

Geographical Underrepresentation and Diversity within the EU Music Ecosystem

By SoAlive Music Conference / Flat Line Collective

Executive Summary

The European Union (EU) has stated a strong commitment to inclusion, diversity, and cultural exchange. Yet the Balkan region, referred to in this report as South East Europe (SEE), remains notably underrepresented within the European music industry, despite comprising more than 58 million people. For the purposes of this report, the term “South East Europe (SEE)” is used to designate the following eleven countries: Albania, Bosnia and Herzegovina, Bulgaria, Croatia, Greece, Kosovo, Montenegro, North Macedonia, Serbia, Romania, and Slovenia. The region continues to occupy a marginal position across key European music platforms, showcase festivals, and digital ecosystems.

This report examines the extent and patterns of underrepresentation affecting SEE artists, identifies structural disparities and systemic factors contributing to these disparities, and presents data-driven recommendations to foster more balanced and equitable representation within the European music ecosystem.

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1. Introduction

Within the progressive and democratic landscape of the European Union (EU), where inclusion, diversity, and gender balance are widely articulated as policy priorities and foundational values of the cultural and music sectors, the limited visibility of the Balkans region remains a persistent and largely unaddressed gap. Despite its rich and cultural musical output and substantial population of **over 58 million people across Albania, Bosnia and Herzegovina, Bulgaria, Croatia, Greece, Kosovo, Montenegro, North Macedonia, Serbia, Romania, and Slovenia**, the region remains largely absent from dominant European musical narratives and platforms.

This study examines the underlying reasons for this disparity by asking why such a territorially expansive and culturally diverse region remains underrepresented within the European music ecosystem. Rather than treating this absence as incidental, the report approaches underrepresentation as a structural issue shaped by historical, institutional, and industry-specific dynamics.

Adopting a data-driven, research-based approach, the report aims to identify the mechanisms that limit the visibility of SEE artists and to propose actionable pathways to address the barriers that have constrained their participation in European and global music markets.

2. Methodology

This report is based on extensive research conducted from June 2023 to January 2026, combining quantitative data analysis with qualitative insights gathered through interviews and surveys. The research engaged a broad group of artists, festival organizers, promoters, programmers, and stakeholders from the SEE region.

Data sources include regional performers' neighboring rights organizations, such as PROPHON (Bulgaria), the Organization for Collective Administration of Performers' Rights (PI – Prava Interpretatora, Serbia), CREDIDAM (Romania), and HUZIP (Croatia), as well as musicians' unions, music export offices, and promotional bodies, including We Move Music (Croatia), SIGIC (Slovenia), RAW Music (Romania), and Serbia Creates (Serbia). Insights from digital platforms, most notably gigmit, were also used to capture the scope of artist representation and market access across the region.

In addition, publicly available statistics and sector reports from organizations such as the Bulgarian Music Association (BMA), the Croatian Musicians' Union (HUG), Creative Europe Desks across the SEE region, and international statistical sources, including Eurostat, were consulted to contextualize the analysis. The study draws on 92 qualitative interviews with festival curators, music programmers, national broadcasters, musicians, and cultural representatives. These interviews were complemented by 240 survey responses, resulting in a combined sample of 332 participants. This multi-source methodology allows for a nuanced analysis of both structural conditions and lived industry experience within the SEE music ecosystem.

A critical component of the research is an impact survey conducted by the Association of Independent Music Publishers and Producers in Bulgaria (ANMIP-BG), an IMPALA member organization. Between 10 October and 5 November 2024, ANMIP-BG collected 71 survey responses to assess the effects of Spotify's 1,000-stream threshold policy on artist revenue in

the SEE region. The survey, which included independent labels with a range of catalog sizes and genres, indicates a disproportionate negative impact on larger catalogs and niche genres, including folk music. These findings provide evidence of digital-platform-related barriers that affect SEE artists' compensation and representation, underscoring the need for more inclusive streaming policies. Incorporating ANMIP-BG's findings strengthens our understanding of digital policy impacts on SEE artists and aligns with our broader examination of structural challenges within the European music industry.

Taken together, this layered methodological approach—integrating regional statistics, digital platform data, and direct stakeholder feedback—ensures that the analysis reflects both quantitative trends and qualitative realities shaping the position of SEE artists within the European music ecosystem.

The findings of this report align with, and are independently corroborated by, a study commissioned by the European Commission's Directorate-General for Education, Youth, Sport and Culture and published in March 2026. The study, conducted by a consortium led by Panteia with partners including KEA European Affairs, Vrije Universiteit Brussel, DELab—University of Warsaw, and Erasmus University Rotterdam, examines how platform practices — including algorithmic recommendations, content prioritisation, and curation — influence exposure to Europe's cultural and linguistic diversity across the music and book sectors (European Commission, 2026). Its findings provide additional institutional validation for the structural observations documented in this report.

3. Analysis of Underrepresentation in SEE

3.1. Festival Participation by Year (2022–2026)

The underrepresentation of SEE artists in major European showcase festivals and industry platforms reflects a persistent imbalance in the European music ecosystem. This section examines participation rates of SEE artists across prominent showcase events, including WOMEX, Eurosonic Noorderslag (ESNS/Eurosonic), Reeperbahn Festival, Tallinn Music Week, The Great Escape Festival, MaMA Music & Convention, Linecheck, and jazzahead!, and compares them with participation levels from Western, Northern, and Central Europe to contextualize both the scale of disparities and their structural dimensions.

2022

At **WOMEX 2022**, no artists from SEE were included in the official showcase programme, marking the beginning of a multi-year pattern of limited visibility for the region. For clarity, it should be noted that Ivo Papasov (Bulgaria) received the WOMEX Artist Award in 2022; however, this distinction is independent of the official showcase selection and therefore does not constitute representation in the curated programme.

A similar pattern emerged at **jazzahead! 2022**, where no acts from SEE countries were selected for the official showcases. Across both WOMEX and jazzahead! in 2022, SEE artists were therefore entirely absent from the official line-ups, despite the festivals' stated commitments to diversity and international representation.

At **Eurosonic 2022**, the total lineup included 259 artists, of whom seven artists were from SEE: Slovenia (2), Bulgaria (1), Serbia (1), North Macedonia (1), Greece (1), and Romania (1). No artists were listed from Croatia, Albania, Kosovo, Montenegro, or Bosnia and Herzegovina. While this reflects some regional presence, it represents a small proportion of the overall programme relative to the region's population of over 58 million people.

At **Tallinn Music Week 2022** (175 artists), SEE was represented by three acts: Serbia (1) and Slovenia (2).

At **Linecheck** (Italy) and **MaMA Music & Convention** (France), no performers from the SEE region were included. **The Great Escape Festival** (UK) featured one SEE performer (Romania).

