bargaining Agreement (“Local CBA”) with a Local of the Federation (“Local Union”), hereby agree to the following terms and conditions for the creation and distribution of audio and audio-visual media (“Agreement”).

The purposes of this Agreement are to:

- ◆ facilitate the Employer’s ability to produce and exploit covered media;
- ◆ simplify the terms that apply to national television and radio broadcast;
- ◆ simplify the terms that apply to a broad range of other audio and audio-visual media;
- ◆ facilitate the release of programs on multiple platforms without difficulty;
- ◆ increase permitted uses for news and promotion; and
- ◆ recognize the value of the creative contribution of the covered musicians.

For signatories to this Agreement, it replaces and supersedes the 2019-2022 Integrated Media Agreement, the Symphony, Opera or Ballet Audio-Visual Agreement, the Symphony, Opera or Ballet Live Recording Agreement and/or the Symphony, Opera or Ballet Internet Agreement.

## **I. SCOPE OF AGREEMENT**

### **A. Audio and Audio-Visual Media Included**

This Agreement shall cover all musicians, including instrumentalists, copyists, orchestrators, arrangers, and those librarians who are covered by the Local CBA (“Musicians”), employed by the Employer in the production and release of audio recordings from live performances of symphony, opera or ballet orchestras, audio-visual recordings from live performances or special calls, or audio or audio-visual recordings from archival recordings of live performances, in all cases where the live performance is subject to the Local CBA.

## **B. Exclusions from Coverage**

1. *Local Radio and Television Excluded:* This Agreement does not cover radio or television broadcast locally (i.e. broadcast or syndicated within the geographical boundaries of the Local Union), which may be covered by the Local CBA.
  - a. In the event that a local radio station does not carry classical programming, the station nearest to the Local's jurisdiction that is willing to carry a broadcast of the orchestra shall be deemed to be "local" within the meaning of this IMA. If a station in the Local's jurisdiction resumes or begins carrying classical programming, then the definition of local broadcast shall revert to that station.
  - b. In the event that the local radio or public television station broadcast signal is carried over "repeater stations" (defined as stations on which programming is identical, other than local news and weather within the state or states contiguous thereto), then those broadcasts shall be deemed to be local within the meaning of the IMA, including in cases where there is natural bleed of the signal across state lines. The Employer will provide, on an annual basis, a list of the local radio and public television stations which may carry Employer orchestra broadcasts on repeater stations pursuant to this provision. The Federation will raise any questions about the validity of the list in a timely fashion.
  - c. The simultaneous streaming of local television broadcasts on the local station's website is permitted under the terms of this Agreement with no additional payment to Musicians, as long as the Musicians are paid for the television broadcast at the higher of the local television rate in the Local CBA or 50% of the Regional Television rate in Article XIIV.
2. *Audio Studio Recording Excluded:* This Agreement does not cover studio recording of audio recordings, which is covered by the Sound Recording Labor Agreement or other relevant Federation agreement.
3. *Standard Commercial Television Excluded:* This Agreement does not cover standard commercial television programs broadcast on commercial network television, nor does it cover "Olympics-type programs." Such programs are covered by the appropriate Federation agreement for commercial television. The exclusion of standard commercial television programs does not apply to news and promotional uses that are consistent with the terms of Article VIII.
4. *Per-Service Orchestra Limitations:* If a per-service orchestra does not guarantee its full season of services to a musician core (defined, for this purpose, as 50% of the roster defined as the tenured or tenure-track musicians), all projects must have the prior approval of the Musicians via secret ballot vote of the Local CBA bargaining unit. Such orchestras are not eligible to use the special "bulk discount" option established by Article XIX (Annual Media Commitment Payment).

### **C. Symphony Concerts and Opera/Ballet Performances**

Where used in this Agreement, the “concert” or “concert program” shall include symphony concerts, opera performances and ballet performances.

## **II. RECOGNITION**

The Employer hereby recognizes the Federation as the exclusive bargaining representative of Musicians who are employed by the Employer in the creation of audio and audio-visual media covered by this Agreement for the purpose of establishing the wages, terms and conditions applicable to the creation of those media.

## **III. UNION SECURITY**

The following provisions contained in this paragraph shall apply to services rendered pursuant to this Agreement and shall be included in and, whether or not so included, shall be deemed a part of all contracts calling for such services between the Employer and persons employed in a classification covered by this Agreement: “Employees of the Employer on the date of signing of this Agreement or on its effective date (whichever is later), who are members of the Federation, shall be continued in their employment by the Employer for services rendered hereunder only so long as they continue their membership in good standing in the Federation. All other employees in a classification covered by this Agreement shall, on or before the thirtieth day following the commencement of their employment or the effective date of this Agreement, whichever is later, become and continue to be members in good standing of the Federation as a condition of their employment. The provisions of this paragraph shall not become effective unless permitted by applicable law.”

## **IV. WAGES AND WORKING CONDITIONS**

For services covered by this Agreement the Employer shall make the payments described herein and shall fully and faithfully perform the other terms and conditions set forth in this Agreement as well as any terms and conditions in the Local CBA that relate to this Agreement.

## **V. GRANTING OF RIGHTS**

In consideration of its agreement to pay the payments and benefits, and to comply with the working conditions provided herein, the Employer is hereby granted the right to make audio recordings from live performances of symphony, opera or ballet orchestras, audio or audio-visual recordings from archival tapes of live performances, and audio-visual recordings from live performances and special calls, and to exploit those recordings subject to the provisions of this Agreement.

## **VI. RECORDINGS FOR PURPOSES NOT SET FORTH IN THIS AGREEMENT**

A. The Employer may not use audio or audio-visual recordings produced pursuant to this Agreement (or sell, lease, license or assign to any other party the right to use such recordings) for any purpose not expressly set forth in this Agreement (such as, e.g., motion picture soundtracks, commercial announcements (jingles), videogames, etc.) unless the Employer receives advance written permission from the Federation and pays to or on behalf of all Musicians who rendered services in the preparation, production and recording of the music, 100% of all amounts that would be required under the appropriate Federation agreement (using terms which are in effect at the time of such use), as though the recordings were originally made for the purpose set forth in such Federation agreement.

B. If the Employer makes use of audio or audio-visual recordings produced pursuant to this Agreement (or sells, leases, licenses or assigns to any other party the right to use such recordings) for any purpose not expressly set forth in this Agreement without having received advance written permission from the Federation, it shall pay to or on behalf of all Musicians who rendered services in the preparation, production and recording of the music, 150% of all amounts that would be required under the appropriate Federation agreement, using terms which are in effect at the time of such use as though the recordings were originally made for the purpose set forth in such Federation agreement.

C. Where the Employer has provided content created under this agreement to any third party, including but not limited to Private Uses covered by Article VII and News and Promotional Uses covered by Article VIII, and the third party has utilized that content for any purpose not explicitly authorized by this agreement, the Employer, in the absence of having cured the unauthorized use within 30 days of receiving notice of such unauthorized use, shall enter into and fulfill all conditions required by the appropriate Federation Agreement covering the use, including but not limited to the payment to all Musicians of prevailing wages and benefits. *Provided*, however, that where the Employer has sought recovery from the third party of monetary amounts due to Musicians in connection with the third party's unauthorized use of material provided pursuant to this agreement and the Employer's claim against the third party is a debt discharged in bankruptcy proceedings without payment to the Employer, no payments will be due to the Musicians but the Employer will otherwise comply with the requirements of this Article. Any amounts recovered by the Employer from the third party in bankruptcy proceedings as described in this section will be distributed equally among the Musicians entitled to payment for the unauthorized use.

D. Where any third party has utilized content created under this Agreement for any purpose not explicitly set forth herein and that content has not been provided to the third party by the Employer, the Employer will make financially reasonable efforts (including if necessary at a minimum sending a cease and desist letter) to require the third party to (a) cease and desist from such unauthorized use and/or (b) enter into and fulfill all conditions required by the appropriate Federation agreement, including but not limited to payment to or on behalf of all Musicians, who rendered services in the preparation,

production and recording of the music, 150% of all amounts that would be required, using terms which are in effect at the time of such use as though the recordings were originally made for the purpose set forth in such Federation Agreement.

## **VII. AUTHORITY OF THE ORCHESTRA COMMITTEE**

A. The Orchestra Committee shall have the following authority under this Agreement:

1. On an annual basis, agree to additional capture for news and promotion purposes beyond that allowed in VIII.A. below.
2. On an annual basis, agree to terms and conditions for audio and audio-visual capture for archives or for future use or broadcast.
3. On a project basis, agree to terms and conditions for audio and audio-visual projects as set forth in Article X (Multi-Platform Release) below.
4. Subject to the Employer obtaining the prior written approval of the Federation, on a project basis, the Orchestra Committee may agree to the terms and conditions applicable to any electronic media activity (not just radio and television) that is distributed only within the jurisdiction of the Local (e.g. closed-circuit distribution, password-protected digital content, live simulcast or taped replay in other local facilities, etc.).
5. On an annual or project basis, agree to allow simultaneous live-streaming (no on-demand streaming) of a live performance to any patron who has purchased a ticket to attend the performance in person but is unable to attend. Such live-stream is to be made available to the ticket buyer through the means of a single-use access code or other technology that protects against unauthorized access to the live-stream. The live-stream must remain within the ownership and control of the Employer. Any archiving of the stream or further use is subject to the other provisions of this Agreement.
6. Other authority as set forth in this Agreement.

B. By mutual agreement of the Musicians and the Employer, the authority of the Orchestra Committee may be exercised during the term of this Agreement by a Local Oversight Committee, Media Oversight Committee or other committee, if that committee was in existence and functioning prior to the effective date of this Agreement. Mutual agreement to this procedure shall be signified by the execution of a side letter to this Agreement in the form prescribed by the Federation.

C. With the prior written approval of the Orchestra Committee on a project or annual basis, the Employer may make audio or audio-visual recordings of rehearsals and



performances available to conductors, composers, soloists, dancers, choreographers, stage/set designers, stage directors and Musicians for their Private Use (archival use, personal study, auditions and grant applications) and to an opera company or ballet company that subcontracts services from, or to a chorus that performs with, a symphonic Employer for that institution's archival, study and grant application uses. The Employer may also provide the Music Director and Musicians of the Orchestra with access to a stream (no downloads or other formats) of such recordings via a password-protected digital portal for personal study purposes only. As indicated in Article VI.C., the Employer will require any individual or entity authorized by the Employer to receive a copy of and/or digital access to any such audio or audio-visual recordings, to sign a Private Use agreement with the Employer, in the standard form in Exhibit C of this Agreement, warranting that:

1. The individual or entity will not sell, license, copy or distribute the recording in any physical or digital format or use the recording for any purpose other than the approved "Private Use;" and
2. Should any such recording ever be utilized for any other purpose, including but not limited to demonstration or marketing of services or product by any group or individual, local or national broadcast, phonograph records, internet streaming or downloading, promotional spots or commercial announcements, theatrical or commercial exhibition, or background music for any type of sound or film program, the individual or entity shall enter into and fulfill all conditions required by the appropriate Federation agreement including, but not limited to, the payment of prevailing wages and allied fringe benefits outlined therein.

## **NEWS, PROMOTION AND DONOR GIFTS**

### **VIII. AUDIO AND AUDIO-VISUAL NEWS AND PROMOTION**

#### **A. Capture**

1. No more than 40 minutes of any rehearsal, performance or special call service may be captured for news media or promotional uses.
2. The Orchestra Committee may agree to additional capture for news and promotion purposes consistent with B. and C. below.
3. Archival material may be used for news or promotion in accordance with the provisions of B. and C. below.

