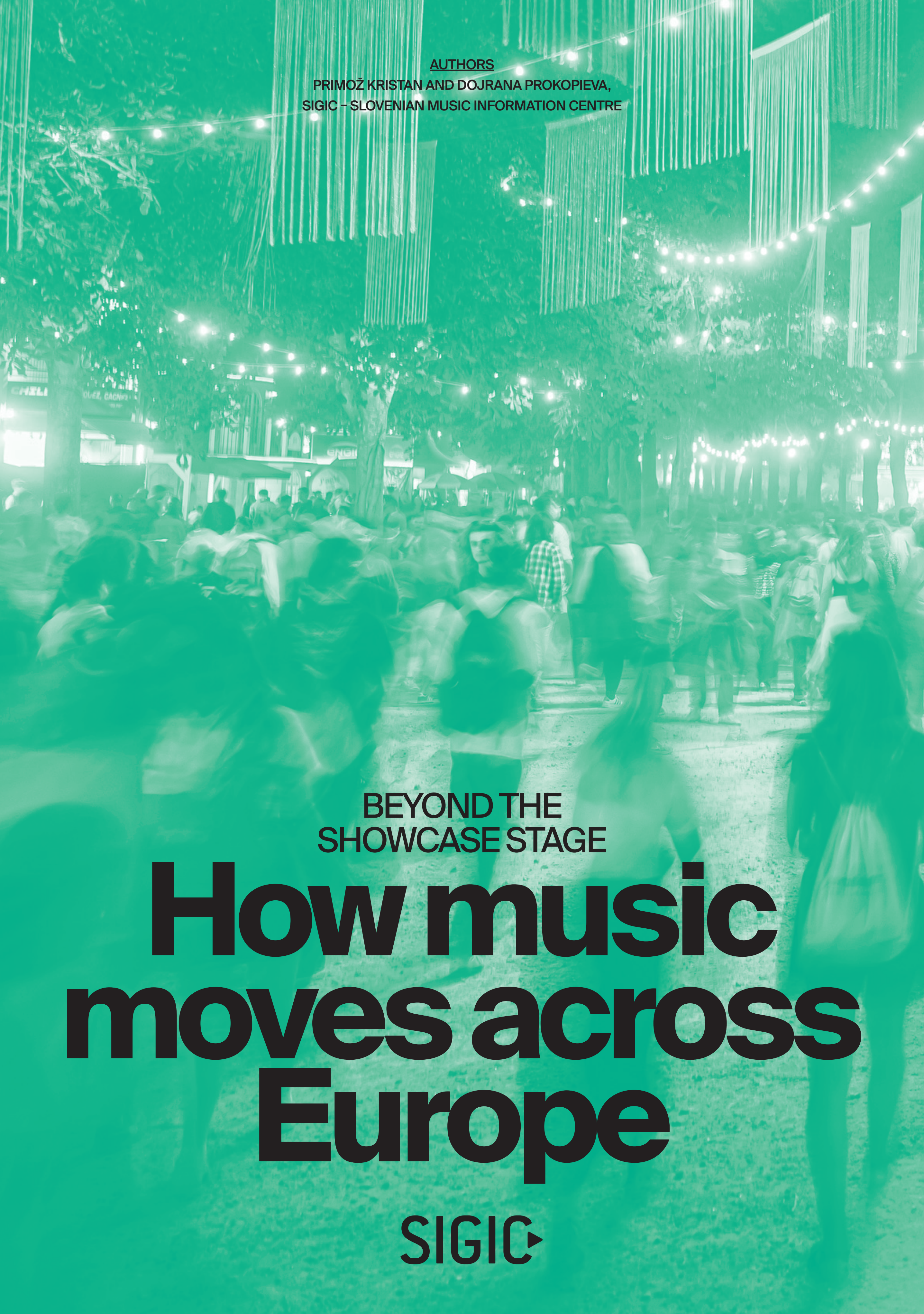

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BEYOND THE SHOWCASE STAGE

How music moves across Europe

SIGIC

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Introduction

Showcase festivals have become key gateways to international visibility for emerging European music artists. Events such as **Eurosonic Noorderslag (ESNS)**, **Reeperbahn Festival**, **Tallinn Music Week**, **Linecheck**, **MENT Ljubljana**, **Sharpe**, **SoAlive**, **WOMEX**, and several others place new talent in front of bookers, agents, festival programmers, and other key industry professionals. At their best, these stages function as stepping-stones: a single performance can initiate professional connections, accelerate touring opportunities, and open access to wider European networks. Taken together with European mobility and talent-support schemes, they form an interconnected ecosystem through which artists begin to move across borders.

Yet access to this ecosystem, and the ability to translate visibility into sustained international mobility, remains unevenly distributed. Artists from smaller markets, countries with limited cultural infrastructure, or regions with weaker export support face significantly greater barriers in converting showcase exposure into long-term international careers.

These differences are driven by structural factors, not by artistic quality alone. Population size, economic capacity, the maturity of national export strategies, and access to European professional networks all shape how consistently artists appear across major platforms – and how effectively they translate exposure into lasting activity. Over the past decade, several support mechanisms and platforms have emerged to counter these imbalances, including European Talent Exchange (ETE), Liveurope, Keychange, Upbeat and initiatives coordinated through Live DMA and EMEE. Together, these programs provide subsidized touring, curated visibility, professional training, and institutional commitments to fairer representation.

This study examines how these showcase platforms and support mechanisms interact during the 2023–2025 period – the first stable, post-pandemic window in which comparable data became available across multiple festivals and networks. The analysis draws on a combined dataset from **Eurosonic Noorderslag (ESNS)**, **European Talent Exchange (ETE)**, **Tallinn Music Week**, **Reeperbahn Festival**, **WOMEX**, **Liveurope**, **LIVEMX**, and **Keychange**.

These platforms were included because they were involved in launching the study, agreed to share their participation data, and contributed through in-depth interviews. As a result, the analysis is based on a clearly defined group of organizations for which both reliable quantitative data and first-hand institutional perspectives were available, enabling participation patterns to be examined across platforms in a consistent and comparable manner. As a pilot study, the analysis offers an empirically grounded snapshot of country-level participation across festivals and talent platforms and demonstrates one possible analytical approach.

Rather than relying on raw participation figures alone, the analysis combines absolute counts with population-normalized indicators and country rankings, enabling structured comparison across markets of different sizes. This approach highlights not only which countries dominate numerically, but also which consistently punch above their weight once scale is considered. The study further distinguishes between visibility gained at showcase events and longer-term mobility outcomes, recognizing that appearing on a showcase stage does not automatically translate into sustained touring or international circulation.

To complement the quantitative analysis, the research also draws on interviews with festival directors, bookers, export-office representatives, and European network coordinators. Their insights illuminate how selection processes function in practice, where mobility bottlenecks persist, and why some support models deliver more predictable results than others.

Taken together, these perspectives reveal a European live music landscape defined by both opportunity and imbalance. While the interconnected ecosystem of showcases and support schemes opens meaningful pathways for many artists, access remains uneven, and the ability to move beyond the showcase stage often depends on structural advantages beyond the artist's control.

1. Patterns of Visibility: National Representation on Europe's Showcase Stages

This chapter moves from the broad overview in the Introduction to a focused examination of how national visibility is structured across Europe's major showcase platforms: Eurosonic Noorderslag (ESNS), Reeperbahn Festival, Tallinn Music Week, and WOMEX (Worldwide Music Expo). Rather than treating these events as neutral reflections of artistic activity, it approaches them as curated environments in which certain national scenes are repeatedly foregrounded while others remain marginal or episodic.

The analysis examines both absolute participation and population-adjusted data.[1] Absolute numbers indicate where representation is concentrated in overall terms, while per-capita measures contextualize these patterns by accounting for differences in country size. Used together, these metrics reveal dynamics of visibility and concentration that would remain obscured by either measure alone. Population-adjusted figures are therefore treated not as indicators of ecosystem "strength", but as a complementary lens that highlights how even limited participation can translate into high relative visibility, and how large markets may appear less prominent despite substantial overall involvement.

Finally, the chapter treats showcase festivals not as interchangeable platforms, but as distinct parts of Europe's live music network. Each has its own curatorial approach, regional focus, and genre priorities, all of which shape national visibility in different ways. The sections that follow examine each platform separately, demonstrating how patterns of national representation differ across platforms and shift depending on the measurement scale.

1.1 Showcase Festivals Overview

ESNS (Eurosonic Noorderslag) – Netherlands

ESNS is one of Europe's most influential platforms for emerging artists, bringing together promoters, festivals, agents, labels, and media. With a strong focus on diversity and innovation, it supports artists through curated showcases, targeted networking, and the European Talent Exchange program[2] – one of the key drivers of follow-up international bookings.

Reeperbahn Festival – Germany

Reeperbahn Festival combines a wide-ranging showcase program with one of Europe's largest music-industry conferences.[3] It highlights new talent across genres while fostering dialogue between music, technology, and culture. Its emphasis on innovation, gender balance, and cross-sector collaboration provides artists with exposure, professional matchmaking, and development opportunities.

Tallinn Music Week – Estonia

Tallinn Music Week presents a forward-looking mix of experimental, genre-defying, and cross-disciplinary music. Its programming reflects a strong commitment to artistic diversity, future-oriented creativity, and sustainable cultural development in the Baltic region. Artists benefit from a dense industry presence and an interdisciplinary conference environment.[4]

WOMEX – Worldwide Music Expo

WOMEX is the world's leading event for global, traditional, and roots-based music. It plays a central role in shaping touring pathways, professional networks, and visibility for artists working across diverse cultural traditions. Its curated showcases and extensive professional market make it a key infrastructure node in the global music ecosystem.[5]

1.2 Who Gets to Perform on Europe's Main Showcase Stages?

This section looks at how national representation plays out on Europe's leading showcase stages. Drawing on participation data from 2023 to 2025, it explores which countries show up year after year, which appear only occasionally, and which are mostly missing from the picture.

For each platform, absolute participation is read alongside population-normalized indicators to distinguish between overall volume and relative intensity of presence. As discussed in the Introduction, per-capita figures are interpreted as indicators of relative exposure rather than comprehensive measures of national scene strength.

1.2.1 Eurosonic Noorderslag (ESNS)
Absolute participation (2023–2025)

Table 1a shows Eurosonic bookings for the years 2023, 2024, and 2025. Countries are ranked according to their total number of bookings over the three-year period. The table also includes each country's percentage share of total bookings and the average number of bookings. Green and red shading indicate countries that are above or below the median.

1 Eurostat. *Culture Statistics: Methodological Notes*. Luxembourg: Publications Office of the European Union, 2019. https://ec.europa.eu/eurostat/statistics-explained/index.php?title=Culture_statistics.

2 Eurosonic Noorderslag. *About ESNS and the Europe Talent Exchange.* Groningen: ESNS Foundation, 2024. https://esns.nl.

3 Reeperbahn Festival. *Festival and Conference Overview.* Hamburg: Reeperbahn Festival GmbH, 2024. https://www.reeperbahnfestival.com.

