

Geographical Equality in the Music Industry in EU

Exploring the Underrepresentation
of Balkan Artists

Introduction by Ruth Koleva, highlighting the aim to
address cultural disparities within the EU music industry

MUSIC
EQUALITY



EU Cultural Mandate

The European Union's principles of diversity, inclusion, and gender balance span across all sectors, including the music industry.

The Balkan Region

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.

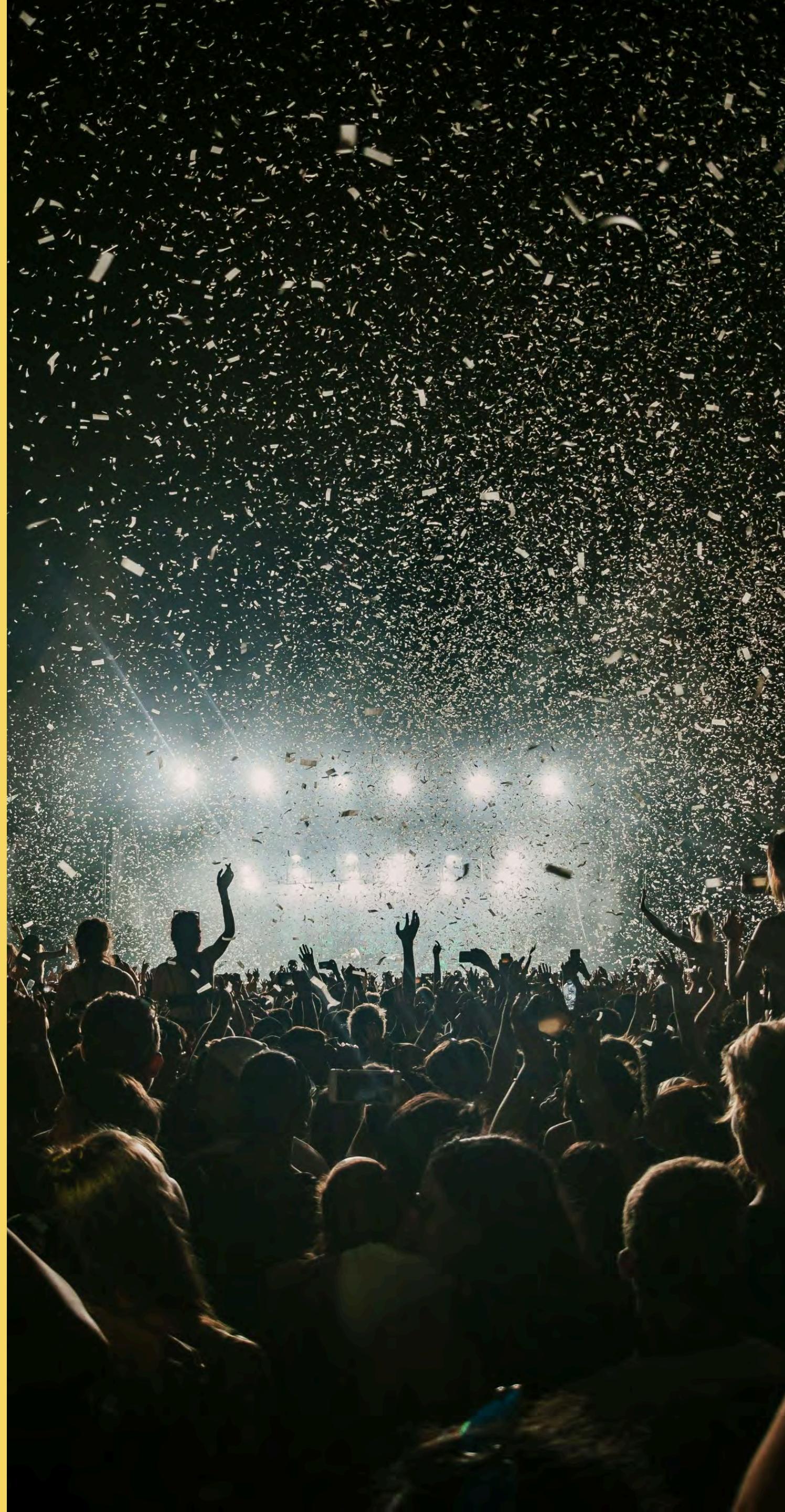
This study aims to explore the reasons behind this significant oversight, questioning why such a territorially vast, populated and culturally rich area is nearly invisible on the European music map.