2023

In 2023, representation of SEE artists within **jazzahead!**'s curated programme remained limited. The official showcases did not include artists formally listed as representing Greece. While the project **MOTHER** includes musicians with Greek roots, it was presented within the programme as a German act. The remainder of the line-up was largely composed of artists from Western, Northern, and Central Europe. Across the 2022–2023 period, SEE participation at **jazzahead!** fluctuated between zero and one to two acts per year—primarily from Greece and Slovenia—out of approximately 38–40 annual showcase slots. This pattern persists despite several countries (including Bulgaria, Kosovo, Romania, Croatia, Slovenia, and Serbia) investing in national stands and professional presence at **jazzahead!**

At **WOMEX 2023**, two SEE artists performed in the official showcase: Teo Collori & Momento Cigano (Slovenia) and Erini (Greece/USA).

Tallinn Music Week 2023 hosted 176 artists from Europe, North and South America, Canada, Africa, and the Middle East. Estonia accounted for the largest share (84 acts), followed by Finland (11), the United Kingdom (9), Canada (8), Latvia (7), Germany (7), Ukraine (6), Lithuania (5), France (5), and Sweden (5). SEE represented one artist: K not K (Romania).

According to the official line-up, **Eurosonic 2023** featured 14 artists from SEE countries. Two acts had dual national identification: freekind. (Croatia/Slovenia) and Bulgarian Cartrader (German/Bulgarian). This dual listing slightly affects categorical totals but does not materially alter overall representation levels.

At **Reeperbahn Festival 2023**, one SEE artist was featured: KOIKOI (Serbia).

By contrast, at **The Great Escape Festival (UK)** and **Linecheck (Italy)**, no SEE artists were included. **MaMA Music & Convention (France)** featured one Serbian act (based in Canada). The Great Escape Festival's programme consisted predominantly of English artists (48.08%), with no representation from SEE countries. MaMA Music & Convention was similarly dominated by French artists, with limited participation from other European countries (3.7% for German and English artists combined).

By comparison, Estonia, Latvia, and Lithuania collectively accounted for eight performers at **Eurosonic 2023**, despite a combined population of fewer than seven million people. This contrast further illustrates the relative visibility gap between the Baltic and SEE countries within the same festival framework.

2024

At **Eurosonic 2024**, which positions itself as a platform for artists from across the EU, 212 artists were programmed. The Netherlands accounted for the highest representation (23 artists), followed by Belgium (18), England (14), Germany (13), France (13), Poland (12), and Ireland (9).

Within this broader context, participation from SEE countries remained concentrated but comparatively modest. The Eurosonic 2024 line-up included:

- Bulgaria: 3 artists
- Serbia: 3 artists
- Slovenia: 3 artists
- Croatia: 2 artists
- Greece: 2 artists
- Romania: 1 artist
- North Macedonia: 1 artist

This includes 15 artists from SEE countries. Two acts, freekind. and Bulgarian Cartrader, appeared as returning performers following their inclusion in the Eurosonic 2023 programme due to Music Moves Europe Awards nominations. Several SEE countries, including Bosnia and Herzegovina, Albania, Montenegro, and Kosovo, were not represented in the 2024 Eurosonic showcase line-up.

A demographic comparison further illustrates the imbalance. The combined population of SEE countries exceeds 58 million people, whereas Ireland—represented by 10 artists at Eurosonic 2024—has a population of approximately five million. Iceland, with fewer than 400,000 inhabitants, had four participating artists—more than any individual SEE country that year. Romania, with a population of nearly 20 million people, was represented by one showcase artist.

At **jazzahead!** in 2024, no acts from SEE countries were selected for the official showcases. At **WOMEX 2024**, two acts originating from SEE countries were included: Zarina Prvasevda (North Macedonia) performed in the OFFWOMEX Showcase and Sutartronica (Serbia) performed in the Club Summit. However, there were no SEE artists in the official showcase selection for 2024. Across the 2022–2024 period, SEE representation fluctuated: none in 2022, two acts in 2023, and none again in 2024.

At **The Great Escape Festival (UK)**, **MaMA Music & Convention (France)**, and **Linecheck (Italy)**, no SEE artists were included in 2024.

Reeperbahn Festival 2024 held 480 concerts. SEE participation consisted of four artists: two from Bulgaria, one from Romania, and one from Greece. Turkey was represented by five artists, presented in partnership with M.O.B Entertainment.

At **Tallinn Music Week 2024**, three SEE artists were featured: Turbo Trans Turisti (Serbia), Lufthansa (North Macedonia), and Johnny Labelle (Greece).

2025

For 2025, cross-festival data show that SEE representation remains limited across major Western European showcase platforms. The festival participation breakdown is as follows:

Festival Participation Breakdown 2025

- **WOMEX 2025** (57 total showcase performances)
1 SEE artist (Serbia)

- **jazzahead! 2025** (total showcase 38 performances)
1 SEE artist (Greece)
- **Reeperbahn Festival 2025** (450)
0 SEE artists
- **The Great Escape 2025** (450)
0 SEE artists
- **Tallinn Music Week 2025** (175)
3 SEE artists (Croatia, Kosovo, Serbia)
- **Linecheck 2025** (63)
1 SEE artist (Greece)
- **Eurosonic 2025** (248)
9 SEE artists (Serbia (2), Croatia (2), Slovenia (2), Bulgaria (1), Greece (1), Romania (1))
- **MaMA Music & Convention 2025** (84)
0 SEE artists

Total: 0.96% (15) of 1565 showcased bands

Across eight major European showcase festivals—WOMEX, jazzahead!, Reeperbahn Festival, The Great Escape, Tallinn Music Week, Linecheck, Eurosonic and MaMA Music & Convention—a total of 1,565 acts was presented. Only 15 of these were from SEE, amounting to just 0.96% of all showcased artists.

Focusing specifically on Eurosonic, the 2025 line-up reflects ongoing challenges in achieving balanced representation across Europe, with SEE artists accounting for 3.62% of the total acts.

In 2025, Eurosonic featured nine artists from the SEE region across six countries: Serbia (2: Lavina, Luka Rajić); Croatia (2: Baby Lasagna, Nemeček); Slovenia (2: Astrid, MRFY); Bulgaria (1: Woomb); Greece (1: Someone Who Isn't Me); and Romania (1: Musspell). This 3.62% share of the 248 total acts at Eurosonic 2025 constitutes a modest level of participation for a region of over 58 million people. Countries such as the Netherlands (117 artists) and England (22 artists) had notably (and historically) higher representation, which is understandable given the structure of various Eurosonic programmes and their funding partners. However, the absence of artists from several SEE countries—namely Albania, Bosnia and Herzegovina, Kosovo, Montenegro, and North Macedonia—underscores a significant opportunity to further engage and include a broader spectrum of talent from the region in future editions.

At **WOMEX**, the 2025 edition included a single act with partial SEE representation: a band featuring one Serbian member (Gordan). In the same edition, the programme featured two acts from Estonia, one from Latvia, and one from Lithuania.