4 Tallinn Music Week. *About Tallinn Music Week.* Tallinn: Shiftworks, 2024. https://tmw.ee.

5 Worldwide Music Expo (WOMEX). *About WOMEX*. Berlin: Piranha Arts AG, 2024. https://www.womex.com.

Table 1a

EUROSONIC

Table 1a: Eurosonic bookings: years 2023, 2024, 2025, 36 countries ranking

Country	The Netherlands*	United Kingdom	Belguim	Germany	France	Spain	Ireland	Italy	Norway	Poland	Denmark**	Switzerland	Austria	Sweden	Finland	Ukraine	Portugal	Iceland	Czech Republic	Estonia	Slovakia	Slovenia	Hungary	Serbia
Nr.	83	61	55	47	45	36	36	30	26	25	24	24	21	20	15	14	13	10	9	9	8	8	7	7
%	12.21	8.97	8.09	6.91	6.62	5.29	5.29	4.41	3.82	3.68	3.53	3.53	3.09	2.94	2.21	2.06	1.91	1.47	1.32	1.32	1.18	1.18	1.03	1.03
avg.	27.67	20.33	18.33	15.67	15.00	12.00	12.00	10.00	8.67	8.33	8.00	8.00	7.00	6.67	5.00	4.67	4.33	3.33	3.00	3.00	2.67	2.67	2.33	2.33

Country	Bulgaria	Greece	Luxembourg	Croatia	Lithuania	Latvia	Romania	Belarus	Cyprus	Malta	North Macedonia	Georgia	Total
Nr.	7	6	6	5	5	4	4	3	2	2	2	1	**680**
%	1.03	0.88	0.88	0.74	0.74	0.59	0.59	0.44	0.29	0.29	0.29	0.15	**100.00**
avg.	2.33	2.00	2.00	1.67	1.67	1.33	1.33	1.00	0.67	0.67	0.67	0.33	

* without Noorderslag
** including Faroe Islands (5)
Median = 18.83, N = 36
above median
below median

Table 1b

Table 1b: Eurosonic bookings: three-year average, index*

Country	Iceland	Luxembourg	Ireland	Estonia	Norway	Belgium	The Netherlands	Denmark	Slovenia	Malta	Finland	Switzerland	Austria	Latvia	Cyprus	Sweden	Lithuania	Slovakia	Croatia	Portugal	Bulgaria	North Macedonia	Serbia	UK
Index	22.69	7.60	5.74	5.67	4.10	4.05	3.98	3.51	3.29	3.03	2.35	2.33	1.98	1.85	1.78	1.63	1.51	1.29	1.15	1.08	0.96	0.96	0.95	0.80

* The index value is the ratio of a country's percentage of all bookings to its percentage of the total population.

Country	Czech Republic	Hungary	Spain	Poland	France	Greece	Germany	Italy	Ukraine	Belarus	Georgia	Romania	Total
Index	0.73	0.65	0.64	0.61	0.57	0.50	0.49	0.45	0.29	0.29	0.22	0.18	**89.90**

* The index value is the ratio of a country's percentage of all bookings to its percentage of the total population.

Median = 2.50, N = 36
above median
below median

Focusing on Eurosonic[6], the highest number of bookings is recorded by the Netherlands (83, or 12.24%), followed by the UK (61, or 9.00%) and Belgium (55, or 8.11%). The lowest number of bookings is recorded by Georgia (1, or 0.15%), followed by North Macedonia, Malta, and Cyprus, each with two bookings (0.29%) over the three-year period.

Based on the number of bookings, countries were grouped into seven clusters: “1 to 10”, “11 to 20”, “21 to 30”, “31 to 40”, “41 to 50”, “51 to 60”, and “above 60”. Most countries (19, or 53%) fall into the lowest group, “1 to 10” bookings. These countries are Georgia (1), North Macedonia (2), Malta (2), Cyprus (2), Belarus (3), Latvia (4), Romania (4), Lithuania (5), Croatia (5), Luxembourg (6), Greece (6), Bulgaria (7), Serbia (7), Hungary (7), Slovenia (8), Slovakia (8), the Czech Republic (9), Estonia (9), and Iceland (10).

In the “11 to 20” group are Portugal (13), Ukraine (14), Finland (15), and Sweden (20). The “21 to 30” group includes Austria (21), Switzerland (24), Denmark (24), Poland (25), Norway (26), and Italy (30). The “31 to 40” group comprises Ireland (36) and Spain (36), while France (45) and Germany (47) fall into the “41 to 50” group. Belgium (55) is in the “51 to 60” group, and the UK (61) and the Netherlands (83) fall into the “above 60” group.

Population-normalized visibility

When country size and population are considered, a different picture emerges. **Table 1b** presents Eurosonic bookings ranked by a *per capita* index[7], calculated as the ratio of a country’s percentage share of total bookings to its percentage share of the total population. The highest index value is recorded by Iceland (22.69), followed by Luxembourg (7.60), Ireland (5.74), Estonia (5.67), Norway (4.10), Belgium (4.05), the Netherlands (3.98), Denmark (3.51), Slovenia (3.29), and Malta (3.03). These countries are above the median.

Countries below the median are Finland (2.35), Switzerland (2.33), Austria (1.98), Latvia (1,85), Cyprus (1.78), Sweden (1.63), Lithuania (1.51), Slovakia (1.29), Croatia (1.15), Portugal (1.08), Bulgaria and North Macedonia (0.96), Serbia (0.95), the UK (0.80), the Czech Republic (0.73), Hungary (0.65), Spain (0.64), Poland (0.61), France (0.57), Greece (0.50), Germany (0.49), Italy (0.45), Ukraine (0.29), Belarus (0.29), Georgia (0.22), and Romania (0.18).

These results show that smaller countries such as Iceland, Luxembourg, Estonia, and Slovenia rank very highly on a per capita basis, while larger countries such as Germany, Italy, and France fall below the median. There are also notable differences among Central and Eastern European countries, particularly within the Balkan region, indicating regional imbalances and disparities in resources. It should be taken into account that smaller countries can typically sustain only a limited number of “outstanding” artists, sometimes just one or two every few years, as clearly demonstrated by the case of Slovenia. Larger countries such as Germany, France, Italy, Spain, and Poland could potentially supply more acts each year; however, festival capacity is limited, and cultural diversity is also a key curatorial consideration. For a more comprehensive understanding, application data from each country, in addition to bookings (and follow-up bookings), should also be considered.

At ESNS, patterns of visibility vary across countries, with some appearing more frequently than others. In absolute terms, participation is led by the host country together with a small group of Western and Northern European nations, while much of South-Eastern and Eastern Europe is represented less regularly.

When population size is taken into account, this picture becomes more nuanced. Several smaller countries move into sharper focus, while the relative prominence of Europe’s largest markets is moderated. From this perspective, per-capita visibility offers insight into differing strategic orientations and levels of international engagement within a tightly curated showcase environment, where even limited participation can translate into a comparatively high share of visibility.

1.2.2 Reeperbahn Festival
Absolute participation (2023-2025)

Table 2a shows Reeperbahn bookings for the years 2023, 2024, and 2025. Countries are ranked according to their total number of bookings over

6 Eurosonic Noorderslag (ESNS) is a combination of several festivals: Eurosonic, Noorderslag, Grunnsonic, and Hit the Noord. Each of these festivals operates with a separate budget. In this analysis, only bookings from Eurosonic are considered, as it is the international component of the ESNS program.

7 By way of example, the population of Slovenia on 1 January 2025 (source: Eurostat) was 2,130,850, representing 0.36% of the total population of all countries considered. Slovenia recorded two bookings in 2025, accounting for 0,90% of all bookings in 2025. Dividing the percentage share of bookings by the percentage share of population yields a per capita index value of 0.90 / 0.36 = 2.51. When averaging index values over a three-year period, the resulting per-capita index is (2.51 + 3.95 + 3.40) / 3 = 3.29.

the three-year period. The table also includes each country's percentage share of total bookings and the average number of bookings. Green and red shading indicate countries that are above or below the median. In total, 28 countries were represented at the festival.

Germany (373 bookings, 42.39%), the UK (214, 24.32%), and Austria (48, 5.45%) recorded the highest number of bookings and are the only countries above the median. Seventeen countries (60.71%) have fewer than ten bookings and are grouped in the "1 to 10" category. These countries are Serbia, Romania, Lithuania, Hungary, Greece, and the Czech Republic (1); Bulgaria and Belarus (2); Portugal (4); Ukraine, Luxembourg, and Estonia (5); Norway, Italy, and Finland (6); and Iceland (8).

In the "11 to 20" group are Denmark (17), Ireland (19), and Spain and Belgium (20). The "21 to 30" group consists of the Netherlands (25), Sweden (27), and Switzerland (30). France, with 31 bookings, stands alone in the "31 to 40" group.

Population-normalized visibility

As shown in the per capita index in **Table 2b**, Germany (2.98), Austria (3.45), and the UK (2.22) remain above the median, joined by Iceland (13.86), Luxembourg (4.52), Ireland (2.67), Estonia (2.36), Switzerland (2.09), Denmark (1.99), and Sweden (1.79). Countries below the median are Belgium (1.07), the Netherlands (0.96), Norway (0.85), Finland (0.66), France (0.32), Spain (0.26), Lithuania and Portugal (0.22), Bulgaria (0.19), Georgia (0.16), Belarus and Serbia (0.13), Ukraine (0.08), Italy, the Czech Republic, Greece, and Hungary (0.06), and Romania (0.03).

At the Reeperbahn Festival, patterns of visibility suggest a degree of concentration alongside a broad international orientation. In absolute terms, a substantial share of participation comes from a limited group of countries, including the host nation and several closely connected markets, which reflects established professional networks and long-standing collaboration within the region. Beyond this core group, many other countries appear less frequently, indicating that access to the platform often builds gradually over time and through repeated engagement.

A population-normalized view nuances this picture without fundamentally altering it. While per-capita analysis brings several smaller and strategically focused countries into sharper relief, it also reveals that many large and structurally prominent markets translate their size into relatively modest relative exposure. Taken together, the two perspectives suggest that presence at Reeperbahn is driven less by demographic scale and more by sustained export strategies, professional alignment with the German-speaking market, and long-term institutional engagement. Per-capita's efficiency may reshape rankings, but it does not dissolve the underlying imbalance in who gains repeated access to Europe's most influential showcase stages.

1.2.3 Tallinn Music Week (TMW)

Absolute participation (2023–2025)

Table 3a shows the number of bookings at the Tallinn Music Week festival for the years 2023, 2024, and 2025. Countries are ranked according to their total number of bookings over the three-year period. The table also includes each country's percentage share of total bookings and the average number of bookings. Green and red shading indicate countries that are above or below the median. A strong visibility of Baltic and Northern countries is evident. Estonia clearly takes first place with 222 bookings (48.79%), while Finland comes second with 49 bookings (10.77%). A total of 27 countries (79.41%) fall below the median.

