

Geographical Underrepresentation and Diversity within the EU Music Ecosystem

By SoAlive Music Conference / Flat Line Collective



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Executive Summary

Despite the European Union's values of inclusion, diversity, and cultural exchange, the Balkan (South East European) region—home to over 55 million people across Albania, Bosnia and Herzegovina, Kosovo, Montenegro, North Macedonia, Serbia, Romania, Bulgaria, Greece, Slovenia, and Croatia—remains notably underrepresented within the European music industry. This study highlights the significant underrepresentation of South East European (SEE) artists in key European music platforms, festivals, and digital ecosystems, exploring the root causes and offering data-driven recommendations to foster more balanced representation.

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1. Introduction

In the progressive and democratic landscape of the European Union, where inclusion, diversity, and gender balance are heralded as priorities, trending topics and even foundational pillars within the culture and music industry, **it has come to light that the Balkan region home to over 55 million people - Albania, Bosnia and Herzegovina, Kosovo, Montenegro, North Macedonia, Serbia, and EU member states Romania, Bulgaria, Greece, Slovenia, and Croatia, remains widely absent and almost entirely marginalized from the continent's musical narrative.** This study aims to explore the reasons behind this significant oversight, questioning why such a territorially vast, populated and culturally rich area is nearly invisible on the European music map.

We aim to present a data-driven, research-based approach to understanding the causes of this underrepresentation, and offer solutions to overcome the barriers that have long prevented Balkan artists from reaching their full potential on the European and global stage.



2. Methodology

This report is based on extensive research conducted from June 10, 2023, to July 8, 2024, involving interviews and surveys with a diverse group of music professionals, festival organizers, promoters, and artists from the South East European (SEE) region. Our research draws on a comprehensive range of data sources, including regional neighboring rights societies—such as Prophon in Bulgaria, PI-Organization for Collective Administration of Performers Rights in Serbia, CREDIDAM in Romania, and HUZIP in Croatia—as well as musicians’ unions, and music export offices like Kosovo’s Music Export Office, Croatia’s We Move Music, Slovenia’s SIGIC, Romania’s Raw Music, and Serbia Creates. We also used insights from digital platforms, notably Gigmit, to capture the breadth of artist representation across the region.

Additionally, statistical data from entities such as the Bulgarian Music Association (BMA), the Croatian Musicians Union, Romanian CREDIDAM, Creative Europe Desks across the SEE region, and international data sources like Eurostat were analyzed. Interviews with a variety of stakeholders—festival curators, music programmers, national broadcasters, musicians, and cultural representatives—allowed us to capture a broad spectrum of perspectives. This multi-source approach enables a nuanced, data-driven analysis of the music industry landscape within SEE.

A critical component of our methodology includes an impact survey conducted by the Association of Independent Record Labels and Publishers – Bulgaria (ANMIP-BG), an IMPALA member organization. From October 10 to November 5, 2024, ANMIP-BG gathered 71 survey responses to assess the effects of Spotify’s 1,000-stream threshold policy on artist revenue in the SEE region. The survey, encompassing labels and artists of varied catalog sizes and genres, revealed substantial revenue impacts, especially among larger catalogs and niche genres

like folklore. This targeted data offers essential insights into the digital barriers affecting SEE artists' compensation and representation, emphasizing a need for 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.

This layered approach, combining regional statistics, digital platform insights, and direct feedback from stakeholders, ensures that our analysis accurately reflects both quantitative and qualitative dimensions of the SEE music industry.

3. Analysis of Balkan Underrepresentation

3.1. Festival Participation Breakdown

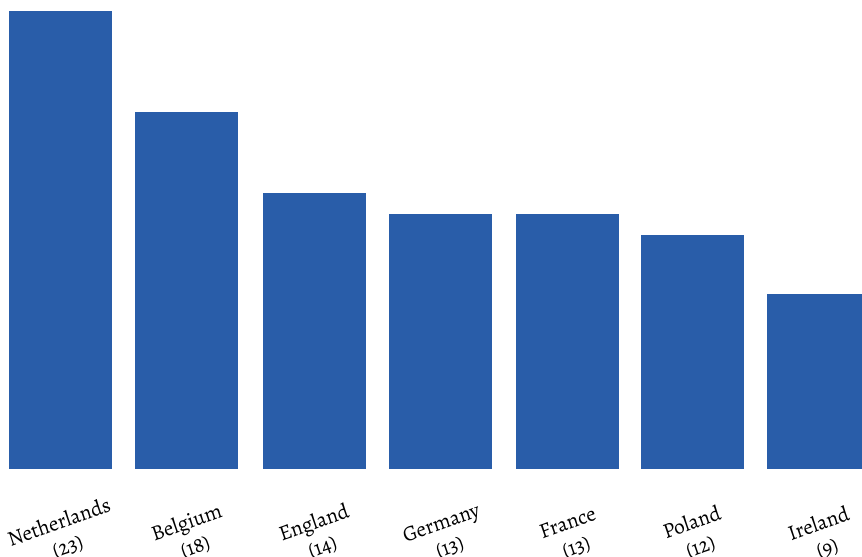
The underrepresentation of Balkan or preferably South East European (SEE) artists in major Western European music events and platforms highlights a complex landscape of geographical discrimination within the music industry. This analysis seeks to examine the participation rates of SEE artists at prominent festivals such as **WOMEX, Eurosonic Noorderslag (ESNS), Reeperbahn, Tallinn Music Week and Jazzahead**, in comparison to those from western countries, to shed light on the disparities and their underlying causes.