#### **B. Use of Captured Material for News.**

1. Audio or audio-visual material captured per A. above must be edited down to no more than ten (10) minutes from any work or movement for news or "magazine program" broadcast. In addition to use by the news broadcaster, the newscast may be distributed on

the Internet, on the Employer's own website, on television or on other media outlets, by the Employer or by third parties as defined in and in accordance with VIII.C.2.

2. In the case of a radio or television broadcast pursuant to B.1. above, up to 10 (ten) minutes of audio or A-V material captured per A. above may be provided to the broadcaster for posting on its website. This material may not include a complete work or movement longer than four (4) minutes.

3. *New Platforms:* New platforms for delivering news broadcasts (e.g. wireless) are included under "news or magazine program broadcast." Online news magazines may have up to ten (10) minutes on their websites.

### **C. Use of Captured Material for Promotion.**

1. Audio or audio-visual material captured pursuant to A. above must be edited down to no more than five (5) minutes for promotional uses. Such uses may be made on the Internet, on the Employer's own website, on television or on other media outlets, by the Employer or by commercial or non-commercial third parties. In the case of third parties, the following terms and conditions shall apply:

a. When the third party's use directly promotes specific activity(ies), event(s) or media product(s) of the Orchestra, (e.g. ticket sales, subscription sales, donations, CD/download/stream or other product sales, etc.) the third party may use five minutes of captured material or up to fifteen (15) minutes, provided that the fifteen minutes consists of non-consecutive segments, no one of which is longer than five (5) minutes; or

b. If the third party's use is not directly promotional in accordance with above paragraph 1.a., then it must satisfy the following conditions:

i. The name of the Orchestra must be clearly identified within the promotional use (e.g. at the outset, at the interval(s) appropriate to the piece or during rolling or billboarded credits, etc.), to ensure public recognition of the Orchestra and its connection to the use; and

ii. The Orchestra's performance is integral to the piece and not the mere provision of soundtrack, underscore or background content; and

iii. The use is not a "call to action" (within the meaning of the PBS National Program Funding Standards and Practices) commercial announcement ("jingle") for a third party, or otherwise violative of the PBS National Program Funding Standards and Practices regarding identifying information for funders (as set forth at <http://www.pbs.org/about/producing-pbs/funding-standards/>); and

- iv. The third party's use is not a) a commercial announcement covered by the AFM Commercial Announcements Agreement, or b) a television appearance by the Employer's Musicians in Scripted, Non-Scripted or other Television Programs covered by the Television Videotape, Basic Television Film Agreement, Basic Cable or other television agreement, or a media product for sale or license; and
- v. The third party must be an institutional or media partner or sponsor of the Employer, or must be engaged in some other meaningful partnership with the Employer which (a) advances community or institutional goals beyond the commercial or noncommercial success of the third party, and (b) advances awareness of the Orchestra; and
- vi. As indicated in Article VI.C., the Employer will enter into a written agreement, in the standard form in Exhibit D of this Agreement, that restricts the rights of the third party to use the recorded product consistent with the terms of this Article VIII and obligates the third party, in the event of any unauthorized use, to enter into and fulfill all conditions required by the appropriate Federation Agreement, including but not limited to the payment to all Musicians of prevailing wages and benefits; and
- vii. The Employer must provide notice to the Federation and the Orchestra Committee in accordance with Article XXXII and the use must be approved in advance by the Orchestra Committee. *Provided, however,* that the Orchestra Committee will be deemed to have approved the use if it fails to render a decision within seven (7) days of receiving a request from the Employer.

2. Notwithstanding C.1. above, the Employer may use up to fifteen (15) minutes, provided that the fifteen minutes consists of non-consecutive segments, no one of which is longer than five (5) minutes. This option may not be used by any third party or for television or radio broadcast. The Institution may use this option for promotional purposes on its own website, in conjunction with its media or other commercial or non-commercial institutional sponsors or partners on their websites, on other internet sites such as YouTube or social media sites, in kiosks or monitors at its location or in tourist or other promotional locations, in cell phone or wireless transmission, in streaming e-mails, or on podcasts as long as the segments used for promotional purposes are not themselves being sold.

- a. Not more than six (6) times per year the Employer may use up to 15 minutes of continuous captured content for promotional purposes; provided that (i) each fifteen-minute segment shall be from a different work or movement; (ii) each fifteen-minute segment shall contain either one composition up to fifteen minutes in length or one movement of one composition up to fifteen minutes in length;

and (iii) the Employer does not provide media payments to anyone else. The Employer may allow an opera or ballet company that subcontracts services from the Employer to use up to two of these six (6) opportunities each year.

b. The Employer will report the use of media pursuant to above paragraph 2.a. to the Federation on the form provided by the Federation.

3. The capture, broadcast and/or streaming by a third party of an Orchestra's live performance of the Star Spangled Banner and/or the national anthem of another country at a sport event is permitted without a media payment to the Musicians so long as the broadcast and/or stream of the Musicians' performance complies with the provisions of Article VIII.C.1. *Provided, however*, that where the sport event is a "Premium Game" each Musician who participates will be compensated with a one-time upfront media payment of \$150.00 plus Pension (as provided in Article XXII) and Health & Welfare (as provided in Article XXIII). "Premium Games" are the All-Star Games, MLB Playoffs through and including the World Series, NFL Playoffs through and including the Super Bowl, NBA Finals, NHL Stanley Cup Finals, World Cup Finals, NFL Thanksgiving Day Games and NBA Christmas Day Games.

4. *New Platforms:* The Employer may use new platforms or technologies now existing or yet to be developed for promotion. Prospective treatment of new platforms or technologies is subject to negotiation at the Federation's option after reasonable notice to the Employer. If the Federation initiates negotiation regarding a new platform or technology, permission for prospective new promotional uses on that platform or via that technology ceases from three (3) months after the Federation's notice until agreement is reached.

5. *Promotion via Performance Streaming:* One time in each season, the Employer may make available on its website or other social media outlets under its control (e.g. the Employer's Facebook Page, the Employer's YouTube Channel, etc.), for on-demand streaming, for forty-five (45) days, a concert that was free to the public, with no additional payment to the Musicians. In the event that the Employer charges a nominal ticket price (in lieu of presenting the concert free to the public), the Employer shall be required to obtain Orchestra Committee approval in order to make the concert available on its website or other social media outlets under its control for on-demand streaming for forty-five (45) days without additional payment to the musicians. In addition, one time in each season, with orchestra approval, the Employer may make available on its website or other social media outlets under its control, for on-demand streaming, for forty-five (45) days, one concert that was not free to the public, without additional payment to the musicians.

6. *Contrary Provisions:* More liberal news and promotion provisions in existence in the Local CBA as of the date of this Agreement are grandfathered. News and promotion provisions in existence in the Local CBA as of the date of this Agreement that are more restrictive than the provisions of this Agreement with regard to minutes of capture and use are presumed to be superseded by the terms of this Agreement unless and until the

parties to that Local CBA mutually agree to more restrictive terms, subsequent to the effective date of this Agreement.

7. *Opera and Ballet Company Subcontractors:* When an opera or ballet company subcontracts services from a symphony orchestra Employer, that Employer may permit the opera or ballet company to use the rights set forth in Articles VIII.A., VIII.B., VIII.C.1.a, VIII.C.2 and VIII.C.2.a (as limited within that provision) for direct promotion of specific events that use the live performance of Musicians employed by the Employer provided that the following conditions are met:

- (a) The Employer has a written agreement with the opera or ballet company that restricts its rights to use the recorded product consistent with the terms of this Article VIII; and
- (b) In the event the opera or ballet company makes use of the recorded product not consistent with the terms of this Article VIII, the Employer, as indicated in Article VI.C., in the absence of having cured the unauthorized use within 30 days, will enter into and fulfill all conditions required by the appropriate Federation Agreement, including but not limited to the payment to all Musicians of prevailing wages and benefits; and
- (c) The opera or ballet company shall identify the Employer institution in the news or promotional use.

8. *Commercial Announcements:* Notwithstanding the exclusion of Commercial Announcements (“jingles”) from the scope of this Agreement up to five minutes of audio or audio-visual material may be used in a commercial announcement (“jingle”) in conjunction with (a) the sale of tickets to the performances of the Orchestra or of the Orchestra’s media products, (b) direct fundraising appeals for the Employer; or (c) sales of electronic media products created under this Agreement. Such audio or audio visual material may also be used in conjunction with commercial announcements for the sale of tickets to performances of works that are co-commissions or co-productions with another non-profit symphony, opera or ballet orchestra employer of Federation Musicians pursuant to a CBA with a Local of the Federation, subject to the approval of the Orchestra Committees of both the Orchestras providing and using the recorded content, as well as appropriate recognition to the Orchestra providing the content. Where the work recorded is not a co-commission or co-production, and there is no extant commercial recording, up to 30 seconds of audio or audio-visual content may be used in a commercial announcement (“jingle”) to promote ticket sales to performances of another non-profit symphony, opera, or ballet orchestra employer of Federation Musicians pursuant to a CBA, with the approval of the Orchestra Committees of both the Orchestras providing and using the recorded content, and, where practicable, appropriate recognition to the Orchestra providing the content.

9. *Promotional Use by Individuals:* The capture of performances on handheld personal devices and distribution via social media by individual audience members may occur without additional compensation to Musicians, so long as:

- a. The audience is seated outdoors, except that for an Employer whose performances occur predominantly outdoors (e.g., Santa Fe Opera, Glimmerglass Festival), the Employer must obtain the approval of the Orchestra Committee on a per project basis;
  - b. The Employer makes reasonable efforts to prevent recording during performance circumstances, when the recording would be disruptive to the experience for other audience members or performers; and
  - c. The Employer will assert its intellectual property rights to stop the electronic distribution of such recorded content, when the use exceeds the promotional use parameters of this Agreement, when there is an attempt by a third party to generate revenue, or when it is distributed in a manner that in the sole discretion of the Employer is inconsistent with the interests of the institution.
  - d. In addition, with the approval of the Orchestra Committee, for up to two full orchestra programs per season, and up to four informal events per season in a venue with a seating capacity that does not exceed 400 seats, the capture of a performance on smartphones by individual audience members at an indoor performance, and the distribution of that material by them via social media, subject to the additional terms of this section, may occur without additional compensation to Musicians. Where the program is repeated multiple times, audience capture as provided in this Article VIII.C.9.d may occur at all repetitions of the program if approved by the Orchestra Committee.
10. Notwithstanding any other provision of this IMA, a stand-alone audio-visual clip of the Orchestra may be broadcast on television without payment to the Musicians if the following conditions are met:
- a. The clip is used in conjunction with an appearance on the television program of the Orchestra's music director, principal conductor, musician, other institutional leader of the Employer, guest conductor or soloist; and
  - b. The clip is thirty (30) seconds or less in duration; and
  - c. The clip is from a paid-for media product or content previously captured under this Agreement); and
  - d. The clip is used as a stand-alone clip and is not played as underscore or backing track; and
  - e. The clip is used to directly promote the Employer institution.
11. *Revenue Participation:* Although news and promotional distribution may not be intended to generate direct revenue to the Employer, it is possible that audio or audio-visual material used in news or promotional activities described herein will produce ancillary direct income to the Employer (e.g. YouTube advertising revenue). If any such

item created pursuant to this Article VIII produces direct income to the Employer, it shall be subject to Revenue Participation in accordance with Article XXI.

