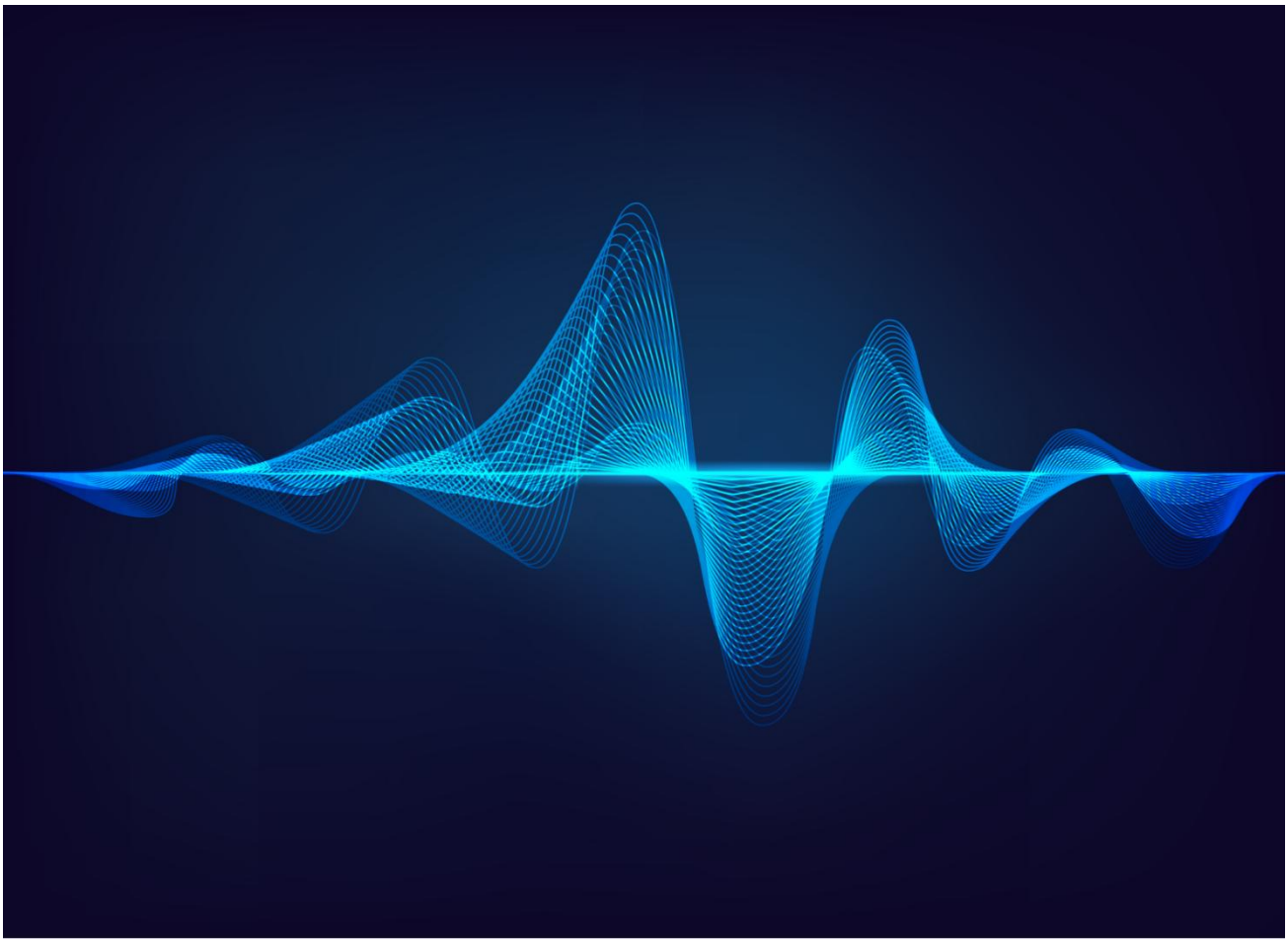

D2.2 - Music Diversity and Circulation: Policy Recommendations

OpenMusE

An open, scalable data to-policy pipeline for European music ecosystems

Funded by the European Union

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Glossary

AVMSD Directive 2010/13/EU of the European Parliament and of the Council of 10 March 2010 on the coordination of certain provisions laid down by law, regulation or administrative action in Member States concerning the provision of audiovisual media services (Audiovisual Media Services Directive)

BC Berne Convention

BER Commission Regulation (EU) No 651/2014 of 17 June 2014 declaring certain categories of aid compatible with the internal market in application of Articles 107 and 108 of the Treaty (Block Exemption Regulation)

CCI **Creative and cultural industry -** Cultural and creative industries are comprised of all sectors whose activities are based on cultural values, or other artistic individual or collective creative expressions and are defined in the legal basis of the Creative Europe Programme

CESCR Committee on Economic, Social and Cultural Rights

CD **Cultural diversity** – represents the different forms of culture that emerge in time and space. Cultural diversity manifests itself in the originality and multiplicity of identities, as well as in the cultural expressions of peoples and societies representing humanity. At the same time, cultural and linguistic diversity contributes to the dissemination and consolidation of the European values of democracy, tolerance and equality.

CDC UN Cultural Diversity Convention

CDSMD Directive (EU) 2019/790 of the European Parliament and of the Council of 17 April 2019 on copyright and related rights in the Digital Single Market and amending Directives 96/9/EC and 2001/29/EC

CEDAW UN Convention on the Elimination of All Forms of Discrimination against Women

CJUE Court of Justice of the European Union

CMO **Collective Management Organisations** - are, in most cases, not-for-profit entities, whose legal form can be either private or public. Their key function is to ensure the smooth enforcement, licensing, collection and distribution of revenues among stakeholders, thus allowing the effective remuneration of all creators with lower transaction costs and increased market efficiency.

CoE Council of Europe

DG **Data granularity** - refers to a measure of the level of detail in a data structure.

DOM Declaration on the Rights of Persons Belonging to National or Ethnic, Religious and Linguistic Minorities (Declaration on Minorities)

ECHR European Convention on Human Rights

EU European Union

Ethnicity describes the culture of people in a given geographic region, including their language, heritage, religion and customs

FCNM Framework Convention for the Protection of National Minorities

FCVCHS Framework Convention on the Value of Cultural Heritage for Society

GBR Regulation (EU) 2018/302 of the European Parliament and of the Council of 28 February 2018 on addressing unjustified geo-blocking and other forms of discrimination based on customers' nationality, place of residence or place of establishment within the internal market and amending Regulations (EC) No 2006/2004 and (EU) 2017/2394 and Directive 2009/22/EC (Geoblocking Regulation)

IP Intellectual Property

ISRC **International Standard Registration Code** – is the globally recognised standard numbering system for audio and music video recordings. It comprises a 12-digit alphanumeric code and functions as a universal identification number for each sound recording.

ISWC **International Standard Musical Work Code**. It is a unique, permanent, and internationally recognised reference number for the identification of musical works.

MD Music diversity - is part of the cultural diversity and refers to the variety and range of musical styles, genres, traditions, and cultures present within a particular musical context, community, or industry. It encompasses the inclusion of different subjects, musical forms, voices, and expressions, and it often promotes the celebration and recognition of various cultural and artistic contributions to music.

Metadata is data that provides information about other data, but not the content of the data itself, such as the text of a message or the image itself. There are many distinct types of metadata, including descriptive metadata (the descriptive information about a resource, used for discovery and identification), structural medatata (indicates how compound objects are put together), administrative metadata (information that helps managing a resource, such as permissions, date of creation, type), reference metadata (information about contents and quality of statistical data), statistical or process data (describing the process that collects, processes or produces statistical data), legal metadata (information about creator(s), rightsholders, eventual public licensing.

PR Regulation on Cross-Border Portability of Online Content Services (2017/1128) (Portability Regulation)

SatCab II Directive Directive (EU) 2019/789 of the European Parliament and of the Council of 17 April 2019 laying down rules on the exercise of copyright and related rights applicable to certain online transmissions of broadcasting organisations and retransmissions of television and radio programmes, and amending Council Directive 93/83/EEC

SROI **Social Return on Investment** – SROI assesses changes that are important to the community - the individuals or entities involved. It describes the narrative of change by quantifying social, environmental, and economic consequences and employs monetary figures to represent these outcomes. This approach allows for the computation of a benefits-to-cost ratio.

TDM Text and data mining - is the process of deriving information from machine-read material. It works by copying large quantities of material, extracting the data, and recombining it to identify patterns (source: UK government)

TFEU Treaty of the Functioning of the European Union

TRIPS Agreement in Trade-Related Aspects of Intellectual Property Rights

UCC Universal Copyright Convention

UDCD Universal Declaration on Cultural Diversity

UDHR Universal Declaration of Human Rights

UN United Nations

UNESCO United Nations Economic Social Cultural Organisation

WIPO World Intellectual property Organisation

WP Work Package

WTO World Trade Organisation

Executive Summary

This deliverable **D2.2. Report on Music Diversity and circulation** builds upon the findings of **D2.1 - "Music diversity and circulation: Novel data collection methods and indicators".**

Deliverable D2.1. identified research questions, regulatory definitions, data sources, gaps, and methods, to co-develop a robust set of indicators that can contribute to fostering cultural and music diversity across borders.

To achieve the set objectives, the research comprised five distinct yet interconnected phases. It began with the identification of research questions and the consolidation of a working definition of cultural and music diversity, built upon an updated review of existing literature. It then moved to a comprehensive mapping of international, European, and national regulatory sources that either directly define cultural diversity, embed it as a fundamental objective, or employ diversity indicators in their implementation. This mapping was deliberately wide in scope, extending beyond copyright to encompass audiovisual law, competition, trade, and cultural policies, recognising that these areas indirectly impact the conditions for music diversity. The third step consisted of an economic analysis of cultural diversity, examining its relationship with the circulation of works, human capital, employment, and the economic performance of the music industry. In a fourth step, existing and proposed policy objectives were aligned and, wherever possible, translated into measurable indicators. Finally, the research addressed data sources and gaps, identifying available data at the European and national levels, exploring Slovakia as a paradigmatic case study, and proposing methods of data collection to fill existing gaps.

Our mapping of regulatory tools across international, EU, and selected Member State sources evidenced an **emerging convergence around diversity-related policy objectives**. Despite this, it also highlighted that **important gaps remain**. First, there are divergent views among policymakers and stakeholders on the effectiveness of instruments such as content quotas. Even where content quotas exist, they are based on demographic indicators (e.g., gender, origin), resulting in a **lack of alignment between media regulation and other rules that protect cultural heritage, including music diversity**. Second, elaborating suitable indicators remains difficult. Current measures tend to privilege gender representation, whereas other demographic dimensions, such as minority languages, ethnicity, age, nationality, and place of origin, are insufficiently integrated into the legal frameworks. In connection to this, the **impact of streaming platforms and their algorithmic recommendation systems on diversity remains mostly unregulated**, despite the fact that these systems are increasingly determining which artists are visible and which remain marginal. Third, **data availability is still fragmented**. In this sense, our research highlighted good practices identified among CMOs, other cultural statistics initiatives, and EUROSTAT, which could be integrated into broader policy objectives.

Against this background, the current deliverable summarises the main findings of D2.1 and develops specific policy recommendations. The aim is to address the misalignment between regulatory tools and cultural policy objectives and to promote a framework that fosters diversity in the European music ecosystem. In this sense D2.2 complements, with a forward-looking approach, the outcome of Task 2.3 and related D2.3, which develops computational methods that use diversity indicators **as framed under**

the current regulatory framework to automatically assess whether specific music content meet diversity criteria. D2.3 maps how the Slovak Comprehensive Music Database operationalises diversity and locality criteria through ontologies and governance-by-design data infrastructures. Its approach is grounded in a *de plano* notion of diversity that reflects existing quota-based policy practices. By contrast and complementing this approach, D2.2 reassesses the underlying concept of diversity itself. It moves beyond compliance-oriented measurement. D2.2 advances diversity as "it-should-be" perspective, proposing policy principles and regulatory adjustments that can better align technological implementations with substantive cultural objectives. In doing so, it offers the conceptual and policy-level framework within which implementation pilots such as SKCMDb can support European music policies.

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1 Introduction

Open Music Europe (**Open MusE**)'s main mission is to build an open, scalable data-to-policy pipeline for European music ecosystems. It brings together music industry stakeholders and researchers from 11 EU countries and Ukraine to strengthen the European music ecosystem. The project aims to make the sector more competitive, fair, sustainable, and transparent by improving how data is collected, analysed, and transformed into effective policy tools.

The project stems from the understanding that the European music industry is rich, large, and diverse, but it is facing significant challenges. Among them are the evolving business models (e.g., streaming), the precarious financial and social sustainability for many small players, the reduced exposure for niche repertoires and artists, alongside significant data gaps that make evidence-based policy difficult.

To achieve its objectives, **Open MusE** is organised in several work packages (WP), each corresponding to a pillar in the Data Observatory. Specifically, WP2 is concerned with how musical diversity is regulated, produced, distributed, and how musical works, artists and repertoires circulate across borders within Europe. In this context, WP2 pursued four interrelated aims, designed to advance the understanding and promotion of diversity within the European music ecosystem:

1 **MAP (objective 1)** The first objective focused on mapping **the regulatory frameworks** that define cultural diversity in Europe. This mapping exercise, as outlined in D2.1, resulted in a comprehensive overview of the legal and policy instruments that influence diversity within the music sector. It also laid the groundwork for the project, as it illustrated how the regulatory landscape could either promote or hinder diversity in the European music landscape, and that the laws and policies shaping the music industry should reflect the rich cultural diversity that characterised the European music ecosystem.

2 **BRIDGE (objectives 2 and 3)** The second objective involved **the development of** concrete **indicators** to measure the cross-border circulation of works and artists. This task has also been accomplished in **D2.1 Music Diversity and Circulation: Novel Data Collection methods and Indicators**, through the creation of a preliminary set of measurable indicators that capture not only the flow of music across Europe but also the diversity inherent within that circulation. This encompassed **identifying and filling data gaps** that limit the understanding of music diversity and its circulation across Europe, in order to be able to make informed decisions and create more inclusive policies.

3 **EMPOWER (objective 4)** The fourth objective of WP2, which forms the focus of the current deliverable, is to **formulate legal and policy recommendations** based on the achievements made so far. The purpose of this final phase is to translate the data and findings gathered in the earlier stages into actionable guidance for policymakers at both national and European levels, as well as for industry stakeholders. These recommendations aim to support the mobility of artists, increase the diversity of music in circulation, and foster a more varied music ecosystem.

2 Methodology

The research in D2.1. comprised five distinct yet interconnected phases:

1. The identification of research questions and the consolidation of a working definition of cultural and music diversity, built upon an updated review of existing literature.
2. A comprehensive mapping of international, European, and national regulatory sources that either directly define cultural diversity, embed it as a fundamental objective, or employ diversity indicators in their implementation. This mapping was deliberately wide in scope, extending beyond copyright to encompass audiovisual law, competition, trade, and cultural policies, recognising that these areas indirectly impact the conditions for music diversity.
3. Economic analysis of cultural diversity, examining its relationship with the circulation of works, human capital, employment, and the economic performance of the music industry. In a fourth step, existing and proposed policy objectives were aligned and, wherever possible, translated into measurable indicators.
4. Data sources and gaps, identifying available data at the European and national levels, exploring Slovakia as a paradigmatic case study, and proposing methods of data collection to fill existing gaps.

This deliverable **D2.2. Report on Music Diversity and Circulation** builds upon the existing findings in **D2.1 Music Diversity and Circulation: Novel Data Collection methods and Indicators**. To develop policy recommendations, we first summarised the main findings emerging from the legal mapping and streamlined them with the most significant data gaps. These insights were then cross-referenced with the new data collection methods proposed in D2.1. From this integrated analysis, we derived policy recommendations designed both to fill the current legislative vacuum and to support the implementation of the data collection methods suggested by our research.