At ESNS (Europe's biggest event for emerging music artists) 2024, artists from various countries participated. ESNS presents different festivals, programs and events. The key part of the event is Eurosonic, which aims to book artists from all European (Union) countries where a total of 212 artists participated. The Netherlands having the highest representation (23 artists), followed by Belgium (18), Germany (13), England (14), France (13), Poland (12) and Ireland (9).

For Eurosonic 2024, the festival lineup included artists from a

Participation at Eurosonic 2024 by countries (excerpt)

*Excluding Norderslaag



wide range of countries. Here's a breakdown of participation from SEE countries:

- Bulgaria: 3 artists
- Serbia: 3 artists
- Slovenia: 3 artists
- Croatia: 2 artists (with one artist *freekind.* being listed for a second time, since the band is both Slovenian and Croatian)
- Greece: 2 artists
- Romania: 1 artist
- North Macedonia: 1 artist

Total of 14 artists (with two – freekind. and Bulgarian Cartrader being repeated performers from ESNS program 2023 due to their Music Moves Europe Awards nominations)

Other countries in the region (e.g., Bosnia, Albania, Montenegro, Kosovo) did not have artists listed in the Eurosonic 2024 lineup nor in any other of the events listed in the study.

This analysis highlights the underrepresentation of SEE artists at Eurosonic 2024, with only a small number being part of the festival's lineup compared to Western European countries.

The population for these counties (The Balkans) combined is 55 million people while Ireland alone (which had 10 artists perform at Eurosonic 2024) is only 5 million.

Iceland, with less than 300 000 inhabitants, had more participants (4) than any of the Balkan countries. For comparison Romania has a population of almost 20 million people and a rich and prosperous music industry, while the country has only 1 performing showcase artist at Eurosonic in 2024.

Estonia, Latvia and Lithuania had 8 performers at Eurosonic 2023 and 5 performers at 2024, with their total population of less than 6 million people.

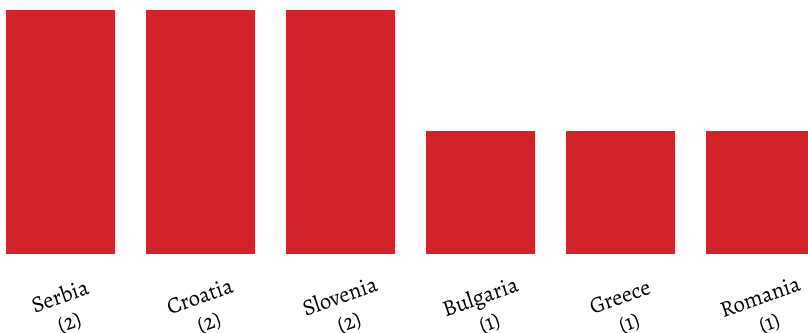
The **2025 Eurosonic** lineup reflects ongoing challenges in achieving balanced representation across Europe, with SEE artists accounting for 4.1% of the total acts. While countries with smaller populations like Ireland (12 artists) and Iceland (3 artists) saw higher representation, this highlights the importance of continued efforts to ensure broader geographical inclusion at major European events.

In 2025, **Eurosonic featured 9 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)
- Romania: 1 (Musspell)

Participation of SEE Artists at Eurosonic 2025 (excerpt)

*Excluding Norderslaag



This accounts for 4.1% of the 222 total acts at Eurosonic 2025—a modest level of participation for a region home to over 55 million people. Countries such as the Netherlands (22 artists) and England (21 artists) had notably higher representation, which is understandable given the structure of various ESNS programs and their funding partners. However, the absence of artists from several SEE countries—namely Albania, Bosnia and Herzegovina, Kosovo, Montenegro, and North Macedonia—highlights an opportunity to further engage and include a broader spectrum of talent from the region in future editions.

WOMEX has not had a performer from the Balkans in their official selection *(in 2022 WOMEX awarded Bulgarian musician Ivo Papasov their annual award, but this does not relate to their official showcase selection, nor emerging artists support).

JazzAhead, the biggest music conference for Jazz music in Europe, has not had artists from the Balkans either, despite the fact that our research shows that there have been multiple

and many applications from artists from the region for years (for both WOMEX and Jazz Ahead). It's important to note that Bulgaria, Kosovo, Romania, Croatia, Slovenia and Serbia are also investing at stands/expo booths at both these events without having showcase artists in the program(s). Based on official selection of artists at the rest of major European conference/showcase festivals the statistics for 2023 show the following.