#### **D. Volunteer Promotional Recordings**

1. The following provisions set forth the conditions upon which the Employer may record and use audio or audio-visual interviews/activities of Musicians in which Musician(s) perform on musical instruments (“Volunteer Promotional Recordings”) without compensation to the Musicians.
2. *Purpose:* Volunteer Promotional Recordings are for the purpose of news and promotion and may be distributed on the internet, on the Employer’s own website, on television news and news magazine programs, or on other media outlets by the Employer or by third parties. Volunteer Promotional Recordings may also be used for educational purposes, provided however that such educational content shall consist only of a single musician performing a lecture-demonstration.
3. *Voluntary Program:* Musicians shall not be required to record Volunteer Promotional Recordings but may provide them on a voluntary basis. Musicians may accept or decline to volunteer without prejudice to their status with the Employer, and Volunteer Promotion Recordings shall not be used in discipline or tenure decisions.
4. *Notice of Opportunities:* At the beginning of and periodically during each season, an Employer interested in recording Volunteer Promotional Recordings shall ask all Musicians if they are interested in participating. The Employer shall provide an equitable and suitable distribution of opportunities among interested Musicians.
5. *Location, Scheduling, Duration and Term:* Recording shall be done at a time and place agreed upon by the volunteer Musician(s) and the Employer. The maximum length of recording shall not exceed forty-five (45) minutes. The maximum length of the resulting Volunteer Promotional Recording shall not exceed fifteen (15) minutes.
  - a. Notwithstanding the limits set forth in D.5, when the Musician is being paid for his or her time, the capture and use may be extended with the approval of the Orchestra Committee and the Federation. Federation approval will not be denied without good cause.
6. *Musician Approval:* The volunteer Musician’s approval shall be required for the repertoire to be performed, and when controlled by the Employer, for the release of the final Volunteer Promotional Recording. The Employer shall take down a Volunteer Promotional Recording from its website or any site or platform which it controls upon the request of any Musician performing on the recording.
7. *Reporting:* Volunteer Promotional Recordings shall be reported to the Federation on a form provided by the Federation.

## **IX. GIFTS TO DONORS, CORPORATE SPONSORS AND SUBSCRIBERS**

1. *Donors:* Without compensation to the musicians, the Employer may conduct annual donor gift projects in accordance with *either* subparagraph 1.a. *or* 1.b. below.
  - a. *Donor CD, DVD, Audio Download or A-V Download.*
    - i. Once per year, the Employer may distribute a CD, DVD, Audio Download or A-V Download to donors as a donor gift.
    - ii. The minimum donation required to receive a donor gift shall be the greater of \$250.00 or the amount required to obtain program recognition.
    - iii. There shall be a maximum of 1000 units distributed, except that more may be distributed with the permission of the Orchestra Committee.
    - iv. Upon request of the Orchestra Committee, each musician shall be entitled to one copy. Any musician copies shall be in excess of the maximum number of units allowed for donors.
    - v. Orchestra Committee approval is required for the project.
    - vi. The Orchestra Committee shall have the right of artistic approval, which shall include approval of the choice of repertoire.
    - vii. Distributed units shall be labelled for personal use only, no resale or commercial use.
  - b. *Donor Portal on the Orchestra Website (or, where the Orchestra does not have the ability to host the portal on its own website, on a third party website).*
    - i. Donor eligibility for access to the portal shall be by season.
    - ii. The minimum donation required to be eligible for access to the portal shall be the greater of \$250.00 or the amount required to obtain program recognition.
    - iii. There shall be a maximum of ninety (90) minutes of unpaid-for material available on the portal at any one time. Material paid for under the IMA may be posted during its rights period, in addition to the ninety (90) minutes of unpaid material. Full works are permitted on the portal.
    - iv. Access to the portal shall be password-protected or otherwise access-restricted.



- v. Orchestra Committee approval is required for the project.
  - vi. The Orchestra Committee shall have the right of artistic approval, which shall include approval of the choice of repertoire.
  - vii. Material on the portal shall be available for on-demand streaming only; there shall be no downloads available.
  - viii. The Employer may not exceed any of the provisions above without approval of the Orchestra Committee.
2. *Major Corporate Sponsors or Underwriters:* No more than once per year, the Employer may make a proposal to the Federation to approve a CD or DVD gift to a major corporate sponsor or underwriter. Federation approval will not be denied without good cause.
3. *Subscribers or Multi-Ticket Buyers:*
- a. Multi-Ticket Buyers shall be defined as individuals who have bought *x* tickets, “x” to be a number determined in conjunction with the Orchestra Committee.
  - b. Up to two (2) times per year, the Employer may provide subscribers or Multi-Ticket Buyers with a free download (or other perquisite like a maximum two-week period of access to a donor portal) in connection with a targeted marketing program that is specifically approved by the Orchestra Committee. For a download in connection with such a project, whole movements may be allowed, but the maximum number of minutes shall be ten (10) minutes.

## **AUDIO AND AUDIO-VISUAL MEDIA**

### **X. MULTI-PLATFORM RELEASE**

Other than for the Exceptions noted in C below, the terms and conditions of this Article X will govern the release of audio and audio-visual recordings (other than Television programs covered by Article XIII or XIV).

#### **A. Scope**

The terms and conditions in this Article X will apply to the capture and release of audio and/or audio-visual content exploited in the following audio and audio-visual media:

- National and Foreign Radio;
- Live Audio Recording (including CDs, Downloads, Streaming and other Audio Products);
- Live Audio-Visual Recording (including DVDs, Theatrical Release, Streaming, Downloading and other Non-Television Audio-Visual Products);
- Audio-Visual Educational Releases; and
- Other audio or audio-visual platforms now known or later discovered, approved by the AFM.

#### **B. Rates**

1. For any one concert program, the one-time payment of 6% of weekly scale (48% of per-service performance rate), with a floor of \$93.64, will enable the Employer to make:
  - a. Unlimited performance capture of all performances of that program and, where there is to be only one performance of the concert, opera or ballet performance being recorded, the last dress rehearsal;
  - b. If there are to be multiple performances at different halls, but no more than one performance per hall, then there may be capture for use on recordings either at all performances, or at one performance and the last dress rehearsal for that performance;
  - c. Exploitation of the captured material in whole, or in single or multiple parts, in perpetuity in any platform covered by the IMA (audio or audio-visual), other than Article XIII Television, Article XIV Regional Television and Article XVII Documentaries.
  - d. Compilation projects: The Employer may make a release under this Article of up to 90 minutes of symphonic material (130 minutes of opera) that consists of material compiled from up to four (4) concert programs. For every 10 additional minutes or portion thereof, an additional payment shall be made that is 1/9 (1/13 for opera) of the original up-front payment.

2. Archival Recordings: A Multi-Platform up-front payment will be required for the first release of any material from a program previously captured for archival purposes that has not been previously released under the terms of the IMA or other applicable AFM Agreement. A Multi-Platform Release of material that has been previously released under a prior IMA or other applicable AFM Agreement, may require a step-up payment if the rates in section B.1 above are higher than the original upfront payment. For archive recordings older than 8 years, where the number of Musicians to be paid is unusually large, with the approval of the Orchestra Committee, the amount of the up-front payment to each Musician may be reduced, so that the total amount to be divided equally among the Musicians paid shall be equal to 125% of the cost of paying all of the current Orchestra members.

### **C. Exceptions**

1. Notwithstanding the rates in Article X.B. above, the following exceptions will apply:
  - a. Once per year, if thirty (30) minutes or less of a concert program is released under the Multi-Platform Release provisions of section B.1. above, the up-front payment will be 50% of the applicable rate. A second time in each year, the release of thirty (30) minutes or less of a concert program under the Multi-Platform Release provisions of section B.1. above may occur with an up-front payment of 75% of the applicable rate;
  - b. If the first and only exploitation is a National Radio Broadcast, the applicable terms and conditions in Article XI will apply;
  - c. If the first and only exploitation is an Audio-Visual Educational Release, the applicable terms and conditions of Article XVI will apply.
2. Notwithstanding the above, a Multi-Platform Release up-front payment will not be required for:
  - a. Simultaneous audio streaming of local radio broadcasts and on-demand audio streaming of local radio broadcasts pursuant to Article XI.D;
  - b. Simultaneous audio-visual streaming of Regional Television broadcasts pursuant to Article XIV; and
  - c. News and Promotional uses within the parameters of Article VIII.

## **D. Tier Payments**

Tier Payments for CD sales will not be required for projects under the Multi-Platform Release system.

## **E. Project Approval**

Orchestra Committee approval on a per project basis shall be required for all projects covered by the Multi-Platform Release up-front payments.

## **F. Artistic and Financial Consultation**

1. The Employer must comprehensively discuss the project with the Orchestra Committee in advance. The discussion will include, but will not be limited to, information about the repertoire, the economic terms of any deal with any partner (if any), the specifics of any proposed license, the elements of any distribution deal with any partners, the financial arrangements with any conductors and soloists, and the financial arrangements for the Orchestra, the project budget, etc. In connection with this consultation, the Employer shall provide to the Orchestra Committee and, upon request, the AFM, all necessary documentation within the possession or control of the Employer including but not limited to, copies of any proposed licensing agreements (including third party distribution arrangements), which must be provided prior to project approval. A draft licensing agreement and/or a list of terms for the license will be provided and approval will be conditional on review of the final agreement. No licensing agreement may be fully executed until the Orchestra Committee has given approval for the project.
2. The consultation must be held in a timely fashion prior to the vote on project approval in accordance with E above.
3. The consultation process must identify the agreed-upon direct costs for purposes of revenue participation calculations. Specifically, the Employer and the Orchestra Committee must agree upon the costs or categories of direct costs paid by the Employer, consistent with the provisions of Article XXI (Revenue Participation), which may be deducted from the Employer's gross receipts to determine the net earned revenue that must be shared with Musicians. In the absence of agreement, which may not be unreasonably withheld, no direct costs may be deducted from the Employer's gross receipts and the net revenue to be shared will be the Employer's gross receipts.
4. The consultation process will also reaffirm the artistic partnership of the Employer and the Musicians and involve artistic consultation.

## **G. Patch Sessions**

1. A patch session of up to two (2) hours may be held after a live performance of the program being recorded and will be paid in 15-minute increments. For the first thirty (30) minutes, a patch session will be paid at the lesser of the concert overtime rate or the SRLA patch rate, assuming that the patch session is announced within 10 minutes and begins within 45 minutes of the concertmaster leaving the stage. After thirty (30) minutes of patch session, the payment rate will be the Sound Recording Labor Agreement patch rate. There shall be five (5) minutes of break during every fifteen (15) minutes of work during patch sessions. SRLA patch conditions otherwise apply in all events.
2. The Employer may call a special patch session of up to two (2) hours at a time other than immediately after a concert of the recorded program (including a special patch session to make corrections in an archived tape), provided that there is orchestra approval of the scheduling of the session. Such patch sessions shall be paid as follows: (i) If the patch session is scheduled to occur immediately after a regular orchestra service, the payment provisions of G.1. above will apply; or (ii) If a special patch session is scheduled as a separate service it will be paid at the SRLA patch rate and SRLA patch conditions shall apply. The minimum call for such a session shall be one half hour.
3. The Employer may request Orchestra Committee approval for a second patch session of up to two (2) hours or for more than two patch sessions when creating a compilation release pursuant to Article X.B.1.d above from multiple concert programs. If additional patch sessions are approved by the Orchestra Committee, payment and conditions shall be at the SRLA patch rates and SRLA conditions shall apply. No additional such patch sessions may occur after midnight, and any Local CBA rules that are more restrictive than the IMA shall apply.
4. There shall be no discipline of any Musician who is unable to attend a special patch session.
5. The provisions of this Article X.G apply to audio-only patch sessions. Audio-visual patch sessions are governed by the terms of Article XVIII.