The resulting policy proposals were then categorised and addressed to three main groups of actors:

- The **European Legislator**, as the actor responsible for providing the overarching framework within which national legislator and sectoral stakeholders operate.
- The **National Legislator**, as the actor who, within the margins of discretion left by the EU law, must establish the legal and operative conditions necessary to support the systematic collection of data capable of capturing cultural diversity in the music sector, as well as measures to promote it among local artists and/ or CMOs.
- **Sectoral stakeholders,** including representative associations and collective management organisations, which act as gatekeepers of essential data and / or representative of the voices of local players and therefore play an important role in enabling bottom-up data provision.

Thus, the policy structure follows a **top-down logic** in terms of legislative design, to ensure that the high-level framework create the necessary enabling conditions. At the same time, the recommendations support a **bottom-up data collection** process, starting with stakeholders' associations and collective management organisations and progressively feeding into national and EU-level monitoring schemes.

Finally, these policy recommendations were tested and validated through a stakeholder workshop carried out during the **Linecheck Music Event**[1] to ensure that the proposals were realistic and aligned with sectoral needs. The discussion moved step by step from lived experience to data, organisational, and infrastructural issues. Participants began by addressing safety, inclusion, and accessibility in live music spaces, revealing forms of diversity that current metrics overlook, including working conditions, training gaps, and audience perception of diversity. They stressed that diversity is often reduced to visible representation, while structural conditions, informal labour, and community participation remain unmeasured. The discussion then highlighted major data gaps, especially the lack of shared standards for gender and intersectional metadata.

These gaps were linked to biased algorithmic discovery systems that limit the visibility and circulation of under-represented repertoires. Participants also observed that diversity pledges rarely produce change due to fragmented data practices and weak organisational practices.
The final discussion situated these issues at the infrastructural level. Participants emphasised that the absence of common definitions, interoperable registries, and aligned incentives across platforms, collective management organisations, and public authorities makes it difficult to fully measure and define musical diversity in all its dimensions. The workshop concluded with a call for participatory approaches, interoperable data infrastructures, and stronger cross-sector coordination to embed diversity throughout the European music ecosystem.

[1] See Linecheck Official Website: https://www.linecheck.it/meeting/program/is-all-diversity-created-equal-reckoning-with-representation-in-music-law-and-practice/ . Last accessed: 9 December 2025.

3 State of the art: The notion of music diversity

3.1 International and European sources: Comparison and convergence analysis of legislative and non-legislative definitions of diversity

The concept of cultural diversity has become central to debates about Europe's cultural and creative sectors, including the music landscape. Yet, despite frequent invocations of "diversity" in EU cultural agendas, the concept remains elusive and inconsistently applied. In the specific context of the music industry, the complexity of the concept becomes more evident. Indeed, being music 'a cultural good' with a dual value, namely an economic and a symbolic one[2], stakeholders reflect a complex interplay of social, artistic and technological dimensions. At the outset, this is why the pursuit of cultural diversity in the music ecosystem requires a holistic approach that embraces multiple dimensions.

In connection with the above, our research dealt with two interconnected questions. First, how to define music diversity in a meaningful manner that can be translated into (policy) practice, and be measured through indicators. Second, to what extent do EU cultural and copyright frameworks align with international obligations regarding cultural diversity? These questions build on the premise that in the digital era, the circulation of repertoires and artists, as well as the accessibility and discoverability of a variety of content, heavily depend on regulatory frameworks. An answer to these questions would address the ongoing criticism that although diversity is often acknowledged as an objective, it is rarely converted into specific definitions, regulatory structures or policy tools.

Cultural diversity is a concept that has been intertwined with cultural rights since the earliest human rights conventions. Article 27 of the Universal Declaration of Human Rights (UDHR, 1948),[3] which represents the debut of the right to take part in cultural life, is deeply linked to Articles 2 and 7 UDHR, according to which every individual is entitled to these cultural rights and freedoms "without distinction of any kind, such as race, colour, sex, language, religion, political or other opinion, national or social origin, property, birth or other status". The language of Article 27 UDHR[4] was later specified by Article 15 of the UN Covenant on Economic, Social and Cultural Rights (ICESCR) in 1966,[5] through Article 2 ICESCR, which prohibits direct and indirect discrimination as to race, colour, sex, language, religion, political or other opinion, national or social origin, property, birth or other status. Both texts emphasise the importance of respecting cultural diversity, protecting minority cultures, and ensuring equality and non-discrimination for all, regardless of their cultural backgrounds. In a similar vein, the Convention on the Elimination of All Forms of Racial Discrimination (ICERD, 1965) and the Convention

[2] Throsby, C. D. (2001). *Economics and culture*. Cambridge university press.

[3] UN General Assembly, Universal Declaration of Human Rights (UDHR), 10 December 1948, 217A (III), Article 27.

[4] Caterina Sganga, 'Right to Culture and Copyright: Participation and Access', *Research Handbook on Human Rights and Intellectual Property* (Edward Elgar Publishing 2015) <https://www.elgaronline.com/display/edcoll/9781783472413/9781783472413.00044.xml> accessed 23 September 2023; Hurst Hannum, 'The UDHR in National and International Law' (1998) 3 Health and Human Rights 144.

[5] International Covenant on Economic, Social and Cultural Rights (ICESCR), 16 December 1966, 993 UNTS 3.

on the Elimination of All Forms of Discrimination against Women (CEDAW, 1979) emphasised demographic diversity.[6] Thus, these United Nation Conventions enshrine the right to participate in cultural life, complemented by non-discrimination clauses and, thereby, provide a normative foundation for cultural diversity.

From 2001 onwards, with the UNESCO Universal Declaration on Cultural Diversity (UDCD),[7] the emphasis shifted from the initial focus on the diversity of natural persons or groups to a broader consideration of diversity of forms of expression. This declaration emphasises the "manifold ways in which the cultures of groups and societies find expression." The definition implicitly links diversity to two main axes: diversity of *subjects* (the individuals and groups engaged in cultural production), and diversity of *content* (the works and expressions these subjects create). The UDCD, which is a non-binding document, was largely translated into a binding text - the Convention on the Protection and Promotion of the Diversity of Cultural Expressions (Cultural Diversity Convention, CDC) – in 2005.[8] The core of CDC is acknowledging the significance of the variety and plurality of identities and cultural manifestations of individuals and society, including those belonging to minorities and indigenous peoples.[9] States have the sovereign right to maintain, adopt, and implement policies to protect and promote cultural diversity within their territory.[10] Such measures may include, among others, regulatory efforts aimed at protecting and promoting diversity of cultural expressions, measures that provide opportunities for domestic cultural activities, including for the creation, production, dissemination, distribution and enjoyment of cultural activities, goods and services, and measures aimed at enhancing the diversity of the media, including through public service broadcasting.

While the CDC and other UNESCO conventions are instruments of international law primarily addressed to States Parties, their relevance extends beyond the national level. Accordingly, even when the EU is not a direct signatory to all these conventions, it is at least indirectly bound through its Member States' commitments under international law. In the case of the 2005 UNESCO Convention on the Protection and Promotion of the Diversity of Cultural Expressions, however, both the EU and all its Member States are Parties. As it will be explained in the following paragraphs, this dual participation reinforces the Convention's role as a normative and policy framework guiding the EU's external cultural action, particularly in areas such as trade policy, development cooperation, and the broader promotion of cultural diversity in international relations. [11]

[6] Convention on the Elimination of All Forms of Discrimination Against Women (adopted 18 December 1979, entered into force 3 September 1981) 1249 UNTS 13; International Convention on the Elimination of All Forms of Racial Discrimination (adopted 21 December 1965, entered into force 4 January 1969) 660 UNTS 195 (ICERD).

[7] Universal Declaration on Cultural Diversity, 2nd of November 2001. Retrieved from: https://www.unesco.org/en/legal-affairs/unesco-universal-declaration-cultural-diversity

[8] Convention on the Protection and Promotion of the Diversity of Cultural Expressions, 20 October 2005, U.N. Doc. CLT-2005/CONVENTION DIVERSITE-CULT REV. Retrieved from: https://www.unesco.org/creativity/en/2005-convention

[9] Ibid, Article 2. The Convention defines cultural diversity in Article 4(1), as "the many ways in which the cultures of groups and societies find expression." See above Section 2.1.

[10] Ibid, Article 6-7. The Convention does not contain substantive cultural rights for individuals or communities, but only recognise States' possibility to take measures to protect cultural diversity.

[11] See: European Commission, Cultural International Relationships, < https://culture.ec.europa.eu/policies/international-cultural-relations> Last accessed: 10 October 2025.

In this sense, it shall be recalled that cultural diversity was long overlooked at the European level. Most Member States highlighted the need to protect national sovereignty, arguing that cultural matters should remain outside the EU's purview.[12] Therefore, the initial EU founding Treaty establishing the European Economic Community (Treaty of Rome) did not envisage a cultural mandate, leaving to Member States total sovereignty in cultural policy.[13] Gradually, however, culture gained relevance in the EU framework, specifically because the distinction between cultural and economic sectors became increasingly blurred. In this context, the growth of cultural industries and the circulation of cultural goods, along with the creation of a common market, evidenced that trade and culture are interconnected, and that actions in trade and intellectual property policies can influence cultural production and access.[14]

This recognition led to the first formal reference to culture in the **Maastricht Treaty (1992)**, which incorporated cultural policies for the first time within the scope of Article 128 EC (now Article 167 TFEU).[15] The article tasked the (former) European Community with encouraging cooperation among Member States to support and supplement their cultural action only if necessary. More importantly, it required the EC to "take cultural aspects into account in its action under other provisions of this Treaty", thereby legitimating EU interventions on cultural matters. This task, however, needed to be fulfilled under two guiding principles that still shape EU cultural policy. The first one is the principle of **subsidiarity**, which means that cultural decisions should mainly remain with Member States, and the second is the so-called "principle of no harmonisation", which requires the EU to preserve **national and regional diversity.**[16]

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[12] Tobias Theiler, *Political Symbolism and European Integration* (Manchester University Press 2005). Retrieved from: https://d-nb.info/1241194262/34 Tobias Theiler, *Political Symbolism and European Integration* (Manchester University Press; Distributed exclusively in the USA by Palgrave 2005) <https://d-nb.info/1241194262/34>.

[13] The Rome Treaty contained a few provisions related to culture, (Article 36, which permitted member states to impose restrictions on imports and exports to safeguard their national cultural treasures, and article which outlined the Community's responsibility to support the cultural development of third countries). As regards the role of the EC institutions on cultural matters prior to its adoption with Article 128, see Rachael Craufurd Smith, 'Community Intervention in the Cultural Field: Continuity or Change?' in Rachael Craufurd Smith (ed), *Culture and European Union Law* (Oxford University Press 2004) <https://doi.org/10.1093/acprof:oso/9780199275472.003.0002> accessed 23 September 2025.

[14] Rachael Craufurd Smith, 'Community Intervention in the Cultural Field: Continuity or Change?' in Rachael Craufurd Smith (ed), *Culture and European Union Law* (Oxford University Press 2004) <https://doi.org/10.1093/acprof:oso/9780199275472.003.0002> accessed 23 September 2025.

[15] Article 128, Maastricht Treaty on the European Union, Official Journal C 191, 29 July 1992. Retrieved from: https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=OJ:C:1992:191:FULL .The basis of this article shall be sought in article 3, which broadened the then Community's application to include cultural matters, thus laying the basis for the EU's competence in the field of culture. Article 128 EC was renumbered to became article 151 after the Treaty of Amsterdam amending the Treaty on European Union, the Treaties establishing the European Communities and certain related acts (OJ C 340, 10.11.1997, pp. 1-144) (1997), and article 167 after the Lisbon Treaty of Lisbon amending the Treaty on European Union and the Treaty establishing the European Community, signed at Lisbon, 13 December 2007 (*OJ C 306, 17.12.2007, p. 1–271)* (2007).

[16] The principle of subsidiarity covers areas which do not fall within the EU's exclusive competence. Its legal basis is article 5(2) of the Maastricht Treaty (ECC), which declares that "the Community shall take action, in accordance with the principle of subsidiarity, only if and insofar as the objectives of the proposed action cannot be sufficiently achieved by the Member States and can therefore, by reason of scale and effects of the proposed action, be better achieved by the Community".

The **Amsterdam Treaty (1997)** went a step further and explicitly required the EU to "respect and promote the diversity of its cultures."[17] The introduction of this wording marked a conceptual shift: diversity was no longer perceived as an obstacle to harmonisation. On the contrary, it became an added value of the European identity, encapsulated in the motto *"United in Diversity."*[18] Later on, the **Lisbon Treaty (2007)** completely integrated culture into the EU legal and political framework, and Article 151 was transformed into Article 167 TFEU.[19] Moreover, the Lisbon Treaty conferred to the EU legal personality, allowing for its greater participation at the international level. This change coincided with the EU's **accession to the 2005 UNESCO Convention on the Protection and Promotion of the Diversity of Cultural Expressions**, representing the alignment of EU cultural policy with international cultural diversity norms.

Due to its intrinsic connection with multiple areas of EU competence, such as the internal market, competition, and trade, cultural policy became both an objective in itself and a strategic means to address other trade-related policy goals. This process, often described as the instrumentalisation of culture or "policy attachment", permitted the EU to increase its policy influence and policy-making power by framing culture as a dual good (an economic and social asset).[20] Following this approach, copyright and related rights have been used as a tool to incorporate cultural diversity issues into the digital single market.

This approach is epitomised in Articles 17 to 19 of the **Copyright in the Digital Single Market Directive (Directive EU 2019/790, "CDSM")**,[21] which introduce a number of provisions aiming at improving cooperation between rightsholders and platforms in the areas of content moderation, transparency, and fair remuneration.[22] The goal is to increase the visibility of works through better data, and in this way to ensure that authors are appropriately remunerated for their works, including niche and local

[17] Council and Commission of the European Communities, "Article 151," in Treaty Establishing the European Community, Amsterdam consolidated version, CELEX 11997E/TXT (Luxembourg: Office for Official Publications of the European Communities, 1997). See also:Theiler, *Political Symbolism and European Integration* (n 92)., 68–70. (asserting that the revision of Article 151 served as a reminder to the Community that its authority remained considerably limited).

[18] The EU Motto," European Union, retrieved from: https://european-union.europa.eu/principles-countries-history/symbols/eu-motto_en#:~:text=%22United%20in%20diversity%22%2C%20the,different%20cultures%2C%20traditions%20and%20languages

[19] Council and Commission of the European Communities, "Article 167," in *Treaty on European Union and the Treaty on the Functioning of the European Union*, CELEX 12007L/TXT (Luxembourg: Official Journal of the European Union, 2007).

[20] Annabelle Littoz-Monnet, 'Encapsulating EU Cultural Policy into the EU's Growth and Competitiveness Agenda: Explaining the Success of a Paradigmatic Shift in Brussels' in Evangelia Psychogiopoulou (ed), *Cultural Governance and the European Union: Protecting and Promoting Cultural Diversity in Europe* (Palgrave Macmillan UK 2015) <https://doi.org/10.1057/9781137453754_3> accessed 23 September 2023; Bjarki V, 'Camouflaged Culture: The "Discursive Journey" of the EU's Cultural Programmes' (2018) 24 Croatian International Relations Review 14.