Based on official selection of artists at the rest of major European conference/showcase festivals the statistics for 2023 show the following.

At **Reeperbahn Festival 2023** there was 1 artist from the SEE region - KOIKOI - (Serbia)

At **Tallinn Music Week 2023** there were 3 artists from the SEE region - Turbo Trans Turisti (Serbia), Lufthansa (North Macedonia), Johnny Labelle (Greece).

At **The Great Escape Festival (UK), MaMA Music & Convention (France) and Linecheck (Italy)** in 2023 there were no performers from the SEE region.

We made a comparative analysis of markets similar to the Balkans in (1) population, (2) regional representation.

Balkan Region population (55 million), Germany (83 million), England (55 million) and the Baltics - Litva, Latvia and Estonia (6.1 million)

The below data on the representation of artists from different regions across a selection of music festivals. It breaks down the number of Balkan, German, English, and Baltic Country artists that participated in each festival and provides the total count of artists for each event. This data allows for an analysis of regional representation at each festival, offering insights into the geographical diversity of artists and how it may reflect the festivals' reach and appeal. The festivals included are Reeperbahn Festival, TMW, MENT, The Great Escape Festival, MaMA Music & Convention.

The total number of artists by region across all festivals is 36 Balkan artists, 150 German artists, 167 English artists, and 82 artists from the Baltic Countries, with an overall total of 1,046 artists.

Looking at the proportions per festival:

Reeperbahn Festival: Predominantly German artists (32.6%), followed by English artists (18.4%), with very few Balkan and Baltic Country artists (both 0.25%).

Tallinn Music Week: Artists from the Baltic Countries represent a significant portion (44.6%), with minimum representation from Balkan (1.7%), larger German (3.4%), and English artists (2.8%).

MENT (the largest music conference in the SEE region): SEE artists have higher representation (36.4%), which is quite distinct compared to the other festivals. German and English artists have a minor presence of about 3.4% and 6.8% respectively. It's very important to note that while MENT is the biggest music conference in the SEE region, the event has significantly lower local representation than the rest of the analyzed events.

The Great Escape Festival: Overwhelmingly English artists (49.7%), with a negligible presence of German artists (0.67%) and none from the Balkans or the Baltic Countries.

49,7% English artists
0,67% German artists
0 Balkans/Baltic Countries

MaMA Music & Convention: Majority representation of French artists, minimal representation of German and English artists (1.21%), with no artists from the Balkans or the Baltic Countries.

Festival Representation Discrepancies

Examining the festival line-ups from the past several years unveils a stark underrepresentation or complete lack of representation of SEE artists. While these festivals are platforms for showcasing a diverse array of talents, the obvious lower presence of SEE artists compared to those from Western and Northern Europe raises questions about inclusivity and diversity in programming choices. The disparity is not merely numerical but indicative of a broader trend that marginalizes the musical contributions of the region's artists on prestigious international stages.

3.2. Selection Processes and Systemic Barriers

Selection Pathways and Opportunities through EBU Partnerships

One pathway for artist participation at ESNS involves the collaboration between the European Broadcasting Union (EBU) and ESNS, which allows EBU-affiliated national radio stations to propose and support emerging acts. This system plays an important role in highlighting new talent across Europe and adds to the diversity of the festival's lineup.

In some countries, this process is carried out through national competitions or selection mechanisms. For example, in Bulgaria, artists are often selected through the Bulgarian National Radio's "Golden Spring" competition. In 2021, one of the guidelines required submissions to be in the Bulgarian language—a policy designed to support local music but which may also limit artists performing in other languages from participating through this route.

While this system offers valuable exposure for many artists, it may not fully capture the broad spectrum of contemporary music trends emerging from the SEE region. Differences in selection processes, language requirements, and local broadcasting frameworks can influence which artists ultimately gain access

to international opportunities like ESNS.

Ongoing conversations with curators and partners, including ESNS and EBU members, are key to finding ways to make these selection pathways as inclusive and representative as possible—ensuring that a wider range of musical voices from all regions, including South East Europe, are reflected on Europe’s major stages.

4. Genre Representation in the SEE Music Scene

One direct answer from JazzAhead in 2023 during the MOST conference in Veszprem, Hungary in regards to the question “why their program lacked artists from the region” was *“limited applications and quality of the applications”*.

Our research in Bulgaria showed that each year since 2014 over 80 jazz artists have applied multiple times, even when the showcase application had a fee (*application fee for Jazz Ahead). No artists were ever selected.

The disparity in musical equity between the Balkans and the rest of Europe is underscored by a disregard for the diverse music genres evolving within the SEE countries. A critical examination of artist selections for the Jazzahead program reveals an alarming trend: the absence of SEE artists is often justified by the “quality of the applications.” However, a closer look at the last five years of selections reveals a preference for specific jazz styles prevalent in Western and North-Western Europe, often labeled as “European jazz” for their experimental nature. This preference suggests a narrow definition of “quality” that overlooks jazz and other contemporary music genres flourishing in Eastern Europe and the Balkans. **Such a trend implies that the more**

traditionally represented Western music scene acts as a gatekeeper, directing the creative development of artists and limiting their access to the international industry.