When countries are grouped into clusters, the "1 to 10" group includes Slovenia, Luxembourg, Kosovo, Greece, Cyprus, Croatia, and Bulgaria, each with one booking over the three-year period. Switzerland, Slovakia, Serbia, Romania, North Macedonia, Ireland, and Austria have two bookings each. Portugal, the Netherlands, and Belgium have three bookings, Spain and Iceland four, Norway and Denmark five, and Italy and Hungary six bookings. In the "11 to 20" group are Poland (11), Ukraine (12), Germany (13), France (15), Sweden (16), the UK (19), and Latvia (19).

Population-normalized visibility

Ranking by the per capita index, **Table 3b** confirms the strong visibility of Baltic and Northern countries. Countries with the highest index values and above the median are Estonia (207.04), followed by Latvia (13.06), Iceland (12.93), and Finland (11.45). Countries below the median are Lithuania (7.26), Sweden (1.94), Luxembourg (1.71), North Macedonia (1.49), Cyprus (1.19), Norway (1.18), Denmark (1.08), Hungary (0.81), Kosovo (0.75), Slovenia (0.46), Serbia (0.41), Poland (0.40), Ukraine (0.38), the UK and Portugal (0.36), Croatia (0.34), the Czech Republic (0.33), Belgium (0.31), Switzerland and France (0.28), Austria (0.27), the Netherlands (0.21), Germany (0.20), Bulgaria (0.18), Italy and Greece (0.13), Romania (0.12), and Spain (0.11).

Tallinn Music Week tells a distinctly regional story of visibility and circulation. In absolute terms, participation is centered on the Baltic and Northern

Table 2a

REEPERBAHN

Table 2a: Reeperbahn bookings: years 2023, 2024 and 2025, 28 countries ranking

Country	Germany	UK*	Austria	France	Switzerland	Sweden	The Netherlands	Belgium	Spain	Ireland	Denmark*	Iceland	Finland	Italy	Norway	Estonia	Luxembourg	Ukraine	Portugal	Belarus
Nr.	373	214	48	31	30	27	25	20	20	19	17	8	6	6	6	5	5	5	4	2
%	42.39	24.32	5.45	3.52	3.41	3.07	2.84	2.27	2.27	2.16	1.93	0.91	0.68	0.68	0.68	0.57	0.57	0.57	0.45	0.23
avg.	124.33	71.33	16.00	10.33	10.00	9.00	8.33	6.67	6.67	6.33	5.67	2.67	2.00	2.00	2.00	1.67	1.67	1.67	1.33	0.67

Bulgaria	Czech Republic	Georgia	Greece	Hungary	Lithuania	Romania	Serbia	**Total**
2	1	1	1	1	1	1	1	**880**
0.23	0.11	0.11	0.11	0.11	0.11	0.11	0.11	100.00
0.67	0.33	0.33	0.33	0.33	0.33	0.33	0.33	

* UK including England, Northern Ireland, Wales, Scotland; Denmark including Faroe Islands

Median = 31.43, N = 28

28 countries

above median

below median

Table 2b

Table 2b: Reeperbahn bookings: three-year average, index*

Country	Iceland	Luxembourg	Austria	Germany	Ireland	Estonia	UK*	Switzerland	Denmark*	Sweden	Belgium	The Netherlands	Norway	Finland	France	Spain	Lithuania	Portugal	Bulgaria	Georgia
Index	13.86	4.52	3.45	2.98	2.67	2.36	2.22	2.09	1.99	1.79	1.07	0.96	0.85	0.66	0.32	0.26	0.22	0.22	0.19	0.16

Belarus	Serbia	Ukraine	Italy	Czech Republic	Greece	Hungary	Romania	**Total**
0.13	0.13	0.08	0.06	0.06	0.06	0.06	0.03	**43.45**

* The index value is the ratio of a country's percentage of all bookings to its percentage of the total population.

Median = 1.55, N = 28

28 countries

above median

below median

Table 3a

TALLINN MUSIC WEEK

Table 3a: Tallinn Music Week bookings: years 2023, 2024 and 2025, 34 countries ranking

Country	Estonia	Finland	Latvia	UK*	Lithuania	Sweden	France	Germany	Ukraine	Poland	Hungary	Italy	Denmark*	Norway	Iceland	Spain	Belgium	Czech Republic	The Netherlands	Portugal	Austria	Ireland
Nr.	222	49	19	19	16	16	15	13	12	11	6	6	5	5	4	4	3	3	3	3	2	2
%	48.79	10.77	4.18	4.18	3.52	3.52	3.30	2.86	2.64	2.42	1.32	1.32	1.10	1.10	0.88	0.88	0.66	0.66	0.66	0.66	0.44	0.44
avg.	74.00	16.33	6.33	6.33	5.33	5.33	5.00	4.33	4.00	3.67	2.00	2.00	1.67	1.67	1.33	1.33	1.00	1.00	1.00	1.00	0.67	0.67

North Macedonia	Romania	Serbia	Slovakia	Switzerland	Bulgaria	Croatia	Cyprus	Greece	Kosovo	Luxembourg	Slovenia	**Total**
2	2	2	2	2	1	1	1	1	1	1	1	**455**
0.44	0.44	0.44	0.44	0.44	0.22	0.22	0.22	0.22	0.22	0.22	0.22	**100.00**
0.67	0.67	0.67	0.67	0.67	0.33	0.33	0.33	0.33	0.33	0.33	0.33	

* UK including Northern Ireland, Scotland and Wales;
Denmark including Faroe Islands and Greenland

Median = 13.38, N = 34

34 Countries

above median

below median

Table 3b

Table 3b: Tallinn Music Week bookings: three-year average, index*

Country	Estonia	Latvia	Iceland	Finland	Lithuania	Sweden	Luxembourg	North Macedonia	Cyprus	Norway	Denmark*	Hungary	Kosovo	Slovenia	Ireland	Slovakia	Serbia	Poland	Ukraine	UK*	Portugal	Croatia
Index	207.04	13.06	12.93	11.45	7.26	1.94	1.71	1.49	1.19	1.18	1.08	0.81	0.75	0.62	0.47	0.46	0.41	0.40	0.38	0.36	0.36	0.34

Czech Republic	Belgium	Switzerland	France	Austria	The Netherlands	Germany	Bulgaria	Italy	Greece	Romania	Spain	**Total**
0.33	0.31	0.28	0.28	0.27	0.21	0.20	0.18	0.13	0.13	0.12	0.11	**268.24**

* The index value is the ratio of a country's percentage of all bookings to its percentage of the total population.

Median = 7.89, N = 34

above median

below median

European space, with Estonia as the most visible country and its regional neighbors forming the most consistently present group. Artists from across Europe do appear, but for many countries this presence remains limited and intermittent.

A population-adjusted perspective further refines this picture. Per-capita visibility is particularly strong among countries in the Baltic and Nordic region, which may reflect geographic proximity, shared cultural circuits, and well-established regional networks, alongside other contributing factors. Even when population size is taken into account, participation continues to show a noticeable regional dimension, suggesting that Tallinn Music Week plays a particularly important role as a gateway and meeting point for this part of Europe, while also remaining open to broader European engagement.

1.2.4 WOMEX (Worldwide Music Expo) Absolute participation (2023–2025)

Table 4a shows WOMEX bookings for the years 2023, 2024, and 2025. Countries (85 in total, accounting for 220 bookings) are ranked according to their total number of bookings over the three-year period. The table also includes each country's percentage share of total bookings and the average number of bookings. Green and red shading indicate countries that are above or below the median.

The countries with the highest number of bookings are France (20, or 9.09%), the UK (17, or 7.73%), and Spain (16, or 7.27%). Countries with ten or fewer bookings but still above the median are Brazil (10, or 4.55%), Canada (9, or 4.09%), Germany (7, or 3.18%), Belgium and Italy (6, or 2.73%), Colombia, Finland, and Iran (5, or 2.27%), Argentina, Estonia, Senegal, Sweden, Syria, and Tunisia (4, or 1.82%), and Congo, Cuba, Ireland, Norway, Palestine, Portugal, Serbia, South Africa, and South Korea (3, or 1.36%).

Out of the 85 countries represented, 29 (34.12%) are European countries that had bookings over the three-year period. Of these, 13 European countries are above the median (see above), while 16 European countries fall below the median. These include Denmark, Israel, Latvia, Lithuania, Poland, and Ukraine (2 bookings, or 0.90%), as well as Austria, Belarus, Bosnia and Herzegovina, Cyprus, Georgia, Greece, North Macedonia, Slovakia, Slovenia, Switzerland, and Türkiye (1 booking, or 0.45%).

Population-normalized visibility

Table 4b presents countries participating at WOMEX in the years 2023, 2024, and 2025 according to a per capita index. Countries with smaller populations generally have higher index values; however, there are also countries, such as Estonia, Finland, Sweden, Serbia, Norway, and Ireland, that rank highly both in absolute numbers and on a per capita basis. Except for Serbia, these countries typically have well-established music export offices and more developed music industries. Notably, several European countries, including Bulgaria, Croatia, the Czech Republic, Hungary, Luxembourg, Malta, Romania, and Iceland, had no representatives during the 2023–2025 period, underscoring that WOMEX's broad geographic remit does not ensure continuous participation across all European countries.

Despite the broad diversity of origins represented at WOMEX, visibility patterns display notable continuity over time. A small group of countries including France, the United Kingdom, and Spain appears particularly regularly, reflecting long-standing engagement with the platform and its professional networks. While artists from dozens of countries are represented across editions, participation from many European nations remains occasional, and some are absent altogether in the 2023–2025 period. This dynamic may partly reflect the event's high competitiveness, with only around 60 showcase slots available globally each year from among hundreds of applications submitted from around the world.

A population-adjusted view shifts attention away from market size toward factors such as genre focus, export capacity, and institutional continuity. Smaller countries with established international pathways often maintain a noticeable presence in both absolute and per-capita terms, while others remain less visible even after normalization. Considered together, these perspectives suggest that WOMEX functions not as a uniform global stage, but as a curated meeting point in which stylistic affinity, long-term engagement, and support structures play an important role in shaping recurring participation, within a framework that continues to emphasize cultural diversity and international exchange.

1.3. Cross-platform synthesis

Across all four showcase platforms, a stable core of more than thirty countries participates regularly, pointing to the existence of a functioning European showcase circuit. At the same time, access and visibility remain uneven, reflecting different national positions within shared European frameworks of presentation and exchange.