Viewed longitudinally across 2022–2025, WOMEX official showcase selections reflect a persistent pattern of limited inclusion of SEE artists. No SEE artists were included in 2022; two were selected in 2023 (one with partial Greek representation); no SEE acts were included in 2024; and one act with SEE representation was included in 2025.

2026

Preliminary data for 2026 indicate a modest increase in the representation of SEE artists at selected showcase events. However, overall participation remains limited.

At **MENT**, the largest industry showcase festival in the SEE region, regional representation is comparatively strong. As of 23 February 2026, 31 SEE artists have been announced out of a total of 68 acts, corresponding to 45.6% of the programme. This demonstrates that when a showcase platform is institutionally rooted within the region, SEE artists can constitute a substantial share of the line-up.

For **Eurosonic 2026** (excluding Noorderslag), 213 showcasing artists have been announced, of whom 16 originate from SEE countries. This reflects a modest numerical increase compared to 2025 and a slight improvement in overall visibility, though not yet a structural shift in representation patterns.

Albania, Bosnia and Herzegovina, and Montenegro are not represented in the 2026 line-up, continuing a pattern of limited participation. North Macedonia is represented by one artist, and Kosovo by one act, marking a reappearance after several years of absence.

Country-level representation is distributed as follows: Bulgaria (4 artists), Greece (3), Romania (2), Croatia (2), Slovenia (2), Serbia (1), Kosovo (1), and North Macedonia (1).

SEE participation, therefore, accounts for approximately 7.51% of the total Eurosonic showcase line-up. While this represents an increase in absolute numbers, it still falls significantly short of reflecting the region's demographic scale and documented activity in the music sector, suggesting incremental rather than systemic progress.

At **jazzahead! 2026**, the European Showcases included one Slovene-led multinational project with Jure Pukl. No artists from Bulgaria, Romania, Serbia, Croatia, North Macedonia, Bosnia and Herzegovina, Albania, or Kosovo are included in the curated programme.

Between 2022 and 2026, SEE participation in jazzahead!'s official showcase remained minimal, ranging from zero to two acts per year across a programme of roughly 36 to 40 annual showcase slots. This pattern reinforces the broader trajectory of limited inclusion, despite ongoing national-level investments in professional presence and international engagement.

Methodological Note

The line-up data for the 2022–2026 period has been compiled from publicly available festival sources, including official websites, press releases, social media announcements, and archived materials. In some cases, historical line-ups are incomplete, no longer publicly accessible, or subject to subsequent programme changes. While every effort has been made to cross-reference available data, minor discrepancies may occur. Such variations do not materially affect the overall trends and conclusions identified in this analysis.

Festival Representation Discrepancies

A review of showcase line-ups from 2022 to 2026 indicates a sustained pattern of limited SEE participation across major European platforms. Although these festivals emphasize

international diversity, participation from SEE countries remains comparatively low compared to other European regions.

The disparity is not solely numerical. It reflects broader structural dynamics affecting access, visibility, and inclusion within the European live music ecosystem.

3.2. Selection Processes and Systemic Barriers

Selection Pathways and Opportunities through EBU Partnerships

One pathway for artist participation at Eurosonic involves the collaboration between the European Broadcasting Union (EBU) and affiliated national broadcasters, whereby EBU-affiliated national radio stations may propose and support emerging acts. This system supports talent discovery across Europe and serves as an institutional channel for representation in the festival's programme.

In several countries, this process is implemented through national competitions or structured selection mechanisms. For example, in Bulgaria, national radio competitions such as "Golden Spring" have served as platforms for emerging artists and, in certain editions, have included language-related eligibility criteria.

Although this system provides valuable visibility for selected artists, it may not fully reflect the broad spectrum of contemporary music practices emerging from the SEE region. Variations in national selection frameworks, language policies, and broadcasting structures can shape access to international showcase platforms such as Eurosonic.

The European Commission's 2026 discoverability study highlights the importance of institutional proximity, noting that "the extent to which music streaming services maintain in-country field offices may also shape these trends [in music consumption patterns], as the regionalisation of the offices can lead to inability to cater to the specific characteristics of individual markets" (European Commission, 2026). While identified in the context of streaming, similar dynamics can be observed across other music discovery pathways: greater inclusion of locally embedded structures may enhance the visibility of diverse local repertoires.

In this context, it can be argued that even where institutional structures exist, reliance on a single type of institutional pathway may limit the extent to which the full diversity and specific characteristics of local music markets are reflected. Continued dialogue among festival curators, EBU members, and regional stakeholders may further strengthen the inclusivity and representativeness of these pathways, ensuring broader participation from underrepresented regions, including SEE.

4. Genre Representation in the SEE Music Scene

During the MOST conference in Veszprem, Hungary (2023), representatives of jazzahead! were asked why artists from SEE were largely absent from the programme. Representatives reportedly referred to limited applications and application quality as contributing factors.

However, research conducted in Bulgaria indicates sustained interest from the region. Since 2014, more than 80 Bulgarian jazz artists have applied to jazzahead!, including in the years when application fees were required. Despite this level of engagement, no Bulgarian jazz artists were selected during the period reviewed.

The disparity in musical representation between the SEE region and other parts of Europe is reflected not only in numerical underrepresentation but also in the framing of evaluative criteria. A critical examination of artist selections for the jazzahead! programme over the past five years indicates that the limited presence of SEE artists has frequently been attributed to the "quality of the applications." While artistic evaluation is inherently subjective, a closer examination of selected line-ups appears to align more frequently with jazz styles commonly associated with Western and North-Western Europe, often described within industry discourse as "European jazz," characterized by experimental and contemporary aesthetics.

This pattern raises questions about how "quality" is defined within the showcase framework. When aesthetic preference aligns consistently with particular regional traditions, other evolving jazz forms—particularly those emerging from Eastern Europe and the SEE region—may receive less visibility. The result is not necessarily intentional exclusion, but a structural narrowing of aesthetic representation. Over time, such patterns can shape perceptions of legitimacy, influence artistic direction, and affect access to international circuits.

The historical record further complicates the narrative of limited engagement. Bulgaria, for example, has maintained a sustained and rich relationship with jazz since the early twentieth century. Jazz was introduced before World War I and had become culturally embedded by the 1920s through military bands, cinema orchestras, and imported recordings. The country produced notable jazz performers, dedicated clubs, orchestras, and a formal educational infrastructure. Notably, the Department of Pop and Jazz Music at the National Music Academy in Sofia was established in 1968, more than a decade before jazz was introduced into the Belgian higher education system (1979).

Given this history, the continued oversight of Balkan jazz within major European showcase platforms appears misaligned with the region's longstanding contributions to the genre. When dominant narratives of "quality" privilege specific stylistic orientations, the diversity of contemporary jazz practices across Europe risks being underrepresented.