[21] Directive (EU) 2019/790 of the European Parliament and of the Council of 17 April 2019 on copyright and related rights in the Digital Single Market and amending Directives 96/9/EC and 2001/29/EC ('DSM Directive'), OJ L 130, 17.5.2019, p. 92–125

[22] Directive (EU) 2019/790 of the European Parliament and of the Council of 17 April 2019 on copyright and related rights in the Digital Single Market and amending Directives 96/9/EC and 2001/29/EC.

artists who often face challenges when operating in opaque revenue platform and AI models. Missing information deprives rightsholders of the opportunity to monitor the potential free-of-charge use of their copyright-protected works and benefit from the content moderation mechanisms established under Article 17(4)CDSM. In this sense, Article 17(4)(a) CDSMD constitutes an incentive to improve the integrity, quality and accuracy of data related to copyrighted contents, including music files, without imposing any general monitoring mechanism within the meaning of Article 17(8) CDSM. Article 19 CDSMD may also give an impulse to the creation and exchange of information and metadata about music contents by setting out a transparency obligation. According to this provision, authors and performers have the right to receive appropriate and proportionate information that is up to date, relevant and comprenhensive related to the revenues generated through the exploitation of their works and performances, .[23] The **Collective Management Organisations Directive (Directive EU 2014/26, "CMOs")**[24] also contributes to cultural diversity to the extent that, among other measures, it imposes governance and non-discrimination obligations on CMOs while reinforcing their cultural responsibilities. For instance, the recital of the directive encourages CMOs and stakeholders to acknowledge their role as promoters of culture in their statutes and to provide social, cultural, and educational services that enhance the welfare and professional development of rightsholders. Furthermore, the same recital encourages CMOs to actively engage in public awareness initiatives that highlight the importance of copyright and related rights, the functioning of collective rights management, and the positive economic and cultural impact of their activities.[25] Other than the copyright framework, the **Portability Regulation (Regulation EU 2017/1128)**[26] and the **Geo-blocking Regulation (Regulation EU 2018/302)** both facilitate cross-border use of content and prohibit discrimination based on nationality.[27] Finally, the **SatCab II Directive (Directive EU 2019/789)**[28] encourages cross-border licensing for broadcasts, which are made available with a streamlined licensing procedure. The indirect outcome of these frameworks is that they facilitate the circulation of diverse repertoires and eliminate access barriers.

[23] Ludovico Bossi and Jacopo Ciani Sciolla, 'The Transposition of the Transparency Obligation Pursuant to Article 19 Directive (EU) 790/2019: An Italian Perspective' (2022) 17 Journal of Intellectual Property Law and Practice 457.

[24] Directive 2014/26/EU of the European Parliament and of the Council of 26 February 2014 on collective management of copyright and related rights and multi-territorial licensing of rights in musical works for online use in the internal market ('CMO Directive'), OJ L 84, 20.3.2014, p. 72–98.

[25] Recital 3, Directive 2014/26/EU of the European Parliament and of the Council of 26 February 2014 on collective management of copyright and related rights and multi-territorial licensing of rights in musical works for online use in the internal market ('CMO Directive'), OJ L 84, 20.3.2014, p. 72–98.

[26] Regulation (EU) 2017/1128 of the European Parliament and of the Council of 14 June 2017 on Cross-border Portability of Online Content Services in the Internal Market ('Portability Regulation'), OJ L 168, 30.6.2017, p. 1–11.

[27] Regulation (EU) 2018/302 of the European Parliament and of the Council of 28 February 2018 on Addressing Unjustified Geo-Blocking and Other Forms of Discrimination based on Customers' Nationality, Place of Residence or Place of Establishment within the Internal Market and Amending Regulations (EC) No 2006/2004 and (EU) 2017/2394 and Directive 2009/22/EC ('Geo-Blocking Regulation'), OJ L 60I, 2.3.2018, p. 1–15.

[28] Directive (EU) 2019/789 of the European Parliament and of the Council of 17 April 2019 laying down Rules on the Exercise of Copyright and Related Rights applicable to certain Online Transmissions of Broadcasting Organisations and Retransmissions of Television and Radio Programmes, and Amending Council Directive 93/83/EEC ('SatCab II Directive'), OJ L 130, 17.5.2019, p. 82–91.

It follows from the above that the measures account for a gradual but still incomplete integration of cultural diversity into EU copyright legislation. This is because these measures focus predominantly on the circulation of works yet disregard the demographic and anthropological aspects of diversity. Such an approach results in a misalignment of the EU copyright framework with the broader definitions outlined in international law as emerged in the previous paragraphs.

Alongside the international and European regulatory framework, a first wave of studies, such as the 2006 UNESCO *Study on the Protection and Promotion of Musical Diversity*,[29] defined musical diversity from a normative and artistic perspective. According to this approach, diversity exists when there is freedom of musical expression and when various communities participate in creating music. This approach could be praised for taking into account some demographic aspects. However, it falls short because it lacks measurable indicators and a clear link to the economic and technological aspects of diversity within the music industry.

A second approach, exemplified by the 2009 *Study on Collecting Societies and Cultural Diversity in the Music Sector*,[30] shifted the focus from artistic freedom to the mechanisms that support and foster music production and dissemination. The reason for this shift lies in the understanding that proper remuneration for creators, fair access to distribution channels, and the availability of varied musical repertoires are essential conditions for preserving cultural diversity. Accordingly, diversity in the music landscape is framed as an issue of content distribution and market structure. This dual economic-functional perspective follows the EU approach of viewing culture as a dual good. From a normative standpoint, it links cultural diversity to the dynamics of copyright, collective management, and technological progress. However, this approach also contains a limitation. By focusing the analysis purely on the circulation side, it overlooks the demographic and sociocultural dimensions of diversity, specifically, who produces and who is represented in the music industry ecosystem/ value chain.

Recent studies, such as the *Study on the Place and Role of Authors and Composers in the European Music Streaming Market* (Legrand Network/GESAC, 2022),[31] and the *UNESCO Study on Revenue Distribution and Transformation in the Music Streaming Value Chain* (2022),[32] expanded the perspective by considering the impact of digital platforms and algorithmic recommendation systems. These works acknowledged that diversity in the contemporary music ecosystem cannot be understood only in terms of artistic output or economic circulation. Rather, according to these studies, diversity

[29] UNESCO and Richard Letts, 'The Protection and Promotion of Musical Diversity' (UNESCO; International Music Council 2006) Study Commissioned by UNESCO <https://unesdoc.unesco.org/ark:/48223/pf0000215412> accessed 23 September 2023.

[30] Hellenic Foundation for European and Foreign Policy and others, 'Collecting Societies and Cultural Diversity in the Music Sector' (European Parliament 2009) Study European Parliament's Committee on Culture and Education IP/B/CULT/IC/2008_136 <https://www.europarl.europa.eu/RegData/etudes/etudes/join/2009/419110/IPOL-CULT_ET(2009)419110_EN.pdf> accessed 23 September 2023.

[31] Legrand Network, *Study on the place of authors and composers in the European music streaming market*, GESAC, European Grouping of Societies of Authors and Composers, 2022. Retrieved from: < https://authorsocieties.eu/content/uploads/2022/09/music-streaming-study-28-9-2022.pdf >. Last accessed: 10 October 2025.

[32] UNESCO, Revenue Distribution and Transformation in the Music Streaming Value Chain (2022), < https://www.unesco.org/creativity/sites/default/files/medias/fichiers/2023/01/2-policy_perspectives_music_en-web.pdf >. Last accessed: 10 October 2025

also depends on how digital infrastructures mediate access to and visibility of musical works. The introduction of streaming services and recommendation systems has indeed altered how music is created, distributed, and consumed. Algorithms influence what users discover and how creators reach their audiences, affecting exposure to diverse content and the variety of musical expressions and artists users encounter. Yet, while these studies recognised the central role of technology, they often addressed it from a limited perspective, focusing on transparency and fairness in algorithmic recommendations rather than integrating it into a broader framework that also accounts for the demographic aspects of diversity.

In tandem with these sectoral analyses, the 2021 *Report on Diversity and Inclusion in the European Audiovisual Sector*[33] developed a more structured conceptualisation that distinguishes between "off-screen diversity" and "on-screen diversity. The former one covers workforce representation, whereas the latter refers to the portrayal of different perspectives and identities in content. Although it does not directly address the music industry, the distinction offered by the audiovisual study provides a useful analogy. It highlights the need to consider both the social composition of the people involved in the value chain/ industry and the outcomes of their work as complementary dimensions of cultural diversity. Nevertheless, such a model risks being incomplete when applied to music, where creation, performance, and consumption are also mediated by technological and economic infrastructures that determine the visibility and discoverability of works.

Taken together, all these studies suggest that there is a fragmented understanding of music diversity. Whereas each study brings relevant insights and offers different dimensions of diversity, relying on a single concept may lead to a partial understanding of cultural diversity in the music ecosystem. In turn, such a segmentation would hinder the development of an operational definition of cultural diversity that, because it captures all dimensions, can adequately guide policy, regulation, and industry practice. For this reason, our research suggests that a comprehensive approach must bridge these dimensions (demographic diversity or diversity of subjects, the artistic diversity or diversity of content, and the economic and technological diversity or diverse circulation) and understand how these interact across the different levels of the value chain.

Thus, it can be said that cultural diversity in the music ecosystem can be understood through three interconnected dimensions: (1) the diversity of creators, (2) the diversity of works (content), (3) and the diversity of circulation and access. This tripartite framing builds on, and refines, the one introduced in Deliverable D2.1, where the three dimensions were defined as: (1) creators, (2) content, and (3) stakeholders. In the present deliverable, we revise the third dimension to focus more directly on circulation and access — that is, the structural and infrastructural conditions that determine who can encounter, share, and benefit from diverse music. While the notion of stakeholder diversity remains important — and is still addressed (see Table 4 and Table 5) — this framing brings greater analytical clarity to how diversity manifests in the pathways through which music moves and becomes accessible. It also better supports policy-relevant monitoring by focusing on discoverability, mobility, and technological mediation (see Section 3.2.3).

[33] Cabrera Blázquez F.J., Cappello M., Talavera Milla J., Valais S., *Diversity and inclusion in the European audiovisual sector*, IRIS *Plus*, European Audiovisual Observatory, Strasbourg, April 2021, <https://rm.coe.int/iris-plus-2021en1-diversity-and-inclusion-in-the-european-audiovisual-/1680a299b9 >. Last accessed: 10 October 2025

The first dimension concerns *who* produces music. It focuses on the range of creative voices participating in the industry, including differences in gender, ethnicity, age, and nationality. Overlooking this dimension entails the risk that only a narrow part of potential contributors is represented. The second dimension focuses on *what* is produced. This dimension covers the variety of musical works, including genres, styles, languages, and groups or traditional artistic forms that are available in the ecosystem. The third dimension addresses *how* music circulates and reaches audiences. This dimension involves ensuring diversity of content and subjects in the mechanisms and infrastructures that determine the visibility and accessibility of musical works, including physical, live performance circuits, digital distribution channels, streaming platforms, and algorithmic recommendation systems. Attention to circulation also requires understanding the structural and technological factors that influence which artists and repertoires gain visibility, and which remain marginalised.

This perspective is in line with the normative foundations of international and European legal frameworks. In this regard, it shall be recalled that the UNESCO Convention on the Protection and Promotion of the Diversity of Cultural Expressions (2005) and the Charter of Fundamental Rights of the European Union (Articles 21 and 22) jointly affirm that cultural diversity encompasses both the right to create and the right to access and participate in cultural life. A functional approach to these principles integrates these EU and international legal obligations with the economic, social and technological realities of the music industry. Moreover, such an approach moves beyond the dichotomy between cultural and commercial rationales, positioning cultural diversity as a common legal, economic, and societal objective within the evolving music ecosystem.

3.2 Diversity in the music ecosystem: A comparison with qualitative sources and grey literature

As outlined in the previous section, cultural diversity in the music ecosystem can be understood through three interconnected dimensions: the diversity of creators, the diversity of works (content), and (3) the diversity of circulation and access. These dimensions are interdependent: who creates music influences what is produced, and both are conditioned by how music circulates and reaches audiences. Diversity thus represents a transversal dimension of sustainability, intersecting with the social and governance pillars defined in D3.1 Music, Society and Citizenship: Methods and Indicators and aligned with the European Sustainability Reporting Standards (ESRS)— notably S1 (Own workforce), S3 (Affected communities), and G1 (Business conduct).

Table 1: European Sustainability Reporting Standards (ESRS).

ESRS domains, topics, and indicators		
Domain	**ESRS topic**	**Potential indicators**
Environmental	E1 Climate change	Energy consumption; climate change mitigation
Environmental	E2 Pollution	Pollutant emission

Environmental	E3 Water and marine resources	Water consumption and discharge
Environmental	E4 Biodiversity and ecosystems	Impacts and dependencies on ecosystems (e.g., use of sustainable resources; animal rights; etc.)
Environmental	E5 Circular economy	Resource inflows and outflows; resource optimisation
Social	S1 Own workforce	Work-related rights (e.g., working conditions; work-life balance; freedom of association; equal opportunities for different groups; etc.)
Social	S2 Workers in the value chain	Work-related rights in the value chain
Social	S3 Affected communities	Impact of company and value chain activities on civil, social, and economic rights; social inclusion of different groups; social cohesion; community wellbeing; etc.
Social	S4 Consumers and end-users	Impact of company products and services on consumers (e.g., data protection; child protection; etc.)
Governance	G1 Business conduct	Anti-corruption and anti-bribery measures; protection of whistleblowers; lobbying; relations with suppliers

Despite growing attention, significant challenges remain in understanding how diversity manifests across creators, musical works, and circulation channels.[34] Together with quantitative data, qualitative and grey literature illuminate the lived realities and structural conditions that shape diversity outcomes across these three domains. This section draws on recent studies — including Live DMA[35]'s Gender Equality in the Live Music Sector[36], Equaly's *Violence and Harassment Against Women in Music*[37] and IMPALA's[38] report on diversity and inclusion policies in the music sector[39] — to map how gender, governance, and working conditions intersect with the broader sustainability goals of the European music ecosystem.

3.2.1 Diversity of creators: Representation, safety, and working conditions

The diversity of creators refers to the range of voices, identities, and roles participating in music production. Qualitative evidence shows that, despite policy commitments, gender and structural

[34] Bauer, C. (2019). Allowing for equal opportunities for artists in music recommendation. *arXiv preprint arXiv:1911.05395*.

[35] LiveDMA is a European non-governmental network supporting live music associations, ultimately serving the members of these associations: music venues and festivals.

[36] Live DMA (2025). *Gender Equality in the Live Music Sector: Literature Review and Empirical Findings 2017–2024.* Nantes: Live DMA / Creative Europe Programme. Available at: https://live-dma.eu/wp-content/uploads/2025/01/Gender-Litterature-review.pdf

[37] Paraciani, R. (2024). *Violenza e molestie contro le lavoratrici della musica* [Violence and Harassment Against Women in Music]. Rome: Equaly. ISBN 979-12-985034-03. Available at: https://cris.unibo.it/retrieve/b2ff2fd6-d593-4c8b-ab71-dabc3a55b197/Report-Equaly-Violenza-e-molestie-contro-le-lavoratrici-della-musica.pdf

[38] IMPALA is a non-profit pan-European network organisation dedicated to strengthening the position of small, micro and medium sized independent music companies and self-releasing artists. https://impalamusic.org/

[39] IMPALA (2022). Towards a more diverse and inclusive independent music sector: Report on IMPALA's first survey. Available at: https://www.impalamusic.org/wp-content/uploads/2022/05/Towards-a-more-diverse-and-inclusive-independent-music-sector.pdf

imbalances persist throughout the European sector. According to Goodwin,[40] women represent only 20–30% of performers at major European festivals, with headline acts still overwhelmingly dominated by men (85–90%). Although initiatives such as *Keychange*[41] and *Female Pressure*[42] have encouraged voluntary gender reporting, critical debate on how gender is understood and how gendered hierarchies are structurally reproduced remains limited.[43]

As it emerged from D3.1, recent research also highlights that diversity challenges extend beyond gender alone. Conceison[44] identifies extremely low levels of representation for Black, Indigenous and People of Colour (BIPOC) across the European music industry — typically between 2–4% — and documents tokenistic attitudes such as "we have one already", signalling that the inclusion of a single woman or racialised person is often treated as sufficient. These findings illustrate that underrepresentation is not incidental but rooted in broader organisational cultures and informal norms that constrain meaningful participation. While these findings highlight the extent of underrepresentation within the music sector, their impact would be strengthened by comparative data. Specifically, understanding how representation levels in music compare to those in other cultural sectors — and to baseline demographic proportions in the general population — would help clarify whether these challenges are unique or systemic. Developing cross-sectoral comparative datasets could be a priority for future research, enabling more targeted and context-specific policy interventions.

Occupational segregation compounds these dynamics. Data from *Fedelima*[45] shows that women account for around 40% of venue staff but are concentrated in administrative, communication, and hospitality roles, while men continue to dominate technical and executive positions. Similar patterns emerge in the field of composition: Bennett et al.[46] report that women composers face limited access to professional networks, report not being taken seriously by gatekeepers, and may even conceal their gender during auditions as a strategy to avoid bias. Their findings also underscore the intersectionality of gender and age, revealing that women experience different forms of exclusion as they progress through their careers. Taken together, this evidence aligns with ESRS S1 workforce indicators, underlining persistent barriers to representation, vertical mobility, and fair remuneration.