The industry framework seems to exclude anything that might place the Western European sector at a competitive disadvantage, thereby preventing diverse artistic expressions from becoming an integral part of the global music landscape.

The rich history of jazz in Bulgaria, as highlighted by the detailed account of its development***, underscores the significant cultural and musical contributions the region has made to the genre.

This underrepresentation is particularly striking given the region's early and sustained engagement with jazz. Bulgaria, for instance, was introduced to Jazz before World War I and had already embraced jazz by the 1920s, with performances by military bands and the spread through cinema orchestras and imported records. The country produced notable jazz musicians who gained international respect and contributed significantly to the genre's development. The establishment of jazz clubs, orchestras, and the integration of jazz in educational institutions further cemented the genre's role in Bulgarian cultural life. In 1968 the department of Pop and Jazz Music at the Music Academy in Sofia was opened, while in Belgium (as an example of dominating force within European jazz) introduced jazz in the education system 11 years after Bulgaria - in 1979. The oversight of Balkan jazz by major European showcase



events fails to acknowledge the depth and diversity of the jazz traditions in the region. While Western European narratives often define “quality applications” based on a specific experimental approach labeled as “European jazz,” the rich and diverse styles developing in the Balkans and Eastern Europe are neglected. This exclusion perpetuates a narrow understanding of jazz and overlooks the rich contributions of Balkan artists, who have been innovating within and beyond traditional jazz boundaries for over 100 years.

The exclusion of Balkan jazz from events like Jazzahead not only highlights a geographical bias but also points to a broader issue of cultural gatekeeping within the European music scene.

This gatekeeping limits the exposure and recognition of diverse jazz styles and artists, contributing to a homogenized and Western-centric view of the genre. By failing to include Balkan jazz, these showcase events miss out on the opportunity to celebrate the full spectrum of jazz’s global influence and evolution, undermining the genre’s foundational spirit of innovation and inclusivity.

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

While the European Union continues to frame cultural cooperation as a tool for unity, the hard data emerging from key support mechanisms tells a different story — **one of geographical imbalance and systemic exclusion**, particularly in relation to the Balkan countries. An in-depth look at two of the continent’s most influential platforms for live music development — **LiveEurope** and **Live DMA** — reveals structural limitations that significantly marginalize

Southeastern Europe from meaningful participation.

LiveEurope: Disproportionate Touring Support

LiveEurope, co-funded by the European Commission since 2014, was designed to support the cross-border circulation of emerging European artists by financially incentivizing venues to program acts from other EU countries. While the initiative has proven highly beneficial for artists from Western and Northern Europe, its impact on the Balkans has been starkly limited.



Between 2014 and 2025:

- Out of **over 3,200 supported events**, countries such as **Albania (0)**, **Montenegro (1)**, and **Kosovo (1)** are virtually absent from the program.
- While **Serbia (83)** and **Croatia (77)** are better represented, a significant proportion of these bookings took place within the region rather than in Western or Central Europe, thereby **undermining the core goal of transnational exposure**.
- For example, over **90% of Serbian acts programmed through LiveEurope were hosted by venues in neighboring Balkan countries**, especially Slovenia and North Macedonia. This indicates a form of **circular isolation** rather than meaningful inclusion in the pan-European music network.

- The entire **Balkan region (11 countries, ~56 million inhabitants)** is grossly underrepresented when compared to **Benelux + Scandinavia (5 countries, ~57.3 million people)**, where acts from the Netherlands, Belgium, Denmark, Norway, and Sweden consistently dominate programming schedules.
- Countries like **Belgium and Sweden** see LiveEurope support almost as a regular export strategy, while entire nations in the Southeast — despite eligibility — are often not even considered.

This disparity cannot be attributed solely to artistic output, as the region has a vibrant and dynamic scene. Rather, the lack of representation is largely driven by:

- **Limited access to information and funding application training**
- **Absence of direct ties with programming networks and influential booking agents**
- **Language barriers and lack of export-focused infrastructure**
- **Persistent stereotypes and geopolitical stigma, often conflating Southeastern Europe with instability and low professionalism**

The result is an **unspoken tier system**, where Western and Northern Europe serve as hubs of cultural mobility, while the Balkans remain perceived as peripheral — both literally and symbolically.

