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NOTE

From: General Secretariat of the Council
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To: Delegations

Subject: Discoverability of diverse European cultural content in the digital environment. Study presentation.
- Presentation by the Commission and by Panteia at the Cultural Affairs Committee meeting on 24 June 2026

Following the meeting of the Cultural Affairs Committee on 27 March 2026, delegations will find in Annex the presentation made by the research organisation Panteia.

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Discoverability of diverse European cultural content in the digital environment

Study presentation

*Cultural Affairs Committee –
24/06/2026*

Martin Clarke - Panteia



Background to the study

- Commissioned by the European Commission under the **EU Work Plan for Culture 2023–2026**
- Study ran from **April 2024 – April 2026**
- Carried out by a **consortium of six organisations** – with support from a scientific advisory board and a stakeholder community.
- **Methods:** Desk research, in-depth stakeholder consultation (interviews, focus groups, workshops), consumer survey, policy analysis, quantitative data analysis, recommendation development
- **Scope:** Covered five different cultural sectors, with a major focus on music and books.



Objectives

- Better understand **needs and specificities** of each cultural and creative sector explored, as regards **discoverability of diverse cultural content online**, including enablers and obstacles.
- Gather information on **existing relevant policies at all levels** and in all EU Member States, i.e., including regulatory measures, support measures and public and private initiatives, to foster discoverability online
- Identify **curation patterns and trends in algorithm recommendations** as regards exposure to cultural content.



Objectives

- Evaluate the impact of these practices on **cultural and linguistic diversity**.
- Investigate the **state of play in algorithm design** for discoverability and diversity of cultural content.
- Discuss **possible policy options** and provide **evidence-based recommendations** to increase the exposure to diverse European cultural content online.



What is discoverability?

The ability of content to be **available** online to **stand out** amongst a vast array of other content and to **be suggested or recommended** to a person who was **not specifically looking for it**

(Ministère de la Culture et des Communications du Québec, and Ministère de la Culture de France, 2020.



the likelihood that an item will be interacted with



Digitalisation, platformisation, and diversity

Digitalisation and global platforms have transformed **cultural and linguistic diversity** in Europe.

Greater content availability does not automatically lead to **diverse consumption**. What matters now is **discoverability**: whether audiences are exposed to, notice, and engage with diverse cultural expressions.

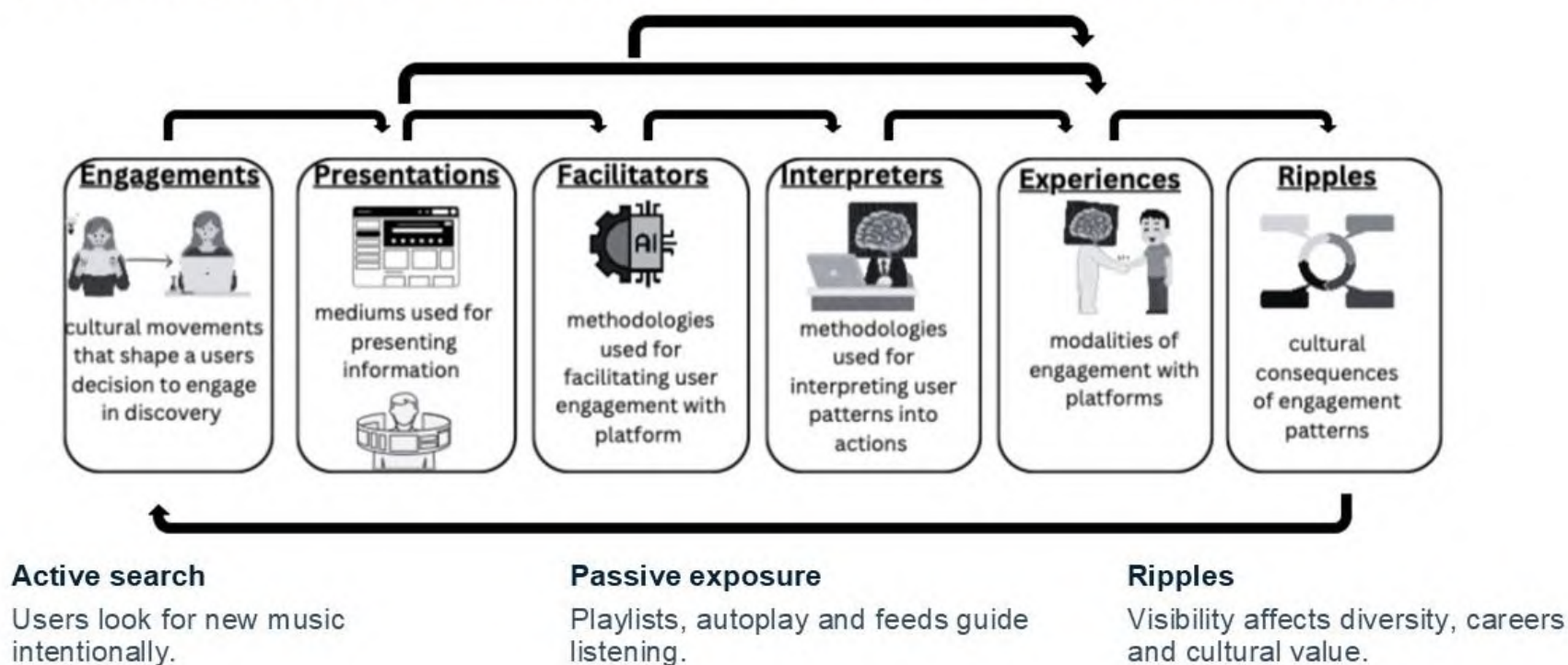
Platformisation has blurred sectoral boundaries. Performers, creators, cultural organisations and museums now produce cross-media content, while global tech platforms increasingly act as gatekeepers.