[40] Live DMA (2025). *Gender Equality in the Live Music Sector: Literature Review and Empirical Findings 2017–2024.* Nantes: Live DMA / Creative Europe Programme. Available at: https://live-dma.eu/wp-content/uploads/2025/01/Gender-Litterature-review.pdf

[41] Keychange is an EU based global network and movement working towards a total restructure of the music industry in reaching full gender equality. https://www.keychange.eu/

[42] https://femalepressure.wordpress.com/

[43] Werner, A., Gadir, T., & De Boise, S. (2020). Broadening research in gender and music practice. Popular Music, 39(3-4), 636-651.

[44] Conceison, M. (2022). Studying Diversity in the Music Industry. *Proceedings of the 2022 International Summit of the Music & Entertainment Industry Educators Association*, 4–32. Available at: https://doi.org/10.25101/22.12. Last accessed: 22 November 2025.

[45] Fedelima (2021) égalité & parité données 2019. Accessed: 3 November 2025.

[46] Bennett, D., Hennekam, S., Macarthur, S., Hope, C., & Goh, T. (2019). Hiding gender: How female composers manage gender identity. *Journal of Vocational Behavior*, *113*, 20–32. https://doi.org/10.1016/j.jvb.2018.07.003. Last accessed: 3 November 2025.

Alongside these structural imbalances, working conditions play a critical role in shaping creators' experiences. *Equaly's* national survey[47] exposes the extent of gender-based violence and discrimination within the Italian music industry. Based on 153 responses from women artists, technicians, and managers, the study found that 83% had experienced at least one episode of workplace discrimination and 73.9% reported gender-based discrimination. Psychological violence (35.3%) was the most common form, followed by economic (9.8%) and physical violence (1.4%). These findings illustrate how informal and precarious labour relations heighten vulnerability to abuse, and demonstrate that diversity cannot be reduced to demographic statistics but must also encompass workplace safety, dignity, and psychosocial well-being. This broadens the lens of "diversity of creators" toward ESRS S3 (A*ffected communities*) and G1 (*Business conduct*), foregrounding the importance of ethical governance and protective measures.

Organisational responses to these inequalities, however, remain inconsistent. IMPALA's 2022 survey of 125 independent music companies and associations[48] reveals that only 38% of businesses and 46% of associations have a diversity policy in place, with a further 20% planning to develop one. Yet fewer than half of those with a policy have a designated person responsible for implementing it, illustrating a significant gap between the existence of D&I policies and their operationalisation. The most common measures include flexible working, collaborations with diverse artists, and equality-oriented job advertisements, while the areas identified as most challenging are gender, ethnicity, and socio-economic background. Major barriers to progress include the belief that no diversity issues exist within an organisation, limited financial resources, and a lack of information about available EU funding. For associations, access to funding appears somewhat easier, but gaps in policy knowledge and capacity remain.

Together, this body of evidence paints a complex picture of creator diversity in Europe: one marked by underrepresentation, occupational segregation, unsafe working environments, and uneven organisational commitments to inclusion. It suggests that meaningful progress requires not only demographic change but also structural reforms in governance, accountability, and workplace culture. Diversity of creators must therefore be understood as both a social and a governance issue — central to the sustainability and fairness of the European music ecosystem.

3.2.2 Diversity of works: Content and repertoires

The second dimension — diversity of works — concerns the variety of musical expressions and repertoires produced and disseminated. The literature highlights the rich variety of genres, styles, and languages, including the integration of ethnic elements into mainstream music, which enhances cultural appreciation and authenticity. Quantitative content analyses and listener surveys provide evidence of positive audience reception to diverse musical expressions, supporting the value of cultural

[47] Paraciani, R. (2024). *Violenza e molestie contro le lavoratrici della musica* [Violence and Harassment Against Women in Music]. Rome: Equaly. ISBN 979-12-985034-03. Available at: https://cris.unibo.it/retrieve/b2ff2fd6-d593-4c8b-ab71-dabc3a55b197/Report-Equaly-Violenza-e-molestie-contro-le-lavoratrici-della-musica.pdf

[48] IMPALA (2022). Towards a more diverse and inclusive independent music sector: Report on IMPALA's first survey. Available at: https://www.impalamusic.org/wp-content/uploads/2022/05/Towards-a-more-diverse-and-inclusive-independent-music-sector.pdf

hybridity.[49] However, concerns about stereotyping and cultural appropriation emerge, indicating that diversity in works does not always translate to equitable representation or respect. The focus on popular music genres may overshadow traditional and experimental forms, and there is limited research on how diversity in musical works intersects with power dynamics in the industry.[50] Furthermore, while large scale quantitative data on repertoire diversity remain scarce, Goodwin[51] notes that programming at live venues continues to privilege dominant genres and commercially viable acts. Independent, experimental, or minority-language repertoires often rely on public funding or voluntary structures, making them vulnerable to economic volatility and policy shifts.

3.2.3 Diversity of circulation and access: Visibility, technology, and governance

The third dimension — diversity of circulation and access — concerns how music travels through physical and digital infrastructures, and how audiences encounter diverse repertoires. Grey literature such as GESAC/Legrand Network's Study on the Place and Role of Authors and Composers in the European Streaming Market (2022) highlights the influence of algorithmic recommendation systems and platform logics in shaping visibility. These technological and governance dynamics determine which repertoires gain prominence and which remain marginalised. This perspective aligns with the sustainability rationale of ESRS G1, which connects transparency, data governance, and ethical business conduct to equitable access and discoverability.

The contemporary circulation of music is increasingly shaped by digital platforms and streaming services, which have transformed both access and distribution on a global scale. These systems have greatly expanded the reach of music, enabling listeners to discover a vast range of artists and genres with unprecedented ease. However, as several studies point out, this apparent democratization often masks deeper structural inequalities. Algorithms and platform hierarchies reinforce dominant market players and create new forms of gatekeeping, limiting the visibility of less commercial or regionally specific content.[52] At the same time, social media networks and cross-platform ecosystems have become powerful tools for emerging genres and artists to bypass traditional industry channels. Movements such as Afrobeats demonstrate how local sounds can achieve global resonance through participatory circulation, fan engagement, and algorithmic virality.[53] These digital infrastructures, while shaped by corporate logics, also provide creative opportunities for artists to build transnational communities and redefine cultural flows beyond Western-dominated markets.

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[49] Chen, M., & Tai, K. H. (2025). Pop Music and Globalization: The Integration and Re-creation of Ethnic Elements. *Salud, Ciencia y Tecnología*, 5, 1607. https://doi.org/10.56294/saludcyt20251607. Pedro, B. G., & Ruiz, J. V. (2024). Unveiling the Cultural and Entrepreneurial Potential of Música Popular Brasileira. *Journal of Undergraduate Research*, *26*. https://doi.org/10.32473/ufjur.26.135436

[50] Chen, M., & Tai, K. H. (2025). Pop Music and Globalization: The Integration and Re-creation of Ethnic Elements. *Salud, Ciencia y Tecnología*, 5, 1607. https://doi.org/10.56294/saludcyt20251607.; Patel, A. D. (2021). *Exploring Cultural Diversity in Experimental Sound*. https://doi.org/10.25370/array.v20213269

[51] Live DMA (2025). *Gender Equality in the Live Music Sector: Literature Review and Empirical Findings 2017–2024.* Nantes: Live DMA / Creative Europe Programme. Available at: https://live-dma.eu/wp-content/uploads/2025/01/Gender-Litterature-review.pdf

[52] Li, C. (2025). A Study on the Transformation of the Music Industry Driven by Digital Technologies. *Interdisciplinary Humanities and Communication Studies*, *1*(4). https://doi.org/10.61173/ken4fe31

[53] Jeduah, B. A.-R. (2025). *Platform Distribution of Music: How Afrobeats Artists Build Audiences Through Social Media and Streaming Algorithms*. 23–38. https://doi.org/10.1108/s0733-558x20250000094003

Nevertheless, the geographies of platforms and their regional intermediaries continue to shape who gets seen and heard. Visibility on global services often depends on partnerships, licensing agreements, and language hierarchies that marginalize artists from peripheral markets or underrepresented regions.[54] In this context, live performances and community-based spaces remain crucial counterpoints to platform dominance. Concerts, local venues, and informal gatherings sustain cultural diversity, allowing artists to maintain direct relationships with audiences and affirm alternative circuits of value and recognition.[55] These localized forms of exchange highlight that, despite the ubiquity of digital systems, the social and embodied dimensions of music continue to resist full commodification and standardization.

3.3 Existing indicators (WP2/WP3)

Building on the multidimensional understanding of music diversity elaborated in the previous sections — namely diversity of creators, diversity of content, and diversity of circulation and access — the following tables present a consolidated overview of existing and proposed indicators developed within WP2 and WP3 of the OpenMusE project. These indicators serve as a bridge between conceptual frameworks and empirical application, illustrating how diversity-related objectives can be operationalised through measurable variables and data sources. They also reveal how sustainability reporting principles (as articulated in the ESRS standards) can inform the monitoring of social, cultural, and governance dimensions of music diversity.

Table 2 summarises the overarching diversity objectives and corresponding measures identified by SSSA (2023), framing diversity as a transversal policy goal that cuts across creators, content, and circulation domains. It outlines how each objective translates into operational measures that reflect the multidimensional nature of music diversity in the European ecosystem.

[54] Hroch, M., & Szczepanik, P. (2025). Playlisting the periphery: Platform intermediaries and East-Central European music visibility in Spotify's geography. *New Media & Society*. https://doi.org/10.1177/14614448251346200

[55] Swartjes, B., & Berkers, P. (2023). 'Getting in' or 'moving on'? On internship experiences and representation in the popular music festival sector. *Journal of Education and Work*. https://doi.org/10.1080/13639080.2023.2289917

Table 2: Diversity objectives and measures. Source: SSSA (2023).

Diversity Objectives	Measurable Dimensions
Demographic	Gender, Colour, Race, Sex/Sexual Orientation, Language, Regional or Minority Language, Indigenous Groups, Ethnicity, Nationality, Territory (residence)
Content	Works (genre, type), Other subject matter (phonogram, sound recording), Traditional Expression
Stakeholder	Creators (authors, interpreters), Rightsholders (producers), Distributors (licensing authority, CMOs)

Table 3 details potential data points and sources associated with the ***content diversity objective***, focusing on the variety of musical works and repertoires, including genre, language, and stylistic heterogeneity — and identifies corresponding datasets and data providers across EU, national, and industry levels.

Table 3 - Overview of potential data points and data sources for the content diversity objective. Source: SSSA. (2023).

Content Diversity Concept	Objective	Potential Data Point	Potential Data Sources
Content	Variety and balance of music consumption	Consumers' choice in term of genre	Consumers' survey; Nielsen; Alpha Data
		Consumers' choice in term of nationality (domestic vs. foreign)	
		Consumers' choice in term of language (domestic vs. foreign)	
		Consumers' reliance on proposed playlists while streaming	Consumer survey; Music streaming services
	Variety and balance in available repertoires	Share of available repertoire by genre	National CMOs; CISAC; GESAC
		Share of available repertoire by gender	
		Share of available repertoire by language	
		Share of available repertoire by nationality	

Content and Circulation	Variety and balance in music circulation	Genre of the cross-border streaming activities	Radio Monitor; BMAT
		Nationality of the cross-border streaming activities	
		Language of the cross-border streaming activities	
		Genre of the cross-border radio airplay	
		Nationality of the cross-border radio airplay	
		Language of the cross-border radio airplay	
		Genre of the cross border live shows	Events themselves; Live music trade organisations; Liveurope
		Nationality of the cross border live shows	
		Language of the cross border live shows	
Content	Other subject matter (phonogram, sound recording)	To be determined	To be determined
	Traditional Expression	To be determined	To be determined
	Transparency	To be determined	To be determined
		Share of available repertoire by minorities and ethnic groups	
Consumption Channels	Variety and balance in music consumption channels	Consumers' choice in term of different channels of music consumption (live shows, streaming, vinyl...)	
		Consumers' choice in term of different channels of legal vs illegal consumption	Specific consumer survey (Global Online Piracy Study); Piracy data specialist MUSO
Content and Consumption Channel	Variety and balance of the most streamed songs	Genre of the most streamed songs in Europe and outside Europe by calendar year	Spotify; Nielsen; Alpha Data
		Language of the most streamed songs in Europe and outside Europe by calendar year	
		Nationality of the most streamed songs in Europe and outside Europe by calendar year	
	Variety and balance of the songs most played on air	Genre of the most radio airplayed songs in Europe and outside Europe by calendar year	Radio Monitor; BMAT
		Language of the radio songs most played on air in Europe and outside Europe by calendar year	
		Nationality of the radio songs most played on air in Europe and outside Europe by calendar year	

Table 4 extends this framework to the ***stakeholders' diversity objective***, identifying indicators that capture the representativeness and inclusiveness of actors involved in the music ecosystem — from creators and intermediaries to audiences and governing bodies. It identifies how workforce, management, and value-chain data can be mobilised to assess inclusiveness and equity among music sector actors.

Table 4 - Overview of potential data points and data sources for the stakeholders' diversity objective. Source: SSSA. (2023).

Stakeholder Diversity	Objective	Potential Data Point	Potential Data Sources
Creators (authors, interpreters)	Diverse participation and circulation in the music industry	Share of CMO's membership by gender	National CMOs; CISAC; GESAC
		Share of CMO's membership by nationality	
		Mobility of music professional	National CMOs; CISAC; GESAC; Surveys
	Economic sustainability of music profession	Share of income derived from creative activities.	Surveys
		Type of tax regimes	Legal documents
		Welfare access (health insurance and retirement benefits)	Surveys; National trade union organisations;
Distributors (licensing authority, CMOs)	Economic sustainability of a diverse music profession	Share of revenues by genre	National CMOs; CISAC; GESAC
		Share of revenues by gender	
		Share of revenues by language	
		Share of revenues by nationality	
		Share of revenues by minorities and ethnic groups	
Rightsholders (producers)	To be determined	To be determined	To be determined

The mapping presented in Tables 2–4 highlights that a number of relevant data points and indicator frameworks already exist across the OpenMusE work packages and in adjacent cultural data initiatives. Yet, these indicators remain unevenly distributed across the three diversity dimensions — creators, content, and circulation. In particular, while content-related metrics are comparatively well defined, demographic and stakeholder-related indicators still rely on fragmented or non-standardised datasets. Furthermore, cross-linkages between cultural, economic, and technological data remain limited, hampering a comprehensive assessment of diversity in the European music ecosystem.

To address these limitations, the following section undertakes a gap analysis, assessing how the currently available indicators align with the conceptual and operational definition of diversity developed in WP2. This analysis identifies where data coverage, granularity, or interoperability need to be strengthened, and proposes a coherent framework to harmonise measurement approaches across the project's work packages.