Live DMA: Institutional Absence and Missing Infrastructure

Live DMA, another Creative Europe-supported network, brings together national associations of music venues, clubs, and festivals across the continent. Its research, advocacy, and capacity-building programs are among the most robust in the EU. Yet, **its member base is overwhelmingly skewed toward Western and Northern Europe:**

- **Germany (LiveKomm):** 510 venues, 160,000 live

performances annually

- **France (FEDELIMA):** 142 venues, over 17,000 performances/year, 58% public subsidy
- **Denmark (Dansk Live):** 76 venues, total revenue exceeding €30 million
- **The Netherlands (VNPF):** 58 venues, 28,000 artist performances, 5.5 million visitors/year

In stark contrast:

- **No Balkan country (except one venue in North Macedonia)** is represented in Live DMA as a full or associate member.
- **Bulgaria, Romania, Albania, Bosnia and Herzegovina, Kosovo, and Montenegro** remain **completely outside** the network's influence, which means:
 - They do not benefit from Live DMA's benchmarking reports, sustainability frameworks, or venue professionalization programs.
 - Their national venues are not part of advocacy conversations regarding fair artist pay, green transition in touring, gender equity, or youth access — all policy areas shaped through Live DMA's strategic influence in Brussels.

This **invisibility in data and decision-making forums** creates a recursive problem: since venues in these countries are not counted, they are not considered in policymaking — which in turn ensures they remain underfunded and structurally isolated.

Moreover, the **lack of a national umbrella body** in most Balkan states (such as a venue association similar to LiveKomm or VNPF) makes integration into European networks extremely difficult. Without a centralized representative platform, regional actors are fragmented and often overwhelmed by the bureaucratic thresholds of international programs.

Structural Consequences

The combined effect of these limitations is twofold:

- **Artists from Southeastern Europe have fewer touring opportunities**, reducing their potential for career growth, international visibility, and revenue.
- **Venues and promoters in the region are cut off from EU-level best practices and funding streams**, further perpetuating disparities in working conditions, safety standards, audience development, and environmental planning.

Despite being formally eligible, Southeastern Europe remains informally excluded. This is not a result of lack of talent or ambition, but rather a reflection of deep-seated inequalities in access, recognition, and structural support.

To move beyond rhetoric, EU-supported platforms like



LiveEurope and Live DMA must **not only acknowledge these blind spots** but actively work to correct them — through targeted inclusion strategies, dedicated funding envelopes, and support for regional intermediary structures.

6. Number of music artists in SEE

To gather a better understanding about the number of artists in the region we made a research on the platform GigMit (a web platform where music artists could apply to play at a festival or gig), where we discovered that in 500 km radius

from Sofia (being a very central city in the Balkans) there are more than 5300 music artists registered in the platform. Because of the specifics of the website GigMit and not being able to cover the full scope of the Balkans (for example in the initial search of 500 km radius from Sofia, Croatia and Slovenia were excluded and in 100 km radius from Zagreb there are 845 registered musicians in the platform). Based on the above information our estimation for registered artists from the Balkans likely **exceeds 7000 registrants on GigMit.**

Another research conducted in Romania, Serbia, Croatia and Bulgaria highlights the number of members at music performers associations and neighboring right society statistics:

Bulgaria

Bulgarian Music Association

- 790 members (official number of performer members).

Prophon's (Bulgarian neighboring rights society for producers and performers) system has 8,710 registered Bulgarian performers with a current mandate, out of which 1,004 have received remuneration at some point. Currently, there are 236 performer members registered with Prophon.

Croatia

Croatian Performers' Rights Collecting Society - HUZIP

- 9000 registered artists (Approximate number of active members; some members might be deceased.)

Croatian Musicians Union

- 6000 to 7000 active artists

Serbia

PI-Organization for Collective Administration of Performers Rights

- 3143 registered members.

Romania

CREDIDAM (Romanian Center for Performing Artists Rights Management)

– 16,148 total Romanian performers (as of 31st January 2024), approximately 12,000 are musicians.

The total number of artists in the region, based on the provided numbers, is approximately 35,853.

This includes registered performers and musicians from Bulgaria, Croatia, Serbia, and Romania.

6.1. Emerging artists

Adding to the discussion on festival representation discrepancies, the **SoAlive Music Conference (SAMC)** showcases a pioneering effort to bridge this gap by curating a showcase program exclusively featuring 40 music acts from the Balkans. **This initiative not only demonstrates the abundance and quality of emerging artists in the region but also sets a benchmark for how festivals and conferences can actively contribute to correcting the underrepresentation of SEE artists.** SAMC's dedication to spotlighting Balkan talent illustrates a proactive approach to fostering inclusivity and diversity within the music industry's programming choices.

By giving these artists a platform, SAMC challenges the prevailing norms and showcases the rich, diverse musical scene of the Balkans, underscoring the potential for greater inclusion in festival line-ups globally. This approach not only enriches the festival experience for attendees by introducing them to new and interesting sounds but also sends a strong message about the importance of cultural representation and the need for a more inclusive music industry.

The success of SAMC's showcase program serves as a compelling argument for the inclusion of more Balkan artists in international festival line-ups. It proves 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 play a role in promoting a more balanced and diverse representation of artists on the global stage.