This dynamic can be understood not as a simple geographical imbalance, but as part of a broader process of aesthetic gatekeeping within international music circulation systems. When certain stylistic frameworks become institutionalized as benchmarks of excellence, alternative expressions—however innovative or historically grounded—may struggle to achieve comparable visibility. This practice overlooks the rich contributions of Balkan artists, who have been innovating within and beyond the boundaries of traditional jazz for over 100 years.

Recognizing this structural tendency does not require rejecting prevailing artistic standards. Rather, it invites a more expansive understanding of European jazz, one that reflects the multiplicity of its regional histories, contemporary evolutions, and cultural contexts. When platforms such as jazzahead! consistently excluding Balkan artists, the practice extends beyond geographical imbalance; it shapes the genre's aesthetic narrative. The consequence is not only reduced visibility for SEE artists, but a constrained representation of jazz as a whole. A more inclusive curatorial approach would strengthen the genre's pluralism and more accurately reflect its historically transnational, innovative, and diverse development.

5. Geographical Gaps in the EU Live Sector: A Closer Look at Liveurope and Live DMA

While the EU positions cultural cooperation as a mechanism for strengthening cohesion, data emerging from key support structures suggest a different story, one of uneven **geographical participation** and **systemic exclusion**, across the live music sector. An

examination of two influential platforms for live music development, **Liveurope** and **Live DMA**, indicates structural disparities that affect participation levels among SEE countries.

Liveurope: Disproportionate Touring Support Patterns

Liveurope, co-funded by the European Commission since 2014, supports the cross-border circulation of emerging European artists by providing financial incentives to member venues to programme acts from other European countries.

According to official Liveurope statistics, participation levels differ considerably across regions between 2014 and 2025. Liveurope tracks performances by artists who appear at member venues outside their home countries. The figures below, therefore, refer to the **number of cross-border performances** rather than the number of individual artists. A single artist may perform multiple times.

Across seven Northern and Western European countries, Liveurope has supported **652 performances** abroad: Estonia (26), Lithuania (66), Latvia (15), Iceland (129), Denmark (239), Luxembourg (35), and Finland (142).

Over the same period, eleven SEE countries accounted for **498 supported performances** abroad: Croatia (89), Albania (1), Bosnia and Herzegovina (4), Bulgaria (23), Greece (70), Kosovo (3), North Macedonia (37), Romania (66), Serbia (101), Slovenia (103), and Montenegro (1). In demographic terms, seven countries with a combined population of approximately 18.8 million produced more Liveurope-supported performances than eleven SEE countries with a combined population exceeding 58 million.

The imbalance is particularly visible in individual cases: Denmark (239) and Iceland (129) record substantially higher figures than several SEE countries, including Bulgaria (23), Albania (1), Bosnia and Herzegovina (4), Kosovo (3), and Montenegro (1).

These patterns may reflect structural factors such as network integration, access to funding, institutional capacity, and historical participation in EU-level touring circuits. While artistic output is one factor within touring ecosystems, disparities of this scale suggest that access conditions and structural positioning within European venue networks warrant examination as well.

Methodological Note (Liveurope)

Performance counts include both past and announced upcoming performances supported by Liveurope. As of 4 March 2026, 31 performances in 2026—including those already completed and those scheduled to take place later in the year—involve artists from SEE countries (Croatia, Albania, Bosnia and Herzegovina, Bulgaria, Greece, Kosovo, North Macedonia, Romania, Serbia, Slovenia, and Montenegro), and 20 from the Northern/Western European comparison group (Estonia, Lithuania, Latvia, Iceland, Denmark, Luxembourg, and Finland).

Live DMA: Network Representation and Institutional Integration

Live DMA, a Creative Europe-supported network of music venues, clubs, and festivals, plays an important role in shaping professional standards, advocacy frameworks, sustainability practices, and sector benchmarking within Europe's live music ecosystem.

Membership remains concentrated primarily in Western and Northern Europe. Illustrative examples include:

- **Germany (LiveKomm):** 510 venues; approximately 160,000 live performances annually (Live DMA, 2020; data based on 2017 figures).
- **France (FEDELIMA):** 137 venues; over 17,000 performances per year; 58% public subsidy (Live DMA, 2023; data based on 2019–2020 figures).
- **Denmark (Dansk Live):** 88 venues; more than €30 million in total revenue (Live DMA, 2023; data based on 2019–2020 figures).
- **The Netherlands (VNPF):** 60 venues; approximately 27,000 artist performances; 4.2 million visitors (Live DMA, 2023; data based on 2019–2020 figures).

Since 2024, Bulgaria has taken an initial first step toward integration: ABEI became the first Bulgarian organization to join Live DMA as an associated member. This represents an essential milestone in strengthening institutional connections between Bulgarian venues and European-level networks.

However, most SEE countries currently remain outside the Live DMA network structure. As a result, venues in these countries may:

- Have more limited participation in benchmarking exercises, sustainability initiatives, and professional exchange programmes
- Have more limited participation in EU-level advocacy processes related to artist remuneration, gender balance, green transition policies, and audience development.
- Miss opportunities for professional development, institutional capacity building, and long-term sector development.

A key structural challenge in several SEE countries is the absence of a **national umbrella association** comparable to LiveKomm (Germany), FEDELIMA (France), or VNPF (Netherlands). Without coordinated representative structures, integration into European networks may be more complex, and individual venues may face greater administrative and informational barriers when navigating EU programmes or cross-border collaborations.

Overall, while recent progress, such as Bulgaria's associated membership, signals positive movement, the region as a whole continues to face substantial barriers to entering and benefiting from the European live-music policy ecosystem.

Structural Consequences

Taken together, disparities in touring support and institutional network participation may contribute to cumulative effects within the live music ecosystem. These dynamics reflect broader structural patterns observed across the European music sector. The European Commission's 2026 study finds that "intra-EU circulation remains limited," with "non-national European songs consistently holding the smallest shares in national charts across all investigated platforms — just 14% on average" (European Commission, 2026). The study attributes this not to audience indifference but to structural platform dynamics, noting that "49% of surveyed consumers report that music in other European languages is not recommended to them, and 39–40% state that such music is not easily available." While these findings relate to streaming, they point to wider

limitations in cross-border discoverability, suggesting that existing pathways fail to facilitate the circulation of artists from smaller and peripheral markets. In this context:

1. Artists from SEE may experience fewer cross-border touring opportunities, which may affect career growth, international visibility, and revenue development.
2. Venues and promoters in the region may have more limited access to EU-level benchmarking frameworks, sustainability standards, and professional development networks, which can influence long-term sector capacity.

Although SEE is formally eligible, participation patterns suggest a persistent gap between formal inclusion and practical access. This disparity does not reflect a lack of talent or ambition within the region. Rather, it points to structural inequalities in access to networks, recognition, visibility, and structural support.

