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From Metaphor to Measurement of Popular Music Ecosystems: Putting Diversities at the Heart of Resilience

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INTRODUCTION

The COVID-19 pandemic and subsequent measures have had a huge impact on the Dutch popular music sector, leading to the closure of venues, cancellation of festivals, and loss of income and jobs. For example, in the first year of the pandemic, the attendance rate of pop venues and festivals dropped by 87%, with 7.3 million fewer visits, resulting in a loss

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of 92 million euros for the pop venues (VNPF, 2021), music professionals lost 80% of their income (Sena/Buma Stemra, 2020), and the largest concert organiser Mojo dismissed one-third of its employees (Van Eenennaam, 2020).

The cultural and creative ecosystem has arguably been impacted more strongly than some other economic sectors for two reasons. First, the labour force consists of a proportionally large percentage of freelancers who had limited access to alleviating measures and other types of credit (Been et al., 2023). Though support measures were in place, many of them either took a generalist approach, and therefore did little justice to the particularities of employment in the creative industries, such as the ‘temporary bridging measure for self-employed professionals’ (TOZO) and the ‘temporary emergency bridging measure’ (NOW), or they focused on the larger organisations with the (idle) hope that this support would trickle down to self-employed workers (Boekman, 2021a).

Second, the popular music ecosystem includes subsectors that were not able to resume their activities in a financially viable way until the very end of the crisis. Hence, whereas recorded music seems to be at an all-time economic high (Mulligan, 2021), the live sector has experienced an unprecedented crisis, including loss of income, personnel, and audiences, causing it to go into survival mode for almost two years (Mulder, 2022a). The precarious situation of young freelance musicians and music sector professionals became even more precarious (Howard et al., 2021), whereas large corporations and government-funded institutions have been better able to withstand the impact of the pandemic (Vinken et al., 2021).

After the release of all corona measures at the end of February 2022, clubs and festivals were able to open again as usual. The summer of 2022 was expected to bring an explosion of creativity and a renewed appreciation for collective effervescence resulting from live music and festival visits (Vandenberg et al., 2021). The reality, however, turned out to be rather different: the world had changed. Inflation is at a peak. Music organisations struggle to find qualified (technical) personnel (Pisart, 2022). Tours are cancelled last minute due to financial (Groves, 2022) and health

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reasons (Barton, 2022). Visitors only buy tickets just before a performance, which means that many organisers are insecure and are forced to play it safe, for example, in terms of programming (Mulder, 2022b).

Despite the hardship following the external shock of the COVID-19 pandemic, representatives of the cultural and creative industries—including popular music—have concluded that a post-COVID-19 return to the default factory settings is undesirable. Instead, the crisis created an opportunity to start a conversation about the future (Boeckman, 2021b). In the context of this reorientation, sector representatives repeatedly suggest (1) to conceptualise the sector as an ecosystem and (2) strengthen the resilience of the sector—yet, often using both terms loosely in metaphorical ways without a clear conceptualisation. For example, the Council for Culture discusses the Dutch music ecosystem as the ‘actors that together make up the music sector in the Netherlands’ (2019). A year later, it addressed the question of what transitions are needed to make the cultural sector more resilient in a post-COVID-19 era in a letter to the Minister of Education, Culture, and Science (Raad voor Cultuur, 2020). Without further definition, the Council for Culture concludes that the cultural sector lacks resilience (*weerbaarheid*). Similarly, the Dutch copyright collecting society states its intentions are ‘to contribute to a healthy music ecosystem and make sure its members are satisfied’ (Buma-Stemra, 2020). Besides mentioning the importance of stakeholder cooperation, little is said of what a healthy ecosystem actually entails.

Yet, despite this dearth of explicit efforts to conceptualise the creative industries’ ecosystems and resilience, existing resilience research on natural ecosystems has provided a validated framework of seven resilience principles that have thus far not been adopted for the cultural and creative sectors (Biggs et al., 2012). While there is growing work on resilience (especially due to the pandemic) within the creative and cultural industries (see: Andres & Round, 2015; Pisotska, & Giustiniano, 2021; Pratt, 2017; Robinson, 2010; Virani & Blackwood, 2021; Virani, 2021), there exists a dearth of work when it comes to specific subsectors like music bars a few examples (see Virani, 2016). As such, we aim to translate this conceptualisation of resilience and ecosystems to the music ecosystem by building upon expert interview sessions and in-depth interviews with music professionals. As a result, in this chapter, we offer a more systematic lens to examine the popular music ecosystem in terms of its resilience. We will focus particularly on one of these seven resilience principles: the role of diversity in maintaining a resilient ecosystem. As we will show,

diversity is a broad concept, ranging from a diversity of business models that foster competitiveness, to inclusion of minoritised groups, languages and genres, increasing access and fairness, and perceive diversity as crucial in fostering resilience, as it provides the basis for innovation, learning, and adaptation. In other words, this chapter aims to make two contributions: (1) how does this model—principles—translate to the popular music ecosystem and (2) and the role of diversities in building resilience.