Participation in showcase festivals represents one visible dimension of a country's music export capacity. These figures do not stand alone but are shaped by a combination of structural and strategic

Table 4a

WOMEX

Table 4a: Womex bookings: years 2023, 2024 and 2025, 85 countries ranking

Country	France	UK	Spain	Brazil	Canada	USA	Germany	Belgium	Italy	Colombia	Finland	Iran	Argentina	Estonia	Senegal	Sweden	Syria	Tunisia	Congo	Cuba	Ireland	Norway	Palestine	Portugal	Serbia	South Africa	South Korea	Benin	Chile	Denmark	Ethiopia	Ghana	Israel	Japan	Latvia	La Réunion	Lebanon	Lithuania	Madagascar	Mali	Nigeria	Poland	Ukraine	Venezuela	Afghanistan
Nr.	20	17	16	10	9	8	7	6	6	5	5	5	4	4	4	4	4	4	3	3	3	3	3	3	3	3	3	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	1
%	9.09	7.73	7.27	4.55	4.09	3.64	3.18	2.73	2.73	2.27	2.27	2.27	1.82	1.82	1.82	1.82	1.82	1.82	1.36	1.36	1.36	1.36	1.36	1.36	1.36	1.36	1.36	0.91	0.91	0.91	0.91	0.91	0.91	0.91	0.91	0.91	0.91	0.91	0.91	0.91	0.91	0.91	0.91	0.91	0.45
avg.	6.67	5.67	5.33	3.33	3.00	2.67	2.33	2.00	2.00	1.67	1.67	1.67	1.33	1.33	1.33	1.33	1.33	1.33	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	0.67	0.67	0.67	0.67	0.67	0.67	0.67	0.67	0.67	0.67	0.67	0.67	0.67	0.67	0.67	0.67	0.67	0.33

Country	Algeria	Armenia	Austria	Australia	Belarus	Bosnia and Herzegovina	Burkina Faso	Cabo Verde	China	Cote d'Ivoire	Cyprus	Egypt	Georgia	Greece	Guatemala	Guinea	Haiti	India	Jamaica	Kuwait	Malawi	Mauritania	Mayotte	Mexico	Morocco	the Netherlands	New Zealand	North Macedonia	Pakistan	Puerto Rico	Slovakia	Slovenia	Somalia	Switzerland	Taiwan	Tanzania	Togo	Türkiye	UAE	Uganda	**Total**
Nr.	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	**220**
%	0.45	0.45	0.45	0.45	0.45	0.45	0.45	0.45	0.45	0.45	0.45	0.45	0.45	0.45	0.45	0.45	0.45	0.45	0.45	0.45	0.45	0.45	0.45	0.45	0.45	0.45	0.45	0.45	0.45	0.45	0.45	0.45	0.45	0.45	0.45	0.45	0.45	0.45	0.45	0.45	**100.00**
avg.	0.33	0.33	0.33	0.33	0.33	0.33	0.33	0.33	0.33	0.33	0.33	0.33	0.33	0.33	0.33	0.33	0.33	0.33	0.33	0.33	0.33	0.33	0.33	0.33	0.33	0.33	0.33	0.33	0.33	0.33	0.33	0.33	0.33	0.33	0.33	0.33	0.33	0.33	0.33	0.33	

Median = 2.59, N = 85

85 countries

above median

below median

Countries not present 2023-2025: Iceland, Bulgaria, Croatia, Czech Republic, Hungary, Luxembourg, Malta, Romania

Table 4b

Table 4b: Womex bookings: three-year average, index*

Country	Mayotte	Estonia	La Réunion	Cabo Verde	Latvia	Cyprus	Finland	Lithuania	Ireland	North Macedonia	Palestine	Norway	Belgium	Slovenia	Serbia	Sweden	Jamaica	Lebanon	Denmark	Armenia	Spain	Tunisia	Puerto Rico	Bosnia and Herzegovina	France	Portugal	Cuba	Georgia	UK	Canada	Senegal	Israel	Kuwait	New Zealand	Mauritania	Slovakia	Syria	Benin	Switzerland	Austria	Belarus	Togo	Italy	Chile	Greece
Index	77.24	76.72	60.11	49.36	28.21	27.24	23.27	18.12	14.72	14.64	14.21	14.13	13.23	12.37	12.04	9.99	9.41	8.90	8.69	8.57	8.57	8.54	8.25	7.74	7.70	7.39	7.20	7.20	6.72	5.91	5.59	5.50	5.31	5.08	4.90	4.86	4.10	3.60	2.91	2.83	2.77	2.75	2.68	2.64	2.53

Country	Colombia	UAE	Argentina	Haiti	Germany	Mali	Venezuela	Guinea	Madagascar	South Korea	Ghana	The Netherlands	Guatemala	Iran	Poland	Somalia	Ukraine	Brazil	South Africa	Malawi	Taiwan	Burkina Fasso	Australia	Cote d'Ivoire	Congo	Morocco	Afghanistan	USA	Algeria	Uganda	Japan	Ethiopia	Tanzania	Türkiye	Egypt	Nigeria	Mexico	Pakistan	China	India	**Total**
Index	2.46	2.35	2.30	2.24	2.21	2.08	1.86	1.77	1.59	1.53	1.50	1.44	1.43	1.43	1.43	1.32	1.29	1.23	1.23	1.20	1.13	1.09	0.97	0.81	0.70	0.69	0.61	0.61	0.56	0.51	0.43	0.39	0.37	0.31	0.22	0.22	0.20	0.10	0.02	0.02	**678.29**

* The index value is the ratio of a country's percentage of all bookings to its percentage of the total population.

Median = 7.99, N = 85

factors, including overall economic capacity, public investment in culture[8], the presence and orientation of export offices, international networking practices, professional know-how, and the availability of capacity-building opportunities[9] for artists and managers. The steady presence across platforms suggests broader engagement with the international live music sector, rather than the result of isolated curatorial outcomes. Read together, absolute and population-adjusted measures show that showcase visibility is shaped less by population size alone than by export infrastructure, professional networks, cultural priorities, and long-term positioning within international circuits.

Showcase festivals operate as selective infrastructures, structured by curatorial logics, regional orientations, market priorities, and genre economies. Platform-specific dynamics influence how patterns of representation and circulation emerge across the European live music landscape, reinforcing certain trajectories while limiting others. Taken together, Europe's showcase stages form not a fully open field, but a structured landscape, in which patterns of access, repetition, and recognition vary across national contexts.

8 European Commission. *Creative Europe Program: Culture Strand 2021–2027.* Brussels: European Union, 2021. https://culture.ec.europa.eu/creative-europe.

9 Liveurope. *Liveurope: A Platform for New European Talent.* Brussels: Liveurope, 2023. https://liveurope.eu.

2. The European Support Web: Participation in Talent and Mobility Programs

This chapter moves beyond showcase stages to examine the broad European support web that surrounds them. While visibility at major platforms marks an important first step, international careers are shaped just as decisively by what happens afterwards: access to mobility schemes, touring support, and institutional networks. By focusing on participation in European talent, mobility, and exchange programs, the chapter explores how national presence is sustained, amplified, or filtered once artists attempt to move beyond the moment of showcase exposure.

2.1 Talent Support Platforms Overview

Support initiatives form the connective tissue between European showcase visibility and sustained international circulation, shaping how artists move from one-off appearances toward longer-term touring and professional development.

European Talent Exchange (ETE)

European Talent Exchange helps translate showcase performances into follow-up bookings across Europe. By coordinating between ESNS, festivals, and industry professionals, it increases opportunities for promising artists to access international stages and supports cross-border collaboration during the early phases of touring careers.

Liveurope

Liveurope brings together established European venues committed to presenting new European music. Through financial incentives and structured support, it enables venues to program more European artists, including those from territories they might otherwise overlook. The network promotes artistic diversity and touring opportunities, offering emerging acts a practical entry point into the international live circuit.

LIVEMX

LIVEMX is a Creative Europe initiative[10] supporting the live music sector amid changing touring dynamics. It strengthens the capacity of export initiatives to develop and strengthen its skills, abilities, processes and resources to adapt and thrive in such a dynamic industry. Through funded projects, training, and shared resources, it promotes more sustainable and inclusive programming and mobility across Europe.

Keychange

Keychange tackles gender imbalance in the music industry[11] through talent development, visibility measures, and institutional commitments. It supports women and gender-expansive artists through international opportunities and mentoring, while encouraging organizations to adopt more equitable programming practices and contribute to lasting structural change.

2.2 From Showcase Visibility to International Mobility: Network-Based Support Mechanisms

To assess how showcase visibility connects to longer-term international circulation, this section examines participation patterns within four major European mobility and support mechanisms: the European Talent Exchange (ETE), Liveurope, LIVEMX, and Keychange. While these initiatives operate downstream from showcase events, their participation structures provide insight into how visibility is translated or filtered into sustained mobility opportunities.

2.2.1 European Talent Exchange (ETE) Absolute participation (2023–2025)

Table 5a shows European Talent Exchange (ETE) bookings for the years 2023, 2024, and 2025. Countries are ranked according to their total number of bookings over the three-year period. The table also includes each country's percentage share of total bookings and the average number of bookings. Green and red shading indicate countries that are above or below the median. In total, 37 European countries are represented, with a total of 1,043 bookings.

Countries above the median are the UK (158, or 15.15%), the Netherlands (120, or 11.51%), Ireland (116, or 11.12%), Belgium (90, or 8.63%), Germany and Switzerland (50, or 4.79%), France (45, or 4.31%), Sweden (41, or 3.93%), Austria (38, or 3.64%), Italy (31, or 2.97%), and Spain, Norway, and Denmark (30, or 2.88%). Countries with fewer than 30 bookings are Ukraine (27), Slovenia (18), Poland (17), Bulgaria, Finland, and Portugal (16), Slovakia (13), Serbia (12), the Czech Republic, Estonia, and Lithuania (11), Iceland and Latvia (8), Hungary (7), Croatia (6), Greece and North Macedonia (4), Luxembourg (3), Georgia (2), and Belarus, Cyprus, Malta, and Romania (1).

Interestingly, countries with well-established music export offices such as Estonia, Iceland, and Luxembourg are placed relatively low, whereas Bulgaria, for example, achieved a relatively high number of bookings within the ETE platform.

Population-normalized visibility

Table 5b shows the same countries ranked by per capita index. Countries above the median

10 European Commission. *LiveMX: Supporting the European Live Music Sector.* Brussels: Creative Europe, 2023. https://livemx.eu.