Festival Representation Discrepancies

Lack of Representation in Major Events:

- **WOMEX 2025**
2 artists from Turkey and Serbia.
- **JazzAhead 2025**
No SEE artists despite multiple applications over the years.
- **Reeperbahn Festival 2025**
0 SEE artists.
- **Tallinn Music Week 2025**
3 artists from Kosovo, North Macedonia, Croatia.
- **The Great Escape 2025**
0 SEE artists.
- **Linecheck 2025**
0 SEE artists.



Data on Limited Representation in the Biggest Showcase Festival in Europe



Eurosonic 2025 Overview

- Europe's biggest event for emerging music artists.
- Total artists in 2025 - 222

SEE Countries Participation:

- 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)

Total from SEE: 6 artists

SEE artists make only 0.6% of acts at major European showcase festivals in 2025 (11 out of 1731)

Comparison with Smaller Populations:

- Iceland (population < 300.000): 3 artists
- Ireland (population 5 million): 12 artists
- Romania (population nearly 20 million): 1 artist

Barriers to Participation Example

The selection process barriers including partnership dynamics between the EBU and ESNS that impact SEE artists.



OPERATING EUROVISION AND EURORADIO



“The mission of the ‘Spring’ contest is to support and stimulate the creation of quality Bulgarian pop and rock music, fostering a fair and diverse international music scene.”

LiveEurope: Disproportionate Touring Support

LiveEurope

- 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 other 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, France, Austria, Germany 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.

Call for Inclusivity

- **Global Stage Accessibility**

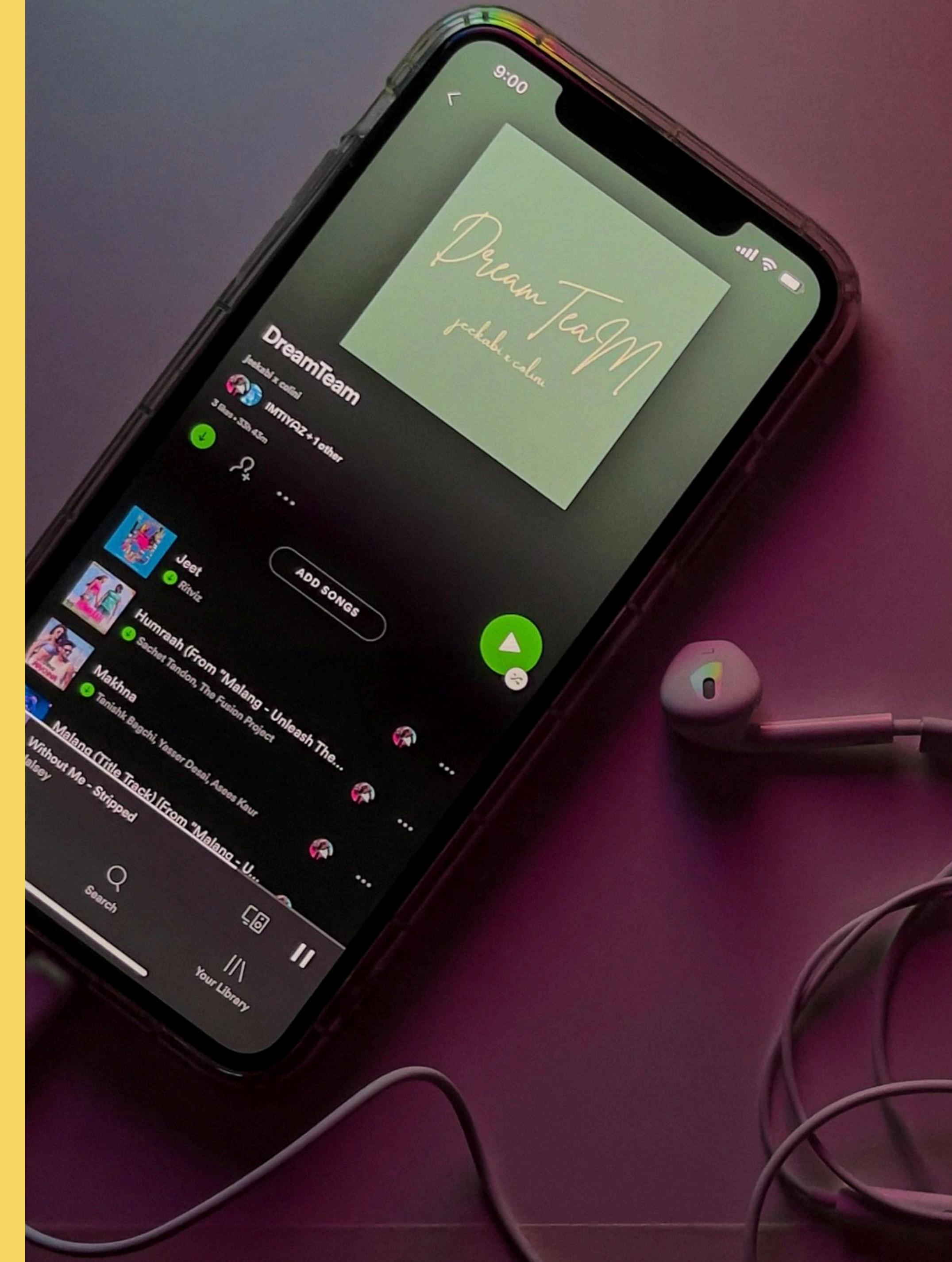
Emphasizes the importance of adjusting selection processes to embrace a broader spectrum of musical innovation and diversity in the SEE region.