ECOSYSTEMS, RESILIENCE AND DIVERSITY

Ecosystems: From Egocentric to Ecocentric Thinking

The success and failure of musicians are often attributed to the individual, be it talent, hard work, or by the individual having the ‘right’ network. Despite the romantic myth of the creative and autonomous artist remaining very much present in the music sector (Haynes & Marshall, 2018), existing research has shown that such an egocentric approach ignores the broader societal structures that shape individual success—or lack thereof (Eikhof & Warhurst, 2013). In response, recently, the terminology of (eco)systems has permeated research on the music industries. Yet, though scholars and policymakers have started looking at the music industry as an ecosystem (e.g. Behr et al., 2016), they provide little clarity of what this perspective entails. Therefore, we draw upon the unique perspective and expertise of Social Ecological Systems (SES) theory to further develop ecosystem thinking for the popular music system.

SES theory defines ecosystems by three main characteristics (Redman et al., 2004). First, ecosystems are more or less coherent systems with regular interactions between social actors in the form of network connectivity occurring at different scales. It therefore includes the—often unequal—interactions between key actors, including artists and creators, live music, recorded music and distribution (including DSPs), rights and publishing, supporting and ancillary, media, education and training, policy, and audiences (Dialogic, 2020). Moreover, ecosystems operate at multiple, interrelated scales, ranging from the global, national, to the local level. For example, music festivals take place locally, likely attract audiences nationally and artists internationally, implying a strong interdependence of the festival on international artists’ touring schedules, national event calendars, and regional transportation services.

Second, ecosystems are perpetually dynamic, complex systems with continuous adaptation—they are Complex Adaptive Systems (CAS). Because no ecosystem is closed, analysis of ecosystems highlights flows across system boundaries and looks at how system boundaries can change (De Bernard et al., 2022). This allows examining whether the ecosystem is shaped by—and shapes—external structural forces. For example, our previous work on the Dutch popular music ecosystem has shown that key actors identify three main changes—often resulting from broader social and technological innovations: a predicted shift towards (1) an economically, socially, and environmentally fair, inclusive, and sustainable sector, (2) an ecosystem that is more strongly based in the digital domain, and (3) an increased valuation of the sector as important for society (Kimenai et al., 2022). These changes show how the popular music ecosystem adapts to broader societal changes as several of these predicted changes have been translated into policy, such as the Fair Practice Code (Van Anandel & Loots, 2022) and the Code Cultural Diversity (Berkers et al., 2018).

Third, ecosystems produce flows of value within the ecosystem and to society at large. This approach moves beyond economic perspectives (Van der Hoeven et al., 2022), emphasising primarily pecuniary payments, and also includes values beyond market exchange, including diversity, equity and inclusion (DEI), and well-being. A resilient ecosystem has the capacity to maintain the core production of these values during and after shocks by anticipating and/or adapting its structure, functions, and organisations. For example, by decreasing precarity and exclusion, more music professionals will be able to make a living wage (economic value), and the mental health of these workers will increase, creating well-being for these people and their surroundings (societal value).

Resilience: From Metaphor to Measurement of Popular Music Ecosystems

Resilience theory is a useful tool for understanding how ecosystems respond to and arm themselves against crises and shocks. Indeed, resilience is crucial for a thriving, future-proof, and sustainable music ecosystem. Resilience refers to the capacity of the system to sustain a desired set of ecosystem services (ES). In ecological systems, ES refer to ‘provisioning (e.g., freshwater, crops, meat), regulating (e.g., flood

and climate regulation), and cultural services (e.g., recreation, spiritual values)’ (Biggs et al., 2012, p. 423). In music ecosystems, ES include resources (e.g. talent, funding, income, cultural capital), regulation (e.g. support schemes, cultural policy, copyright laws), and culture (e.g. economic, social, artistic values, identity formation). Hence, this conceptualisation of resilience steers away from a neoliberal approach where resilience narrows down to being business-oriented or seen as an essential—often romanticised—trait of an individual to thrive and survive in a highly competitive sector (Newsinger & Serafini, 2021). A resilient ecosystem system, which can buffer a great deal of change or disturbance, is synonymous with ecological, economic, and social sustainability. One with low resilience has limited sustainability and may not survive for the long haul (Berkes et al., 2008).