7. Cultural Bias and the Role of Stereotypes

The root causes of this underrepresentation extend beyond mere programming choices to include deep-seated stereotypes and cultural biases. **SEE artists often find themselves confined within traditional or folkloric music categories, overlooking the region's booming contemporary music scene (from indie, to electronic, pop, synth music and hip-hop, rarely anything from these genre groups is shown at major European showcase festivals).** These stereotypes not only limit their international exposure but also contribute to a homogenized and outdated perception of Balkan music, sidelining its rich diversity and modern expressions. Expanding on the topic of stereotypes and cultural bias, it's evident that such preconceived notions play a significant role in shaping the opportunities available to SEE artists on the international stage. Stereotypes

that pigeonhole SEE music into narrow categories fail to acknowledge the dynamism and innovation present in the region's contemporary music scene. This reductionist view not only misrepresents the artistic diversity of SEE countries but also impedes artists from being recognized for their contributions to various modern music genres.

The impact of cultural bias extends further, influencing the decision-making process of festival organizers, record labels, and curators, who might be less inclined to engage with SEE artists due to a lack of familiarity or appreciation for the region's music. This bias not only hinders the visibility and accessibility of SEE music but also discourages artists from pursuing opportunities that could lead to broader recognition.

Furthermore, this cultural bias contributes to a cycle of underrepresentation, where Balkan artists are less likely to be featured in international music festivals, showcases, and playlists, further entrenching the stereotypes.

It creates a barrier to entry for emerging artists who wish to break free from traditional labels and showcase their music on a global platform. It's a vicious circle, which has to be overcome by acknowledging the problem.

8. Structural Challenges in the SEE Music Industry

A significant challenge faced by South East European (SEE) artists in making their mark on the international stage stems from considerable financial and structural barriers. While artists from wealthier European regions benefit from robust support systems for touring and festival appearances, their SEE counterparts often navigate a

landscape marked by a scarcity of resources and financial backing. This disparity not only affects their capacity for international exposure but also underscores a broader issue of accessibility within the global music ecosystem.

The lack of well-established music export offices in the SEE region, with only a handful currently operational (such as Kosovo, Croatia's We Move Music, Slovenia's unofficial SIGIC, Serbia Creates - intergovernmental umbrella body in charge of international promotion and export in the fields of creative industries, innovation and knowledge-based economy, Raw Music in Romania - which functions as an export office and is European Music Export Exchange member) and Romanian Cultural Institute (Inter-governmental structure) underscores a structural gap in support for music export initiatives. Despite this, it's noteworthy that nearly all countries in the region offer some form of mobility funding and support for artists' participation in international events, indicating a recognition of the importance of cultural exchange and the global showcasing of local talent.

Most SEE countries are actively investing in export initiatives, including stands, expo booths, and participation in international conferences, demonstrating a commitment to overcoming these barriers. In Bulgaria, the Bulgarian Music Association and the SoAlive Music Conference play pivotal roles in disseminating information on funding opportunities and open calls for showcases to their members and newsletter subscribers. They also provide essential guidance on the application process for funding, showcasing a proactive approach to facilitating artists' international engagement.

However, these efforts face challenges due to the region's underrepresentation in major music events and platforms, highlighting the need for more substantial and coordinated support mechanisms. The financial and structural obstacles SEE artists encounter not only limit their opportunities for international career development but also impact

the diversity and richness of the global music scene, underscoring the urgency of addressing these disparities to foster a more inclusive and equitable music industry.

Distribution of Cultural Organizations Participating in 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/Northern Europe 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

Selected Western/Northern Europe

66 million people

1,071,000 km² area

158 funded projects

South East Europe

55 million people

871,000 km² area

100 funded projects

Funded Projects Per Capita

SEE Funded Projects Per Million:

$100 / 55 = 1.82$ projects per million

Selected Western/Northern Funded Projects Per Million:

$158 / 66 = 2.39$ projects per million

Percentage Difference in Funding

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

Total Projects Difference:

$158 \text{ (Western/Northern)} - 100 \text{ (SEE)} = 58$

Percentage Difference: approx 36.7%

Analysis

1. Population and Area:

Selected Western/Northern Europe has a slightly higher population and area compared to SEE, yet the number of funded projects is significantly higher.

2. Funded Projects Per Capita:

Selected Western/Northern Europe has a higher number of funded projects per capita (2.39 projects per million) compared to SEE (1.82 projects per million), indicating better funding accessibility and representation.

3. Funding Disparity:

There is a 36.7% difference in the total number of funded projects, indicating a significant funding disparity favoring Western/Northern Europe.

4. Implications for Cultural Representation:

The disparity in funded projects suggests that SEE countries are underrepresented in EU cultural funding initiatives. This disparity can impact the development of the cultural and music sectors in these countries, limiting their ability to compete on equal footing with their Western/Northern counterparts.

The comparative analysis highlights a substantial imbalance in the distribution of funded projects between South East Europe and selected Western/Northern Europe countries. Addressing this disparity is crucial for promoting a more inclusive and diverse European cultural landscape, ensuring that all regions have equitable opportunities to showcase their cultural and artistic contributions on the global stage. The data suggests that while SEE projects receive adequate funding per capita, the overall number of projects is insufficient compared to the larger, more populated Western/Northern European countries. This indicates a need for more focused initiatives to support the cultural sectors in SEE countries.