3.4 Gap analysis of existing indicators vis-à-vis the definition of diversity

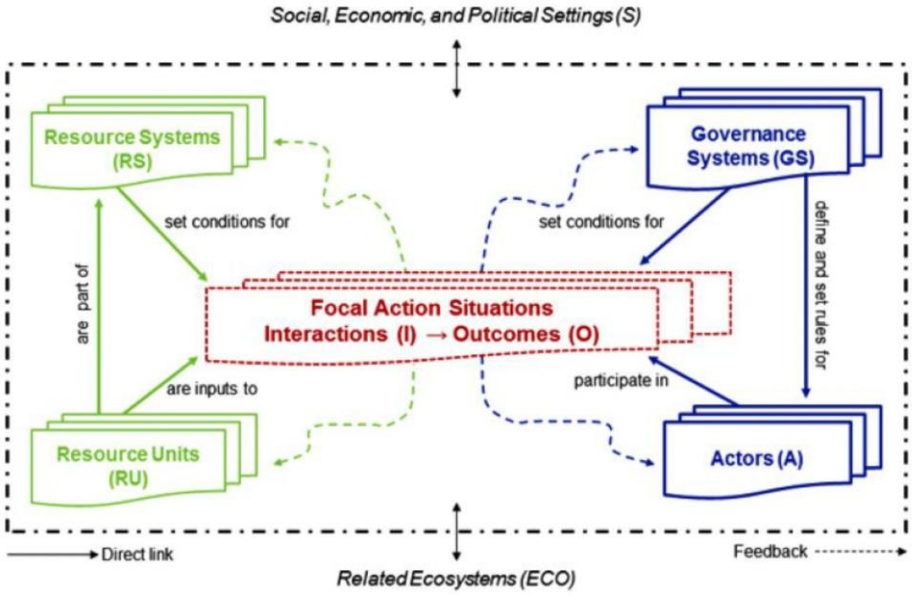
3.4.1 Methodological framework

In line with the expected outcome of the Horizon Europe call *HORIZON-CL2-2022-HERITAGE-01-05 – "Towards a competitive, fair and sustainable European music ecosystem*", which aims to develop indicators to better assess the performance of the European music sector and its contribution to economic, social, and environmental sustainability, the first deliverables produced under OpenMusE Work Packages 1 to 3 included dedicated sections on indicators, focusing, respectively, on music

economics (WP1), music diversity and circulation (WP2), and music, society, and citizenship (WP3)—the latter also addressing themes related to music innovation and future trends.

During the OpenMusE project interim review, it was proposed to harmonise the indicators developed across work packages in order to expedite vertical and horizontal policy coordination. Deliverable D3.4., entitled *Comprehensive indicators for the assessment of European music ecosystems*, proposes a **generalizable indicator framework,** transferrable to all the above research areas, based on Nobel Prize winning economist Elinor Ostrom's **social-ecological systems framework (SESF)**.[56] The SESF offers a well-established template for operationalising the parameters of European music ecosystems as defined in 2024 by Music Moves Europe (MME),[57] and it is transferable across music sub sectors and research cases.

Figure 1 - cf. McGinnis & Ostrom, 2014.



Examples of **focal ecosystems in WP2** could vary widely. The European music ecosystem or a national music ecosystem could be analysed for diversity and circulation, but units as small as an individual organisation could be assessed under this perspective as well. The SESF first-tier categories define domains for data collection. As described in D2.1, diversity and circulation in the music sector can themselves be viewed through several lenses.Diversity of persons active in the sector, diversity of musical content, and diversity of stakeholders and stakeholder interactions are all relevant. **Table 5** below, drawn as part of D3.4, provides examples of data collection targets related to the diversity of persons, content, and stakeholders, as mapped from D2.1, Section 4.2, Tables 27, 28, and 29,

[56] McGinnis, M., & Ostrom, E. (2014). Social-ecological system framework: initial changes and continuing challenges. *Ecology and Society*, 19(2). https://doi.org/10.5751/ES-06387-190230

[57] Music Moves Europe (2024). *The European music ecosystem: A conceptual framework definition of the European music ecosystem to understand and drive its diversity, creativity and solidarity making it competitive, resilient, and attractive*. Unpublished working paper.

respectively. In cells without a good match, targets were suggested based on the feedback received during stakeholder workshops.

Table 5 - Examples of data collection targets on the diversity of persons, content, and stakeholders. Source: SSSA. (2023).

Rows: Diversity targets	Columns: SESF first-tier categories			
	Actors	Resources	Governance	Interactions
Diversity of persons (D2.1 Table 27 & 28)	Diversity in music employment (new)	Diversity-targeted funding (D2.1)	Regulations to prevent discrimination (D2.1)	Representation metrics in live and recorded music (D2.1)
Diversity of content (D2.1 Table 29)	Enterprises and organisations promoting small repertoires (new)	Mechanisms to support small repertoires (new)	Regulations to safeguard small repertoires (new)	Diversity of music consumption (D2.1)
Diversity of stakeholders (D2.1 Table	Diversity within stakeholder networks (D2.1)	Cross-sectoral networking mechanisms (D2.1)	Regulations to promote participatory decision-making / policymaking (new)	Participation in decision-making / policymaking (new)

3.4.2 Main gaps identified

Building on the mapping in Section 3.3, a comparison between the existing indicators and the operational definition of music diversity reveals several critical gaps in scope, granularity, and coherence. These are summarised below.

1. Data fragmentation and comparability: Data on music diversity is dispersed across national agencies, collective management organisations, and sectoral studies. Methodological inconsistencies limit cross-country comparability, making it difficult to produce EU-level insights or monitor longitudinal change.

2. Limited demographic granularity: Most datasets capture gender representation but rarely include intersectional variables such as ethnicity, age, disability, socioeconomic background, or regional origin. As a result, demographic diversity within the music workforce and among creators remains only partially visible.

3. Underrepresentation of technological and algorithmic dimensions: While content and circulation data exist, indicators do not yet account for the influence of algorithmic recommendation systems, metadata transparency, or platform governance. These are decisive factors in determining visibility and access, particularly in streaming-based ecosystems.

4. Weak linkage between cultural and economic indicators: Cultural and financial metrics are often developed in isolation. Existing frameworks rarely measure how diversity affects or is affected by economic performance, revenue distribution, or market concentration. This separation hampers the evaluation of diversity as both a social and an economic asset.

5. Insufficient stakeholder and governance indicators: There is limited systematic data on the diversity of organisations and decision-making structures (e.g., boards of CMOs, festival programming committees, funding bodies). Such indicators are essential to assess inclusiveness and accountability within the ecosystem.

6. Lack of harmonised and longitudinal datasets: Many datasets stem from ad-hoc projects or national initiatives, lacking standardised methodologies or continuity. This prevents time-series analysis and evidence-based policy tracking at the European level.

These gaps demonstrate the need for a more integrated and interoperable indicator framework — one capable of capturing demographic, artistic, and circulation-related dimensions of diversity within a single analytical structure. The SESF provides the conceptual architecture to achieve this integration, allowing cultural, economic, and technological indicators to be viewed as interdependent components of a shared ecosystem.

The forthcoming policy recommendations **(Section 4)** build on this analysis by outlining specific measures to: strengthen data governance and interoperability across the music sector; promote standardised diversity reporting within CMOs, streaming platforms, and public agencies; and ensure that the collection and use of diversity indicators contribute to a fairer and more sustainable European music ecosystem.

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4 Policy recommendations

Preserving and enhancing cultural diversity in the music ecosystem requires coordinated action across levels. Based on the previous sections and the findings of D2.1 **"Music diversity and circulation: Novel data collection methods and indicators"**, this section presents a set of policy recommendations targeted at the EU legislator, national legislators, and sectoral stakeholders, specifically CMOs, which represent the third dimension of diversity. Such a granular approach takes into account the responsibilities and potential contributions of these actors in the design and implementation of policies.

4.1 EU Legislator

As it emerges from **Section 3.1**, while the EU does not possess competence to harmonize national cultural policies, the EU legislator does play a role in encouraging cooperation in the field of culture among Member States, as established under Article 167 TFEU.

Therefore, within the competencies conferred by TFEU, the following actions should be taken:

EU Legislator	
(P1) Align EU Framework with International obligations related to cultural diversity	Mainstream cultural & music diversity across EU legislation (copyright, competition, Digital and Data Legislation) impacting on music production & circulation
	Close the gap between EU law and UNESCO 2005 Convention commitments
	Explicitly incorporate demographic and content diversity goals into copyright policy
(P2) Adopt diversity metric & monitoring	Create EU-level **Music Diversity & Circulation Index**.
	Expand Eurostat music-specific and disaggregated indicators.
	Integrate diversity measures into impact assessments and ex-post evaluations.
(P3) Platform & Algorithmic governance, including diversity obligations (P5) (P4) Incorporate sector-specifc transparency duties	Include transparency duties for (pure) music algorithmic recommender systems / streaming platforms → include sector-specific transparency reporting. E.g.Require reporting on exposure patterns by diversity dimension.
	Move beyond transparency → **algorithmic diversity obligations**, including exploring EU-level **quotas** & prominence rules ensuring diverse works & creators are surfaced.
	Encourage diversity in engineering & curation teams ('offline' diversity)
(P6) Create a European Music Metadata Infrastructure + Metadata Harmonisation	Harmonise and centralise metadata to close the "metadata gap." → (i) *Soft law option*: Encourage cooperation between CMOs, ministries, research institutions, and stakeholders (CISAC, GESAC) for creating common reporting templates → (ii) normative option: Explore EU frameworks: CMOs Directive, Article 17(4)(b) CDSMD, Common European Data Spaces (CEDS) to create harmonised standards.

Table 6 – Policy recommendations addressed to EU policymakers. Source: SSSA. (2025).

These recommendations are further illustrated in the following paragraphs.

PR_1 ALIGN REGULATORY FRAMEWORKS WITH BROADER INTERNATIONAL OBLIGATIONS RELATING TO CULTURAL DIVERSITY

The EU legislator should actively promote the systematic inclusion of cultural diversity objectives in the three-dimensional definition adopted in this deliverable across all relevant legislative, regulatory, and funding instruments. This mainstreaming process should explicitly consider the EU's international

obligations, and particularly those stemming from the UNESCO Convention on the Protection and Promotion of the Diversity of Cultural Expressions (2005). While the EU has repeatedly affirmed its commitment to this instrument, as it emerged from this study, a substantive gap still persists between its normative principles and its operational execution.

This gap is particularly evident within the copyright *acquis*. As it emerged from section 3.1, the copyright framework was primarily designed to ensure the efficient functioning of the internal market, promote cross-border access, and harmonize rights and enforcement. However, in this way, the *acquis* does not explicitly pursue the promotion of cultural diversity as a policy goal but relies on the assumption that a fair and competitive market will automatically result in a multiplicity of cultural expressions. The CDSM Directive is the most recent example of how an implicit link between copyright and diversity is not enough to achieve cultural diversity within the music ecosystem. Although the Directive, in theory, enables the wider dissemination of musical works across Europe, due to facilitated licensing mechanisms, in practice, it does not guarantee proportional visibility for linguistic minorities or regional repertoires on streaming platforms.

Thus, without explicit policy tools or indicators, market mechanisms risk reinforcing concentration rather than promoting diversity. Accordingly, embedding diversity objectives within the copyright and other regulatory framework (e.g., competition law) impacting the music ecosystem would ensure that the internal market actively sustains, rather than replaces, cultural diversity.

PR_2 ADOPT A ROBUST METRIC FOR ASSESSING AND MONITORING MUSIC DIVERSITY AT THE EUROPEAN LEVEL

In connection with the first policy recommendation, EU policymakers should introduce diversity performance indicators to move from assumptions to evidence-based governance. As it emerged from D2.1, Eurostat and national statistics lack music-specific, disaggregated indicators (e.g., on language, author's origin, gender, minority languages, cross-border circulation). The current lack of consistent data and indicators on the impact of copyright and digital market policies on the diversity of content, subjects and circulation within the music industry makes it difficult to evaluate whether EU legislation is fulfilling the pursued diversity goals, and to elaborate evidence-based decisions.

To implement this action, the EU should develop a harmonised framework of diversity indicators capturing the three dimensions of the music ecosystem. Eurostat could be tasked with the development of these specific- music-specific indicators (e.g. "Music Diversity and Circulation Index). These indicators should be embedded in existing *ex ante* and *ex post* policy evaluation tools, such as impact assessments and ex-post evaluations of directives. They should address current data gaps related to the fragmentation and methodological inconsistencies, and should also expand demographic granularity, integrating variables such as ethnicity, age, disability, and region; incorporate technological and algorithmic dimensions to reflect how platforms shape access and visibility. Indicators should also cover cross-border data for live performance mobility, festival attendance disaggregated by demographic factors, and cross-border flows of neighbouring/author rights, which are currently largely missing. Finally, to address the existing data gaps, the indicators must also link cultural and economic data to capture how diversity influences market concentration and revenue flows.

The monitoring of such indicators could be ensured either through the establishment of a dedicated Observatory on Cultural Diversity in Music, or by introducing transparency obligations for online music services, such as Spotify (see policy below). In the latter case, platforms would be required to

periodically publish relevant data and diversity indicators. This would allow researchers, policymakers and stakeholders to access aggregated datasets and monitor trends in cultural and market diversity over time.[58]

While robust data collection is essential for monitoring diversity, it is critical to acknowledge the political risks involved in gathering sensitive demographic data — particularly in uncertain or polarising political environments. Categories such as ethnicity, nationality, gender identity, or sexual orientation, when collected without strong safeguards, could be misused in ways that harm the very groups they aim to protect. As political consensus around inclusion erodes in some parts of Europe, data infrastructures designed for empowerment could be repurposed for exclusion or surveillance.

Given that socioeconomic and demographic marginalisation are often closely correlated, an alternative approach could be to design targeted inclusion measures based on socioeconomic indicators (e.g., income, revenue, grant access) rather than on sensitive demographic variables. These metrics are less politically sensitive, more readily available, and align with the principle of data minimisation by design — collecting only the data strictly necessary for the intervention. In this light, socioeconomic inclusion measures can act as levers for demographic inclusion, helping address structural inequalities without exposing vulnerable populations to potential misuse of their identity-related data.

PR_3 ADOPT A DATA-DRIVEN GOVERNANCE FRAMEWORK FOR MUSIC PLATFORMS, INCLUDING ALGORITHMIC RECOMMENDATION SYSTEMS

One of the most immediate priorities concerns the governance of algorithmic recommendation systems. Today, these systems operate with limited transparency and accountability, despite their predominant role in determining content and artists' visibility and consumption patterns. EU policymakers should impose a model of algorithmic governance for cultural diversity, ensuring that diversity objectives are explicitly incorporated into the design, calibration, and validation of recommender systems.

This policy action requires the adoption of measures to be implemented both *offline* and *online*, amongst them:

PR_4 THE INCORPORATION OF SECTOR-SPECIFIC TRANSPARENCY AND ACCOUNTABILITY DUTIES: Under Article 19 of the CDSM Directive, online content-sharing service providers are obliged to provide rightsholders with transparent, up-to-date information on the exploitation of their works and performances, including data on types of use (license or transfer), revenues generated, and remuneration due. This provision enshrines a principle of transparency as a condition for fair participation in the digital market. However, as noted in this study, Article 19 CDSM Directive focuses on financial and use data. Conversely, the algorithmic dimension of visibility and access to a variety of content and subjects remains largely unaddressed. Thus, mirroring the transparency duties introduced by art. 19 CDSM Directive, digital and streaming platforms should be required to disclose information regarding their algorithmic design principles, metadata practices and how their content curation affects the visibility of content and artists.

[58] Farchy, J., & M'barki, J. (2024). Measuring cultural diversity: policy and methodological issues. *European Journal of Cultural Management and Policy*, *13*, 12400.

The Digital Services Act (DSA)[59] also represents an interesting model that should be further explored to implement this policy action. Article 27 DSA introduces transparency obligations for online platforms, including requirements to explain parameters used in recommender systems, and to provide users with information about the main criteria determining the prioritisation of content. [60] Yet, this provision does not affect streaming services that only make licensed content available (and not User-Generated Content), such as Spotify and Apple Music, which continue to remain in a regulatory gap in this regard.[61] For Very Large Online Platforms (VLOPs),[62] Article 34 requires VLOPs to identify "systemic risks" associated with their design, functioning, and use, including risks related to fundamental rights. Article 35 DSA imposes additional duties to assess and mitigate systemic risks, also with special consideration to the impacts of such measures on fundamental rights.

However, the regulation is designed primarily as a horizontal instrument of digital governance, addressing risks to the internal market, information integrity, and consumer protection. There is no explicit mention of cultural diversity goals. As a result, this transparency alone does not ensure diversity. Article 27 DSA requires disclosure and explanation, but it does not impose any correction in the outcome. This means that platforms, if subject to this obligation, bear no legal obligation to modify how their recommender systems impact visibility or diversity. Along the same lines, the DSA does not define algorithmic homogenization or lack of cultural diversity as a systemic risk per se. In this sense, Article 34(1)(b) DSA lists several fundamental rights when creating risk assessment and mitigation obligations for VLPs, but no explicit reference to culture as a fundamental right is included.[63] The obligation remains discretionary insofar as platforms must mitigate only the risks they have identified under Article 34 DSA.