11 Keychange. *About Keychange: Gender Equality in Music.* London: PRS Foundation, 2024. https://keychange.eu.

Table 5a

Table 5a: European Talent Exchange bookings: years 2023, 2024 and 2025, 37 countries ranking

Country	UK*	The Netherlands	Ireland	Belgium	Germany	Switzerland	France	Sweden	Austria	Italy	Spain	Norway	Denmark*	Ukraine	Slovenia	Poland	Bulgaria	Finland	Portugal	Slovakia	Serbia	Czech Republic	Estonia	Lithuania	Iceland	Latvia
Nr.	158	120	116	90	50	50	45	41	38	31	30	30	30	27	18	17	16	16	16	13	12	11	11	11	8	8
%	15.15	11.51	11.12	8.63	4.79	4.79	4.31	3.93	3.64	2.97	2.88	2.88	2.88	2.59	1.73	1.63	1.53	1.53	1.53	1.25	1.15	1.05	1.05	1.05	0.77	0.77
avg.	52.67	40.00	38.67	30.00	16.67	16.67	15.00	13.67	12.67	10.33	10.00	10.00	10.00	9.00	6.00	5.67	5.33	5.33	5.33	4.33	4.00	3.67	3.67	3.67	2.67	2.67

Hungary	Croatia	Greece	North Macedonia	Luxembourg	Georgia	Belarus	Cyprus	Malta	Romania	**Total**
7	6	4	4	3	2	1	1	1	1	**1043**
0.67	0.58	0.38	0.38	0.29	0.19	0.10	0.10	0.10	0.10	**100.00**
2.33	2.00	1.33	1.33	1.00	0.67	0.33	0.33	0.33	0.33	**AVERAGE P**

* UK including England, Northern Ireland, Wales, Scotland; Denmark including Faroe Islands (5)
Median = 28.19, N = 37
37 countries
above median
below median

Table 5b

Table 5b: European Talent Exchange bookings: three-year average, index

Country	Ireland	Iceland	Slovenia	Estonia	Belgium	The Netherlands	Switzerland	Norway	Denmark*	Luxembourg	Latvia	Austria	Sweden	Lithuania	Finland	Bulgaria	Slovakia	UK*	North Macedonia	Serbia	Malta	Croatia	Portugal	Czech Republic	Cyprus	Hungary
Index	12.16	11.72	4.82	4.58	4.31	3.79	3.15	3.06	2.86	2.51	2.46	2.36	2.21	2.17	1.62	1.42	1.37	1.34	1.25	1.04	0.99	0.88	0.85	0.58	0.58	0.42

Ukraine	France	Spain	Germany	Georgia	Italy	Poland	Greece	Belarus	Romania	**Total**
0.38	0.37	0.35	0.34	0.31	0.30	0.27	0.22	0.06	0.03	**77.13**

Median = 2.08, N = 37
The index value is the ratio of a country's percentage of all bookings to its percentage of the total population.
* UK including England, Northern Ireland, Wales, Scotland; Denmark including Faroe Islands (5)
above median
below median

are Ireland (12.16), Iceland (11.72), Slovenia (4.82), Estonia (4.58), the Netherlands (3.79), Switzerland (3.15), Norway (3.06), Denmark (2.86), Luxembourg (2.51), Latvia (2.46), Austria (2.36), Sweden (2.21), and Lithuania (2.17). The relatively high per capita index value for Slovenia suggests that in smaller countries with less established music export capacity, a single outstanding artist can make a significant difference.[12] The case of Bulgaria indicates that, despite comparatively weaker showcase visibility, follow-up bookings can still be achieved. The data also suggest that strong representation at Eurosonic does not necessarily translate into a high number of subsequent bookings; notably, this applies to countries such as Iceland, Estonia, and Luxembourg, which otherwise consistently rank among the highest.

European Talent Exchange outcomes illustrate how existing capacity can influence the extent to which showcase exposure develops into sustained mobility. In absolute terms, bookings are most frequent among a group of Western and Northern European countries, while participation from parts of Central, Eastern, and South-Eastern Europe occurs less regularly. When adjusted for population size, several smaller countries become more prominent, highlighting how individual breakout artists can have a meaningful impact on national results.

At the same time, strong showcase visibility and well-developed export structures do not automatically translate into high booking conversion, pointing to the diversity of pathways through which artists and countries engage with international touring circuits. Overall, ETE plays an important supportive role in European music mobility by helping artists build on showcase appearances, facilitating concrete follow-up bookings, and creating touring opportunities for acts from a wide range of markets, including those with lower overall visibility. Differences in outcomes between countries appear closely linked to variations in national support structures and professional networks, a pattern that is observed consistently across the study.

2.2.2 Liveurope Absolute participation (2023–2025)

Table 6a shows Liveurope bookings for the years 2023, 2024, and 2025. Countries are ranked according to their total number of bookings over the three-year period. The table also includes each country's percentage share of total bookings and the average number of bookings. Green and red shading indicate countries that are above or below the median. In total, 38 European countries are represented, with 2,169 bookings.

Countries with the highest number of bookings and above the median are Germany (213, or 9.82%), France (196, or 9.04%), the Netherlands (157, or 7.24%), Belgium (139, or 6.41%), Italy (107, or 4.93%), Portugal (99, or 4.56%), Sweden (92, or 4.24%), Austria (86, or 3.96%), Spain (85, or 3.92%), Denmark (77, or 3.55%), Ireland (76, or 3.50%), Norway (74, or 3.41%), Poland (72, or 3.32%), Finland (62, or 2.86%), and the Czech Republic and Slovenia (61, or 2.81%).

Countries below the median are Serbia (55), Slovakia, Switzerland, and Ukraine (47), Greece (43), Croatia and Hungary (42), Lithuania and Romania (33), Iceland (31), North Macedonia (23), Latvia (20), Estonia (18), and Bulgaria (12). Fewer than ten bookings are recorded for Luxembourg (5), Georgia (4), Cyprus and the Faroe Islands (2), and Albania, Bosnia and Herzegovina, and Malta (1).

Among Central and Eastern European and Balkan countries, Slovenia, Serbia, and Slovakia rank highest, outperforming several countries with significantly greater export capacities, such as Switzerland, Estonia, Iceland, and Luxembourg.

Population-normalized visibility

Table 6b shows Liveurope bookings for the years 2023, 2024, and 2025 ranked by per capita index. Countries above the median are Iceland (30.33), Slovenia (11.04), the Faroe Islands (9.58), Ireland (5.36), Estonia (5.05), Norway (5.04), North Macedonia (4.98), Denmark (4.94), Belgium (4.46), Lithuania (4.39), Finland (4.19), Croatia (4.18), and Latvia (4.04).

Countries below the median are Austria (3.59), Portugal (3.51), Slovakia (3.36), the Netherlands (3.33), Serbia (3.24), Luxembourg (2.86), the Czech Republic (2.18), Switzerland (1.92), Hungary (1.70), Greece (1.60), Germany (0.97), Cyprus (0.78), Poland (0.76), Bulgaria (0.71), Italy (0.70), Romania, Spain, and Malta (0.67), Kosovo (0.64), Georgia and Ukraine (0.44), Albania (0.17), and Bosnia and Herzegovina (0.11). Considering both absolute numbers and per capita values, Slovenia shows relatively strong results compared with more developed and bigger markets in Western European countries. However, most

12 The number of Slovenian bookings is largely driven by bands freekind. and Joker Out, both of whom have successfully transitioned to the international market and now perform regularly abroad.

Table 6a

LIVEUROPE

Table 6a: Liveurope bookings: years 2023, 2024 and 2025, country ranking

Country	Germany	France	The Netherlands	Belgium	Italy	Portugal	Sweden	Austria	Spain	Denmark	Ireland	Norway	Poland	Finland	Czech Republic	Slovenia	Serbia	Slovakia	Switzerland	Ukraine	Greece	Croatia	Hungary	Lithuania	Romania
Nr.	213	196	157	139	107	99	92	86	85	77	76	74	72	62	61	61	55	47	47	47	43	42	42	33	33
%	9.82	9.04	7.24	6.41	4.93	4.56	4.24	3.96	3.92	3.55	3.50	3.41	3.32	2.86	2.81	2.81	2.54	2.17	2.17	2.17	1.98	1.94	1.94	1.52	1.52
Avg.	71.00	65.33	52.33	46.33	35.67	33.00	30.67	28.67	28.33	25.67	25.33	24.67	24.00	20.67	20.33	20.33	18.33	15.67	15.67	15.67	14.33	14.00	14.00	11.00	11.00

Iceland	North Macedonia	Latvia	Estonia	Bulgaria	Luxembourg	Georgia	Kosovo	Cyprus	Faroe Islands	Albania	Bosnia and Herzegovina	Malta	**Total**
31	23	20	18	12	5	4	3	2	2	1	1	1	**2169**
1.43	1.06	0.92	0.83	0.55	0.23	0.18	0.14	0.09	0.09	0.05	0.05	0.05	**100.00**
10.33	7.67	6.67	6.00	4.00	1.67	1.33	1.00	0.67	0.67	0.33	0.33	0.33	

Median = 57.08, N=38

above median

below median

Table 6b

Table 6b: Liveurope bookings: three-year average, index

Country	Iceland	Slovenia	Faroe Islands	Ireland	Estonia	Norway	North Macedonia	Denmark	Belgium	Lithuania	Finland	Croatia	Latvia	Austria	Portugal	Slovakia	Sweden	The Netherlands	Serbia	Luxembourg	Czech Republic	Switzerland	Hungary	Greece	France
Index	30.33	11.04	9.58	5.36	5.05	5.04	4.98	4.94	4.46	4.39	4.19	4.18	4.04	3.59	3.51	3.36	3.34	3.33	3.24	2.86	2.18	1.92	1.70	1.60	1.10

Germany	Cyprus	Poland	Bulgaria	Italy	Romania	Spain	Malta	Kosovo	Georgia	Ukraine	Albania	Bosnia and Herzegovina	**Total**
0.97	0.78	0.76	0.71	0.70	0.67	0.67	0.67	0.64	0.44	0.44	0.17	0.11	**136.93**

Median = 3.60, N = 38

above median

below median

Countries not present in 2023-2025: Montenegro, Russia, the UK, Türkiye, Belarus bookings remain regional in nature, underscoring the importance of regional connections and cooperation.[13]

Liveurope includes a wider range of countries, encompassing both large and smaller markets, including Slovenia, Croatia, Hungary, and Romania. Despite this broader geographic reach, absolute participation remains concentrated among Germany, France, the Netherlands, Belgium, and Sweden, which consistently rank above the median and maintain high index values.

When population size is taken into account, however, this hierarchy shifts: several smaller countries, including Slovenia, Iceland, Ireland, and the Faroe Islands, rank among the most visible on a per capita basis, while some of the largest markets fall closer to or below the median. This indicates that absolute participation largely reflects market size, whereas population-normalized results highlight the greater relative reliance of smaller countries on transnational touring platforms such as Liveurope.

The distribution of participation therefore reveals clusters and atypical cases rather than uniform access barriers. Differences between countries stem from varying levels of engagement with the platform, access to co-funding, institutional strength, and export readiness, which continue to shape participation even within a comparatively low-threshold mobility scheme.

2.2.3 LIVEMX: country participation in a support scheme

Absolute number of approved applications (2023-2024)

Table 7a shows the number of selected projects by country. Countries are ranked according to their total number of selected projects over the two-year period[14]. The table also includes each country's percentage share of total selected projects. Green and red shading indicate countries that are above or below the median.