Moving beyond declarative commitments to inclusivity requires that EU-supported platforms such as Liveurope and Live DMA examine how participation criteria, funding structures, and network configurations may produce uneven outcomes. Addressing these gaps may involve targeted inclusion measures, more balanced funding allocation, and strengthened support for regional intermediary structures that facilitate integration into European touring and venue ecosystems.

6. Estimated Number of Music Artists in SEE

To better understand the scale of artistic activity in the region, exploratory research was conducted using gigmit, a digital platform through which artists apply for festival and live performance opportunities.

A search within a 500-km radius of Sofia—a geographically central city in the Balkans—identified nearly 5,000 artist profiles on the platform. Due to platform search constraints, this radius did not fully capture the entire region. For example, Croatia and Slovenia fall outside the 500-km search radius from Sofia. A separate search within a 100-km radius of Zagreb identified 898 registered artists.

Based on these combined observations, it is reasonable to estimate that the number of artists from SEE countries registered on gigmit exceeds 5,000. While platform-based data do not represent the total number of active artists in the region, they provide an indicative measure of international-facing engagement.

Additional data were gathered from national performer associations and neighbouring rights societies **in Romania, Serbia, Croatia, and Bulgaria.**

Bulgaria

- Bulgarian Music Association: over 800 registered professional artist-performers
- PROPHON's (Bulgarian neighbouring rights society):
 - 8,710 registered Bulgarian performers with an active mandate
 - 1,004 performers have received remuneration
 - 236 currently registered performer members

Croatia

- Croatian Performers' Rights Collecting Society (HUZIP)

- Approximately 9,000 registered artists (includes active members and deceased members)
- Croatian Musicians' Union:
 - Approximately 6,000 to 7,000 active artists

Serbia

- PI-Organization for Collective Administration of Performers' Rights:
 - 3143 registered members

Romania

- The Romanian Center for Performers' Rights Management (CREDIDAM)
 - 16,148 total registered performers (as of 31 January 2024)
 - Approximately 12,000 musicians

Based on the figures above, the combined total across Bulgaria, Croatia, Serbia, and Romania is approximately 35,853 registered performers and musicians. These figures do not include artists from Albania, Bosnia and Herzegovina, Kosovo, Montenegro, North Macedonia, Greece, or Slovenia; therefore, the total number of active artists across SEE is likely higher.

These data indicate that the region maintains a substantial, institutionally registered music workforce, reinforcing the scale of artistic production across SEE countries.

6.1. Emerging Artists

In addition to institutional statistics, regional showcase platforms provide further evidence of active artistic development.

The **SoAlive Music Conference (SAMC)** curates an annual showcase programme featuring 40 to 50 emerging music acts from SEE countries. This sustained programming demonstrates both the volume of emerging artists and the region's organizational capacity to identify and present new talent.

While SAMC operates at the regional level, its model illustrates how curated showcase structures can increase the visibility of emerging artists from underrepresented regions. By providing these artists with a platform, SAMC challenges the prevailing norms and showcases the rich, diverse musical scene of the SEE, underscoring the potential for greater inclusion in festival line-ups globally. Such initiatives strengthen regional networks and may support artists' progression toward broader European platforms.

The success of SAMC's showcase program provides a compelling rationale for including more artists from SEE countries in international festival lineups. This level of output suggests that when given the opportunity, SEE artists can captivate audiences and contribute significantly to the cultural and artistic diversity of music festivals. This example should encourage festival organizers in the EU to reassess their programming strategies and consider how they can help promote a more balanced and diverse representation of artists on the global stage.

7. Cultural Framing and the Impact of Stereotypes

The root causes of this underrepresentation extend beyond mere programming choices to include persistent stereotypes and cultural framing. SEE artists are frequently associated with traditional or folkloric categories, while the region's vibrant contemporary music scene—spanning indie, electronic, pop, synth music, and hip-hop—remains comparatively underrepresented at major European showcase festivals. This pattern not only limits their international exposure but also contributes to a homogenized, outdated perception of Balkan music that does not adequately reflect its contemporary diversity and evolution.

These cultural assumptions play a significant role in shaping the opportunities available to SEE artists on the international stage. When SEE music is framed primarily through narrow or heritage-based lenses, the dynamism and innovation present in the region's contemporary genres risk being overlooked. Such reductionist framing can misrepresent the artistic diversity of SEE countries and constrain recognition of artists working across modern and globally circulating genres.

The impact of cultural bias extends to the decision-making processes of festival organizers, record labels, and curators, who may have limited familiarity with the breadth of contemporary music emerging from the region. This lack of exposure can affect programming outcomes, reduce visibility, and discourage artists from pursuing international opportunities that require substantial investment of time and resources.

This dynamic reflects broader patterns identified in the European Commission's 2026 discoverability study, which highlights as “popularity bias” within music streaming and curation systems, whereby “curated playlists wield substantial power within music streaming service ecosystems” and “artists excluded from these influential playlists struggle to achieve adequate recognition despite potentially high artistic merit” (European Commission, 2026). The study further observes that “music streaming services predominantly utilise rigid taxonomic classification systems, which simplify user navigation but frequently fail to accommodate the inherent complexity and richness of diverse musical styles”. While identified in the context of streaming, these findings highlight how systems of categorisation — whether algorithmic or curatorial — tend to favour simplified and familiar representations of music, a dynamic that can also be observed in the cultural framing of SEE artists.

Over time, these cultural biases contribute to a cycle of underrepresentation: limited inclusion reinforces existing perceptions, which in turn shape future selection patterns across music festivals, showcases, and playlists. For emerging artists seeking to move beyond traditional classifications and position their work within global markets, this can create structural barriers to entry. Breaking this cycle requires first acknowledging how cultural framing influences access and visibility within European music ecosystems.

8. Structural Challenges in the SEE Music Industry

A significant challenge for SEE artists in establishing a sustained presence on the international stage is the presence of financial and structural barriers. While artists from wealthier European regions often benefit from established touring infrastructures, export agencies, and integrated support systems, their counterparts in SEE frequently operate within more limited institutional frameworks. This disparity affects not only international mobility and festival participation but also broader questions of access within the European music ecosystem.

The relative scarcity of fully institutionalized music export offices in the SEE region highlights a structural gap in export support. Although several entities operate with export-oriented functions—such as We Move Music (Croatia), Slovenian Music Information Centre, Serbia Creates, Bulgarian Music Association, RAW Music (Romania), and the Romanian Cultural Institute—these structures vary in mandate, funding capacity, and degree of formal recognition. Compared with more centralized export models in parts of Western and Northern Europe, SEE export infrastructure remains fragmented and unevenly resourced.