- **Equitable Music Ecosystem**

Urges modifications to ensure that showcase events can serve as truly global stages, fostering a fair and diverse international music scene.



Digital Challenges and Opportunities for SEE Artists in Streaming Services



Digital Underrepresentation

- **Streaming Challenges:** South East European (SEE) artists face significant underrepresentation on major streaming platforms like Spotify. Spotify's 1,000-stream demonetization policy has hit the SEE market especially hard, with 65% of surveyed regional labels reporting significant revenue loss.
- In smaller SEE markets, limited user bases mean even established, professional artists often don't cross the 1,000-stream mark. Spotify's policy effectively penalizes them not for lack of quality or real life audience, but for coming from smaller markets – a form of structural discrimination
- **Lack of Regional Curators:** The absence of dedicated curators for the Balkans impedes the promotion of SEE music, favoring globally recognized English-speaking artists.

Adaptation and Compromise

- **Cultural Dilution:** SEE artists often have to modify their music to fit more "marketable" criteria, such as singing in English, which can dilute their regional identity and uniqueness.
- **Increased Marketing Costs:** Without regional curators, SEE artists incur higher costs in promoting their music on platforms like Spotify, making it difficult for them to reach international audiences, but also creating financial burden.

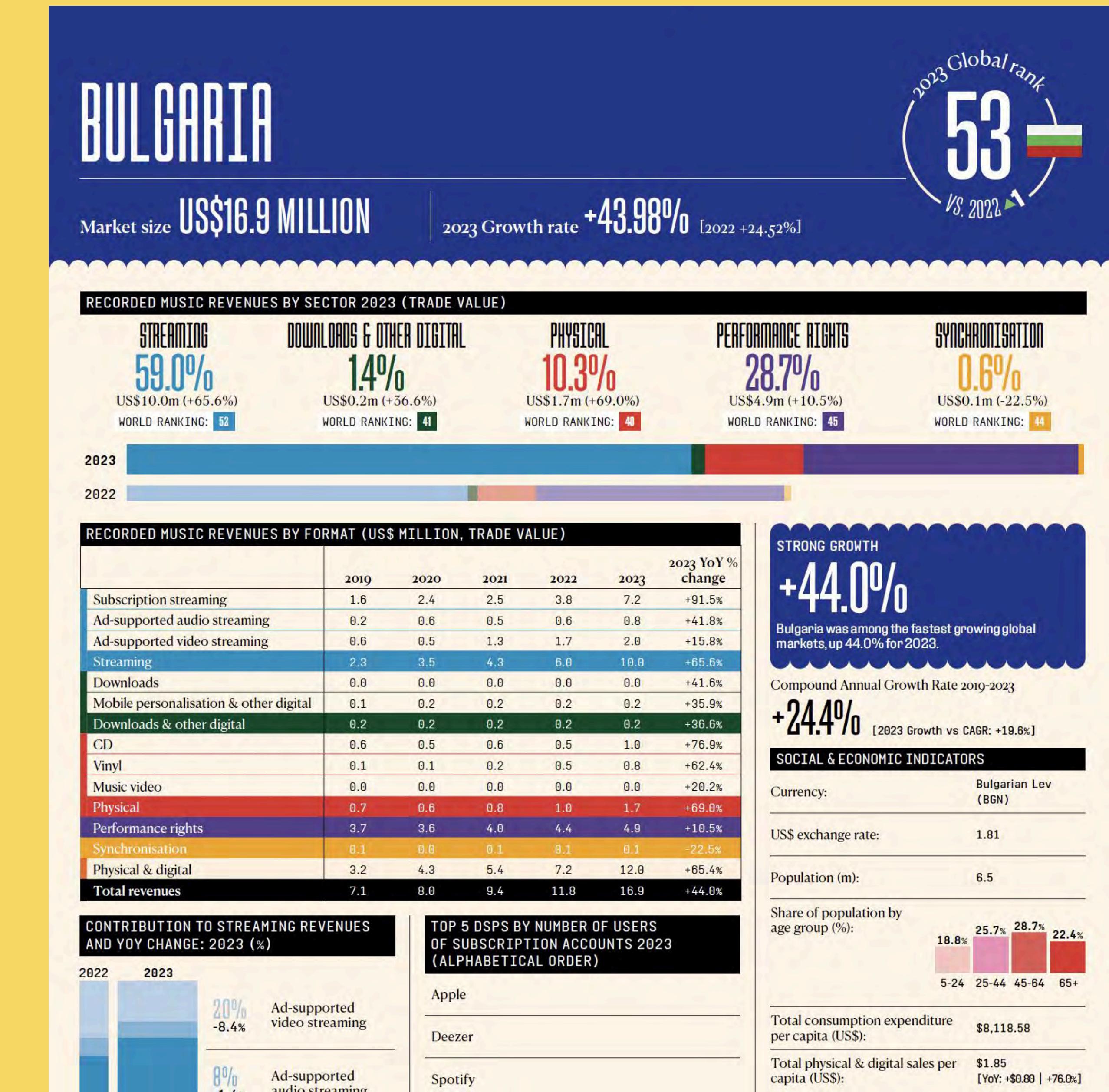


Market Potential

- User Growth:** Spotify's user base in Bulgaria grew by over 25% in 2023, indicating a substantial untapped market for digital music content in the region.

EU's Role and Responsibility

- Need for EU Action:** There is an urgent need for the European Union to address the geographical biases and ensure fair representation of SEE artists on streaming platforms.
- Policy Recommendations:** Encouraging streaming services to appoint regional curators and supporting visibility initiatives for SEE artists are critical steps.



Impact of Bias on Cultural Diversity:

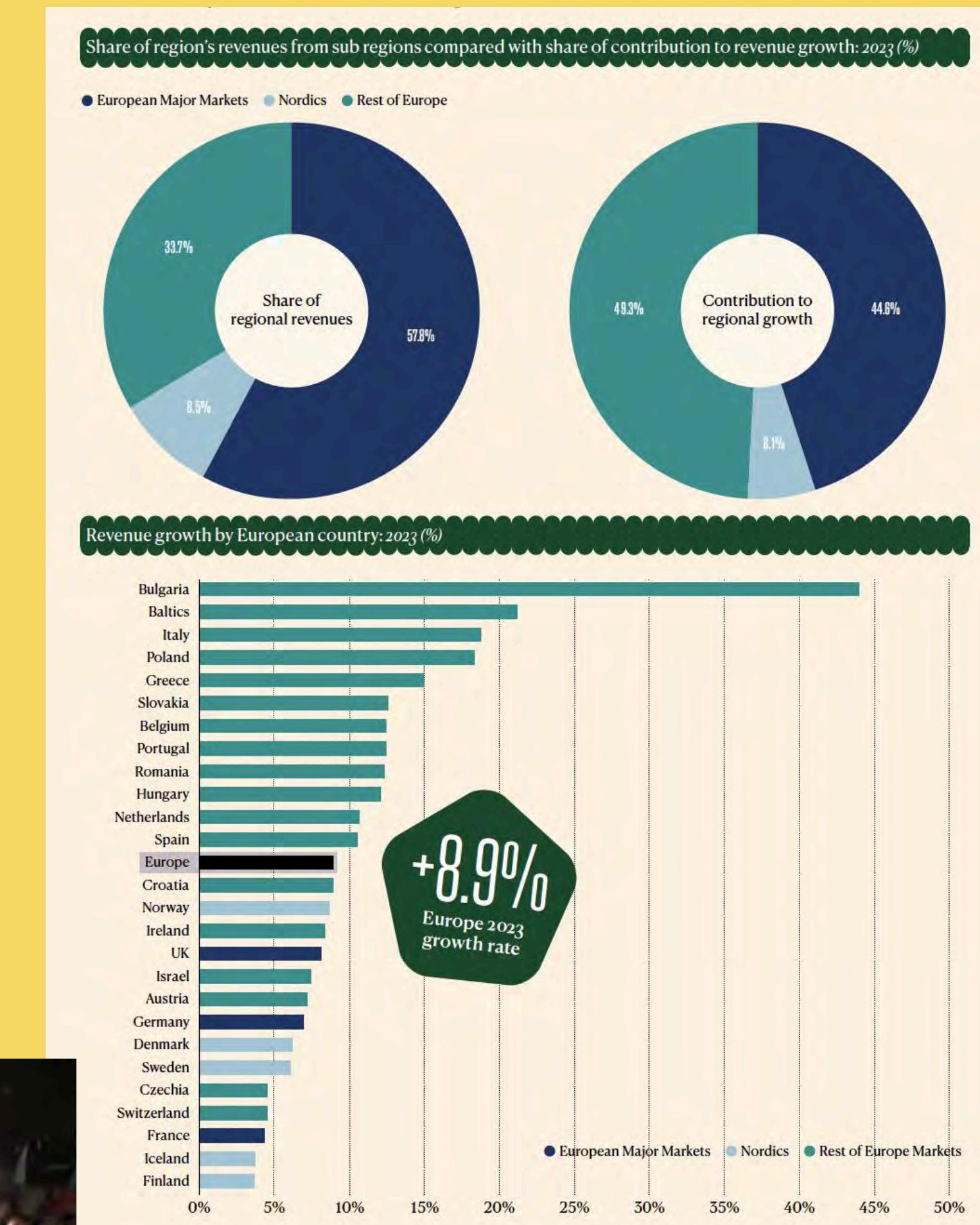
- **Cultural Risk:** Persistent biases risk losing the rich cultural identity of the Balkans and other SEE regions, as their music remains underappreciated globally.
- **EU's Cultural Objectives:** Ensuring diversity and inclusivity in the digital music landscape aligns with the EU's goals of promoting cultural diversity.