In total, 72 projects from 26 countries were approved. Above the median are Spain (12, or 16.67%), France (9, or 12.50%), Germany (8, or 11.11%), Italy (6, or 8.33%), The Netherlands (4, or 5.56%), Poland and Romania (3, or 4.17%), Bulgaria, Croatia, Czech Republic, Denmark, Estonia, Hungary, Serbia, and Ukraine (2, or 2.78%). Below the median are Armenia, Austria, Bosnia and Herzegovina, Belgium, Finland, Iceland, Ireland, Kosovo, North Macedonia, Portugal, and Slovenia (1, or 1.39%).

Population-normalized visibility of approved applications

Table 7b presents countries ranked by a per capita index based on approved projects. Countries above the median are Iceland (16.28), Estonia (9.26), Kosovo (3.57), North Macedonia (3.48), Croatia (3.27), and Slovenia (2.98. Countries below the median are Denmark (2.12), Armenia (2.06), Bulgaria (1.97), Serbia (1.93), Bosnia and Herzegovina (1.86), Spain (1.55), The Netherlands (1.41), Hungary (1.33), Ireland (1.17), Czech Republic (1.16), Finland (1.13), Poland (1.05), Romania (1.00), France (0.83), Austria (0.69), Italy (0.65), Germany (0.61), Spain (0.59), Belgium (0.53), and Ukraine (0.31).

Out of 72 selected projects, 25 (35%) originated from non-Western countries, including 11 projects from the Balkan region. It is important to note that LIVEMX explicitly supports countries with more limited capacity and resources. To help rebalance national disparities – particularly in the Balkans – the open calls introduced a special bonus mechanism. Additional points were awarded to applicants who had not previously led a European project or who had participated in two or fewer European projects over the past three years.

A country cap was also implemented in the final ranking process, setting a maximum number of projects that could be selected per country. Specifically, the cap limited selection to two projects per country and per topic (i.e., per open call), resulting in a maximum of four projects per country in total per call. This measure ensured a more equitable distribution of opportunities across participating countries and fostered greater diversity and inclusivity in the project selection process.

13 Altogether, Slovenian artists recorded 61 Liveurope bookings during the years 2023, 2024, and 2025. The highest number of bookings took place in Croatia (15), followed by the Czech Republic (10), Slovakia (9), Hungary (8), Italy (7), Bulgaria (6), North Macedonia (2), France (2), Austria (1), and the Netherlands (1). Nearly 25% of all bookings occurred in Zagreb (Croatia). In total, 82% (50/61) of bookings were in Eastern European (EE) countries, while 69% (42/61) were in Central and Eastern European (CEE) countries. This type of analysis can also reveal interesting patterns in the booking distributions of other countries.

14 Three open calls were announced in January 2023, April 2024, and November 2024 to address some specific needs of the European music ecosystem, focusing on three specific topics: Music Export, Live Music Venues, and Digital circulation and engagement.

Table 7a

Table 7a: LIVEMX selected projects

Country	Spain	France	Germany	Italy	The Netherlands	Poland	Romania	Bulgaria	Croatia	Czech Republic	Denmark	Estonia	Hungary	Serbia	Ukraine	Armenia	Austria	Bosnia and Herzegovina	Belgium	Finland	Iceland	Ireland	Kosovo	North Macedonia	Portugal	Slovenia	Total
Nr.	12	9	8	6	4	3	3	2	2	2	2	2	2	2	2	1	1	1	1	1	1	1	1	1	1	1	**72**
%	16.67	12.50	11.11	8.33	5.56	4.17	4.17	2.78	2.78	2.78	2.78	2.78	2.78	2.78	2.78	1.39	1.39	1.39	1.39	1.39	1.39	1.39	1.39	1.39	1.39	1.39	**100.00**

Median = 2.77, N = 26

above median

below median

Table 7b

Table 7b: LIVEMX selected projects, index (per capita)

Country	Iceland	Estonia	Kosovo	North Macedonia	Croatia	Slovenia	Denmark	Armenia	Bulgaria	Serbia	Bosnia and Herzegovina	Spain	The Netherlands	Hungary	Ireland	Czech Republic	Finland	Poland	Romania	France	Austria	Italy	Germany	Spain	Belgium	Ukraine	Total
Index	16.28	9.26	3.57	3.48	3.27	2.98	2.12	2.06	1.97	1.93	1.86	1.55	1.41	1.33	1.17	1.16	1.13	1.05	1.00	0.83	0.69	0.65	0.61	0.59	0.53	0.31	**62.79**

Median = 2.41, N=26

The index value is the ratio of a country's percentage of selected projects to its percentage of the total population.

above median

below median

2.2.4 Keychange

Absolute participation (2023–2025)

Table 8a shows participation in the Keychange program by country. In total, there are 334 participants from 26 countries. Canada, as the only non-European country, ranks first with 39 participants (11.68%), followed by the UK (37, or 11.08%), Germany and Spain (30, or 8.98%), Estonia and Sweden (29, or 8.68%), Iceland (28), France and Poland (20, or 5.99%), and Ireland, Italy, and Norway (19, or 5.69%). Countries below the median are Ukraine (2, or 0.60%) and Austria, Belgium, Cyprus, the Czech Republic, Denmark, Finland, Georgia, Hungary, Lithuania, the Netherlands, Portugal, and Slovenia (1, or 0.30%).

The results show a clear division and a significant gap between countries above and below the median. Notably, several Western European countries, such as Austria, Belgium, Denmark, Finland, and the Netherlands also display very low participation in the Keychange program. A likely explanation for this, outcome is lower engagement or activity by local partners in promoting or disseminating the open call.[15]

Population-normalized visibility

Table 8b presents participation in the Keychange program according to a per capita index. Iceland (124.63) and Estonia (36.69) dominate by a wide margin, followed by Ireland (6.05), Norway (5.89), Sweden (4.75), Cyprus (1.77), Canada (1.68), Spain (1.06), the UK (0.96), Poland (0.95), Slovenia (0.81), Germany (0.62), Lithuania (0.60), Italy (0.56), France (0.51), Georgia (0.47), Finland (0.31), Denmark (0.29), Austria (0.19), Hungary (0.18), the Czech Republic and Portugal (0.16), Belgium (0.15), the Netherlands (0.10), Romania (0.09), and Ukraine (0.08).

Overall, the data indicates that countries fall into two distinct categories: those with exceptionally high representation and those with very low representation. Iceland and Estonia stand out with an extraordinarily high number of innovators and musicians relative to their population, followed by Ireland, Norway, and Sweden.

Keychange combines broad geographic reach with persistent concentration. While the program includes a wide array of countries, absolute participation and index values remain dominated by Germany, France, the United Kingdom, and Nordic countries. Median-based classification indicates that countries with stronger institutional support structures benefit most consistently from participation over time.

Smaller and more peripheral countries are present, yet their participation remains less stable across the three-year period. This pattern suggests that while Keychange succeeds in widening access at the level of inclusion, sustained engagement continues to favor countries with established infrastructures capable of supporting repeated nominations and long-term involvement.

2.2.5 Cross analysis

Table 9 presents countries with the highest levels of participation across the selected festivals and platforms. Countries are compared based on the sum of their percentage shares of total participation at each event (festival or platform). A higher cumulative percentage indicates greater overall participation. Germany ranks first with a cumulative score of 90.04, followed by the UK (71.43) and Estonia (65.92).[16] These are followed by France (54.37), Spain (48.16), the Netherlands (40.77), Ireland (31.19), Belgium (30.48), Italy (30.30), Sweden (28,20), Poland (22.12), Finland (22.01), Norway (18,94), Austria (18.72), Denmark (16.98), Iceland (15.23), Switzerland (14,79) Ukraine (14.32), Portugal (12.16), Serbia (9.41), Czech Republic (9.03), Hungary (8.15), Lithuania (8.15), Slovenia (8.08), Latvia (7.37), Romania (7.23), Bulgaria (6.34), Croatia (6.26), Slovakia (5.49), Greece (4.01), Luxembourg (2.19), Cyprus (1.45), Georgia (1.38), Belarus (1.22), and Malta (0.44). Except for Estonia and Poland (both CEE), all countries above the median are Western European countries.[17] Overall, 24 out of 36 countries are placed below the median.

15 This was not the case in Slovenia, where the open call for participation in the Keychange program was well promoted and announced in a timely manner. Despite this, only one person applied, indicating a low level of interest in participation.

16 Estonia's absolute high-ranking stems from its inclusion of Tallinn Music Week; the same goes for Germany's Reeperbahn and the Netherlands' Eurosonic. Comparing these results, we can see that Eurosonic (12.21%) includes fewer home artists in festivals regular (international) program than Tallinn Music Week (48.79%) or Reeperbahn (42.39). On the other hand, ESNS dedicates one special day to emerging Dutch artists (Noorderslag). It is important to note that the results depend on the selection of events included in the analysis. In Slovenia, for example, the MENT festival typically features around 40% Slovenian acts in its program. This also helps explain the high levels of participation observed for Estonia at Tallinn Music Week, and for Germany and Austria at Reeperbahn. For these reasons, WOMEX was included in the analysis to provide a broader perspective on how European countries perform at a larger scale.

17 The highest-ranked Balkan country is Serbia (9.41), followed by Slovenia (8.08), Romania (7.23), Bulgaria (6.43), Croatia (6.26), and North Macedonia (4.01). A clearer picture could be obtained by including the following regional festivals: MENT Ljubljana, SHIP, PIN, SoAlive, and MMB.

Table 8a

KEYCHANGE

Table 8a: Keychange all participants, country rankings

Country	Canada	UK	Germany	Spain	Estonia	Sweden	Iceland	France	Poland	Ireland	Italy	Norway	Ukraine	Austria	Belgium	Cyprus	Czech Republic	Denmark	Finland	Georgia	Hungary	Lithuania
Nr.	39	37	30	30	29	29	28	20	20	19	19	19	2	1	1	1	1	1	1	1	1	1
%	11.68	11.08	8.98	8.98	8.68	8.68	8.38	5.99	5.99	5.69	5.69	5.69	0.60	0.30	0.30	0.30	0.30	0.30	0.30	0.30	0.30	0.30

The Netherlands	Portugal	Romania	Slovenia	**Total**
1	1	1	1	**334**
0.30	0.30	0.30	0.30	**100.00**

Median = 12.85, N = 26

above median

below median

Table 8b

Table 8b: Keychange total participants by country (per capita index), rankings

Country	Iceland	Estonia	Irekand	Norway	Sweden	Cyprus	Canada	Spain	UK	Poland	Slovenia	Germany	Lithuania	Italy	France	Gerogia	Finland	Denmark	Austria	Hungary	Czech Republic	Portugal
Index	124.63	36.69	6.05	5.89	4.75	1.77	1.68	1.06	0.96	0.95	0.81	0.62	0.60	0.56	0.51	0.47	0.31	0.29	0.19	0.18	0.16	0.16

Belgium	The Netherlands	Romania	Ukraine	**Total**
0.15	0.10	0.09	0.08	**189.71**

Median = 7.30, N = 26

above median

below median

The index value is the ratio of a country's percentage of all participants to its percentage of the total population.