Essential in building resilience is that ‘any consideration of policies for enhancing resilience requires a clear specification of “resilience of what to what”’ (Biggs et al., 2012, p. 423): e.g. strengthening the resilience of grass roots music venues to the pressure of urban development, or increasing the capacity of record labels to deal with the ongoing changes of Web3. Such power inequalities are often linked to the level where the focus of resilience building is located. At the level of the ecosystem, resilience is seen as a key aspect of complex adaptive systems (Folke et al., 2010), as we have discussed above. At the level of the organisation, it frequently refers to economic issues, for example, financial capacity. At the level of the individual, resilience is often defined in terms of mental health and psychology and its associated research fields. However, whereas the discursive focus has been increasingly oriented towards the level of the system, we signal a pragmatic slippage where the burden of successful adaptation to change is placed onto individual—often freelance—workers (cf. Newsinger & Serafini, 2021). Indeed, a recent policy report concludes that government support for cultural organisations in times of Corona did not trickle down—as was intended—to freelancers. Cultural organisations in the Netherlands had to cut back on freelance labour by 55%, compared to a 3% reduction among employed staff during the last nine months of 2020 (Boekman, 2021a).

In order to further explore building resilient ecosystems, we draw on the seven principles for building resilience-framework, developed by researchers of the Stockholm Resilience Centre (Biggs et al., 2012), and adapt it to fit popular music ecosystems. The seven resilience principles consist of two clusters. We will focus on principles 1–3, which refer to

the ecosystem properties that need to be managed. Principles 4–7 are attributes of the governance system of popular music ecosystems, and will be covered in less detail.

1. *Diversity*. There is wide consensus from a variety of disciplines that diversity and its counterpart redundancy are important for resilience because they provide options for responding to change and disturbance. The diversity of system elements, such as multiple business models or musicians with different backgrounds, fosters innovation, learning, and adaptation to slow variables (see below). In terms of resilience to disturbances, response diversity and functional redundancy are particularly important. Functional redundancy, or the presence of multiple components that can perform the same function, can provide ‘insurance’ within a system by allowing some components to compensate for the loss or failure of others. For example, only focusing on live music as a business model proved a rather unresilient strategy when the corona crisis took hold (Dowd et al., 2022). Response diversity refers to the variety of ways in which different actors in the music industry can respond to disturbance, such as a pandemic or digital disruption. We will discuss diversity in more detail in the next section.
2. *Connectivity* refers to the way *by which* (structure) and the way *to which* (strength) the ecosystem components are interconnected. The way these interconnections are distributed determines the structure of the system: some actors or geographical regions of the music sector are better connected than others. High levels of connectivity can facilitate recovery after a disturbance, for example, the swift production and distribution of best practices for music venues and festivals to deal with the pandemic via the European network Live DMA. But highly connected systems can also spread disturbances faster, as became clearly visible during the COVID-19 pandemic, for example, in relation to touring and the immediate scapegoating of festivals as sites of contamination (i.e. ‘superspreader events’ where people crossed regions or even countries to attend festivals and ‘took’ the virus home to their respective places of residence).
3. *Slow variables* determine the underlying structure of the ecosystem, whereas the dynamics of the system typically arise from interactions and feedback between fast variables that respond to the conditions created by the slow variables. In our earlier work (Kimenai et al.,

2022), we report on some of the main slow variables the Dutch popular ecosystem has been confronted with. First, low earnings have been a structural characteristic of the (Dutch) music ecosystem. Research has again and again shown that a large proportion of professional musicians have a low income, making it difficult to sustain themselves (Von der Fuhr, 2015; Dialogic, 2020). A recent report concludes that the actual income mid-level pop musicians receive from performing live is one-third of the legal minimum wage and one-fourth of a fair pay reward (Berenschot, 2023). Hence, despite a strong push towards fair practice codes, low incomes are often still the norm rather than the exception. Second, digitalisation has had profound effects on the way music is produced, consumed, and monetised. The advent of DSPs—and the associated drop in physical sales of CDs especially—led to a decrease in earnings from the sales of recorded music. Streaming royalties—though increasingly important—have not yet been able to counter this trend (Hesmondhalgh et al., 2021). At the same time, digitalisation made it easier for amateur musicians to enter the market, both in creative as well as more commercial roles (Baym & Burnett, 2009), encapsulating new groups and organisations in the music ecosystem. Finally, digitalisation simplified the (global) promotion of music and events, solidifying connections between nodes on different (global, national, and local) levels. The remaining four principles concern the governance of ecosystems.