## **H. Ownership and Licensing**

1. Use of the Multi-Platform Release provisions requires the Employer to retain ownership and control of the product.
2. Licensing arrangements are permissible, but the specifics of the license must be disclosed in advance to the Orchestra Committee and the duration of the standard license period for all audio and audio-visual releases will be limited to no more than five (5) years or until the exploitation stops (e.g. distribution ceases, deletion of the recording from the licensee's catalog, etc.), whichever comes first. With the permission of the Orchestra Committee, the license period can alternatively be an initial 10 years; subject in all cases only to continued revenue sharing and annual reporting, and a requirement that the Employer's contract with the licensee provide for a termination of the license if the exploitation stops and there is any other material breach of the licensee's obligations. A license may be renewed or extended for

additional periods not to exceed five (5) years only upon presentation to the Orchestra Committee of an accounting of revenue generated by the project to date of the renewal.

3. Third party license agreements in existence as of the date of ratification are grandfathered.

#### **I. Step Ups**

1. Audio or audio-visual content for which Musicians have received an up-front payment under one of the “exceptions” in section C.1. above can be exploited in all other audio and/or audio-visual electronic media platforms covered by the IMA (other than Article XIII Television and Article XIV Regional Television) upon paying a “Step-Up” to the Multi-Platform Release up-front payment in section B.1. above.
2. Audio or audio-visual content for which Musicians have received either a Multi-Platform Release (B.1.) or “Exceptions” (C.1.) up-front payment can be exploited on television upon paying a “Step-Up” to the applicable Article XIII television fee.

#### **J. Pension Contributions**

Multi-Platform Release up-front payments shall be considered to be scale wages and the Employer shall make pension contributions on them to the American Federation of Musicians and Employers’ Pension Fund as provided by Article XXII.

#### **K. Payment Due Dates and Reporting**

Payments to Musicians, payments to the American Federation of Musicians and Employers’ Pension Fund, and the appropriate B-form are due within fifteen (15) days after the final capture, or in the case of archival use, within fifteen (15) days of the patch session. In the absence of a patch session, payments and the B-form are due within fifteen (15) days of product release.

#### **L. Revenue Participation**

Musicians shall be entitled to participate in revenue derived from Multi-Platform Release exploitation in accordance with the provisions in Article XXI (Revenue Participation).

## **XI. NATIONAL AND FOREIGN RADIO**

The following optional “exception” provisions may be used in lieu of the provisions set forth in Article X (Multi-Platform Release) for the broadcast of live performances (whether the broadcasts are simultaneous, delayed or from the archive) on commercial over-the-air radio, non-commercial over-the-air radio, satellite radio, internet radio and all other wired or wireless broadcast formats shall be subject to the following provisions.

### **A. Rates**

1. *Single Broadcast.* For each program that is broadcast, Musicians shall be compensated at the rate of 4% of weekly scale (32% of per-service performance scale in the case of per-service orchestras), with a floor of \$55.75, except where the Employer guarantees the broadcast of five or more programs per year.
2. *Guarantee of Five or More Programs Broadcast per Year.* Where the Employer guarantees the broadcast of five or more programs per year, Musicians shall be compensated at the rate of 3% of weekly scale (24% of per-service performance scale in the case of per-service orchestras), with a floor of \$44.60, for each national/foreign radio program that is broadcast. This rate shall not be subject to further reduction pursuant to the provisions of Article XIX (Annual Media Commitment Payment).
3. *Foreign Radio Broadcast While on Tour in a Country Outside the Jurisdiction of the Federation.* A tour concert in a country outside the jurisdiction of the Federation may be broadcast on the radio within the country where the live concert occurs for 75% of the applicable radio payment.
4. *Opera.* Rates for opera broadcasts shall be subject to local negotiation, but in no case shall be lower than the floor established for a Multi-Platform Releases in Article X.B.1. of \$93.64 per broadcast).
5. *Pension Contributions.* The payments described in A.1., 2. 3. and 4. above shall be considered to be scale wages and the Employer shall make pension contributions on them to the American Federation of Musicians and Employers’ Pension Fund as provided by Article XXII.
6. *Payment Due Dates and Reporting.* Payments to Musicians, payments to the American Federation of Musicians and Employers’ Pension Fund, and the appropriate B-form are due within fifteen (15) days after the broadcast.

### **B. Rights**

- a. *Three (3) Years Unlimited Broadcast, Simultaneous Streaming, Archiving.* The Employer may license the program for unlimited broadcasts, simultaneous streaming of broadcasts, and archiving for on-demand streaming of broadcasts for a period of three (3) years from the date of the initial broadcast.

- b. *Foreign Radio Broadcast While on Tour.* In the case of a foreign tour concert paid pursuant to A.3. above, the Employer may license the program in the country where the live concert occurs for unlimited broadcast, simultaneous streaming of broadcasts, and archiving for on-demand streaming of broadcasts for a period of three (3) years from the date of the initial broadcast.
3. *Subsequent Licensing.* The Employer may license the program for subsequent three-year broadcast periods upon payment to the Musicians of 25% of the original rate.
4. *Radio Broadcasts on the Employer's Website.* Upon approval of the Orchestra Committee at the end of the license period, radio broadcasts may remain on the Employer's own website for an additional three (3) years of on-demand streaming beyond the three (3) year radio rights period, without further compensation to the Musicians.

### **C. Grandfathering of Contrary Provisions**

Contrary provisions in the Local CBA, a local media side letter or individual Employer agreement with the Federation in existence as of the date of this Agreement are grandfathered. Both radio provisions that are more favorable to the Musicians and radio provisions that are more favorable to the Employer are grandfathered. Provisions grandfathered pursuant to this provision shall be provided to the AFM.

### **D. Streaming of Local Radio Broadcasts**

In accordance with Article I.B.1. regarding scope of this Agreement, rates for radio broadcasts that are local within the meaning of that provision shall be covered by the Local CBA. The simultaneous streaming of such local broadcasts is permitted under the terms of this Agreement with no additional payment to Musicians. On-demand streaming of such local broadcasts is permissible on the radio station or Employer's website, without additional upfront compensation, for one month following the initial broadcast. On-demand streaming of such local broadcasts beyond one month is subject to the audio streaming provisions of Article X.B.1 .

### **E. Regional Radio Broadcasts**

The terms and conditions that govern radio broadcasts on a regionally syndicated network of non-repeater radio stations ("Regional Syndicated Radio Network") are subject to the mutual agreement of the Federation, the Musicians, and the Employer.



## **XII. INTENTIONALLY LEFT BLANK**

## **XIII. NATIONAL AND FOREIGN TELEVISION**

The creation and broadcast of national and foreign television programs shall be subject to the following provisions.

### **A. Rates**

1. Musicians shall be paid at the applicable per-minute rate times the length of the program. Per-minute rates shall always be paid in five-minute increments.
2. *Per-Minute Rate Television When There Have Been One or Two Audio-Visual Captures:* There shall be applicable per-minute rates for “Live” Television, defined as a television program involving no more than two audio-visual captures. The applicable per-minute rates shall be:

<b>One (1) or Two (2) Captures</b>	<b>Rate</b>
National Public Television <sup>A</sup> (Standard Rate) <i>NOTE: Payment of this Standard Rate entitles the Employer to license for three (3) years of unlimited broadcast on national public television, national non-standard and worldwide foreign television per B.1. below</i>	\$5.79 per minute
Non-Standard (Cable) Television <sup>B</sup> (60% of standard rate)	\$3.48 per minute
Unlimited Foreign Countries (4 or more) (65% of standard rate)	\$3.76 per minute
Three (3) Foreign Countries (55% of standard rate)	\$3.18 per minute
Two (2) Foreign Countries (45% of standard rate)	\$2.60 per minute
One (1) Foreign Country (35% of standard rate)	\$2.03 per minute
One (1) Broadcast Option (81.5% of applicable per-minute rate)	

---

<sup>A</sup> As defined in E.1. & 2. below.

<sup>B</sup> As defined in E.4. below.

3. *Per-Minute Rate for “Multi-capture” Television:* There shall be applicable per-minute rates for “Multi-Capture” Television, defined as a television program involving three (3) or more audio-visual captures.

<b>Three (3) or More Captures</b>	<b>Rate</b>
National Public Television <sup>A</sup> (Standard Rate) <i>NOTE: Payment of this Standard Rate entitles the Employer to license for three (3) years of unlimited broadcast on national public television, national non-standard and worldwide foreign television per B.1. below</i>	\$6.93 per minute
Non-Standard (Cable) Television <sup>B</sup> (60% of standard rate)	\$4.15 per minute
Unlimited Foreign Countries (4 or more) (65% of standard rate)	\$4.50 per minute
Three (3) Foreign Countries (55% of standard rate)	\$3.80 per minute
Two (2) Foreign Countries (45% of standard rate)	\$3.12 per minute
One (1) Foreign Country (35% of standard rate)	\$2.43 per minute
One (1) Broadcast Option (81.5% of applicable per-minute rate)	

4. *Pension Contributions:* Per-minute rate payments shall be considered to be scale wages and the Employer shall make pension contributions on them to the American Federation of Musicians and Employers’ Pension Fund as provided in Article XXII.

5. *Opera:* Opera television programs shall be paid at the applicable per-minute rate for up to two hours of program, and thereafter shall be paid at 75% of the applicable per-minute rate.

6. *Payment Due Dates and Reporting:* Payments to Musicians, payments to the American Federation of Musicians and Employers’ Pension Fund, and the appropriate B-form are due within fifteen (15) days of program release.

7. *Revenue Participation:* Musicians shall be entitled to participate in revenue derived from television programs in accordance with the provisions in Article XXI (Revenue Participation).

---

<sup>A</sup> As defined in E.1. & 2. below.

<sup>B</sup> As defined in E.4 below.

## **B. Rights – Three (3) Years Unlimited Broadcast**

1. *Standard Television Rate:* Payment of the standard television per-minute rate entitles the Employer to license the program for unlimited broadcast for three (3) years on national public television, national non-standard television and foreign television.
2. *Non-Standard (Cable) Rate:* payment of the non-standard (cable) television rate entitles the employer to license the program for unlimited broadcast for three (3) years on national non-standard television and in three (3) or fewer foreign countries.
  - a. *Step-Up to National Public Television:* Payment of the difference between the non-standard (cable) rate and the standard television rate shall entitle the Employer to license the program for three (3) years of unlimited broadcast on national public television and in unlimited foreign countries. Step-up payments, pension payments and the appropriate B-form shall be due within fifteen (15) days after the step-up release.
  - b. *Step-Up to Unlimited Foreign Countries Rate:* Payment of the difference between the non-standard (cable) rate and the unlimited foreign countries rate shall entitle the Employer to license the program for three (3) years of unlimited broadcast in unlimited foreign countries. Step-up payments, pension payments and the appropriate B-form shall be due within fifteen (15) days after the step-up release.
3. *Unlimited (4 or more) Foreign Countries Rate:* payment of the unlimited (4 or more) foreign countries television rate entitles the employer to license the program for unlimited broadcast for three (3) years in foreign countries and on non-standard (cable) television.

*Step-Up to National Public Television:* Payment of the difference between the unlimited foreign country rate and the standard television rate shall entitle the Employer to license the program for three (3) years of unlimited broadcast on national public television. Step-up payments, pension payments and the appropriate B-form shall be due within fifteen (15) days after the step-up release.

4. *Three (3), Two (2) or One (1) Foreign Country Rate:* payment of the three (3), two (2) or one (1) foreign country(ies) television rate entitles the employer to license the program for unlimited broadcast for three (3) years in three (3), two (2) or one (1) foreign country(ies), respectively.