Thus, EU policymakers should introduce diversity reporting obligations as part of the general transparency duties for online platforms and explicitly make platforms offering music streaming services subject to this obligation. These reporting obligations should cover, at minimum, breakdowns of exposure and recommendation data regarding diversity in the tripartite dimension (subject, content, circulation/stakeholders). As a second step, sector-specific transparency duties should be translated

[59] Regulation (EU) 2022/2065 of the European Parliament and of the Council of 19 October 2022 on a Single Market for Digital Services and amending Directive 2000/31/EC (Digital Services Act) [2022] OJ L277/1.

[60] 'Recommender system' is defined as "a fully or partially automated system used by an online platform to suggest in its online interface specific information to recipients of the service or prioritise that information, including as a result of a search initiated by the recipient of the service or otherwise determining the relative order or prominence of information displayed" (Art. 3(s) DSA).

[61] Online platforms are defined as: a hosting service that, at the request of a recipient of the service, stores and disseminates information to the public, unless that activity is a minor and purely ancillary feature of another service or a minor functionality of the principal service and, for objective and technical reasons, cannot be used without that other service, and the integration of the feature or functionality into the other service is not a means to circumvent the applicability of this Regulation (Art. 3(i), DSA). Thus, these obligations apply mainly to platforms hosting publicly shared user-generated content (e.g., SoundCloud). Yet, for all types of intermediary services, the DSA introduces a transparency obligation which materializes in the need to establish points of contact and legal representatives. See, Art.11 DSA. See also: Cappello M. (ed.), *Algorithmic transparency and accountability of digital services,* IRIS *Special*, European Audiovisual Observatory, Strasbourg, 2023. Available at: https://rm.coe.int/iris-special-2023-02en/1680aeda48 (Last Accessed 15 november 2025)

[62] Very Large Platforms are online platforms and online search engines which have a number of average monthly active recipients of the service in the Union equal to or higher than 45 million, and which are designated as very large online platforms or very large online search engines pursuant the European Commission Decision in accordance with Art. 33(4), DSA (e.g. YouTube). Art. 33 DSA.

[63] See also, Recitals §81-84, DSA.

into diversity accountability, including monitoring and corrective measures in recommender systems that do not comply with diversity goals.

PR_5 INTRODUCTION OF DIVERSITY OBLIGATIONS FOR STREAMING PLATFORMS: Comparable mechanisms to those existing in other areas, such as for European works in the **Audiovisual Media Services Directive** (**Directive EU 1808/2018, "AVMSD**")[64] or national measures like the radio quotas in France (not applicable to streaming), should be adopted in the music streaming environment.[65] Whereas National Radio quotas, if existent, do not apply to streaming platforms, the content quotas imposed by the **AVMSD** apply to audiovisual services and their content. Quotas or specific requirements do not apply to music playlists alone. In this sense, the **2022 GESAC Study** on the Place and Role of Authors and Composers in the European Music Streaming Market[66] highlighted that in the EU, audio streaming services currently occupy a regulatory gap, as the AVMSD does not cover them. The suggestion of introducing content quotas for the music industry was furthermore advanced during the **2021 Stakeholder Conference on Diversity and Competitiveness of the European Music Sector,** organised by the European Commission within the framework of the Council Work Plan for Culture 2019-2022.[67] Along the same lines, on 17 January 2024, the European Parliament plenary adopted the report of MEP Ibán García del Blanco on "Cultural diversity and the conditions for authors in the European music streaming market" (2023/2054(INI) and P9_TA(2024)0020) [68] which, amongst other, calls on the Commission to reflect on the possibility of imposing quotas on European works on music streaming platforms, and of introducing new provisions to ensure the prominence and discoverability of European works on music streaming platforms.
However, such diversity obligations should be adapted to the characteristics of algorithm recommender systems. This means that rather than imposing static quotas, i.e. a percentage based on a catalogue composition or airtime, diversity obligations for streaming platforms should ensure that works and subjects (authors, performers, etc.) are actively surfaced to users through recommendation systems, playlists, and search functions. Therefore, algorithmic diversity obligations would require platforms to integrate diversity parameters into their recommendation logic to ensure the diverse visibility and accessibility of musical repertoires and of subjects rather than their mere availability.

- **FOSTERING DIVERSITY AMONG THOSE WHO DESIGN, TRAIN AND CURATE PLATFORMS:** (demographic composition of engineering and data science teams): Diversity should not only

[64] Directive (EU) 2018/1808 of the European Parliament and of the Council of 14 November 2018 amending Directive 2010/13/EU on the coordination of certain provisions laid down by law, regulation or administrative action in Member States concerning the provision of audiovisual media services (Audiovisual Media Services Directive) [2018] OJ L303/69.

[65] See, Sections 3.7 and 3.5 of Deliverable D2.1 – Music Diversity and Circulation, OpenMusE, available: https://www.openmuse.eu/wp-content/uploads/2024/12/D2.1_Music-Diversity-and-Circulation-Novel-Data-Collection-Methods-and-Indicators.pdf (Last accessed 10 November 2025).

[66] Emmanuel Legrand, Study on the place and role of authors and Composers in the European Music Streaming Market, European Grouping of Societies of Authors and Composer (GESAC) (2022) < https://authorsocieties.eu/content/uploads/2022/09/music-streaming-study-28-9-2022.pdf >.

[67] European Commission, Report from the Conference Diversity and Competitiveness of the European Music Sector with EU Member States Experts (2021), < https://cnm.fr/wp-content/uploads/2021/09/Final-Report-EU-Music-conference-2021-march.pdf >.

[68] The procedure is available at the following link: https://oeil.secure.europarl.europa.eu/oeil/popups/ficheprocedure.do?reference=2023/2054(INI)&l=en

concern online outputs, but also those who design and train the technologies that govern content circulation. To mitigate algorithmic bias, EU policymakers should encourage the demographic diversity of engineering, data science, and content curation teams.[69] This policy action could take the form of a normative requirement for targeted recruitment, interdisciplinary collaboration, equality standards, a diversity reporting obligation, and targeted support funding for recruiting underrepresented groups throughout the entire supply chain.

PR_6 CREATE A EUROPEAN MUSIC DATA INFRASTRUCTURE AND METADATA STANDARDISATION

In connection with the second policy recommendation, EU policymakers should support the establishment of an interoperable European music data infrastructure to overcome the metadata gap (D2.1, Section 2.2.2 Data Infrastructure; see also D1.3 Section 6). The absence of a harmonised, interoperable, and trustworthy metadata infrastructure remains one of its most critical structural weaknesses. Metadata, namely, the structured information describing who created, owns, and licenses a musical work, underpins virtually every transaction in the digital music value chain. When such metadata is incomplete or inconsistent, it leads to errors in royalty attribution and restricts visibility for minority-language repertoires. This "metadata gap" also prevents policymakers from assessing how cultural diversity objectives are being met.

Thus, in order to improve the visibility and accessibility of the European repertoire of works and to enable the creative industries to benefit from licensing opportunities in the field of new technologies, there should be in place an improved data infrastructure. In this context, the general framework for copyright data, as outlined in the CMOs Directive, could be relevant. The provisions of the Directive place CMOs in a position of stewardship over the metadata associated with the works and subjects they represent.

Accordingly, implementing this action could be achieved either by (i) normative obligations, such as, obligating CMOs and other authorised entities to submit metadata in a harmonised format to their national registries, and subsequently to the EU-level infrastructure (**see coordinated action with National Legislator at 4.2)**, or (ii) by, self-regulatory measures, such as strongly incentivising the adoption and development of a common reporting template. The latter option (ii) could take the form of a coordinated task between EU policymakers (e.g., the EU Commission) and major stakeholders, such as CISAC, GESAC, and national legislators. A starting example, though narrow in scope, is the 2021 CISAC Global Project to harmonise data reporting for music in commercials.[70] The OpenMusE–Slovakia MOU (**see D2.1., Section 4.3.5.**) also illustrates how formalised cooperation between ministries, national statistical offices, CMOs, and research institutions can overcome the fragmentation that often hinders cultural data collection. It shall also be noted that, currently, the CMOs Directive does not impose a direct obligation on CMOs to develop industry-wide metadata standards or best practices.

Option (i) would require an amendment of the CMOs Directive. The starting point would be articles 24 to 27 CMOs, according to which CMOs are expected to store, monitor, and update metadata to ensure

[69] See also: Georgina Born and others, 'Artificial Intelligence, Music Recommendation, and the Curation of Culture: A White Paper' (Schwartz Reisman Institute 2021) White Paper <https://static1.squarespace.com/static/5ef0b24bc96ec4739e7275d3/t/60b68ccb5a371a1bcdf79317/1622576334766/Born-Morris-etal-AI_Music_Recommendation_Culture.pdf>. Last accessed 16 November 2025.

[70] CISAC, Press release, Societies and Publishers complete global project to harmonise data reporting for music in commercials (2021), Available at: https://www.cisac.org/Newsroom/articles/societies-and-publishers-complete-global-project-harmonise-data-reporting-music (Last Accessed 13 november 2025).

accuracy and transparency in rights management. Although these obligations were originally conceived within the narrow context of multi-territorial licensing for online rights in musical works, they provide a valuable blueprint for the wider harmonisation and improvement of copyright data infrastructure across the European creative and cultural sectors. Strengthening and expanding these metadata governance duties could therefore form the basis for a coherent, interoperable system of copyright data management at both national and EU levels (**see coordinated action with National Legislator at 4.2.**).

More concrete obligations to provide work-related data can follow from provisions in the EU copyright acquis. For instance, the notification of "relevant and necessary" information for the purpose of blocking infringing content under Article 17(4)(b) CDSMD provides an important starting point. If Article 17(4)(b) notifications sent to online platform providers are collected and pooled in a central EU copyright data repository, the resulting accumulation of EU copyright data could lead to a data reservoir that dwarfs existing data silos of collecting societies, rightholders and distribution platforms. However, notifications under Article 17(4)(b) would have to be detailed and comprehensive enough to allow an EU data repository to enhance the visibility of the European repertoire in a meaningful way and to expand licensing opportunities for copyright holders. The legislative and policy framework set forth by Common European Data Spaces (CEDS) and Data Digital Legislation could offer the regulatory support necessary to achieve data creation, harmonisation and improvement goals. However, the relationship between the copyright acquis and data and digital legislation, and in particular the carve-outs present in the latter with regard to specific copyright-related activities, need to be properly assessed. The development of a data space for music metadata could certainly offer an interesting model that should be explored further. [71]

4.2 National Legislator

Given that the cultural competencies rest primarily on the national legislation, national policymakers hold a central position in shaping the cultural regulatory environment within which the music industry operates. While their actions can support the local ecosystem, it is important that such actions are coordinated within the EU framework.

[71] See, D5.6 – Policy Brief 1: Music Metadata Mainstreaming and EU Law, OpenMusE (2024). Available at: https://www.openmuse.eu/wp-content/uploads/2024/12/D5.6_Policy-Brief-1_Music-Metadata-Mainstreaming-and-EU-Law.pdf Last accessed 12 November 2025.

The following recommendations are addressed to national legislators:

Table 7 – Policy recommendations addressed to national legislators. Source: SSSA. (2025).

National Legislator	
(P1) Embed music diversity explicitly in national cultural policies.	Make music diversity an explicit national cultural policy goal & Move from isolated measures (e.g., radio quotas) → integrated national strategies.
	Coordinate national policies with EU-level diversity & data-governance actions
	Prioritise demographic diversity e.g. minority-language repertoires & underrepresented creators.
(P2) Structural support for local creators & stakeholders	Introduce targeted funding following diversity criteria. E.g. Support projects by women, minority & migrant creators; minority-language works.
	Expand mobility schemes & cross-border collaboration opportunities. → Where funding is limited: simplify visas, reduce tax burdens, enable co-production
	Expand collaboration with stakeholders: →Partner with streaming platforms to boost visibility of domestic repertoires. → Partnerships with neighbouring Member States to co-produce and co-promote music events → Partnerships with CMOs, national statistical offices & cultural institutions to provide training in digital distribution, metadata, licensing & rights
(P3) Coordinate actions with EU legislator	**Develop national music metadata registries** aligned with EU standards (ISWC, ISRC, DDEX), or other metrics defined at EU level.
	Adopt a bottom-up model feeding national datasets into the EU Music Data Infrastructure Use multi-level coordination: ministries, NSIs, CMOs, industry (e.g., OpenMusE–Slovakia model).
	Coordinate metrics & adopt a national system for monitoring cultural diversity (aligned with EU measures).

These recommendations are further illustrated in the following paragraphs.

PR_1 EMBED MUSIC DIVERSITY IN NATIONAL CULTURAL STRATEGIES

As emerged from the analysis of the measures adopted in selected member states **(D2.1, Section 3.7**), whereas some countries such as Bulgaria, Lithuania, Slovakia, and Ukraine formally recognize cultural and linguistic heritage in their constitutions or cultural heritage laws, few translate those constitutional commitments into music-specific policy instruments. Radio quotas exist in some countries (Hungary, Slovakia, Ukraine), but their scope and application vary. Repeated attempts to introduce quotas in countries such as Bulgaria and Lithuania have failed due to political resistance and concerns about the impact on competition law. Live performance, festival programming, and streaming remain largely unregulated with respect to diversity.

However, where available, measures such as content quotas represent isolated and ad hoc measures. There is no systematic integration of music diversity objectives into the core of national cultural strategies, nor is there coordination with EU regulatory tools. For instance, at the international level, Québec's integrated provincial strategy, which combines production supports, digital visibility measures, and targeted funding, is an interesting policy model that could be adapted to EU Member States.

Therefore, national legislators should incorporate music diversity as an explicit policy goal within national cultural policies to support the production, circulation, and discoverability of diverse repertoires produced by a variety of subjects. These goals should then be translated into regulatory tools. Amongst them, national policymakers should prioritize underrepresented repertoires, minority

language works, and gender-balanced participation, for instance, through dedicated funding lines and performance-based incentives. Moreover, targeted incentives should be introduced for festival programming and local live circuits. The implementation shall be multi-stakeholder, including ministries, media regulators, CMOs, artists' organizations and cultural institutions. Finally, these measures should be coordinated with the actions taken at the EU-level, specifically the fourth policy recommendation, to create a multi-layered governance model for music diversity.

PR_2 STRENGTHEN SUPPORT FOR LOCAL AND EMERGING CREATORS AND MUSIC STAKEHOLDERS

As it emerged from **D2.1, Section 3.7** on the Measures adopted by selected Member States, funding mechanisms tend to favor public broadcasters, national institutions, or artists under CMOs' mandate. This leaves independent artists and Ethnic and minority linguistic groups of artists with limited access to structural support. D2.1 also notes that training in digital distribution and rights management remains underdeveloped, preventing local creators from fully participating in the digital and global music economy.

Thus, national policymakers should strengthen targeted support for local stakeholders (creators, but also other stakeholders involved in the creation and distribution of musical repertoires) through a two-tier approach that covers both financial and structural measures.

The first prone of this measure could be achieved by adopting dedicated funding calls for independent creators that ensure demographic diversity along the entire creation and supply value chain. This includes projects by women, minority, or migrant creators; schemes supporting works in regional and minority languages; and initiatives that promote intercultural collaboration, mobility and content circulation schemes **(See, D2.1, table 21 on demographic diversity objectives)**. Moreover, leveraging on the Music Moves Europe action, which second pillar directly addresses the financing of music-related projects and initiatives, national policymakers could complement this action with targeted calls for underrepresented repertoires and minority-language projects, and mobility schemes designed to support cross-border collaboration among artists ensuring demographic /gender, ethnicity, language, religion) variety.

Where there is a lack of financial resources to introduce dedicated funding programs, actions could consist of the removal of administrative burdens, such as simplifying visa processes and tax reduction schemes for artists engaging in short-term cross-border activities. Finally, these actions could be soft measures, such as partnerships with neighbouring Member States to co-produce and co-promote music events. To increase visibility and discoverability of local artists and repertoires in streaming platforms, national governments could seek partnership agreements with major platforms. Where appropriate, public support could be linked to voluntary commitments by platforms to promote domestic repertoires and artists.