In this attention economy, **recommendation systems and curation practices strongly shape visibility**, amplifying some works while leaving others unseen.



How online discovery actually happens

A six-part ecosystem links user motivations, platform design, recommender systems and cultural outcomes.



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From cultural diversity to discoverability

Cultural diversity as an **important component of European identity**

The **respect of the EU's cultural and linguistic diversity** is an objective of the Treaty on European Union, and the EU is bound by the Treaty to take the **cultural dimension** into account in its core policies

The EU is party to the **2005 UNESCO Convention** on the Protection and Promotion of the Diversity of Cultural Expressions

Discoverability as one of the main themes in current efforts to adapt the Convention to digital environment



Cross cutting discoverability challenges

- **Language silos and translation gaps** → impacts minority and smaller-language **works**.
- **Generational and behavioural divides** → younger users led by social media and trends
- Content is everywhere, but **attention and visibility** are increasingly scarce.
- **Personalisation, algorithmic bias, and weak metadata** often reinforce what is already popular,
- **Limited transparency and data access** → creators, cultural operators, and researchers in the dark about how visibility is generated



Cross cutting discoverability challenges

- **Unequal promotion and curation power** → favours large players, smaller and independent actors struggle to be seen.
- **Capacity gaps** persist across the sector → lack of digital skills, marketing expertise, or resources.
- **Low user awareness and digital literacy** combined with reliance on default recommendations
- The rise of **generative AI** → harder for human-created European works to stand out.



Music sector: streaming as the main gateway

- The European music sector has been reshaped by **streaming services**.
- Streaming platforms now dominate revenues and are the **main route through which audiences discover music**.
- They have lowered barriers for independent artists, but also created **extreme overcrowding**.
- In 2023, around **184 million tracks were available**, with nearly 80 million streamed fewer than ten times.
- **AI-generated music** adds further pressure, already accounting for close to almost half of uploads, with the majority of listeners failing to identify these as AI generated.



Streaming is the main gateway to music discovery

Discovery is shaped by music streaming services, social recommendations and live contexts.