*Step-Up:* The Employer can step up to unlimited broadcast for three (3) years in more foreign countries, unlimited foreign countries, non-standard (cable) television or national public television by paying the difference between the rate paid and the applicable rate for the desired distribution. Step-up payments, pension payments and the appropriate B-form shall be due within fifteen (15) days after the step-up release.

5. *Subsequent Rights Periods:* The Employer may license the program for subsequent three-year broadcast periods upon payment to the Musicians of 25% of the original rate.
6. *One Broadcast Option:* payment of the one broadcast option rate (81.5% of the applicable per-minute rate) entitles the Employer to license the program for one broadcast (unlimited plays for one week) on PBS, cable and/or foreign television. It shall not entitle the Employer to make a CD or audio-only download.

Step-Up: The Employer can step up to unlimited broadcast for three (3) years in one or more foreign countries, unlimited foreign countries, non-standard (cable) television or national public television by paying the difference between the rate paid and the applicable rate for the desired distribution. Step-up payments, pension payments and the appropriate B-form shall be due within fifteen (15) days after the step-up release.

#### **C. Additional Rights – Full Price Television Bonus**

Payment of the per-minute rates for standard television, non-standard (cable) television or unlimited foreign countries shall entitle the Employer to release the program in the following additional formats without additional up-front payments: CD, audio download, audio streaming, DVD, audio-visual download, audio-visual streaming and all other audio (other than radio) and audio-visual formats. Such products will be subject to revenue participation (including tier payments where relevant). The rights period for streaming or similar uses shall be the same as the rights period for standard television, non-standard (cable) television or unlimited foreign television (i.e., three (3) years). The “Full Price Television Bonus” set forth in this provision does not apply to projects to which the New Projects Discount pursuant to XII.D. applies, nor to any projects under the Side Letter Regarding Audio and Audio-Visual Recording with Non-Classical Featured Artists.

#### **D. New Projects Discount**

If the Employer has not made a national television program within the last ten (10) years, it shall be entitled, upon secret ballot approval of the CBA bargaining unit, to make a national television program upon payment of 25% of the applicable per-minute rates. The “Full Price Television Bonus” set forth in XIII.C. above does not apply to projects under this section XIII.D. The New Projects Discount set forth in this section XIII.D. does not apply to any projects under the Side Letter Regarding Audio and Audio-Visual Recording with Non-Classical Featured Artists.

#### **E. Definitions**

1. **Standard Television:** Standard (free) television shall mean the remote transmission of video and audio signals comprising a schedule of programming intended for and capable of reception on one or more channels of television receivers utilized by

the ultimate consumer for viewing such video and audio signals, which transmissions originate from outside the place (or distant from the location of portable television receivers) where such television receivers are located and which video and audio signals are transmitted by means of over-the air VHF or UHF transmissions, satellite, cable or any other transmission means known or hereafter devised without a charge being made to the viewer by the telecaster for the right to receive and view such transmission.

2. National Public Television: Standard television on a public television network.

3. Commercial Television: Standard television on a commercial network. "Olympics-type programs" and programs broadcast on commercial television are not covered by this Agreement and must be made and broadcast pursuant to the applicable Federation agreement for commercial television.

4. Non-Standard Television: Non-Standard Television shall be defined as all forms of television exhibition other than Standard Television, whether now testing or developed in the future and however transmitted or delivered, including broadcast, satellite, and terrestrial microwave transmission, cassette and disc transmission, coaxial cable transmission, and Internet transmission. Non-Standard Television shall include, but not be limited to all transmissions on: basic cable and pay cable; over-the-air "pay" subscription television (STV) (except during such portions of the day, if any, as is broadcast on a free basis, as Standard Television), direct broadcast satellite (DBS), master antenna (MATV), multipoint distribution system (MDS), small antenna television system (SMATV); and transmissions via Non-Standard Television delivery systems to closed-circuit television systems such as hotel, motel or hospital rooms, educational institutions and military locations. Non-Standard Television transmission shall include all of the foregoing whether such transmission is on a subscription, pay-per-view, license, rental, sale, free or other basis. Non-Standard Television shall also include so-called "drop in" and "low power" VHF or UHF stations or VHF "limited facility" stations if these are not available to the viewer without charge.

## **XIV. REGIONAL TELEVISION**

### **A. Rates**

Musicians shall be paid the greater of:

1. The established local rate, if any, for either a local or regional television broadcast; or
2. \$37.87 per hour of finished product, with a two (2) hour minimum.
3. Pension Contributions: The regional television payment shall be considered to be scale wages and the Employer shall make pension contributions on them to the American Federation of Musicians and Employers' Pension Fund as provided in Article XXII.
4. Payments to Musicians, payments to the American Federation of Musicians and Employers' Pension Fund, and the appropriate B-form shall be due within fifteen (15) days of program release.

### **B. Rights**

Payment of the above rates entitles the Employer to license the program for unlimited broadcast for three (3) years on regional television. The simultaneous streaming of Regional Television programs on each local television station's website is permitted under the terms of this Agreement with no additional payment to Musicians.

### **C. Subsequent Rights Periods**

The Employer may license the program for subsequent three-year broadcast periods upon payment to the Musicians of 25% of the original rate.

### **D. Step Up**

Payment of the difference between the original regional rate and the applicable per-minute rate in Article XIII for national television or upfront fee for Multi-Platform Release in Article X shall entitle the Employer to license the program in accordance with the limits in Articles X or XIII, respectively. Step-up payments, pension payments and the appropriate B-form shall be due within fifteen (15) days after the step-up release.

### **E. Definition of Regional Television**

Regional television broadcasts shall be defined as the transmission or exhibition of audio-visual product emanating and/or broadcast from within the geographical boundaries of the Employer's Designated Market Area ("DMA"), as defined by the Nielsen Company on August 1 annually ("Employer's DMA") and expanded either:

1. Statewide in the Employer's home state, or
2. to include the DMAs contiguous to the Employer's DMA.

## **XV. REHEARSAL PROVISIONS FOR AUDIO-VISUAL PRODUCTS**

The following provisions govern rehearsal for all audio-visual projects including National and Foreign Television (Article XIII), Regional Television (Article XIV) and all other Non-Television Audio-Visual Products (Article X).

### **A. Audio Visual Capture At Rehearsals**

There shall be no audio-visual capture at rehearsals for use on audio-visual products made under this section, except that if there is to be only one performance of the concert, opera or ballet performance being recorded, then there may be audio-visual capture at the last dress rehearsal before the captured performance. If there are to be multiple performances at different halls, but no more than one performance per hall, then there may be audio-visual capture for use on audio-visual products either at all performances, or at one performance and the last dress rehearsal for that performance.

### **B. Working Tapes**

Notwithstanding Paragraph A. above, the final dress rehearsal may be captured solely for test blocking, scratch tape, working tape or sound test purposes ("working tapes"). The Employer shall require the audio-visual producer to provide the musicians with notice of intent to make such tapes. The Employer shall require the Producer to guarantee that no such tape shall be edited into the finished product nor used for any other purpose except those set forth in this paragraph. If any portion of the working tape is edited into the final product, the Employer shall pay a penalty of \$100 to each Musician.

### **C. Rehearsal Character; Overtime**

Any rehearsal captured under Paragraph A. or B. above must retain its character as a dress rehearsal for the live performance, and shall not be subject to the direction of the audio or audio-visual recording producer or sound engineer. If a rehearsal is captured pursuant to these provisions, and the rehearsal goes into overtime, there may be no capture during the overtime unless, in addition to the normal overtime payment, the Musicians are also paid for a patch session pursuant to XVIII.B. (Special Calls and Patch Sessions for Audio-Visual Product).

### **D. Concert Dress**

Musicians may be required to wear concert dress for a rehearsal captured pursuant to Paragraph A. or B. above, but if concert dress is required, each Musician shall receive additional compensation in the amount of \$50.00.

## **XVI. AUDIO-VISUAL EDUCATIONAL RELEASES**

### **A. Eligible Releases**

An institution may create and release educational programming for Pre-K through 12 classroom-based uses, and for distribution to home schoolers and college undergraduates in pursuit of a degree program, pursuant to the provisions in this section. Except for “Young People’s Concert” content (i.e., capture of a live performance for school children), the distribution of such educational programming shall be via closed-circuit, internet with password protected entry, internet2 or other technologies designed to protect the work for classroom educational use. The provision of a physical DVD, marked as not for sale, to an educational institution for classroom use, is covered by this section.

### **B. Capture**

Capture is limited to one (1) or two (2) performances.

### **C. Rates**

- a. Musicians shall be paid 2% of weekly scale (16% of per-service performance scale), with a minimum payment of \$39.02 for the creation and distribution of a program of up to forty-five (45) minutes.
- b. Musicians shall be paid 2.5% of weekly scale (20% of per-service performance scale), with a minimum payment of \$44.60 for the creation and distribution of a program of up to sixty (60) minutes.
- c. Musicians shall be paid 3% of weekly scale (24% of per-service performance scale), with a minimum payment of \$53.51 for the creation and distribution of a program of up to ninety (90) minutes.
- d. Notwithstanding the rates set forth in C.a-c. above, for no more than two separate projects during each year of this Agreement, the Employer may elect the following modified rate structure: no up-front payment for a program of forty-five (45) minutes or less, or an up-front payment of 2% of weekly scale (16% of per-service performance scale) with a minimum payment of \$39.02 for a program of more than forty-five (45) minutes. The allowable distribution period for such programs shall be seven (7) years. The rates set forth in C.a.-c. above, and the rights period set forth in F. below, shall apply to educational releases other than those made pursuant to this provision.



**D. Pension Contributions**

Educational audio-visual payments shall be considered to be scale wages and the Employer shall make pension contributions on them to the American Federation of Musicians and Employers' Pension Fund as provided in Article XXII.

**E. Payment Due Dates and Reporting**

Payments to the Musicians, payments to the American Federation of Musicians and Employers' Pension Fund, and the appropriate B-form shall be due within fifteen (15) days after the final taping.

**F. Rights**

The Employer shall be entitled to unlimited classroom distribution of the product for ten (10) years.

**G. Step Up**

The Employer may release the product in other forms covered by this Agreement upon payment of the difference between the educational rate paid and the applicable rate for the product under this Agreement. Step-up payments, pension payments and the appropriate B-form shall be due within fifteen (15) days after the step-up release.

**XVII. DOCUMENTARIES, CLIP PROGRAMS, COMPILATIONS**

New or existing audio-visual material may be used for documentaries, clip programs or compilations under the provisions of this section. A "Documentary," "Clip Program" or "Compilation Program" shall be defined as a program created from new and/or existing A-V Product extracted from one or more other programs for the purpose of including that material in a new product that is primarily informational.

**A. Use of Five (5) Minutes or Less**

1. The Employer may use a maximum aggregate of five (5) minutes or less of audio-visual material, created under this Agreement or predecessor agreements, for use in a clip, compilation or documentary program with no additional payment to the Musicians.
2. For new audio-visual material created under this Agreement, the Employer may capture a maximum of forty (40) minutes of any rehearsal or concert from which a maximum of five (5) minutes may be used without payment.

**B. Use of Thirty (30) Minutes or Less**

1. The Employer may use a maximum aggregate of thirty (30) minutes or less of audio-visual material created under this Agreement or predecessor agreements, for use in a clip, compilation or documentary program, upon payment to Musicians as provided in B.3. below.
2. For new audio-visual material created under this Agreement, the Employer may capture a maximum of one (1) hour at each of two (2) services.
3. Each Musician who was paid for the original program, who performed on an archival recording used, or who participates in the capture of the new program shall receive a payment based on the number of minutes of the Musician's participation in the final product times the standard television multi-capture rate in effect at the time the program is released. Creation of this product does not require subsequent use payments.
4. Documentary, clip and compilation payments shall be considered to be scale wages and the Employer shall make pension contributions on them to the American Federation of Musicians and Employers' Pension Fund as provided in Article XXII.
5. Payments to Musicians, payments to the American Federation of Musicians and Employers' Pension Fund, and the appropriate B-form are due within fifteen (15) days of the final capture, or in the case of archival use, within fifteen (15) days of the decision to use the archival material.