Growing Euroscepticism

- Persistent underrepresentation of SEE artists fuels Euroscepticism in the region, reinforcing narratives that the EU disregards its cultural periphery. If left unaddressed, this exclusion risks amplifying nationalist and anti-EU sentiment, weakening unity across the entire Union.

Call to Action:

- **Promoting Regional Music:** The EU is positioned to lead changes that promote the diversity of its peoples and ensure every culture has the opportunity to flourish in the digital age.
- **Supporting SEE Artists:** By implementing supportive policies and structures, the EU can help bridge the gap between SEE artists and the global music stage, enriching the global cultural landscape.



Consequences for SEE Artists

Stereotypes and Cultural Bias:

- **Root Causes:** The underrepresentation of SEE artists is not only due to programming choices but is deeply rooted in cultural biases and stereotypes.
- **Impact on Music Categories:** SEE artists are often stereotypically confined to traditional or folkloric music categories, ignoring their contributions to contemporary genres like indie, jazz, electronic, pop, synth music, and hip-hop.
- **Consequences:** These stereotypes limit international exposure and perpetuate a homogenized view of Balkan music, marginalizing its diversity and modern expressions.

Decision-Making Influences:

- **Cultural Bias:** Stereotypes influence the decision-making of festival organizers, record labels, and curators, who may be less inclined to engage with SEE artists due to unfamiliarity or underappreciation of the region's music.
- **Barriers to International Exposure:** This bias restricts SEE music's visibility and accessibility, discouraging artists from pursuing broader recognition and perpetuating underrepresentation.

Consequences for SEE Artists (cont.)

Structural and Financial Barriers:

- **Resource Scarcity:** SEE artists face significant financial and structural challenges, lacking the robust support systems that artists from wealthier European regions enjoy.
- **Music Export Offices:** Few operational music export offices in the SEE region, such as Kosovo, Croatia's We Move Music, Bulgarian Music Association and others, illustrate structural gaps. Most SEE countries actively invest in export initiatives but face challenges due to underrepresentation in major music events.

Policy and Integration Challenges:

- **National Music Councils:** SEE's avoidance of overarching National Music Councils due to associations with past regimes, preferring instead segmented industry representations.
- **Music Export Dynamics:** The expectation for a unified music export entity does not match the diverse and competitive nature of SEE's music export organizations.

Overview of Regional Artists

Digital Platform Data

Research on GigMit reveals that within a 500 km radius from Sofia, more than 4840 music artists are registered. Including Croatia, Slovenia and Romania expands this estimate to over 7580 registered artists from SEE on Gigmit.