The second prone of this measure covers structural assistance for stakeholders (creators), such as training in digital distribution, metadata management, licensing, and rights administration. Many small creators lack the skills and institutional capacity to participate in the digital market, where algorithmic visibility and accurate metadata are decisive for remuneration and visibility. The training could be done in cooperation with national statistical offices or CMO, through partnerships (voluntary measure) or by tasking them with normative obligations.

PR_3 ADOPT COORDINATED ACTIONS WITH EU POLICYMAKERS

- **DEVELOP A NATIONAL METADATA AND MUSIC METADATA INFRASTRUCTURE:** to achieve the creation of a European Music data infrastructure, it is necessary to adopt a 'bottom-up' approach to ensure that data collection and standardization begin at the local and national levels. This involves adopting and creating national registries that will be the first layer, subsequently fed into a broader and interoperable registry held at the EU level (the European music data infrastructure). Registries shall capture accurate and standardised information on the subjects, works, ownership, and licensing thereof. These registries should adopt a common metadata schema and persistent identifiers (PIDs) aligned with international standards (e.g., ISWC, ISRC, DDEX) and interoperable formats defined under EU normative (**see fourth policy recommendation to EU legislator "Create a European Music Data infrastructure and standardised metadata**"). Once established, national datasets should be integrated into the European Music Data Infrastructure or under the Common European Data Spaces (CEDS) initiative (**see fourth policy recommendation to EU legislator "Create a European Music Data infrastructure and standardised metadata").** This would enable the aggregation of national registries into a unified data ecosystem governed by the principles and rules focusing on data, data transactions and data intermediaries outlined in the Data and Digital Legislation[72]. Implementing this action would exploring further which of these provisions will apply to a music metadata and its many possible interactions with the copyright *acquis*. At the outset, it would require multi-level vertical coordination from top to bottom, including sectoral organisations and CMOs. The OpenMusE-Slovakia MOU is a good model: partner Ministries, National Statistical Institutes, CMOs and industry to create data sharing agreements. (**see fourth policy recommendation to EU legislator "Create a European Music Data infrastructure and standardised metadata").**

- **COORDINATE METRICS AND ADOPT A NATIONAL MONITORING SYSTEM FOR CULTURAL DIVERSITY**: National legislators should develop a coordinated system for monitoring cultural diversity in the music sector, ensuring coherence with the harmonised EU indicator framework proposed in the preceding policy section. This process should not be conceived as a stand-alone national exercise, but rather as part of a multi-level approach in which national systems are strengthened through EU-supported capacity-building, including training of statistical agencies, harmonisation of data practices, and the integration of cultural diversity indicators into official statistics. In this context, Member States should establish a national set of indicators that reflects the EU structure **while incorporating domestic specificities — such as linguistic diversity, regional production patterns, and minority cultural expressions — in a way that remains interoperable with EU-level methodologies.** Clear methodological guidelines, co-developed with EU bodies, should ensure that data collection is consistent across regions, institutions, and industry actors and can feed upward into future EU monitoring frameworks. To implement this approach, governments should **create or strengthen a National Observatory for Cultural Diversity**, or designate an existing agency to fulfil this role. This body would collect and analyse data on music

[72] See also, D5.6 – Policy Brief 1: Music Metadata Mainstreaming and EU Law, OpenMusE (2024). Available at: https://www.openmuse.eu/wp-content/uploads/2024/12/D5.6_Policy-Brief-1_Music-Metadata-Mainstreaming-and-EU-Law.pdf (last accessed 12 November 2025).

production, programming, consumption, and discoverability, and publish regular reports highlighting emerging trends, risks to pluralism, and potential inequalities. Diversity indicators should be embedded in existing cultural governance instruments, with publicly funded institutions, broadcasters, festivals, and music organisations required to report relevant data as part of their funding agreements and compliance processes.

National legislators should also introduce targeted transparency and data-sharing obligations in funding schemes to disclose diversity benchmarks, including demographic composition. Mandatory measures should be accompanied with voluntary mechanisms supported by incentives to encourage participation from private actors such as labels and promoters. For instance, as the OpenMuSe-Slovak MoU showed, structured data-sharing arrangements between public authorities, CMOs, and industry intermediaries could strengthen the national evidence base. To support long-term monitoring, Member States should invest in interoperable digital infrastructures capable of integrating cultural, economic, and digital consumption datasets, ensuring compatibility with the EU-level diversity framework once formalized. These efforts should be accompanied by capacity-building initiatives for cultural organizations, CMOs, and regional authorities, and by structured stakeholder engagement to ensure that indicators remain aligned with EU efforts and, at the same time, in line with national realities of the music industry. The resulting evidence should guide targeted interventions—such as dedicated funding measures, visibility initiatives, and regulatory adjustments—to strengthen cultural diversity across the national music ecosystem.

4.3 CMOs and Stakeholders

The last set of policy recommendations is addressed to CMOs and other stakeholders, such as representative associations. Though with different statutory functions (advocacy vs right management), CMOs and associations represent the *subject dimension* of diversity — authors, performers, and music creators — and manage the infrastructures that determine how works circulate and are remunerated (*second dimension of diversity: diversity of works)*. In this sense, their role is complementary. CMOs hold control regarding metadata, rights management, and royalty distribution. As such, they can also influence which repertoires and artists become visible, insofar as accurate and standardised metadata, timely licensing, and clear remuneration conditions affect how works are indexed, monetised, and promoted by digital platforms. In this way, CMOs can play a role in defining the conditions under which certain works are more readily exploitable and discoverable than others. Stakeholder associations, in turn, bring granular knowledge of structural issues affecting creators and often act as advocacy entities.

Thus, addressing policy recommendations to these actors ensures that such broader goals are grounded in the operational realities of the music sector. At the same time, this set of recommendations builds on the understanding that, to overcome data inaccuracy and fragmentation problems, the actions to be taken by these stakeholders should be framed and aligned with EU and national frameworks through coordinated, multi-level implementation.

CMOS & Stakeholders	
(P1, P2, P3) Adopt diversity as an explicit policy goal; Promote structural inclusion and equitable representation across governance, workforce, and the music value chain	Include cultural diversity mandates in CMO statutes and governance; Develop curated initiatives (playlists, showcases, events); Develop member-support services focusing on digital skills, metadata, and algorithmic visibility (also in coordination with national Policy P3); Create funding lines for under-represented repertoires and emerging artists (mirroring national EU funding mechanisms).
	Recruit and retain underrepresented groups across all roles; Support mentorship, inclusive leadership pathways, and safe workplaces; Provide bias training, employee resource groups, and equitable pay systems.
	Promote inclusive programming and editorial strategies; Support visibility initiatives for marginalised creators; Provide dedicated grants and subsidised resources for creation/distribution.
(P4) Improve metadata stewardship and infrastructure	Adopt common identifiers and enrich metadata (e.g. genre, region, language)
	Generate diversity data through transparency reports, platform analytics, CMO monitoring.
	Establish formal data-sharing agreements with national registries, statistical offices, and industry associations.
(P5) Strenghten multi-level and cross-sector coordination mechanisms	Participation in algorithmic governance: e.g. Article 45 DSA provides a formal framework for codes of conduct and multi-stakeholder collaboration (CMOs, platforms, Digital Services Coordinators, cultural institutions, civil society).
	Participate in national/EU observatories through structured reporting.
	Support creators via visibility initiatives, collective capacity-building and resource pooling
(P6 + P7) Ensure inclusive, transparent, and accountable algorithmic systems in music discovery and circulation	Integrate diversity-by-design in recommender systems and technical development.
	Involve diverse stakeholders in system design and testing; establish transparency in how algorithms shape visibility and access (e.g. diversity audits, ex-ante testing, and feedback loops)
(P8) Recognise and strengthen the socio-economic role of digital platforms	Support digital literacy, especially for disadvantaged artists; Promote alternative distribution models (e.g. cooperatives, regional platforms); Advocate for transparent remuneration and fair contractual practices.

Table 8 – Policy recommendations addressed to CMOs & Stakeholders. Source: SSSA. (2025).

The policy recommendations outlined in this section are informed by the findings of D2.1, particularly Section 3.9, which maps a set of **CMO-developed best practices** that could contribute to diversity governance. Some of these best practices draw on provisions already contained in the CMOs Directive. These include:

- **Cultural mission integration (Best Practice 4):** embedding cultural promotion within statutory objectives, ensuring that CMOs' governance structures explicitly support diverse repertoires and creators.
- **Awareness and education initiatives (Best Practice 8):** engaging the public and rightsholders to improve understanding of copyright and highlight how collective management contributes to cultural diversity.
- **Non-discriminatory membership criteria (Best Practices 14–15):** guaranteeing fair access for creators regardless of demographic or national background, thereby fostering inclusive representation within CMO governance.
- **Data and metadata standards (Best Practices 76–79):** building robust infrastructures capable of accurately identifying works, rightsholders, and repertoires, through the adoption of international identifiers, interoperable metadata formats, and transparent documentation systems.

These practices directly support the monitoring and promotion of diversity and serve as the operational basis for the following policy recommendations (P1–P3).

PR_1 ADOPT DIVERSITY AS AN EXPLICIT POLICY GOAL; ENHANCE REPERTOIRE VISIBILITY AND MEMBER SERVICES

Building on the mapping conducted in D2.1, CMOs are recognised not only as rights-management intermediaries but also as active promoters of cultural diversity. Recital 3 of the **CMOs Directive** explicitly acknowledges that CMOs should facilitate access to the market for "the smallest and less popular repertoires" and provide social, cultural, and educational services for the benefit of rightsholders and the public. This cultural mandate forms the basis for their contribution to industry-level diversity governance and positions them as key actors within a multi-layer approach, complementing EU-level policy objectives and national cultural strategies.
In this context, policy should encourage CMOs and other relevant sectoral stakeholders to explicitly acknowledge, within their statutes and governance frameworks, their role as promoters of culture, including the provision of social, cultural, and educational services that enhance the welfare of rightsholders. This normative anchoring reflects both existing obligations under EU law and best practices identified in D2.1 and provides the foundation for operationalising diversity goals across the music ecosystem.

Moreover, such formal recognition should translate into concrete and measurable actions towards diversity goals. Such actions can be furthermore supported by the legal basis offered by Article 12 and the Annex of the **CMOs Directive**. Article 12(4) CMOs Directive stipulates that **where CMOs provide social, cultural or educational services funded through deductions from rights revenue, these must be offered "on the basis of fair criteria, in particular as regards access to, and the extent of, those services."** Building on this framework, CMOs can adopt concrete actions that enhance diversity, such as:

- Introducing diversity-distribution indicators for monitoring to identify structural imbalances across gender, region, type of works, or language. This action shall align with national and EU efforts monitoring exercises.
- Creating funding lines for under-represented repertoires and emerging artists, mirroring national and EU cultural funding mechanisms and supporting the creation and circulation of minority expressions.
- Establishing curated playlists, showcases, and live events that promote domestic diversity in its demographic (e.g. minority language) and work dimentions, coordinated with national cultural strategies to ensure coherence across governance levels.
- Developing member-support services focused on digital skills, metadata quality, and algorithmic visibility, in order to enhance discoverability and level the knowledge for creators from diverse backgrounds. These initiatives can be implemented in coordination with broader national and EU programmes that strengthen digital literacy and the resilience of cultural workers.

Industry-level data and monitoring are essential to support and assess these diversity-enhancing actions. Industry stakeholders—particularly CMOs—are responsible for generating key datasets that

inform diversity monitoring frameworks. As mapped in D2.1 (Table 30), these include indicators such as the composition of CMO membership by gender and nationality; the distribution of revenues by genre, language, nationality, or minority group; data on the mobility of music professionals; and information on the sustainability of artistic careers, including income derived from creative work and access to welfare mechanisms.
Through these activities, CMOs operationalise their statutory mission while contributing to a coherent multi-layer governance structure: EU institutions set overarching principles and support capacity-building; national authorities ensure alignment with cultural policy objectives; and CMOs implement diversity-enhancing measures within their operational domain. This vertically integrated approach ensures that the promotion of cultural diversity is embedded across the entire music ecosystem, from regulatory frameworks to day-to-day organisational practices.

PR_2 PROMOTE WORKFORCE DIVERSITY AND INCLUSIVE LEADERSHIP

Workforce diversity is a fundamental component of a culturally vibrant and innovative music sector. Diverse teams bring a wider range of artistic, cultural, and lived experiences into organisational decision-making, thereby enriching programming choices, technological design, and strategic development. CMOs and industry stakeholders should therefore adopt comprehensive workforce strategies that promote diversity at all levels—from technical and production departments to senior leadership and governance bodies.

Promoting workforce diversity requires addressing disparities in recruitment, career progression, and retention. Organisations should adopt **proactive recruitment strategies** targeting underrepresented groups, including **organisational-level partnerships** with universities, **vocational training programmes, and community-based organisations**. Particular attention should be paid to professional roles that remain structurally underrepresented in fields such as production, sound engineering, and music technology.

Career development and leadership inclusion are equally important. **Mentorship schemes connecting early-career professionals with established practitioners** can support career advancement and help strengthen representation in decision-making environments. To remove structural barriers to creation and distribution, CMOs and industry stakeholders should provide **targeted production support, including grants, subsidized studio access, and distribution assistance**. Executive boards, advisory committees, and senior management teams should also reflect the demographic plurality of the communities they serve, through inclusive selection criteria, diversity targets, or reserved representation mechanisms where appropriate.

Organisational culture and internal capacity-building play a critical role in sustaining workforce diversity. **Continuous education on unconscious bias, cultural competence, inclusive design, and anti-discrimination practices** can strengthen internal awareness and improve decision-making. **Establishing employee resource groups, mentorship networks, and cross-functional teams** can further support inclusive working environments. Retention should be prioritised through **transparent promotion pathways, equitable pay structures, and safe, respectful workplaces** protected from harassment and discrimination.

By investing in inclusive leadership and diverse talent pipelines, CMOs and industry stakeholders strengthen their internal capacity to design culturally sensitive technologies, promote diverse repertoires, and engage meaningfully with communities. Workforce diversity thus reinforces the broader multi-level governance framework, ensuring that the sector's internal structures embody the values of cultural pluralism that it seeks to promote externally.

PR_3 REDUCE GENDER AND RACIAL INEQUALITIES ACROSS THE MUSIC VALUE CHAIN

Gender and racial inequalities remain deeply rooted in the music sector and require coordinated, intersectional action across the value chain to address disparities in access, visibility, and circulation. CMOs and industry stakeholders have a significant role in promoting more equitable outcomes by supporting fairer representation in programming, curation, and promotional ecosystems, both online and offline.[73] Measures such as **gender-balanced line-ups, proportional representation of racial and ethnic minorities, and inclusive editorial strategies** can help counter the structural under-exposure of marginalised creators and repertoires. In parallel, platforms and CMOs should develop long-term **visibility initiatives** highlighting the work of women, racialised artists, and minority-language creators, ensuring that promotional efforts combine editorial choices with algorithmic visibility mechanisms.

Reducing inequalities across the music value chain also requires addressing structural barriers to creation and distribution. CMOs and industry stakeholders should provide targeted production and distribution support, including dedicated grants, subsidised access to studios and technical resources, and tailored distribution assistance. Promoting gender and racial equality in this way strengthens the cultural vibrancy of the sector and broadens the range of artistic expressions that reach audiences.

PR_4 IMPROVE METADATA QUALITY, STANDARDISATION, AND REPORTING CAPACITY

Improving metadata quality and harmonisation is essential for ensuring the visibility and fair circulation of diverse repertoires. As highlighted in the EU-level recommendations, metadata governance must be strengthened through interoperable standards, persistent identifiers, and common reporting templates. CMOs, which already manage substantial datasets on works, rightsholders, and usages, are uniquely positioned to advance these objectives at industry level and to feed national and EU infrastructures.