89%

say music streaming services are important or very important for discovery

85%

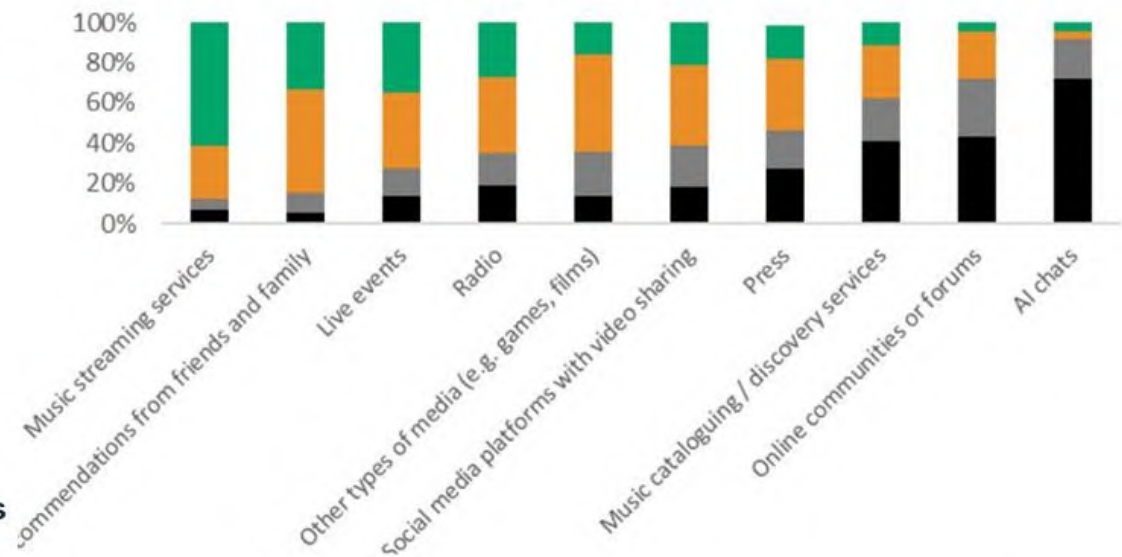
say recommendations from friends and family matter

73%

say live events and concerts are important discovery routes

Implication: platform design and playlists influence not just consumption, but the visibility of European cultural diversity.

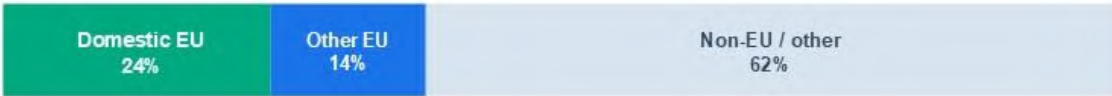
"How important would you say are the following sources for your discovery of music?"



European music is visible nationally - less so across borders

The study finds strong domestic momentum but limited non-national EU circulation.

Share of songs in top streaming charts



38%
of chart songs are European overall

14%
are non-national EU works

62%
of users feel algorithms help discover new music



Music sector: Key challenges and opportunities

CHALLENGES

- 1 Hyper-abundance of releases, intensified by AI-generated uploads and streaming fraud
- 2 Playlist and algorithmic gatekeeping that reinforces popularity bias
- 3 Passive listening that narrows active exploration and repeats the familiar
- 4 Incomplete metadata and weak provenance, attribution and rights data
- 5 Market concentration, capacity gaps and fairness concerns for smaller actors



OPPORTUNITIES

- 1 Interfaces that make exploration and serendipitous discovery easier
- 2 Hybrid editorial + algorithmic curation to surface emerging artists
- 3 Social, gaming and live digital pathways that can create new exposure
- 4 Creator-facing transparency tools for algorithms, metadata and audiences
- 5 Decentralised and community-led models that strengthen human curation



Books: discovery remains hybrid and language-bound

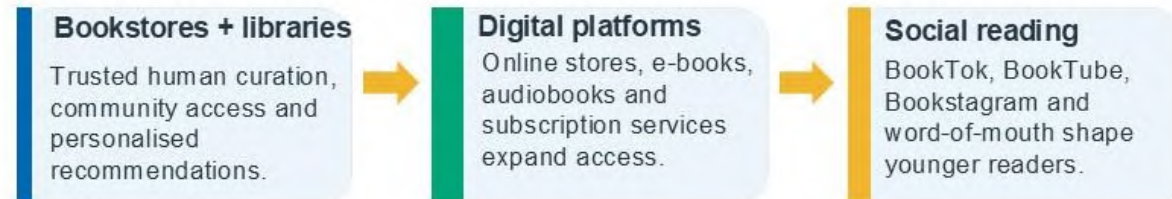
Book discovery combines trusted offline routes with platform, social and algorithmic pathways.

75%
of sales still happen in
physical bookstores

70%
very likely to read home-
country authors

<10%
EU titles on examined
global-facing popular
lists

Main discovery pathways



The book sector differs from music

Discovery is still strongly shaped by language, translation, physical places and local literary ecosystems — not only platform algorithms.

Implication: improving online discoverability means connecting digital tools with trusted offline curation and multilingual access.