Summary of Lead Partners and Project Scale

South East Europe (SEE)

Total Projects 100

Lead Projects 53

Western/Northern Europe

Total Projects 158

Lead Projects 88

Breakdown by Country:

Albania: 3 projects, 1 lead

Bosnia and Herzegovina: 4 projects, 1 lead

Bulgaria: 6 projects, 2 lead

Greece: 21 projects, 12 lead

Croatia: 12 projects, 8 lead

Montenegro: 4 projects, 2 lead

North Macedonia: 3 projects, 2 lead

Romania: 14 projects, 8 lead

Serbia: 18 projects, 10 lead

Slovenia: 15 projects, 7 lead

Breakdown by Country:

Belgium: 53 projects, 29 lead

Netherlands: 31 projects, 18 lead

Denmark: 10 projects, 5 lead
Luxembourg: 8 projects, 5 lead
Norway: 25 projects, 13 lead
Finland: 14 projects, 8 lead
Sweden: 10 projects, 6 lead
Ireland: 7 projects, 4 lead

Other European Countries

Total Projects: 386

Lead Projects: 223

Highlights:

Countries like France, Belgium, and Germany lead in both participation and leadership.

SEE countries show significant leadership despite fewer total projects.

Western/Northern Europe dominates in project leadership compared to SEE.

Key Statistics:

Total Projects: 644

Total Lead Projects: 364

This summary highlights the disparity in project leadership and participation between South East Europe and Western/ Northern Europe, emphasizing the need for more inclusive representation and support for SEE countries.



8.1. Established framework and new dynamics in the SEE

The evolving dynamics within the European music industry reveal significant challenges for the SEE region, particularly concerning its integration and recognition within the EU's established frameworks. Two examples elucidate this issue:

National Music Councils: The concept of a National Music Council, serving as the official representative for a country's entire music sector, has its roots in the mid-20th century and has proven effective for countries that adopted it during that period. However, within SEE countries, such organizational structures are often associated with communist regimes and are poorly received today. Instead, these countries have developed professional organizations that, while not representing the entire sector by definition, have advanced policy-making efforts on national and international levels and are recognized by state authorities. These organizations may represent specific industry segments (e.g., performers, entertainment industry associations, or independent labels) and have become the primary voice for the industry. Proposals to merge them into a larger, overarching organization like a National Music Council could jeopardize their successful advocacy work. Yet, European music organizations and networks have not fully acknowledged this nuanced landscape, still expecting a singular National Music Council for equal decision-making rights.

Music Export Offices: Similarly, the expectation for a single, state-recognized organization to handle all music export activities does not align with the realities in the SEE region. Here, multiple organizations within a country may engage in music export, supported and recognized by their governments for their contributions to the field. The European insistence on a unified Export Unit overlooks the dynamism and competitiveness among these organizations, which, in fact, accelerates the development of music export activities.

This diversity of export-focused entities allows for both collaboration and competition, fostering a faster catch-up with Western European music industries.

These two examples highlight a critical gap between the expectations of established European models and the innovative, diverse approaches emerging in the SEE region.

Recognizing and adapting to these differences is essential for fostering genuine inclusion and leveraging the full potential of Europe's musical diversity.

8.2. Geographical Equality and Treatment of Balkan Promoters by Agencies

Through extensive research and interviews conducted with key promoters in the Balkan region, we have uncovered significant issues regarding the treatment of promoters by major music agencies. Our study involved 12 detailed interviews with key promoters, revealing a troubling pattern of bias and unequal treatment compared to their Western European counterparts.

Promoters in the Balkans frequently report receiving less support from agencies when organizing shows and events.

Unlike the collaborative approach often extended to Western European promoters, Balkan promoters face stringent demands, such as the requirement to pay the full fee of the artist upfront.

This practice places a considerable financial burden on these promoters, who must secure substantial funds well before the event, adding significant risk to their operations.

Furthermore, agencies and artists often hold no liability for last-minute cancellations, leaving promoters to shoulder the financial and reputational consequences alone. This lack of

accountability not only affects the promoters' businesses but also tarnishes their relationships with audiences and local stakeholders. The absence of a safety net for promoters in the Balkans contrasts sharply with the more balanced and supportive arrangements seen in other parts of Europe.

Even festivals that are members of YOUROPE, the European Festival Association, encounter difficulties. Despite adhering to YOUROPE's standards and guidelines, these festivals often face agencies that refuse to comply with YOUROPE's terms, solely based on the region. This selective enforcement of policies exacerbates the challenges faced by Balkan promoters and highlights a systemic bias within the industry.

Our interviews revealed a consistent sentiment among promoters that the Balkan region is undervalued and unfairly treated by major music agencies. Promoters expressed frustration over the lack of respect and recognition for their efforts to promote music and culture in a region with rich historical and cultural significance. They emphasized the need for more equitable treatment to foster a thriving music ecosystem in the Balkans.

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 the ability of local promoters to attract major acts and organize successful events, ultimately impacting the music landscape and economic opportunities in the Balkans.