In line with the obligations set out in Articles 24–27 of the **CMOs Directive**, and consistently with the policy direction and governance principles emerging under the Common European Data Spaces, **CMOs should progressively enhance their metadata management practices** to align with international standards (ISWC, ISRC, IPI, DDEX) and with future EU-level requirements. This role is reinforced by several best practices identified in D2.1, including collaborative metadata projects developed by CISAC, GESAC, and national societies, as well as case studies such as the OpenMusE–Slovakia MoU, which

[73] Park, J. H., & Braden, L. E. (2025). Gender and Success in Getting "Heard": How Orchestral Programming Choices Promote Women Composers. *Gender, Work & Organization*.; Tolare, J. B., Novaes, F. C. P., & Silva, A. M. (2024). The Thematic Representation of Female Composers in Classical Music on Streaming Platforms. *The Canadian Journal of Information and Library Science*, 47(2), 150-157.; Kirchberg, I. (2025). *(Mis)representation of Gender in Digital Classical Music Mediation*. 1. https://doi.org/10.71228/ijmm.2024.17

demonstrated how collaboration between ministries, national statistical institutes, CMOs, and research organisations can overcome fragmentation and create reliable shared datasets.

To fulfil this role, CMOs and stakeholder organisations should take the following steps:

- **Standardise internal metadata and reporting processes**, including the adoption of common identifiers, enriched work and repertoire information (e.g., language, genre, region), and higher-granularity distribution data to support diversity indicators.
- **Develop annual transparency and diversity reports**, which include metrics on repertoire distribution, author demographics where lawfully collected, and circulation patterns. These reports would complement national indicators and support the emerging EU monitoring frameworks.
- **Collaborate in the development of a unified reporting template**, aligned with EU data initiatives and sectoral standards. This could be undertaken through coordinated action with industry federations (e.g., CISAC, GESAC) and national cultural authorities.
- **Strengthen technical capacities**, including training for staff and members on metadata quality, data governance, and the interface between copyright data and digital platform environments.
- **Contribute datasets to national observatories and, in the future, to the European Music Data Infrastructure**, ensuring upward interoperability within the multi-layer governance model.

PR_5 STRENGTHEN MULTI-LEVEL AND CROSS-SECTOR COORDINATION MECHANISMS

Effective diversity governance in the music ecosystem requires coordinated action across governance levels and sectors. CMOs and stakeholder organisations should actively participate in and support coordination mechanisms that connect EU-level policy frameworks, national implementation structures, and industry-level practices, while also fostering structured collaboration across the music value chain. Such coordination is essential to ensure coherence between regulatory objectives, data infrastructures, and operational realities.

(a) Vertical coordination (EU–national–industry)

CMOs and stakeholder organisations should actively participate in the coordinated governance structures emerging at EU and national levels, ensuring that their operational knowledge informs broader policy frameworks. Their role is particularly important in the domains of **algorithmic governance**, **data sharing**, and **monitoring diversity outcomes**, where EU legislation increasingly relies on multi-stakeholder cooperation.
For instance**,** Article 45 **DSA** provides a formal framework for developing **codes of conduct** involving platforms, Digital Services Coordinators, and sectoral actors. CMOs and creators' associations should participate in these processes to ensure that cultural diversity indicators, in its tripartite dimension, are embedded into algorithmic audit practices, recommender transparency, and content curation guidelines.

Multi-level coordination also requires CMOs to mirror and support national and EU frameworks for diversity monitoring. This includes:

- **Collaborating with national statistical agencies and cultural authorities** to integrate diversity indicators into statistical collections, as foreseen in the national legislative recommendations.
- **Participating in structured data-sharing arrangements**, ensuring that repertoire, distribution, and circulation data contribute to a shared evidence base.
- **Joining multi-stakeholder observatories**, working groups, and advisory bodies dealing with music discoverability, platform regulation, and data interoperability.
- **Supporting national and EU capacity-building initiatives**, particularly in areas where CMO expertise (metadata, repertoire classification, royalty distribution) is critical to improving indicator accuracy and comparability.
- **Engaging with platforms and digital intermediaries** to implement transparency obligations and ensure that diversity-related metadata are duly recognised and operationally integrated into recommendation systems.

(b) Horizontal coordination (cross-sector collaboration)

In parallel, effective implementation of diversity-enhancing measures across the music ecosystem requires **structured collaboration between CMOs, industry organizations, platforms, public institutions, and civil society** (horizontal governance). Given the interdependent nature of the music value chain, no single actor can achieve meaningful progress in isolation. Cross-sector coordination ensures that diversity objectives are shared, mutually reinforcing, and aligned with broader EU and national cultural policy frameworks.

To support this, the sector should establish **formal multi-stakeholder working groups** bringing together CMOs, streaming platforms, independent labels, artists' associations, cultural institutions, and community-based organisations. These bodies can serve as stable forums for dialogue, collective problem-solving, and co-development of standards that improve the representation and circulation of diverse repertoires. They may also enable the exchange of best practices—through peer-learning structures, public repositories, or sectoral conferences—which helps disseminate innovative approaches to programming, metadata management, and algorithmic fairness.

Horizontal coordination may also support **collective capacity-building and resource pooling**, for example through joint funding schemes, sector-wide diversity initiatives, or shared training programmes. These collaborative arrangements are particularly important for enabling smaller organisations and independent creators to access expertise and resources that would otherwise remain out of reach.

Structured collaboration may also supports policy coherence. By participating actively in national consultations and EU-level processes, industry stakeholders may help ensure that regulatory instruments reflect the realities of music production, distribution, and discovery. **Shared metrics and common reporting frameworks aligned with EU and national indicators** may further enhance comparability and transparency, allowing diversity goals to be monitored consistently across organisations. Finally, **collaborative funding mechanisms** — for example, sector-wide diversity funds or collective capacity-building programmes — may enable smaller organisations and independent creators to access resources that would otherwise be out of reach. In this sense, cross-sector coordination may act as the connective tissue that ensures diversity objectives are promoted consistently across all layers of the music ecosystem.

Through the combined strengthening of vertical and horizontal coordination mechanisms, CMOs and stakeholder organisations may become an integral part of the multi-layered governance architecture designed to ensure coherence across governance layers and to facilitate the circulation of information and best practices. At the EU level, policymakers and lawmakers shall set the overarching principles, regulatory frameworks and cross-border infrastructures necessary for coordinated action (See Section 4.1. PR_1-PR_6). National authorities (See section 4.2) shall then contextualise indicators, support capacity building, and organise data collection efforts in line with these EU requirements. Finally, at the industry level, CMOs and stakeholders' association shall be entrusted to implement, monitor and operationalise diversity indicators into their day-to-day practice to translate high-level commitments into concrete outcomes.

PR_6 IMPLEMENT DIVERSITY-BY-DESIGN PRINCIPLES IN ALGORITHMIC AND DIGITAL SYSTEMS

The role of algorithmic systems in shaping music discovery and circulation requires the sector to adopt a diversity-by-design approach. Rather than treating diversity as an ex-post corrective, CMOs and industry stakeholders should integrate diversity indicators, in the tripartite dimension envisaged in this research, into the earliest stages of technical development. This involves embedding **diversity indicators directly within recommender systems**[74], ensuring that algorithmic ranking and discovery logic do not systematically disadvantage certain groups or works, such as minority-language repertoires, regional works, or creators from underrepresented groups. This should be accompanied by the development of **machine-learning methods** or prototype-based embeddings that integrate diversity parameters to ensure calibrated exposure models, and reduce the reinforcement of existing hierarchies without undermining user relevance.

A diversity-by-design approach also relies on **participatory processes** of quotas. Stakeholders with differentiated cultural perspectives—artists, CMOs, community organisations, and minority-language representatives—should be involved in design, testing, and evaluation phases.[75] Their participation helps prevent unintentional reproduction of biases embedded in training data or curatorial logic. To ensure accountability over time, algorithmic systems should be subject to **diversity benchmarks**, ex-ante testing procedures, and regular audits aimed at detecting shifts that may reduce the range of repertoires exposed to audiences. Continuous feedback loops should allow platforms and CMOs to adjust algorithmic parameters dynamically as new patterns of circulation, audience behaviour, or repertoire availability emerge.

PR_7 ENHANCE TRANSPARENCY AND ACCOUNTABILITY IN ALGORITHMIC DESIGN

Improving transparency and accountability around algorithmic curation is essential to strengthening trust and ensuring that diversity goals are translated into practice. While the DSA establishes baseline transparency obligation, the music sector should go further by providing meaningful insight into how recommendation systems balance engagement metrics, personalisation objectives, and cultural

[74] Moradi, A., Neophytou, N., & Farnadi, G. (2024). Advancing cultural inclusivity: Optimizing embedding spaces for balanced music recommendations. *arXiv preprint arXiv:2405.17607*. Ungruh, R., Dinnissen, K., Volk, A., Pera, M. S., & Hauptmann, H. (2024). *Putting Popularity Bias Mitigation to the Test: A User-Centric Evaluation in Music Recommenders*. 169–178. https://doi.org/10.1145/3640457.3688102

[75] Artz, M. (2024). *Reimagining Recommender Systems* (pp. 40–63). Informa. https://doi.org/10.4324/9781003458555-3

diversity considerations. Clear documentation explaining the logic and weight of key design choices would allow creators, regulators, and users to understand the role of algorithms in shaping repertoire visibility.[76]

Transparency also requires **systematic reporting**. Platforms and industry stakeholders should publish regular diversity assessments covering creator demographics, repertoire characteristics, geographic circulation patterns, and the presence of minority-language or regionally specific works within curated spaces. Making these data publicly accessible, for instance **through dashboards or periodic reports**, would support external scrutiny and allow researchers and public bodies to track progress toward policy goals.

Accountability mechanisms reinforce transparency commitments. Organisations should designate staff responsible for monitoring algorithmic fairness and addressing emerging disparities, and they should establish independent auditing processes—potentially coordinated with national cultural observatories—to evaluate compliance with diversity objectives. Meaningful creator participation is equally important. Rightsholders should have access to information explaining how their works are categorised and promoted, as well as mechanisms to challenge misclassifications or unfair treatment. Strengthening accountability ensures that diversity objectives are embedded throughout the lifecycle of algorithmic design and implementation.

PR_8 RECOGNISE AND STRENGTHEN THE SOCIO-ECONOMIC ROLE OF DIGITAL PLATFORMS

Digital platforms play a decisive role in shaping who is heard, who is visible, and who can sustainably pursue a career in music. While platforms have expanded access to global audiences, they have also amplified inequalities arising from uneven digital literacy, lack of financial resources, or limited access to professional support. CMOs and stakeholders should therefore contribute to a more equitable digital environment by helping creators address these disparities. This includes **supporting digital literacy initiatives**, expanding access to technical tools for independent and economically disadvantaged artists, and partnering with community organisations to ensure that all creators can engage effectively with digital distribution.

Strengthening diversity also requires rebalancing the economic structures of the digital ecosystem. While dominant platforms continue to shape discovery and remuneration, **industry organisations should support alternative and community-driven distribution models — such as regional networks, cooperative platforms, or artist-owned infrastructures**— that promote local scenes and provide creators with greater agency. Helping independent musicians develop diversified revenue strategies, including crowdfunding, direct-to-fan models, and enhanced visibility in live performance circuits, contributes to long-term sustainability.

Digital inclusion must be paired with **advocacy for fair remuneration**. CMOs and industry stakeholders should work together to promote transparent royalty calculations, fairer contractual terms, and multi-

[76] Dinnissen, K., & Bauer, C. (2023). Amplifying Artists' Voices: Item Provider Perspectives on Influence and Fairness of Music Streaming Platforms. *User Modeling, Adaptation, and Personalization*. https://doi.org/10.1145/3565472.3592960; Dinnissen, K., Saccardi, I., Vredenborg, M., & Bauer, C. (2023). *Looking at the FAccTs: Exploring Music Industry Professionals' Perspectives on Music Streaming Services and Recommendations*. https://doi.org/10.1145/3609987.3610011

stakeholder dialogues on equitable revenue distribution. Recognising the socio-economic role of platforms thus involves strengthening creators' capacity to participate fully in the digital ecosystem while addressing structural imbalances that limit diversity in circulation and remuneration.[77]

[77] Resmadi, I. (2024). The Impact of Platformization on Streaming Music Governance in Indonesia and The Resistance by Local Indie Musicians. *Jurnal Sosioteknologi*, *23*(3), 358–373. https://doi.org/10.5614/sostek.itbj.2024.23.3.5; Jeduah, B. A.-R. (2025). *Platform Distribution of Music: How Afrobeats Artists Build Audiences Through Social Media and Streaming Algorithms*. 23–38. https://doi.org/10.1108/s0733-558x20250000094003.

5. Conclusions

The purpose of this deliverable was to synthesize current research on cultural diversity in the music ecosystem, focusing on creator demographics, musical diversity, and circulation challenges and opportunities. By bridging existing indicators and fragmented findings, this deliverable aimed to clarify the implications of diversity for representation and industry sustainability, thereby informing policy and platform design.

The collective body of research and existing indicators on cultural diversity in the music ecosystem reveals that diversity manifests across multiple interrelated dimensions, yet persistent structural challenges hinder equitable representation and access. Among **creators**, demographic disparities are well-documented, with women, ethnic minorities, and artists from marginalized regions frequently underrepresented. This **underrepresentation is compounded by intersectional factors and socioeconomic barriers**, which limit visibility and career advancement – issues also explored in Deliverable D3.2 on *Music, Society, and Citizenship in Europe*. Although some progress has been made in recognizing these disparities, most studies focus on Western contexts, indicating a need for broader geographic and cultural inclusivity in future research.

Musical works themselves exhibit increasing diversity in genres, styles, languages, and the integration of traditional and ethnic elements, driven partly by globalization and digital accessibility. However, this creative plurality coexists with **risks of homogenization and standardization due to platform-driven financial incentives and algorithmic prioritization of commercially viable content.** The underrepresentation of Global South musical forms in AI datasets and streaming catalogs further underscores challenges in preserving cultural specificity and authenticity within global digital environments.

Digital platforms and streaming services play a pivotal role in **music circulation**, expanding access and enabling cross-cultural exchange. Yet, these platforms also reproduce and amplify existing social inequalities through algorithmic biases favoring popular and economically dominant artists, often marginalizing local scenes, women, and minority groups. The dominance of algorithms in shaping cultural consumption highlights the dual potential of technology to both democratize and constrain diversity. Mitigation strategies, such as prototype-based recommendation models and re-ranking algorithms, demonstrate promise in reducing biases and enhancing fairness without compromising user satisfaction, though their adoption and impact remain uneven.

Broader industry implications emphasize the complex interplay between technological innovation, economic concentration, and cultural justice. The sustainability of a diverse music ecosystem depends on participatory and transparent algorithmic designs, equitable governance frameworks, and policies sensitive to local cultural contexts. Representation and visibility of women and other marginalized groups require targeted interventions, including inclusive programming and recognition of intersectional identities. Urban and global perspectives reveal that **cultural diversity arises not only from demographic heterogeneity but also from opportunities for cultural interaction, which digital platforms must better facilitate**.

In summary, while technology and globalization have expanded the horizons of musical diversity, entrenched socio-cultural and economic structures continue to shape whose voices are heard and how cultural goods circulate. Addressing these challenges calls for multidisciplinary approaches that

integrate technological, social, educational, and policy dimensions to foster a more inclusive, vibrant, and equitable music ecosystem.

A future research priority should include **examining diversity under conditions of crisis and geopolitical instability**. Ukraine, as a candidate country affected by war, presents a paradigmatic case for understanding how **diversity in the music ecosystem is shaped by workforce disruption, mobility constraints, and structural precarity**. Proactively exploring this case would align with the Council Resolution on the EU Work Plan for Culture 2023–2026 (2022/C 466/01, 2022) Priority D – "Culture for co-creative partnerships: strengthening the cultural dimension of EU external relations" (see OpenMusE D3.1, pg. 22-25). The ongoing war has altered the sector's gender composition — due in part to military conscription of male artists — and revealed systemic vulnerabilities such as the lack of care infrastructure, unequal access to social protections for freelancers, and disruptions to professional continuity. Including Ukraine in EU diversity and circulation monitoring frameworks would support the country's European integration while expanding the conceptual scope of EU policy to incorporate resilience, care, and security as structural components of music diversity. Although this topic exceeds the scope of the present deliverable, it signals a crucial direction for future inquiry.

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