**C. Use of More than Thirty (30) Minutes**

Documentary, clip or compilation programs that include more than thirty (30) minutes of Musician participation shall be treated as television or non-television audio-visual product and shall be covered by the applicable provisions of this Agreement.

## **XVIII. SPECIAL CALLS AND PATCH SESSIONS FOR AUDIO-VISUAL PRODUCT**

### **A. Special Calls**

1. For each orchestra service that has been called solely for rehearsal for an audio-visual product, or for audio and/or audio-visual capture for an audio-visual product, where the Musicians are not credited with a rehearsal or performance fee under the Local CBA (“Special Call” or “Studio Session”), each Musician shall be paid the greater of \$275.94, or 25% over the per-service rate in the Local CBA, for up to a three-hour service.
2. There shall be rest periods of not less than an average of ten (10) minutes per hour away from the stand. No Musician shall be required to work more than sixty (60) consecutive minutes without a rest period of at least ten (10) minutes except during performances, or simulated performances, where the requirements of musical continuity dictate that a longer period of time is necessary, in which case the subsequent break period shall be no less than fifteen (15) minutes.
3. There shall be no more than two (2) Special Calls permitted in any one (1) day with at least a one (1) hour break between the end of the first Special Call and the beginning of the second Special Call.
4. The Employer shall provide Musicians with notice of its intent to schedule a Special Call in accordance with the notice provisions of the CBA.
5. A Special Call shall not be canceled, postponed or otherwise rescheduled less than seven (7) days prior to its scheduled date, except in the case of an emergency with the consent of the Office of the Federation President.

### **B. Patch Sessions**

1. In the event the Employer requires a Musician to remain following the conclusion of a live service at which audio-visual material is captured for the purpose of re-taping a portion or portions, that Musician shall receive overtime pay, pro-rated in 15-minute increments, at time and one-half the Special Call rate, computed from the time that the performance ends. Within ten (10) minutes after the Concertmaster has left the stage, the Employer shall advise the Musicians whether a patch session shall take place and, if so, the proposed length of that patch session. In the event that a patch session is called, the Musicians shall be guaranteed such overtime pay for the time periods as follows:
2. No patch session shall exceed two (2) hours for a symphony orchestra, or three (3) hours for an opera or ballet orchestra, and any work after midnight shall be compensated at overtime rates, pro-rated in fifteen (15)-minute increments, at double the Special Call rate. There shall be five (5) minutes of break during every fifteen (15) minutes of work during patch sessions.

3. If re-takes of musical performances are captured at a regular concert service in which audio-visual material is taped, each Musician shall be paid a 15-minute “patch session” payment, and the duration of the Regular Service may be extended for up to 15 minutes. If such regular concert extends into overtime under the terms of the Local CBA due to these interruptions, then each Musician shall be paid either the 15-minute patch session payment or the applicable overtime payment under the Local CBA, whichever is greater, for each 15-minute segment of overtime.

**C. Pension Contributions**

Special call and patch payments shall be considered scale wages and the Employer shall make pension contributions on them to the American Federation of Musicians and Employers’ Pension Fund as provided in Article XXII.

**D. Payment Due Dates and Reporting**

Payments to Musicians, payments to the American Federation of Musicians and Employers’ Pension Fund, and the appropriate B-form are due within fifteen (15) days of the final taping.

## **XIX. ANNUAL MEDIA COMMITMENT PAYMENT**

### **A. IMA Media Bulk Discounts**

An Employer shall be eligible for the following discounts on applicable IMA rates in return for the Employer's election and payment of the following IMA Annual Media Commitment Payments:

<b>Annual Commitment</b>	<b>Minimum Payment</b>	<b>Discount</b>
3% of base annual salary	\$ 1,045.00	5.25%
4% of base annual salary	\$ 1,393.33	10.50%
5% of base annual salary	\$ 1,741.67	16.00%

### **B. Eligible IMA Rates**

The applicable Discount set forth above may be applied to IMA upfront rates, including both Multi-Platform Release rates and individual platform audio and audio-visual rates, other than audio or audio-visual patch session rates, special calls or radio broadcasts at the discounted rate provided in Article XI.A.2. For any patch sessions or special calls, full IMA rates must be paid.

### **C. Rights**

For all media to which the Discount is applied, the rights shall be identical to the rights set forth in the relevant IMA a la carte provision (*e.g.*, radio rights shall be those set forth in Article XI.B).

### **D. Capture**

The rules regarding audio and audio-visual capture shall be the rules set forth in the applicable provisions of the IMA. Payment of the Annual Media Commitment Payment does not entitle the Employer to more or different capture.

### **E. Additional Audio and Audio-Visual Products**

To the extent that the Musicians perform IMA work in excess of the Annual Media Commitment Payment made by the Employer, the applicable discount rate shall continue to apply.

### **F. Pension**

The Annual Media Commitment Payment shall be considered scale wages and be subject to pension contributions in accordance with Article XXII.

## **G. EMG**

An EMG in existence as of the date of this Agreement may be used to pay the Annual Media Commitment Payment. If an Employer has an EMG in existence as of the date of this Agreement and desires to make the Annual Media Commitment Payment, the amount of the EMG (if any) not already stated as salary shall be included as part of the base annual wage for the purpose of calculating the Annual Media Commitment Payment.

## **H. Payment and Reporting Terms**

The Annual Media Commitment payments in Article XIX.A. shall be paid to each Musician on a pro-rata basis over the course of the contract year as part of the employer's regular payroll. Payments due each Musician for electronic media services at the applicable IMA Discount rates shall be offset against the Annual Media Commitment payment. If during the course of any contract year total payments due to each Musician for electronic media services exceed the Annual Media Commitment payment, any such excess shall be paid to each Musician within 15 days of the time it is earned.

## **I. Revenue Participation**

Musicians shall be entitled to participate in any revenue derived from the exploitation of products produced from material captured pursuant to the Annual Media Commitment in accordance with the provisions in Article XXI (Revenue Participation).

## **J. Per Service Orchestras**

A per service orchestra is not eligible to elect the Annual Media Commitment Payment unless it guarantees its full season of services to a Musician core as defined in Article I.B.4 (Scope of Agreement – Per Service Orchestra Limitations). In an eligible per service orchestra that makes such an election, the Annual Media Commitment Payment shall be paid to all Musicians on the roster. It shall consist of the applicable percentage in Article XIX.A. above of the core Musician's base per-performance scale times the number of guaranteed services, with a minimum payment of \$1,045.00 (3%), \$1,393.33 (4%), or \$1,741.65. respectively.

## **K. Substitutes and Extras**

When a substitute or extra Musician is employed in the creation of media product, that Musician shall be compensated at 100% of the rate provided for in this agreement or the applicable AFM agreement. Substitute and extra Musicians shall not receive an Annual Media Commitment Payment or portion thereof. Provided, however, that a substitute or extra Musician engaged on a full season basis at terms equivalent to those of a regular contracted member of the Orchestra shall be

compensated in the same manner as the regular Musicians, including Annual Media Commitment payments and commensurate discount rates for media services.

## **REPORTING AND REVENUE PARTICIPATION**

### **XX. REPORTING**

Compensation and pension contributions paid under this Agreement shall be reported to the Local Union, the Federation, and the American Federation of Musicians and Employers' Pension Fund on the B-form provided by the Federation.

### **XXI. REVENUE PARTICIPATION**

#### **A. Revenue Participation for Single Projects**

All media projects created and exploited pursuant to Sections X through XVII of this Agreement (i.e., national radio and wireless audio broadcast, live recording to CDs and downloads, other audio products, national television, regional television, DVDs, theatrical release, streaming, downloading and all other non-television audio-visual products, educational products and documentaries) shall be subject to revenue participation.

1. For symphonic projects, the Musicians' revenue participation shall be 55% of the Employer's Gross Receipts from the project. Gross Receipts is defined in A.3. below.
2. For opera projects or ballet projects, if the Employer has a revenue sharing agreement with one or more other bargaining units, the Musicians' revenue participation shall be 21% of the Employer's Gross Receipts; otherwise it will be 55% of the Employer's Gross Receipts.
3. Employer Gross Receipts shall be the Employer's gross receipts from exploitation of the project on all platforms, minus the Musicians' costs paid by the Employer for the project. When a recording made pursuant to this Agreement is broadcast on radio or television, sold on CDs or DVDs, sold via audio or audio-visual downloads, exploited by other means on the Internet, shown in theaters, or exploited in any other way, the gross receipts to the Employer from the project will include any and all revenue from all such exploitation including license fees, sales, royalties, theatrical release ticket sales, shares of advertising, subscription or other revenue or any other receipts. Gross Receipts subject to Revenue Participation will not include any statutory license fees for digital transmissions, required pursuant to 17 U.S.C. Sec. 114, received by the Employer or the Musicians, whether as a Featured Artist and/or the Copyright Holder of an audio recording, from SoundExchange or other statutory license collection agencies.

4. Until June 30, 2024, if the Employer enters into or renews a licensing arrangement with a third party (“Third Party Licensee”) which allows that Third Party Licensee to exploit the recording by entering into direct licenses with music services (“Music Service Licensees”) for digital transmissions otherwise eligible for the statutory license pursuant to 17 U.S.C. Sec. 114, where the license between the Third Party Licensee and the Music Service Licensee (“Direct Digital Streaming License”) does not provide that 50% of the total royalties and other compensation payable by the Music Service Licensee in respect of the transmissions shall be paid to SoundExchange and passed on to the artists on the recording pursuant to the provisions of 17 U.S.C. Sections 114(g)(B), (C) and (D) then 55% of any revenue reported to and received by the Employer from such licensing arrangement shall be shared from the first dollar with the Musicians as part of the revenue sharing package.

After June 30, 2024, the Employer may not enter into or renew a licensing arrangement with a third party (“Third Party Licensee”) which allows that Third Party Licensee to exploit the recording by entering into direct licenses with music services (“Music Service Licensees”) for digital transmissions otherwise eligible for the statutory license pursuant to 17 U.S.C. Sec. 114, unless the license between the Third Party Licensee and the Music Service Licensee (“Direct Digital Streaming License”) provides that 50% of the total royalties and other compensation payable by the Music Service Licensee in respect of the transmissions shall be paid to SoundExchange and passed on to the artists on the recording (including the Musicians as featured artists) pursuant to the provisions of 17 U.S.C. Sections 114(g)(B), (C) and (D). Such payments shall be the sole payments to which featured and non-featured artists are entitled by virtue of the digital transmissions under the Direct Digital Streaming License, and any payments made to the Employer by virtue of those digital transmissions shall not be included in the Employer’s gross receipts under Article XXI.A.3 or XXI.B.2.

5. Allowable Musicians’ costs shall be limited to those required pursuant to this Agreement (e.g. upfront fees, pension, health and welfare, doubling, etc.). Allowable Musicians’ costs shall not include overhead, allocated staff costs or similar costs to the Employer. Allowable Musicians’ costs shall not include EMGs if the EMG is included within the Musicians’ salary rather than stated separately. Allowable Musicians’ costs shall be determined by the Orchestra Committee and the Employer jointly.