Table 9

Table 9: Countries with the highest participation across festivals and platforms. Share of percentages of total participation.

Country:	ESNS	Reeperbahn	TMW	Womex	ETE	Liveurope	LIVEMX	Keychange	Total:
Germany*	6.91	**42.39**	2.86	3.18	4.79	9.82	11.11	8.98	**90.04**
UK	8.97	24.32	4.18	7.73	15.15	0.00	0.00	11.08	**71.43**
Estonia*	1.32	0.57	**48.79**	1.81	1.05	0.92	2.78	8.68	**65.92**
France	6.62	3.52	3.30	9.09	4.31	9.04	12.50	5.99	**54.37**
Spain	5.29	2.27	0.88	7.27	2.88	3.92	16.67	8.98	**48.16**
The Netherlands*	**12.21**	2.84	0.66	0.45	11.51	7.24	5.56	0.30	**40.77**
Ireland	5.29	2.16	0.44	1.36	11.36	3.50	1.39	5.69	**31.19**
Belgium	8.09	2.27	0.66	2.73	8.63	6.41	1.39	0.30	**30.48**
Italy	4.41	0.68	1.32	2.73	2.97	4.93	8.33	4.93	**30.30**
Sweden	2.94	3.07	3.52	1.82	3.93	4.24	0.00	8.68	**28.20**
Poland	3.68	0.00	2.42	0.91	1.63	3.32	4.17	5.99	**22.12**
Finland	2.21	0.68	10.77	2.27	1.53	2.86	1.39	0.30	**22.01**
Norway	3.82	0.68	1.10	1.36	2.88	3.41	0.00	5.69	**18.94**
Austria	3.09	5.45	0.44	0.45	3.64	3.96	1.39	0.30	**18.72**
Denmark	3.53	1.93	1.10	0.91	2.88	3.55	2.78	0.30	**16.98**
Iceland	1.47	0.91	0.88	0.00	0.77	1.43	1.39	8.38	**15.23**
Switzerland	3.53	3.41	0.44	0.45	4.79	2.17	0.00	0.00	**14.79**
Ukraine	2.06	0.57	2.64	0.91	2.59	2.17	2.78	0.60	**14.32**
Portugal	1.91	0.45	0.66	1.36	1.53	4.56	1.39	0.30	**12.16**
Serbia	1.03	0.11	0.44	1.36	1.15	2.54	2.78	0.00	**9.41**
Czech Republic	1.32	0.11	0.66	0.00	1.05	2.81	2.78	0.30	**9.03**
Hungary	1.03	0.11	1.32	0.00	0.67	1.94	2.78	0.30	**8.15**
Lithuania	0.74	0.11	3.52	0.91	1.05	1.52	0.00	0.30	**8.15**
Slovenia	1.18	0.00	0.22	0.45	1.73	2.81	1.39	0.30	**8.08**
Latvia	0.59	0.00	4.18	0.91	0.77	0.92	0.00	0.00	**7.37**
Romania	0.59	0.11	0.44	0.00	0.10	1.52	4.17	0.30	**7.23**
Bulgaria	1.03	0.23	0.22	0.00	1.53	0.55	2.78	0.00	**6.34**
Croatia	0.74	0.00	0.22	0.00	0.58	1.94	2.78	0.00	**6.26**
Slovakia	1.18	0.00	0.44	0.45	1.25	2.17	0.00	0.00	**5.49**
Greece	0.88	0.11	0.22	0.45	0.38	1.98	0.00	0.00	**4.02**
North Macedonia	0.29	0.00	0.44	0.45	0.38	1.06	1.39	0.00	**4.01**
Luxembourg	0.88	0.57	0.22	0.00	0.29	0.23	0.00	0.00	**2.19**
Cyprus	0.29	0.00	0.22	0.45	0.10	0.09	0.00	0.30	**1.45**
Georgia	0.15	0.11	0.00	0.45	0.19	0.18	0.00	0.30	**1.38**
Belarus	0.44	0.23	0.00	0.45	0.10	0.00	0.00	0.00	**1.22**
Malta	0.29	0.00	0.00	0.00	0.10	0.05	0.00	0.00	**0.44**

*home event

Median = 20.45, N=36 — 736.35

Western European countries

Other countries

A further analysis incorporating additional showcase festivals (such as MENT, SHIP, BUSH, MMB, SHARPE, Jazzahead!, and others) would yield slightly different cumulative results; nevertheless, Western European countries would still likely dominate. As can be observed, aside from the exceptional visibility of Estonia, almost all countries above the median value (20.45) are Western European. With the exception of Germany, the United Kingdom, Estonia, and France – each of which demonstrates strong participation across all festivals and platforms – subsequently ranked countries exhibit a more gradual decline in cumulative percentage values.

Estonia represents a particularly interesting case, performing strongly across all observed festivals and platforms. Given its size and population, this suggests a high level of capacity in export activities, professional networking, and talent development. At the other end of the spectrum is Luxembourg, a Western European country with greater resources and capacity than most CEE countries, yet one that appears to underperform across the selected festivals and platforms.

The findings of this analysis are indicative only, and further, more detailed research – taking into account a broader range of factors such as export budgets, levels of investment, expenditure, and capacity-building efforts – would be necessary to explain why some countries overperform while others do not.[18] Finally, it should be noted that the music sectors of the participating countries (and of the region more broadly) extend well beyond the genres typically represented at showcase festivals and capacity-building platforms.

A notable increase in representation is evident for non-Western countries after incorporating LIVEMX into the cross-analysis, although only Poland and Estonia exceed the median ranking. This underlines the importance of combining showcase-based indicators with broader structural data when assessing national capacity and designing support measures.

2.3 How Support Mechanisms Shape Mobility Outcomes

Drawing on combined data from ESNS, Europe Talent Exchange, Tallinn Music Week, Reeperbahn Festival, WOMEX, Liveurope, LIVEMX, and Keychange (2023–2025), Europe's music mobility can be understood as a highly interconnected ecosystem shaped by the interaction of showcase festivals and support schemes. These initiatives have played an important role in widening access to international platforms and creating new pathways for artists across the continent.

At the same time, participation and booking outcomes continue to show noticeable differences between countries, with some maintaining a more regular presence than others. Artists often move from initial showcase exposure toward touring and follow-up bookings, yet the data suggests that sustained international activity is most likely when such exposure is complemented by longer-term support. In this respect, mechanisms such as Europe Talent Exchange, Liveurope, LIVEMX, and Keychange appear to provide valuable continuity, helping artists build on early visibility. Their effectiveness is closely associated with institutional capacity, strategic engagement, and coordinated export-related efforts, which tend to support more stable outcomes over time.

Per-capita and index-based measures further indicate that several small and mid-sized countries achieve levels of visibility that exceed what population size alone would suggest. Slovenia stands out in this regard, maintaining a steady presence despite its limited domestic market.

While year-to-year results naturally fluctuate due to individual breakthroughs, programming choices, or changes in policy priorities, these variations unfold within broader patterns that shape participation over longer periods. Overall, the findings point to a meaningful distinction between short-term visibility and longer-term mobility: while European platforms are increasingly diverse and open in whom they present, sustained international circulation appears to benefit most from continued institutional and structural support.

This cross-analysis points to several directions for further research: expanding the platform scope to additional showcase festivals (e.g., MENT, SHIP, SHARPE, Waves Vienna, PIN); conducting comparative case studies of high- and low-performing countries that incorporate export offices, professional networks, and cultural investment; and examining follow-up bookings in greater detail to distinguish short-term exposure from sustained touring patterns.

18 Participation in festivals and platforms is considered a single dimension of a country's export capacity, reflecting its level of activity in the international live music sector. These participation figures are shaped by multiple factors influencing music export performance, including national financial strength (e.g. GDP), levels of public investment, the activity and strategic orientation of export offices, international networking, the expertise of local professionals, capacity-building opportunities for musicians and industry workers, and the presence of music companies integrated into the international music industry.

3. How Gatekeepers Decide: Inside Europe's Music Mobility System

3.1 Purpose and scope of the qualitative analysis

This chapter complements the quantitative analysis by adding qualitative insights drawn from interviews conducted by the authors in November and December 2025 with representatives of the same major European showcase festivals, talent networks, and professional support platforms, including Eurosonic Noorderslag (ESNS) and the European Talent Exchange (ETE), Tallinn Music Week (TMW), Reeperbahn Festival, WOMEX, Liveurope, Live DMA, and EMMA.

Interview material is referenced using respondent labels (Respondent 1, Respondent 2, etc.), with organizations named where relevant. References in this chapter reflect shared perspectives expressed across multiple interviews unless otherwise specified and are attributed to platforms or organizations rather than individuals. The analysis is based on themes identified across interviews and is supplemented by publicly available information. Full interview transcripts are included in the appendix.

3.2 What industry decision-makers broadly agree on

Despite operating within very different institutional frameworks, several shared viewpoints emerge across the interviews. The platforms do not position themselves as capacity-building or compensatory spaces. Instead, showcases and support programs are understood as professional environments in which artists are expected to meet established standards of live performance, originality, and production quality before entering international circulation.

Second, export readiness outweighs nationality. While geographical diversity is widely valued, selection decisions are rarely driven by origin alone. Instead, attention is directed toward professional context: management, touring capacity, release timing, and strategic intent. In this sense, gatekeepers assess not only who an artist is, but whether they are realistically able to act on international opportunities.

Third, mobility is understood as a process rather than an event. A single showcase rarely leads to a lasting impact on its own. International careers tend to grow gradually, built through repeated encounters, trust, and professional relationships. Without continuity and follow-up, visibility fades quickly.

Finally, national infrastructure quietly shapes outcomes. Although access to European platforms is formally open, interviewees consistently observe that artists from countries with export offices, venue networks, and supportive cultural policies are far better positioned to convert opportunities into bookings, tours, and long-term careers.

These qualitative observations closely align with the systemic perspective articulated in ***Developing Music Export in Europe II*** (Virgo Sillamaa, 2025).[19] The report formulates international music mobility not as a direct outcome of touring subsidies or showcase exposure, but as a cumulative process of capacity building and ecosystem development. Rather than targeting artists directly, the EMEE framework prioritizes strengthening music export organizations (MEOs), professional knowledge, and long-term cooperation structures that enable artists and professionals to operate internationally in a sustainable way.

Key support mechanisms identified in the report include training and education, mentoring and business development, mobility support through networking missions, delegations and co-creation formats, and long-term partnership building. These measures are designed to work gradually, building strategic capacity, professional networks, and market readiness over time. The report explicitly stresses that seminars and showcase appearances have limited impact in isolation and only become effective when embedded within longer-term mentoring, consulting, and follow-up structures.