European books: local strength, weak cross-border reach

National visibility is stronger than non-national EU circulation, especially when language and platform scale intervene.

What the study suggests

Domestic / national markets



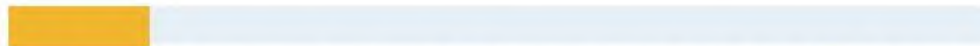
National EU titles achieve stronger visibility on local platforms and national storefronts.

Non-national EU circulation



Cross-border European titles are often a smaller share of what readers encounter.

Global-facing platforms



Non-EU titles frequently dominate; EU titles are often less than 10% of most-popular lists.

Core bottleneck: translation gaps, language silos, metadata quality and platform fragmentation.



Book sector: key challenges and opportunities

CHALLENGES

- 1 Translation gaps and high costs restrict cross-border circulation
- 2 Metadata and cataloguing inconsistencies reduce online visibility
- 3 Platform fragmentation creates search, access and interoperability silos
- 4 Global platforms and English-language dominance narrow exposure
- 5 Need for authors to build their own visibility and AI-generated books add further pressure



OPPORTUNITIES

- 1 Invest in human translation and localisation across EU languages
- 2 Expand multilingual e-books and audiobooks to widen access
- 3 Use digital libraries and inclusive collections to spotlight overlooked voices
- 4 Deploy AI-powered search carefully in public-interest discovery contexts
- 5 Strengthen community curation through libraries, bookstores and reading networks



Other cultural sectors: discovery is digital + analogue

Cultural heritage, visual arts and performing arts have distinct pathways, but common visibility pressures.

Cultural heritage

Discovery is strongly linked to digitisation, search engines, Europeana-type platforms and in-person visits.

Main barrier: many collections remain undigitised and metadata quality varies.

Visual arts

Galleries, fairs and exhibitions remain central, but social media, online auctions and algorithmic curation increasingly shape attention.

Main barrier: high digitisation costs and platform dependence.

Performing arts

Discovery remains rooted in live, local and place-based experiences, while ticketing, livestreaming and digital marketing extend reach.

Main barrier: limited resources and low awareness of digital offers.

Across these sectors, online visibility complements rather than replaces physical access, local presence and word-of-mouth.



Recommendations ecosystem



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Recommendations I: governance and evidence

Make discoverability a shared policy objective and build the data base to monitor it.

Foster collaboration + governance

- 1 Convene an EU multi-stakeholder forum on discoverability
- 2 Integrate discoverability into EU cultural policy and the post-2026 Work Plan
- 3 Add digital discoverability goals to national cultural strategies
- 4 Promote cross-sector partnerships and public-private agreements

Enhance data + knowledge

- 5 Strengthen monitoring and EU-level cultural data collection
- 6 Develop operational definitions of “European works” across sectors
- 7 Run regular consumer surveys on cultural discovery and consumption
- 8 Strengthen and harmonise metadata and interoperability practices

Core message: align actors, define what to measure, and make visibility observable.

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Recommendations II: capacity and audiences

Equip creators, organisations and audiences to shape discovery rather than rely on defaults.

Build digital capacity + tools

- 9 Launch training on metadata, SEO, analytics, audience development and recommenders
- 10 Create mentorship, peer-learning networks and practical sectoral guides

Audience-focused measures

- 11 Boost digital and media literacy for active content discovery
- 12 Run awareness campaigns on Europe's diverse cultural content
- 13 Engage young audiences as cultural diversity ambassadors
- 14 Bridge language gaps and include minority communities
- 15 Improve digital inclusion for older audiences

Core message: discoverability also depends on skills, awareness and inclusive access.

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Recommendations III: innovation, supply and visibility

Turn research, funding, curation and transparency into more diverse exposure online.

Accelerate research + innovation

- 16 Fund discovery tools, cross-border recommendation innovation and sandboxes
- 17 Support adaptive policy review and research on emerging technologies
- 18 Invest in tools for metadata quality, transparency and diversity audits

Bolster European content supply

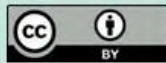
- 19 Increase funding for translation and localisation of European works
- 20 Strengthen cultural curation and explore prominence mechanisms
- 21 Encourage transparency in recommendation algorithms
- 22 Ensure accountability and authenticity as synthetic content grows

Core message: make diverse European works available, understandable and prominently discoverable.

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Thank you



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