At the same time, it is important to acknowledge that most SEE countries provide mobility funding to support artists' participation in international events. This demonstrates national-level recognition of the importance of cultural exchange and international visibility. Moreover, many countries invest in national stands, exhibition booths, and conference participation as strategic tools for export promotion.

In Bulgaria, for example, the Bulgarian Music Association and the SoAlive Music Conference play pivotal roles in disseminating information about funding opportunities and open calls for showcases to their members. They also provide guidance on the funding application process and on international positioning, reflecting a proactive effort to strengthen export readiness within the sector.

Nevertheless, these efforts operate within a broader European ecosystem in which structural imbalances persist. Limited visibility within major platforms and networks reduces the return on national export investments and can constrain artists' long-term career development. The financial and structural obstacles faced by SEE artists, therefore, extend beyond individual capacity. They are linked to uneven integration into European touring, funding, and decision-making structures. Addressing these disparities is essential not only for regional development but for ensuring a more inclusive and representative European music industry overall.

Distribution of Cultural Organizations Participating in Creative Europe “MUSIC” Cooperation Projects (2014–2020)

South East Europe (SEE)

- Albania: 3
- Bosnia and Herzegovina: 4
- Kosovo: 0
- Montenegro: 4
- North Macedonia: 3
- Serbia: 18
- Romania: 14
- Bulgaria: 6
- Greece: 21
- Slovenia: 15
- Croatia: 12

Total SEE Projects: 100

Selected Western and Northern European Countries

- Belgium: 53
- Netherlands: 31
- Denmark: 10

- Luxembourg: 8
- Norway: 25
- Finland: 14
- Sweden: 10
- Ireland: 7

Total Selected Western/Northern Projects: 158

Population and Size Comparison

Region/Country	P o p u l a t i o n (millions)	Area (sq. km.)	F u n d e d Projects
South East Europe	58	805,342	100
Selected Western/Northern Europe	66	1,679,659	158

Funded Projects Per Capita

When adjusted for population size:

- **SEE:** approximately 1.82 projects per million inhabitants
- **Selected Western/Northern group:** approximately 2.39 funded projects per million inhabitants

Percentage Difference in Funding

To calculate the percentage difference in funded projects between SEE and selected Western/Northern Europe:

1. **Total Projects Difference:** 158 (Western/Northern) - 100 (SEE) = 58
2. **Percentage Difference:** approximately 36.7%

Analysis

1. Population and Territorial Scale

- The selected Western/Northern European group has a moderately larger combined population and territorial area than SEE. However, the difference in funded project totals exceeds the proportional demographic gap, suggesting variation in participation intensity across regions.

2. Funded Projects Per Capita

- When adjusted for population size:
 1. SEE: approximately 1.82 funded projects per million inhabitants
 2. Selected Western/Northern group: approximately 2.39 funded projects per million inhabitants

- This indicates a higher per-capita participation rate in the selected Western/Northern group during 2014–2020.

3. **Project Distribution Differential**

- In absolute terms, the selected Western/Northern group accounts for 36–37% more funded projects than SEE within the sample examined. This differential reflects uneven participation outcomes within the Creative Europe “Music” cooperation framework.

4. **Implications for Cultural Representation**

- Differences in participation in funded projects may influence institutional visibility, partnership networks, and long-term capacity development. Regions with higher project volumes may benefit from greater coordination experience, increased cross-border collaboration, and expanded access to European cultural platforms.

This comparative analysis highlights a substantial imbalance in the distribution of funded projects between SEE and selected Western/Northern European countries. These patterns suggest structural variation in project development ecosystems rather than differences in artistic capacity alone.

Addressing such variation may involve examining application support structures, co-financing mechanisms, partnership formation dynamics, and access to intermediary networks across regions.

Summary of Lead Partners and Project Scale

South East Europe (SEE)

- **Total Projects:** 95
- **Lead Projects:** 15

Breakdown by Country:

- Albania: 3 projects, 1 lead
- Bosnia and Herzegovina: 3 projects, 1 lead
- Bulgaria: 7 projects, 1 lead
- Greece: 18 projects, 4 leads
- Croatia: 17 projects, 2 leads
- Montenegro: 3 projects, 0 leads
- North Macedonia: 1 project, 0 leads
- Romania: 14 projects, 2 leads
- Serbia: 10 projects, 1 lead
- Slovenia: 19 projects, 3 leads

Selected Western/Northern Europe

- **Total Projects:** 131
- **Lead Projects:** 30

Breakdown by Country:

- Belgium: 41 projects, 17 leads
- Netherlands: 26 projects, 6 leads
- Denmark: 13 projects, 2 leads
- Luxembourg: 4 projects, 0 leads
- Norway: 14 projects, 0 leads
- Finland: 11 projects, 2 leads
- Sweden: 15 projects, 3 leads
- Ireland: 7 projects, 0 leads

Other European Countries

- **Total Projects:** 386
- **Lead Projects:** 223

Key Statistics:

- **Total Projects:** 226
- **Total Lead Projects:** 45

Comparative Observations:

- Across the full dataset (226 total projects; 45 lead projects), participation and leadership roles are distributed unevenly across European regions.
- Countries such as Belgium, France, and Germany appear among the most active participants in Creative Europe cooperation projects, both in terms of participation and project coordination.
- SEE countries account for 95 project participations and 15 coordinator roles, representing approximately 15.8 percent of project lead participations. Selected Western and Northern European countries account for 131 participations and 30 coordinator roles, corresponding to approximately 22.9 percent lead roles. This indicates that organizations from the selected Western and Northern European countries assume coordinator roles more frequently than their participation levels would suggest.

This summary highlights the disparity in project leadership and participation between SEE and Western/Northern Europe. These findings suggest that, although overall SEE participation volume is lower, institutional leadership capacity is present and may be further strengthened through expanded access to partnership networks and application support mechanisms.

8.1. Established Framework and Emerging Institutional Models in SEE

The evolving institutional landscape of the European music sector poses integration challenges for the SEE countries, particularly concerning alignment with long-established EU governance models. Two illustrative areas are national music councils and music export offices.

National Music Councils

In many Western and Northern European countries, National Music Councils serve as umbrella bodies representing the entire music sector at national and international levels. These

structures have roots in the mid-20th century and have become institutional reference points within European-level policy frameworks.

In several SEE countries, however, these structures are often associated with communist regimes and are poorly received today. Rather than a single umbrella entity representing the entire music ecosystem, professional associations often operate by segment (e.g., performers, producers, independent labels, or broader creative industry platforms). These organizations are frequently recognized by national authorities and are active in policy dialogue and international collaboration.

Proposals to merge them into a single, consolidated national music council may jeopardize their successful advocacy and may not align with domestic institutional realities.

While umbrella structures can facilitate streamlined representation at the European level, sector-based organizations in SEE countries often play an equivalent functional role within their respective domains. Understanding these structural differences is important when assessing participation in EU-level decision-making processes and network governance structures.