Importantly, the report confirms that despite formally equal access to European-level frameworks, outcomes remain uneven across countries and regions. Artists and professionals from countries with strong export offices, stable funding instruments, and coherent cultural policies are significantly better positioned to convert visibility into sustained touring and professional mobility. Where such infrastructures are weak or fragmented, European-level initiatives cannot fully compensate for the lack of long-term capacity, reinforcing structural inequalities observed by interviewees in this chapter. [20]

3.3 Distinct selection approaches & criteria

While these principles are shared, the interviews reveal three different selection approaches, each influencing how mobility is understood and who gains access to it.

19 Virgo Sillamaa, *Developing Music Export in Europe II* (Tallinn: European Music Exporters Exchange (EMEE), 2025), esp. sections 1.3 and 4.2–4.4, which frame international music mobility as a long-term ecosystemic process centered on capacity building, music export organizations, and sustained cooperation rather than isolated touring or showcase interventions.

20 Ibid., esp. sections 1.2, 1.3, and 4.3–4.6, which document uneven outcomes across European countries and link successful international mobility to the presence of stable export infrastructures, coherent cultural policies, and long-term institutional support structures.

3.3.1 Market-oriented selection approach: competing in a saturated field
In this pattern, international mobility is framed primarily as a market outcome. Selection is highly competitive and centrally curated, based on uniform criteria applied across all applicants. Beyond artistic quality, strong emphasis is placed on audience engagement, export comparability, touring plans, release timing, and demonstrable demand in key live markets.

Reeperbahn Festival exemplifies this logic. In 2025, it presented 510 artists from 46 countries, with German acts making up roughly one third of the line-up. Selection is internally curated through applications, international scouting, and listening sessions, without external juries (Respondent 2). Only a small proportion of applicants are selected, and all artists compete under the same criteria regardless of origin. This model offers clarity and consistency but tends to favor artists from stronger markets with existing traction and professional infrastructure.

3.3.2 Curated diversity: balancing excellence and representation
The second pattern combines artistic curation with internal balancing mechanisms aimed at shaping the wider ecosystem. Platforms operating within this approach focus on artists at key transitional stages, prioritizing musical quality, live performance potential, and export readiness. Formal quotas are generally avoided, but geographical and genre balance function as guiding programming principles.

ESNS and the ETE operate within this framework. ESNS programs emerging European artists at the point where domestic recognition meets international ambition, while ETE connects around 130 partner festivals through booking incentives designed to reduce risk and stimulate initial international touring. Interviewee points out, however, that outcomes vary widely depending on professional representation and follow-up capacity (Respondent 1).

WOMEX applies a similar logic on a global scale. Its official showcase is curated by a rotating international jury (7 Samurai) and guided by internal benchmarks for geographical and musical balance. Participation requires substantial financial investment, as travel costs are not covered, making national support structures a decisive factor in who can participate and benefit (Respondent 4).

3.3.3 Ecosystem-first gatekeeping: building the conditions for touring
The third pattern shifts attention away from individual artists toward the professional environments that enable touring. Rather than selecting artists directly, these initiatives focus on venues, managers, and professional communities, reducing financial risk for bookers and fostering long-term cooperation and peer exchange.

Liveurope shows this approach by reducing financial risk for venues. Since 2014, it has supported nearly 5,700 concerts featuring artists from 43 European countries. Member venues increased their average number of emerging-artist concerts from 22 to 34 per year, while English-only performances declined from around 80% to 47% by 2025 (Respondent 5). Population-adjusted data show that smaller countries often benefit disproportionately, with local venues functioning as informal export hubs in regions with weaker infrastructures.

Live DMA (European network of national live music associations) applies a similar logic by strengthening professional ecosystems rather than targeting artists directly. Interviewees consistently note that outcomes depend heavily on national infrastructure, even where formal access to European cooperation is equal (Respondent 6).

3.4. Structural constraints and unequal outcomes
A central qualitative finding is the persistent gap between formal openness and effective access. While most platforms are theoretically open to all European countries, interviewees repeatedly highlight how structural conditions shape participation and outcomes.

Financial barriers, particularly where travel and production costs are not covered, to a larger degree affect artists from countries with limited public or export support. Informal professional knowledge, how to prepare, whom to contact, when to apply, circulates unevenly across regions. The presence of a local venue or export office often functions as an informal gateway, amplifying participation and follow-up opportunities.

These dynamics help explain why certain smaller countries may outperform larger markets in population-normalized mobility indicators, while others remain visible yet struggle to translate exposure into sustained touring.

3.5 When visibility does not translate into mobility
Across all interviews, one conclusion is clear: **showcase visibility alone rarely produces touring**. Recurring bottlenecks include limited professional representation during and after showcases, lack of touring subsidies or risk-sharing mechanisms, insufficient national follow-up structures, and misalignment between artist readiness and market expectations.

3.6 Comparative synthesis of selection models

Platform / Festival	Selection logic	Selection focus	Support mechanism	Main limitation
ESNS / European Talent Exchange (ETE)	Curated professional readiness	Emerging European artists	Booking incentives, promotion, professional access	Depends on team capacity and follow-up
WOMEX	Jury-based artistic curation	Export-ready global acts	Visibility, networking, curated showcases	High participation and travel costs
Reeperbahn Festival	Market competition	Professionally established acts	Paid showcases, industry exposure	Favors strong markets and existing infrastructure
Tallinn Music Week	Decentralized co-curation	Genre-specific excellence	Professional access, curator expertise	Artists bear travel and participation costs
Liveurope	Local curation	European emerging artists	Financial incentives to venues	Limited network size and funding
Live DMA	Ecosystem strengthening	Venues and cultural professionals	Long-term cooperation, peer exchange	Impact depends on national structures
EMMA	Capacity building	Music managers	Mentoring, training, peer networks	Uneven regional participation

3.7 Beyond the showcase stage

Taken together, the interviews depict European music mobility not as a single gateway, but as a complex crossroads. There is no central authority controlling access. Instead, mobility emerges through a dispersed network of programmers, funders, venues, managers, and institutions, each operating according to partly overlapping priorities. Artistic quality and export readiness may open initial doors, but they function only as baseline conditions rather than guarantees of continued movement.

What ultimately determines whether an artist continues to circulate is the surrounding support system: the strength of local infrastructure, access to professional networks, and the capacity to follow up when opportunities appear. This helps explain why, across countries, increased visibility does not consistently translate into sustained international mobility.

4. Conclusions & Recommendations

4.1 Conclusions

The analysis indicates that representation across Europe's major showcase stages and touring platforms is developing within an increasingly interconnected European music mobility space but remains unevenly distributed. While artists from more than thirty countries circulate regularly through key events and support programs, participation is more consistent for some countries than for others.

Population-normalized indicators show that small and mid-sized countries can achieve strong relative visibility. At the same time, such figures "are best understood as measures of exposure rather than direct indicators of ecosystem strength" (Respondent 8). As the analysis demonstrates, relative visibility may reflect threshold effects or individual breakthrough artists and does not necessarily translate into long-term capacity or sustainability on its own.

Across platforms, support mechanisms such as touring incentives, booking networks, and capacity-building programs play an important role in shaping mobility outcomes. Participation in initiatives such as European Talent Exchange, Liveurope, LIVEMX, and Keychange extends opportunities beyond initial showcase appearances and contributes to a more inclusive European touring landscape, while operating within the broader structural conditions of the music ecosystem. The data indicates that countries with stronger institutional capacity tend to benefit more consistently from these mechanisms, while others engage more intermittently or face greater challenges in converting access into sustained touring activity.

A key finding of the study is the strong relationship between export capacity and longer-term international success. Countries that have invested over time in export offices, professional training, venue networks, and international partnerships appear better positioned to translate visibility into repeat bookings and durable international careers. Where such capacity is more limited or fragmented, showcase participation often represents an important first step, but may be harder to build upon without additional support.

Finally, the qualitative interviews underline that showcase visibility is most effective when accompanied by coordinated follow-up. Cultural perception and reputation continue to influence demand and expectations among programmers and audiences, shaping how music from different regions is received.

Overall, the analysis highlights the important role of European-level initiatives in fostering mobility and helping to mitigate existing imbalances. Their contribution is greatest when complemented by sustained national investment in people, organizations, and professional ecosystems, creating conditions in which visibility can more readily develop into long-term international activity.

4.2 Recommendations

Based on these findings, the study points toward a set of interlinked considerations and recommendations that prioritize long-term capacity building. Central to all of them is the role of structured, well-resourced local infrastructures such as venues, festivals and promoters in enabling artist development, professionalization, and sustained circulation. European-level funding can support these efforts and help mitigate imbalances, but its impact depends on the presence of strong local structures capable of sustaining careers over time.

First, national governments should focus on strengthening export offices and mobility funding mechanisms by ensuring stability, strategic orientation, and continuity. Rather than functioning as isolated funding instruments, these structures should be embedded within coherent local and national ecosystems that support artists across different career stages. Export structures are most effective when they combine financial support with professional training, international networking, and long-term institutional capacity.

Second, European and regional stakeholders should continue expanding transnational touring schemes and follow-up structures that reduce risk for venues and promoters. Initiatives that operate beyond the showcase stage - by supporting repeat bookings, touring routes, and sustained partnerships - are particularly effective in strengthening long-term mobility and professional exchange.

Third, greater emphasis should be placed on the professional development of managers, agents, and other intermediaries. International circulation depends not only on artist visibility but also on the availability of skilled professionals who can navigate markets, negotiate opportunities, and maintain long-term cross-border relationships. Strengthening these professional ecosystems enhances the ability of artists to sustain international activity over time.

Fourth, diversity in showcase curation should remain a core value and strategic objective. Its impact is strongest when combined with appropriate follow-up opportunities and realistic assessments of artist readiness, allowing visibility to translate into meaningful professional progression rather than remaining an isolated moment.

Finally, European support programs should continue to prioritize long-term sustainability. Stable funding frameworks, knowledge transfer between regions, and continuity in program design support gradual but lasting change in mobility patterns. While short-term indicators can signal activity and engagement, sustained investment is what ultimately enables durable careers and resilient professional ecosystems.[21]

Authors' biographies

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Dojrana Prokopieva is a musicologist and cultural project manager with a strong professional background in festival production, international cultural project management, and musicological research. Her experience includes long-term collaborations with the Skopje Jazz Festival, the Composers' Association of Macedonia, the cultural institution Druga Godba, and the Center Rog Creative Hub in Ljubljana. She joined the Slovenian Music Information Centre (SIGIC) as a Project Manager in November 2025.

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Appendix

All three appendixes are available on the following link: https://drive.google.com/drive/folders/1GiSp5fBhvnmajvlhAW3WBUjj-CK7uPew

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21 Interview with a respondent, music export and industry expert, Zoom interview conducted in December 2025.; arguments concerning the limits of corrective representation policies and the central role of long-term national investment.