6. There shall be no cross-collateralization among projects.

7. The Musicians’ revenue participation shall be divided evenly among the Musicians paid for the project.

8. All revenue participation payments shall be inclusive of a thirteen and two-tenths percent (13.2%) contribution to the American Federation of Musicians & Employers Pension Fund. Thus, 88.34% of revenue participation payments shall be treated as wages, and the remaining 11.66% shall be contributed into the AFM&EPF on behalf of each such Musician.



9. The Orchestra Committee shall review revenue reports and shall meet and confer regarding any issues that arise with regard to revenue participation.

## **B. Revenue Participation Accounting**

1. The Employer shall calculate the Revenue Participation payments due under A. above for each twelve (12)-month period from September 1 to the following August 31 (“Accounting Year”) for which it has gross receipts as described in A.4. above. The calculation shall be reported on a statement provided to each Musician, the Federation, the Local and the Orchestra Committee. The payments and the statement shall be due by November 30 immediately following the Accounting Year.
2. For single projects, the statement shall specify the gross receipts to the Employer from each platform or source for each project, the allowable direct cost deductions for each project, the net earned revenue to the Employer for each project, the calculation of the Musicians’ share of the net earned revenue for the project, the number of Musicians entitled to Revenue Participation for the project, and the calculation of the individual Musician share for the project.
3. Revenue Participation payments shall be due to a Musician during his or her lifetime. After the Musician’s death, Revenue Participation payments shall be due to the Musician’s beneficiary for the life of the beneficiary. After the death of the beneficiary, the Musician’s individual share shall be allocated, as determined by the Orchestra Committee, either to a local voluntary supplemental fund for retired musicians or the AFM-EPF as an unallocated contribution unattached to benefits payable to any particular participant and conditional on such additional contributions not triggering an additional withdrawal liability.
4. If the Revenue Participation payment due to any Musician on November 30 for all projects is less than ten dollars (\$10.00), the Employer may carry that Musician’s payment forward to successive Accounting Years until the accumulated Revenue Participation payment due that Musician is equal to or greater than ten dollars (\$10.00).

## **C. Right to Examine Books**

1. If the Employer fails to provide the revenue statement required by B. above within sixty (60) days of the due date, the Federation (or its designated accounting firm) shall have the right to examine the Employer’s books and records related to gross receipts, costs and net earned revenue.
2. At any time within three (3) years after a revenue statement is provided, the Federation (or its designated accounting firm) shall have the right to examine the Employer’s books and records related to gross receipts, costs and net earned revenue.

3. Such examinations shall be at the Employer's expense. They shall be made during the Employer's usual business hours at the location where the Employer maintains the books and records.

4. The Federation acknowledges that the Employer's gross receipts, costs and net earned revenue constitute confidential trade information, and shall not communicate such information to others or use that information other than in pursuit of the enforcement of this Agreement.

## **GENERAL PROVISIONS**

### **XXII. PENSION CONTRIBUTIONS**

All media payments (up-front, step-up, tier, patch, special call, buffet, etc.) shall be considered to be scale wages and the Employer will make 13.2% pension contributions on them to the American Federation of Musicians and Employers' Pension Fund (the AFM-EPF).

In the case of revenue sharing, 88.34% of any revenue sharing amount payable to any Musician will be treated as scale wages, and the remaining portion (i.e., 13.2% of the scale wages (11.66% of the total revenue sharing amount)), will be treated as a pension contribution payable on behalf of the Musician to the American Federation of Musicians and Employers' Pension Fund. The Employer agrees to be legally bound to the terms and conditions of the Agreement and Declaration of Trust establishing the American Federation of Musicians and Employers' Fund, as amended from time to time, which is incorporated by reference into the Agreement.

### **XXIII. HEALTH AND WELFARE**

Health and Welfare contributions shall be paid only on behalf of each individual Musician covered by this Agreement for whom the Employer does not contribute to any other Health and Welfare Fund. With respect to each such musician, the Employer shall make contributions to his/her Local Union Health and Welfare Fund (and, commencing thirty (30) days after notice in writing, to any other lawful fund as may be established hereafter by any other Federation Local) in the following amounts: \$18.00 per day (maximum of \$90.00 per week). With respect to any service performed hereunder by a musician whose Local has no such fund established, the Employer shall pay the aforesaid applicable amounts of money directly to each individual musician.

## **XXIV. ELECTRONIC MEDIA GUARANTEE (EMG)**

Subject to any restrictions existing in the Local CBA, an EMG may be used to pay up-front payments and per-minute rate payments pursuant to this Agreement. An EMG in existence as of the effective date of this Agreement may be used to make Annual Media Commitment Payments. No EMG may be used to make tier payments or revenue participation payments.

If the Employer has an EMG in existence as of the date of this Agreement and desires to make an Annual Media Commitment Payment, the amount of any EMG not already stated as salary shall be included as part of base annual wage for the purpose of calculating the Annual Media Commitment Payment.

## **XXV. DOUBLING**

Musicians shall receive a payment for doubling whenever they provide such services covered by this Agreement. Doubling payment shall be in accordance with the following provisions:

- A. If there is a doubling provision in the Local CBA or individual contract applicable to performances covered by that Agreement, then the Musicians shall receive one (1) additional doubling payment (in the same amount) for each final new audio product.
- B. If there is no doubling payment provision of any nature in CBA, then the Musicians shall receive a doubling payment in the amount of 20% of the individual service scale.

## **XXVI. CARTAGE**

Cartage shall be paid under the terms of the Local CBA.

## **XXVII. SUBSTITUTE AND EXTRA MUSICIANS**

Any Musician, whether or not a regular member of the Orchestra, whose services are captured or used in the final product shall be entitled to the same payments and benefits as a regular Musician, and to revenue participation as set forth in Article XXI (Revenue Participation). In the event that the Employer elects the Annual Media Commitment Payment option (Article XIX), substitutes and extras shall be paid in accordance with the Annual Media Commitment Payment option provisions regarding substitute and extra Musicians.

## **XXVIII. MUSICIANS TO BE PAID**

A. In the case of audio and audio-visual recordings made pursuant to this Agreement and for archived audio recordings, all current members of the Orchestra (or, in the case of a “per service orchestra,” all Musicians on the roster) shall be paid (except that members of the Orchestra or Musicians on the roster who are on sabbatical or long-term disability, or who opt out of performing in the recorded concert after having received notice reasonably in advance of the recording project, shall not be paid). In the case of archived audio recordings, all Musicians who performed on the recording (including subs and extras) who are not current members of the Orchestra at the time of release also shall be paid. In the case of archived audio-visual recordings, all Musicians who were on the roster at the time the archive was created, and any subs and extras who performed on the recording, shall be paid. In all circumstances, revenue participation payments shall be divided evenly among the same Musicians as those paid pursuant to this provision. Payment will be made to a deceased Musician’s estate or beneficiary under the applicable pension plan. At such time as payments under a Musician’s applicable pension plan cease, funds due to that Musician will instead be made, as determined by the Orchestra Committee, either to a local voluntary supplemental fund for retired Musicians or the AFM-EPF as an unallocated contribution unattached to benefits payable to any particular participant and conditional on such additional contributions not triggering an additional withdrawal liability.

B. In the case of works scored for no more than 32 musicians, only the Musicians who perform on the recording will receive payments, provided that the recording has Orchestra Committee approval. This provision shall not be used to allow a reduction in instrumentation of a work originally created for more than 32 musicians.

C. In the case of a salaried (not a per-service) symphony orchestra where members of the Orchestra are performing subcontracted services for an opera or ballet company, only those Musicians actually performing these services shall be paid under the terms of this Agreement. If a permanent member of a symphony orchestra is assigned to a split symphony orchestra which is sub-contracted as above, that permanent member shall be paid under the terms of this Agreement, even if that permanent member is not required to perform.

## **XXIX. ORCHESTRAS WITH SALARIED AND PER SERVICE MUSICIANS**

If an Orchestra includes both salaried and per-service Musicians, the per-service Musicians shall be paid the same amount as the salaried Musicians wherever the applicable rate is based on a percentage of weekly scale. Rates based on a percentage of per-service performance scale apply only where the entire Orchestra is paid on a per-service basis.

### **XXX. FORBIDDEN USES OF RECORDINGS**

A. Audio or audio-visual products created and/or released pursuant to this Agreement shall not be used in lieu of the employment of Musicians as accompaniment in connection with live performances, or to replace Musicians who are engaged in a strike or subject to a lockout.

B. Audio or audio-visual product created and/or released pursuant to this Agreement shall not be used by the Employer as evidence in any disciplinary proceeding that affects the employment status of any Musician covered by this Agreement.

### **XXXI. MUSIC PREPARATION**

In the event a Musician performs music preparation work (arranging, orchestrating, copying or librarian services) for media released under the terms of this Agreement, that Musician shall receive music preparation payment under the terms and conditions of the appropriate Federation agreement. However, if the project is a premiere performance of an original composition commissioned for a symphony, opera, or ballet institution that is exploited under the terms and conditions of this Agreement without any modifications to the original preparation, the music preparation payment to the Musician shall be identical to the payment to a Musician under the relevant terms of this Agreement.

### **XXXII. NOTICE TO MUSICIANS OF RECORDING**

Prior to the first audio or audio-visual capture for a project, the Employer shall notify the Musicians of any capture pursuant to this Agreement in accordance with the notice provisions in the Local CBA, but in no case shall notice be less than one week before the first capture. When a news or promotional opportunity arises less than one week before the first capture, notice to Musicians shall be given as soon as practicable, but in any event shall be given in accordance with the notice provisions in the Local CBA or past practice. Notice requirements for late-arising news and promotion may be waived by the Orchestra Committee.

### **XXXIII. STEP-UP CALCULATIONS**

Step-up payments shall be calculated by subtracting the up-front payment received by each Musician from the current applicable rate for the step-up use.

## **XXXIV. GRIEVANCE AND ARBITRATION**

### **A. Scope of Grievances**

Any dispute or controversy of any kind that may arise between any Musician(s) or the Federation and the Employer arising out of or in connection with this Agreement (including but not limited to disputes concerning the meaning, interpretation, application or enforcement of the provisions set forth in this Agreement) shall be resolved exclusively through the procedure set forth herein.

### **B. Initiation of Grievances**

Within sixty (60) calendar days after the occurrence of the event that gave rise to the grievance or after the date that the aggrieved party reasonably could have learned of that event (whichever occurs later), a grievance shall be submitted in writing to the Employer by the Federation on its own or on behalf of the individual Musician(s) or to the Federation by the Employer.

### **C. Informal Meeting**

Within fifteen (15) calendar days from receipt of the grievance, a representative designated by the Federation and a representative designated by the Employer shall meet to discuss the matter and attempt to resolve the dispute informally.

Written Answer: If the parties are unable to resolve the dispute at the informal meeting, the party against whom the grievance is filed shall submit a written answer to the grievance within fifteen (15) calendar days after such meeting.

### **D. Demand for Arbitration**

If either party (the Federation or the Employer) is not satisfied with the answer, or if an answer is not submitted within the time set forth in (C) above, that party may elect to submit the dispute to arbitration by notifying both the American Arbitration Association ("AAA") and the other party simultaneously in writing within thirty (30) calendar days after the date the answer was due. The written demand for arbitration shall include a copy of the grievance that was filed and the answer, if any.

### **E. Choice of Arbitrator**

Upon receipt of the demand for arbitration, the AAA shall promptly provide the parties a list of eleven arbitrators experienced in labor cases and the parties then shall select an arbitrator using the alternate strike method.