Music Export Structures

A similar dynamic is observable in music export coordination. In some EU member states, music exports are managed through a centralized, state-recognized export office that serves as the primary national interlocutor.

In parts of SEE, however, the expectation that a single, state-recognized organization should handle all music export activities does not align with the realities of the region. Here, multiple organizations within a country may engage in music export. These may include industry associations, creative economy agencies, or hybrid public–private entities. In several cases, these organizations receive government recognition or project-based support and actively engage in international networking and promotion.

The European insistence on a single, unified export authority overlooks the dynamism and competitiveness among these organizations, which, in fact, accelerates the development of music export activities and can also foster specialization, competition, and adaptive development within national ecosystems.

This diversity of export-focused entities illustrates a structurally distinct pathway to internationalization, shaped by historical, political, and sectoral evolution.

Structural Alignment Considerations

These two examples highlight a critical gap between the expectations of established European models and the innovative, diverse approaches emerging in the SEE region. Differences in organizational architecture do not necessarily indicate institutional weakness; rather, they reflect alternative trajectories of sectoral development.

Greater mutual recognition of these structural differences may support more inclusive participation in European-level networks and decision-making forums. Alignment efforts may benefit from flexibility in institutional criteria, allowing for diverse models of representation and export coordination across member states.

8.2. Geographical Equality and Agency-Promoter Dynamics in SEE

Interviews conducted with 12 key promoters operating in SEE provide insight into perceived differences in contractual and operational practices between the region and parts of Western Europe.

Several interviewees in the SEE region frequently reported receiving less support from agencies when organizing shows and events. Unlike the collaborative approach often extended to Western European promoters, SEE promoters face stringent demands regarding financial terms and risk allocation. Promoters in SEE reported that agency contracts more frequently require full or substantial artist fees to be paid in advance of events. This practice places a considerable financial burden on promoters, who must secure substantial funds well before the event, thereby increasing the risk to their operations.

Furthermore, interviewees indicated that contractual provisions related to cancellations may place a greater share of financial and reputational risk on local promoters. Where cancellation clauses limit the liability of artists or agencies, promoters may absorb losses associated with last-minute changes. Respondents contrasted these arrangements with what they perceive as more balanced, negotiable, and supportive terms in certain Western European markets.

These perceptions were expressed even by promoters affiliated with European industry networks such as YOUROPE. Interviewees consistently expressed among promoters the view that the Balkans is undervalued and unfairly treated by major music agencies. Promoters expressed frustration with the lack of respect and recognition for their efforts to promote music and culture in a region of rich historical and cultural significance. They emphasized the need for more equitable treatment to foster a thriving music ecosystem in the SEE.

The disparity in treatment between Balkan promoters and their Western European counterparts is a significant barrier to the growth and development of the music industry in the region. It hinders local promoters' ability to attract major acts and organize successful events, ultimately affecting the music landscape and economic opportunities in the Balkans.

It is important to note that these findings are based on qualitative interviews and reflect the perspectives of participating promoters. Nonetheless, consistent themes emerged across respondents, suggesting that differences in market size, purchasing power, historical network integration, and perceived commercial risk may influence agency behavior in different regions. Such dynamics may affect promoters' ability to secure internationally touring acts and to manage financial risk effectively. Over time, variations in contractual norms and risk distribution can influence the stability and growth potential of local live music ecosystems.

Addressing these disparities requires a concerted effort from agencies, policymakers, and industry stakeholders to ensure fair and equitable treatment for all promoters, regardless of their geographical location. By recognizing and rectifying these biases, the music industry can support the flourishing of diverse cultural expressions and contribute to a more inclusive and successful European music scene.

9. The Role of Streaming Platforms

In the digital music ecosystem, streaming platforms play a central role in shaping visibility, audience development, and revenue flows. For artists from SEE, digital discoverability represents both an opportunity and a structural challenge.

Interviews and stakeholder consultations indicate that SEE artists perceive limited regional visibility within major international music streaming platforms. While streaming platforms operate globally, editorial curation and algorithmic amplification significantly influence exposure. It is important to note that streaming platforms rely on a combination of algorithmic systems, editorial decisions, and market performance data. However, stakeholders from the SEE region report limited regional editorial representation on major streaming platforms, which they perceive as a barrier to promoting music from the region. Without dedicated personnel who understand the linguistic nuances, cultural context, and musical diversity of the region, SEE artists are often sidelined in favor of more globally recognized English-speaking artists.

This observation is formally corroborated by the European Commission's 2026 discoverability study, which confirms that "challenges persist in playlisting, particularly for artists from smaller or non-Anglo markets, where limited access to industry intermediaries and opaque curation processes can hinder discoverability efforts" — and explicitly cites Hroch and Szczepanik's (2025) research on East-Central European music visibility in Spotify's geography as evidence for this structural pattern (European Commission, 2026). The Commission study further documents that "algorithmic opacity leaves creators and users with little insight into why certain content is shown or hidden," and that "European publishers or music labels often cannot tell how their content is being recommended or why it might be less visible than expected, because platforms rarely share detailed analytics beyond basic metrics" (European Commission, 2026).

In response to these dynamics, some SEE artists choose to record in English or adapt stylistically to align with perceived global marketability. While artistic adaptation has long been a feature of global music markets, such compromises may influence how artists balance regional identity and international market positioning. Moreover, the absence of regional curators may require SEE artists to invest significantly more in Spotify promotion and other direct marketing to reach larger audiences. These additional costs can be prohibitive for artists from regions with fewer resources and lower levels of industry support.

The Commission's study documents the same dynamic at European scale, finding that "only 38% of consumers indicated it is very likely for them to listen to music in other European languages," and that among those who do not, "more than half said they simply do not encounter such music" while "39–40% said such music is not recommended to them" (European Commission, 2026). This confirms that the linguistic adaptation pressure reported by SEE artists is not a matter of audience preference — it is a structural consequence of algorithmic and curatorial systems that fail to surface non-dominant language content.

At the same time, digital growth indicators suggest that SS markets are expanding. IFPI data show that Bulgaria's recorded music market grew by 44 percent in 2023, highlighting the accelerating role of streaming platforms and digital distribution in expanding music consumption across SEE. This growth suggests rising digital consumption and potential market development opportunities within the region.

The Commission study confirms Bulgaria's digital growth, citing it among the examples of the "glocalisation" trend — the increased prominence of domestic artists in national streaming charts (European Commission, 2026). Crucially, however, the study distinguishes between domestic visibility and cross-border discoverability, finding that glocalisation does not translate into cross-border circulation: non-national European songs account for just 14% of chart entries on average, meaning that Bulgarian artists who succeed domestically remain largely invisible to audiences in France, Germany, or the Netherlands (European Commission, 2026). This distinction is essential for policy: domestic growth within streaming is real, but it does not

resolve the structural exclusion of SEE artists from intra-European and international discovery pathways.