Addressing this issue 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 realm, the underrepresentation of South East European (SEE) artists on streaming platforms such as Spotify further exacerbates the challenges these artists face in gaining international exposure. The absence of regional curators or managers for the Balkans on these platforms is a significant barrier to promoting SEE music to broader audiences. 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 lack of representation forces many SEE artists to adapt their music to fit more “marketable” criteria, such as singing in English, to stand a chance of being included in influential playlists. Such compromises can dilute the regional identity and uniqueness of their music, potentially alienating local audiences without necessarily guaranteeing broader international success. Moreover, the absence of regional curators means that SEE artists have to invest significantly more in Spotify promotion and other direct marketing efforts to reach outside audiences. These additional costs can be prohibitive for artists from regions with fewer resources and

lower levels of industry support.

The growth of Spotify's user base in Bulgaria by 20+% in 2023 (based on IFPI's report) illustrates a rising demand for digital music content in the region.

This increase signals a substantial market opportunity that remains largely untapped due to the platform's current curatorial policies. By not assigning a regional manager or curator who understands the Balkans' unique cultural and musical landscape, streaming platforms miss out on fostering 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 Balkans' distinct sounds and stories.

The urgent need for action by the European Union (EU) to safeguard cultural diversity and ensure the fair representation of South East European (SEE) artists on streaming platforms cannot be overstated. The EU, with its foundational

principles of promoting unity while respecting diversity, has a pivotal role in addressing the geographical biases and underrepresentation issues within the digital music landscape.

The lack of SEE curators on major streaming platforms not only marginalizes artists from the region but also restricts the cultural diversity available to global audiences. This situation undermines the EU's objectives of cultural diversity and inclusivity, as it limits the exposure of rich musical traditions that form an integral part of Europe's cultural heritage. By allowing such biases to persist, the EU risks losing an essential aspect of its cultural identity, as the unique sounds, languages, and stories from the Balkans and other SEE regions remain underexplored and underappreciated on a global scale.

Urgent action is required to ensure that the digital music ecosystem reflects the diversity of its member states and promotes equal opportunities for all artists, regardless of their geographical origin. This includes encouraging streaming services to appoint regional curators for underrepresented areas and supporting initiatives that aim to increase the visibility of SEE artists. Such measures would not only benefit artists from these regions by providing them with the platform they need to reach wider audiences but would also enrich the global music scene with their unique cultural contributions.

The EU has the tools and the mandate to lead this change, through policy, funding, and advocacy, to ensure that the digital realm serves as a space that truly represents the diversity of its peoples. 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. This is not just about promoting regional music; it's about preserving the richness of European culture for future generations, ensuring 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 South East Europe (SEE)

The recent analysis by ANMIP-BG highlights the substantial impact of Spotify's 1,000-stream policy on artists and labels in South East Europe. According to survey responses from 71 industry professionals, the threshold policy disproportionately affects those with large catalogs and niche genres, such as folklore and regional music. 65% of respondents reported a significant negative impact on revenue, particularly labels managing over 100 tracks. 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.

The feedback indicates overwhelming opposition to the policy, with 85% of respondents advocating for more inclusive streaming practices. Suggestions include lowering or removing the threshold, improving algorithmic support for lesser-known artists, and assigning local curators to promote regional music on Spotify. This analysis offers crucial insights for stakeholders in the EU music industry, emphasizing the need for fairer digital policy structures that ensure equitable compensation and representation for artists across all regions.

10. Recommendations for Inclusive Change

To address the underrepresentation of SEE artists in the European music ecosystem, we propose the following:

- 1. Reforming Festival Selection Processes:** Major European festivals should adopt more transparent and inclusive selection processes, ensuring that SEE artists have equal

opportunities to perform and showcase their talents. Removing language barriers and modernizing the selection criteria will open the door for a wider range of artists from diverse backgrounds.

2. Appointing Regional Curators for Streaming Platforms:

Streaming platforms like Spotify should assign regional curators for the Balkans to ensure that SEE artists are adequately represented on key playlists. This will help bridge the gap between local artists and global audiences.

3. Supporting Music Export Initiatives: EU institutions should increase funding for music export offices in SEE countries, while fostering collaboration between existing export offices. This will help artists gain access to international markets and create sustainable careers in music.

4. Expanding Mobility Funding: SEE governments should enhance mobility funding for artists, ensuring that they have the resources needed to participate in international showcases and festivals. This would also require greater collaboration with EU cultural funding programs to ensure that SEE artists are included in future EU cultural initiatives.

11. Conclusion

The geographical and cultural marginalization of SEE artists in the European music ecosystem is not only an issue of representation but also of fairness and inclusivity. By addressing the systemic barriers that prevent SEE artists from participating in international festivals and digital platforms, the EU and the global music industry can help foster a more diverse and vibrant cultural landscape. It is time for the music industry to recognize the rich and varied talent in South-East Europe and provide the region with the opportunities it deserves to thrive on the global stage.

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The Balkans
deserve
a stage.