4840

music artists registered within
500 km radius from Sofia

7580

registered artist if the estimate includes
Croatia, Slovenia and Romania

Country-Specific Artist Registrations



Bulgaria

- Bulgarian Music Association: **790 official members**.
- Prophon (neighboring rights society): **8,710 registered performers**, 1,004 of whom have received remuneration, with 236 currently active members.



Croatia

- Croatian Performers' Rights Collecting Society (HUZIP): Approximately **9,000 registered artists**.
- Croatian Musicians Union: Between 6,000 and 7,000 active artists.



Serbia

PI-Organization for Collective Administration of Performers' Rights: **3,143 registered members**.



Romania

CREDIDAM (Romanian Center for Performing Artists' Rights Management): **16,148 total performers**, with approximately 12,000 musicians.

35,853

Total Regional Count

The collective data from these countries puts the **total number of music artists in the Balkans** at approximately 35,853, highlighting a vibrant and extensive community of musicians across various genres.

Systemic Discrimination Discussion

music:ly
www.musicly.com

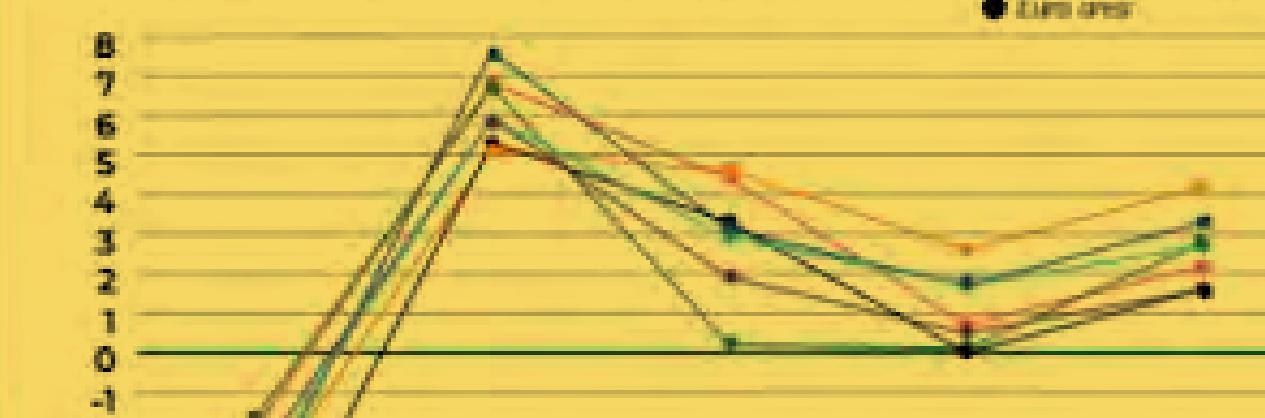
Bulgaria

Bulgaria was one of the fastest growing music markets in the world in 2022, in percentage terms. But it has a lot of catching up to do

IT IS PERHAPS TELLING THAT THE MOST COMMON reference to Bulgaria that emerges when you search most music industry websites is to the so-called "Bulgarian scam" - a warehouse full of devices streaming songs uploaded by the scammer - rather than any specific news about the music industry.

Global economic prospects Jan. 2023

Real GDP (per cent change from previous year)



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Strategic Initiatives for Empowering Balkan Artists

Appoint Regional Curators

- Advocate for the appointment of regional curators on major streaming platforms and at prominent music festivals to ensure representation and promotion of Balkan music.

Strengthen Music Export Offices

- Encourage the development of robust music export offices in SEE countries to provide structured support for artists targeting international exposure.

Increase Access to Funding

- Propose increased funding and grants specifically for Balkan artists to facilitate their participation in international events, reducing economic barriers.

Strategic Initiatives for Empowering Balkan Artists

Establish Collaborative Networks

- Create platforms for collaboration that connect Balkan artists with international industry stakeholders to enhance their career opportunities.

Promote Cross-Cultural Exchange

- Initiate cultural exchange programs that encourage artistic collaborations across borders, enriching the global music scene with diverse Balkan influences.

Support Artist Development:

- Implement artist development programs including workshops, training, and mentorship tailored to the unique challenges faced by Balkan artists.

Work for REAL Inclusive Policies:

- Work with European policymakers to address systemic biases and ensure equitable opportunities for Balkan artists on international platforms.

*The Ballers
deserve
a stage.*

MUSIC

EQUALITY