From a policy perspective, the question is not whether platforms intentionally exclude certain regions, but whether existing digital infrastructure adequately reflects the linguistic and cultural diversity of European music production. By not assigning a regional manager or curator who understands the SEE's unique cultural and musical landscape, streaming platforms forgo opportunities to foster a more diverse and inclusive musical ecosystem. Such a role could bridge the gap between SEE artists and global audiences, promoting cultural exchange and enriching the global music scene with the region's distinct sounds and stories.

The EU, given its foundational commitment to cultural diversity and unity, has an important role in ensuring that digital music ecosystems reflect the full breadth of its member states. In this context, questions of geographical representation and structural visibility on streaming platforms warrant careful consideration within broader cultural and digital policy discussions.

The limited presence of region-specific curatorial representation for SEE on major streaming platforms may contribute to reduced visibility for artists from the region. This dynamic has implications not only for individual artists but also for the diversity of cultural expression available to global audiences. Ensuring that Europe's linguistic and musical richness is adequately reflected in digital environments aligns with the EU's stated objectives of cultural inclusion and balanced development across member states.

The EU has the tools and the mandate to lead this change through policy coordination, funding instruments, and sectoral advocacy. By taking action to address these disparities, the EU can safeguard cultural diversity, support the creative industries, and foster a more inclusive and equitable digital music landscape.

The European Commission's 2026 discoverability study provides the evidentiary foundation for exactly this mandate, concluding that "a small number of global tech companies mediate a large share of cultural consumption" and that "this structural issue is at the heart of why policy attention is turning to discoverability as a complement to traditional cultural policies on production" (European Commission, 2026). Significantly, the study finds that "there is no equivalent framework for music" comparable to the Audiovisual Media Services Directive's 30% European content quota and prominence requirements for video streaming — identifying this regulatory gap as a priority concern requiring policy response (European Commission, 2026). The absence of a binding discoverability framework for music streaming is not merely an industry oversight; it is a documented gap in EU cultural policy that this report urges policymakers to address urgently.

The objective is not to mandate specific platform behaviors, but to ensure that digital infrastructures evolve in ways that are consistent with European commitments to cultural diversity, fairness, and equal opportunity across regions, and to ensure that every voice has the chance to be heard, and every culture the opportunity to flourish in the digital age.

Impact Analysis of Spotify's 1,000-Stream Policy on Artist Revenue in SEE

An analysis conducted by ANMIP-BG provides insight into the perceived impact of Spotify's 1,000-stream threshold policy on artists and labels in SEE. Based on 71 survey responses from industry professionals, the findings suggest that the threshold policy may

disproportionately affect labels managing larger catalogs and artists operating within niche genres, such as folklore.

According to the survey, **65 percent of respondents** reported a negative impact on revenue, particularly among labels managing more than 100 songs. Respondents indicated that labels with extensive catalogs find the policy "punishing," as many artists in SEE are unable to meet the threshold despite contributing high-quality, genre-diverse music and ongoing audience engagement.

The feedback indicates overwhelming opposition to the policy. The responses overwhelmingly oppose the 1,000-stream policy, with 85 percent of respondents expressing dissatisfaction with the current policy structure. This level of dissatisfaction suggests significant concern within the sector regarding the impact of the threshold on labels and artists with larger catalogues. Proposed measures included lowering or removing the threshold level, improving algorithmic discoverability for emerging or lesser-known artists, and strengthening regional editorial representation on platforms like Spotify.

While these findings reflect stakeholder perceptions rather than platform-level conclusions, they underscore the importance of assessing how standardized digital policies operate across markets of differing scale and linguistic reach. Continued conversations between platforms, industry representatives, and policymakers may help ensure that compensation and visibility structures function equitably across Europe's diverse music ecosystems.

10.Recommendations for Inclusive Change

To address the persistent underrepresentation of SEE artists within the European music ecosystem, we propose the following measures:

1. **Reforming Festival Selection Processes:** Major European showcase festivals could strengthen transparency in their selection frameworks and broaden evaluative criteria to ensure that SEE artists have equal opportunities to perform and showcase their talents. Removing language barriers and providing greater clarity about application requirements, jury composition, and aesthetic criteria may help reduce perceived barriers and further support diversity of representation.
2. **Strengthening Regional Representation in Streaming Ecosystems:** Streaming platforms may benefit from increased engagement with underrepresented markets, including the Balkans. This could involve enhanced regional editorial focus and closer collaboration with local industry stakeholders, helping bridge the gap between local artists and global audiences.
The European Commission's 2026 discoverability study makes a directly aligned recommendation, calling for "greater data-sharing and transparency initiatives that allow better sectoral insights" and noting that "policymakers could consider supporting research and innovation initiatives on recommenders that incorporate European diversity by design" (European Commission, 2026). It further recommends "promoting openness and accessibility of API endpoints from music streaming services" to enable independent researchers and cultural institutions to evaluate recommendation systems "comprehensively and transparently" (European Commission, 2026).
3. **Supporting Music Export Initiatives in SEE Countries:** EU institutions and national governments could consider strengthening support structures for music export activities in SEE countries. This may include increased funding opportunities, technical assistance, and structured collaboration between existing export offices and European

networks. This will help artists gain access to international markets and create sustainable careers in music.

4. **Expanding and Coordinating Mobility Support Mechanisms:** National authorities in SEE countries, in coordination with EU cultural funding instruments, could explore ways to enhance mobility funding for artists, ensuring that they have the resources needed to travel and participate in international showcases and festivals. Improved alignment between national mobility schemes and EU-level programmes may facilitate more consistent participation of SEE artists in European cultural initiatives.

11. Conclusion

The geographical and cultural marginalization of SEE artists within the European music ecosystem is not only an issue of representation. It also raises broader considerations of structural fairness and inclusivity. Addressing the systemic barriers that prevent SEE artists from participating in international festivals, touring networks, and digital platforms is essential to fostering a more balanced and dynamic European cultural landscape.

The publication of the European Commission's own study on the discoverability of diverse European cultural content (European Commission, 2026) in March 2026 represents institutional recognition that the structural challenges documented in this report are real, measurable, and policy-relevant. That study's central conclusion — that “ensuring that smaller voices and minority cultures are visible requires both addressing structural imbalances and harnessing technological tools to expand discoverability” — aligns precisely with the recommendations presented here (European Commission, 2026). The question now is whether this institutional recognition translates into binding action. For the 58 million people of South East Europe, and for the thousands of artists whose work remains systematically underrepresented in European digital and live music ecosystems, incremental progress is no longer sufficient.

Greater transparency, targeted support mechanisms, and sustained dialogue between regional stakeholders and European institutions can contribute to more equitable participation across the continent. It is time for the music industry to recognize the rich and varied talent in South East Europe and to provide the region with the opportunities it deserves to thrive on the global stage.

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