#### **F. Hearing**

The hearing shall be held on thirty (30) working days' notice. The hearing and pre-hearing proceedings shall be conducted pursuant to the AAA Labor Arbitration Rules. The hearing shall be conducted in the city where the dispute arose unless the parties mutually agree to another location. The arbitrator's award shall be rendered within thirty (30) calendar days of the close of the hearing or thirty (30) calendar days after the submission of post-hearing briefs, where applicable. The award of the arbitrator shall constitute a final binding resolution of the dispute with respect to all parties – the individual Musician(s), the Federation and its Locals, and the Employer and its agents.

#### **G. Arbitrator's Authority**

The Arbitrator shall have the power and authority to issue an award that he/she may deem appropriate, including but not limited to the authority to remedy any violations. The arbitrator, however, shall not have the power or authority to amend, add to, or subtract from, or alter in any manner the provisions of this Agreement.

#### **H. Costs**

Fees and expenses of the arbitrator and the proceedings (e.g., witnesses, counsel, court reporter) shall be borne equally by the parties; provided, however, if the arbitrator concludes that the position of either party is frivolous, he/she may award fees and expenses to the prevailing party, including reasonable attorney's fees.

#### **I. Extension of Time Limits**

Any of the time limits set forth may be extended by mutual agreement in writing.

## **XXXV. INTENTIONALLY LEFT BLANK**

## **XXXVI. RELATIONSHIP TO LOCAL CBA**

Except as specifically grandfathered herein, the Local CBA may not include any provision that is less favorable to Musicians than any provision of this Agreement, and any such less favorable provision shall be deemed null and void.

## **XXXVII. EFFECT OF NONRENEWAL OF AGREEMENT**

Any contract in existence at the termination of this Agreement (whether such termination is caused by expiration, breach, or otherwise), made and entered into by the Employer with the Local Union, Musicians, licensed booking agents, personal managers, producers, or others, for the employment and rendition of services covered by this Agreement, shall not impose any obligation on the part of Musicians represented by the Federation to render further musical services for the Employer unless this Agreement is renewed or a new one entered into permitting the same. Any Revenue Participation Payments or other payments due as a result of any material produced during the term of this Agreement shall continue to be due and payable regardless of the termination or non-renewal of this Agreement. Any material produced during this term may be marketed in supplemental markets, regardless of the termination or non-renewal of this Agreement.

## **XXXVIII. EXHIBITS**

This Agreement is supplemented by Exhibit C (Private Use Tape Agreement), Exhibit D (Third Party Promotional Use Agreement), and Exhibit E (Non-Classical Featured Artists) attached hereto.

## **XXXIX. TERM OF AGREEMENT**

The term of this Agreement shall be from December 1, 2023 to June 30, 2026. The terms of the expired Integrated Media Agreement or other AFM Agreements applicable to Employers are extended through the date of ratification of this Agreement.



AMERICAN FEDERATION OF  
MUSICIANS OF THE UNITED  
AND CANADA

Name of Orchestral Institution

\_\_\_\_\_  
Date: \_\_\_\_\_

\_\_\_\_\_  
Date: \_\_\_\_\_

**EXHIBIT A: INTENTIONALLY LEFT BLANK**  
**EXHIBIT B: INTENTIONALLY LEFT BLANK**

## EXHIBIT C: PRIVATE USE TAPE AGREEMENT

In consideration of the mutual covenants herein contained and of other good and valuable considerations, the undersigned conductor, composer, dancer, choreographer, stage/set designer, stage director, musician or soloist, hereinafter referred to as "Artist," or opera or ballet company, hereinafter referred to as "Entity" hereby agrees with the undersigned symphony, opera or ballet orchestra, hereinafter referred to as "Licensor," that an audio or audio-visual recording of the Artist's performance of

\_\_\_\_\_,  
recorded on \_\_\_\_\_ (dates) is hereby being made available solely for the "Private Use" of Artist or Entity under the following terms and conditions:

1. "Private Use" as defined in this Agreement shall be limited to the Artist's personal study, auditions, grant applications or archival storage or the Entity's archival, study or grant applications.
2. Artist or Entity warrants not to sell, license, copy or distribute the recording in any physical or digital format or use the recording for any purpose other than the approved "Private Use."
3. Should the recording ever be utilized by Artist or Entity for any purpose(s) not explicitly set forth herein, including but not limited to demonstration or marketing of services or product by any group or individual, local or national broadcast, phonograph records, internet streaming or downloading, promotional spots or commercial announcements, theatrical or commercial exhibition, or background music for any type of sound or film program, the Artist or Entity shall:
  - a. Enter into and fulfill all conditions required by the appropriate agreement of the American Federation of Musicians, including, but not limited to, the payment of prevailing wages and allied fringe benefits outlined therein; and
  - b. Indemnify and hold harmless Licensor from and against all other allegations, claims, actions, suits, demands, damages, liabilities, obligations, losses, settlements, judgments, costs and expenses (including without limitation attorneys' fees and costs) which arise out of, relate to or result from any unauthorized use of the recording.

AGREED:

AGREED: LICENSOR

ARTIST/ENTITY

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Print Name

\_\_\_\_\_  
Print Name

<hr/>		<hr/>	
Address		Address	
<hr/>		<hr/>	
City	State	City	State
<hr/>		<hr/>	
Telephone		Telephone	
<hr/>		<hr/>	
Email		Email	
<hr/>		<hr/>	
Date		Date	
<hr/>		<hr/>	

## **EXHIBIT D:      THIRD PARTY PROMOTIONAL USE**

In consideration of the mutual covenants herein contained and of other good and valuable considerations, the undersigned entity, hereinafter referred to as "Licensee," hereby agrees with the undersigned symphony, opera or ballet orchestra, hereinafter referred to as "Licensor," that an audio or audio-visual recording of the Licensor's performance of

---

recorded on \_\_\_\_\_ (date) is hereby being made available solely for the Promotional Use of Licensee under the following terms and conditions:

1. No more than forty (40) minutes of Licensor's performance may be captured as audio or audio-visual content for the Promotional Uses covered by this Agreement.
2. The audio or audio-visual material captured pursuant to 1. above (or, if applicable, previously recorded material) must be edited, so that no more than five (5) minutes of Licensor's performance is distributed electronically for Promotional Uses in any format on the Internet, on radio, television or on other media outlets.
3. The name of Licensor must be clearly identified within the Promotional Use (e.g. at the outset, at the interval(s) appropriate to the piece and/or during rolling or billboarded credits, etc.), to ensure public recognition of Licensor and its connection to the use.
4. Licensee may not use Licensor's performance in a "call to action" (within the meaning of the PBS National Program Funding Standards and Practices) commercial announcement ("jingle"), or otherwise violative of the PBS National Program Funding Standards and Practices regarding identifying information for funders (as set forth at <https://www.pbs.org/about/producing-pbs/funding-standards/>).
5. Except as explicitly permitted in this Agreement, Licensee warrants not to sell, license, copy or distribute the recording of Licensor's performance in any physical or digital format or use the recording for any purpose other than the approved Promotional Use.
6. Except as expressly permitted within the limitations of paragraph 2 above, should the recording of Licensor's performance ever be utilized by Licensee for any purposes not explicitly set forth herein, including but not limited to demonstration or marketing of services or product by any group or individual, local or national broadcast, phonograph records, internet streaming or downloading, promotional spots or commercial announcements, theatrical or commercial exhibition, or background music for any type of sound or film program, Licensee shall:
  - a. Enter into and fulfill all conditions required by the appropriate agreement of the American Federation of Musicians, including, but not limited to, the payment of prevailing wages and allied fringe benefits outlined therein; and
  - b. Indemnify and hold harmless Licensor from and against all other allegations, claims, actions, suits, demands, damages, liabilities, obligations, losses, settlements, judgments, costs and expenses (including without limitation

attorneys' fees and costs) which arise out of, relate to or result from any unauthorized use of the recording.

AGREED LICENSEE:

---

LICENSEE

---

Signature

---

Print Name

---

Address

---

City State

---

Telephone

---

Email

---

Date

---

AGREED LICENSOR:

---

LICENSOR

---

Signature

---

Print Name

---

Address

---

City State

---

Telephone

---

Email

---

Date

---

## EXHIBIT E: SIDE LETTER REGARDING NON-CLASSICAL FEATURED ARTISTS



# AMERICAN FEDERATION OF MUSICIANS

OF THE UNITED STATES AND CANADA  
AFFILIATED WITH THE A.F.L.-C.I.O.

TINO GAGLIARDI  
OFFICE OF THE PRESIDENT  
1501 Broadway, 9<sup>th</sup> Floor  
New York, NY 10036

—  
(212) 869-1330, Ext. 212  
FAX (212) 764-6134

### **Integrated Media Agreement Side Letter Regarding Audio and Audio-Visual Recording with Non-Classical Featured Artists**

A. *Incorporation of Integrated Media Agreement.* This Side Letter Agreement Regarding Audio and Audio-Visual Recording with Non-Classical Featured Artists is an Addendum to the Integrated Media Agreement and incorporates its terms except as modified below.

B. *Recording with Non-Classical Featured Artists.* The following rules shall apply to electronic media projects with featured artists who are “rock,” “pop,” or other Non-Classical Featured Artists, provided that the orchestra is also billed as a featured artist:

#### (1) Audio and Non-Television Audio-Visual Recordings

- a. Up to two times per IMA contract year, the terms of Article X (Multi-Platform Release) may be applied to cover a live audio-only recording (CDs, Downloads, Streaming and/or other audio product) and/or non-television audio-visual recording (DVD, Theatrical Release or A-V Stream) with any Non-Classical Featured Artist provided that:
  - i. The ownership of the master recordings and all copyright rights in the recording are retained by the orchestra institution, and the orchestra institution warrants that it will not sell, lease, license or assign the rights to any third party.
  - ii. Notwithstanding (B)(1)(a)(i) above, the orchestra institution may enter into a pressing and distribution license with a third party distributor, at the then-current usual and customary rates and terms.
  - iii. All requirements of Article X are met, including but not limited to orchestra approval.

iv. The provisions of Article X.C (Exceptions) and X.I (Step Ups) shall not be available or apply to projects created pursuant to this Exhibit E.

b. No other live audio or non-television audio-visual recording with a Non-Classical Featured Artist may be made or exploited, except pursuant to the applicable Federation agreement or advance written permission of the Federation.

(2) Standard and Non-Standard Television

a. Up to two times per IMA contract year, the terms of Article XIII may be applied to cover an orchestra performance in a standard or non-standard television program with any Non-Classical Featured Artist. All requirements of Article XIII shall be met.

b. The Article XIII.C “Full Price Television Bonus” will not be available for projects produced pursuant to this Exhibit E.

c. No other television show with a Non-Classical Featured Artist may be made or exploited except pursuant to the applicable Federation agreement or with advance written permission of the Federation.

(3) The two-per-contract-year projects described in (B)(1) and (2) above may include releases in any audio and/or audio-visual electronic media formats paid at the applicable IMA rates (i.e. the projects may be released under the terms of B(1) and/or B(2) above), provided however that the maximum number of media projects that may be made under these provisions is a total of two per contract year. In addition, the two-per-contract year may not be carried over from one year to the next.

C. *Sports*. The provisions of this side letter do not apply to sports events, which must be done under the appropriate AFM Agreement, other than those which are explicitly within the scope and parameters of Article VIII of this Agreement.

D. *Sunset*. This Side Letter Agreement will expire on June 29, 2026.



Agreed:

AMERICAN FEDERATION OF MUSICIANS    Name of Orchestral Institution  
OF THE UNITED STATES AND  
CANADA

\_\_\_\_\_

\_\_\_\_\_

Date: \_\_\_\_\_

Date: \_\_\_\_\_