4. *Complex adaptive system* refers to the type and direction of connections between parts of the ecosystem. To govern ecosystems towards being more resilient, it is crucial to understand them as complex adaptive systems (see above), instead of as economic value chains flowing linearly from A to B. Hence, a one-size-fits-all approach does not work. For example, digitalisation has diversified the earning models of musicians and organisations within the sector, and permitted a larger variety of career trajectories (see e.g. Everts et al., 2022).
5. *Learning and experimentation* refers to the process of modifying existing or acquiring new knowledge, behaviours, skills, values, or preferences, which is crucial to deal with change. Biggs et al. (2012) distinguish between three types of learning. Single-loop learning refers to a change in actions to correct mistakes in policies, norms, or practices, for example, public broadcasters that start remunerating

musicians to perform in TV and radio shows (Kunstenbond, 2021). Double-loop learning refers to a change in these policies, norms, or practices themselves, for example, showcase festival Eurosonic Noorderslag signing up for the Keychange Pledge committing to a 50–50 gender balance in their line-up. Triple-loop learning entails an overall change in the organisational rationale and context, basically questioning the foundation of an organisation or sector. Following the COVID-19 pandemic, we saw many initiatives for triple-loop learning focusing on the future of the popular music sector, taking the form of open discussions (Boekman, 2021b) or reports with clear recommendations based on specific timeframe (VNPF, 2022).

6. *Broaden participation* refers to the participation of a diversity of stakeholders in SES management. Such broad participation is thought to improve legitimacy, facilitate monitoring and enforcement, promote understanding of system dynamics, and improve a management system's capacity to detect and interpret shocks and disturbances. For example, to develop a new fee guideline for popular music performances, labour market platform PACCT set up a Ketentafel Popmuziek [value chain table on popular music] that included twelve representatives from various parts of the popular music sector (Platform ACCT, 2022).
7. *Polycentric governance systems* finally refer to streamlining different policy levels both vertically (European, national, regional, and local) and horizontally (with policies regarding urban development, well-being, leisure, etc.). For example, the so-called Rotterdam Model for live music is a policy-supported complex and interconnected polycentric system of urban music programming which emerged bottom up, relying not so much on the physical infrastructure, but much more on the network of trust between the people who are part of the city's live music ecology (Hitters & Mulder, 2020).

Diversities: From Describing Diversity to Creating Diversities

Diversity has long been linked to resilience in complex systems (Elmqvist et al., 2003). Both functional—the variety of things that are done—and response diversity—the variety of responses things have to stress—have been shown to affect the resilience of ecosystems. In music research,

diversities are often studied separately, drawing on different academic disciplines: economics and organisation studies often focus on organisational diversities (*practices*) (e.g. Gamble et al., 2017; Towse, 2020), whereas the humanities and sociology have put more emphasis on social and cultural diversity (*people*) (Schaap & Berkers, 2020; Swartjes & Berkers, 2022).

Organisational diversities refers to how the music ecosystem is organised (practices): the separate actors and organisations participating, and their differences in terms of their capabilities, objectives, and routines. Currently, music ecosystems' organisational diversity is challenged by their hourglass-like structure, where a small number of platforms are essential to connect producers and audiences. Platforms make cheap and high-quality transaction services available and enable complex information exchanges between various stakeholders, fostering broad and diverse participation and mutual learning in the music sector. Yet, they also exploit economies of scale and network effects by bundling transactions and setting standard terms. Many of the connections between nodes in the ecosystems are dependent on only a few organisations. Important are of course the well-known global streaming platforms, but also within the organisation of live music, power has concentrated within the hands of a small number of ticketing services. In the Netherlands, for example, ticketing mogul Live Nation has put ticket resale platform Ticketswap out of action (De Vrieze, 2022). Now having a monopoly over ticket resales for large festivals, fees for individual buyers and sellers have soared, decreasing the accessibility of events to those who demand higher flexibility or have less to spend. Moreover, the increasing importance of algorithms on the platforms affects the diversity of content that reaches audiences throughout the world (Ferraro, Serra & Bauer, 2021). 'The question is if streaming creates opportunities for diversity, or if it could favour certain artists or genres to the detriment of others'—the European Commission asks (2021). Platforms therefore exert a strong influence on the diversity and resilience of the music ecosystem, both in affecting the music audiences are exposed to, as well as in affecting the capacities for music creators.

Social and cultural diversities refer to the individuals working in the music ecosystem (people): the types of people participating, regarding for instance the access to, representation of, and influence exerted by minoritised and marginalised groups in society, including women. Social and cultural diversities are associated with cultural participation and equity,

and can be treated as an end in itself. The contemporary music ecosystem is one of the largest employers for the younger generations (European Commission, 2021). Yet, working in music requires investing in a 'portfolio' career, where the music-oriented roles of creator, producer, entrepreneur, and promoter are often combined with varied employment arrangements (through paid and unpaid, part-time, or freelance work) and activities in other industries outside of music. Moreover, exclusionary mechanisms such as working conditions demanding flexibility, long hours, and geographical mobility, as well as a reliance on personal networks and recommendations to get the job done are omnipresent. The external shock of the COVID-19 pandemic has aggravated the vulnerability of workers in the music industry. As such, access to paid music work is not distributed equally across the Dutch music ecosystem. (1) It is well documented that access to work is unevenly distributed among social groups (e.g. gender, class, and ethnicity). (2) Cultural dimensions such as national, linguistic, and genre variations also determine what types of music and artists are able to negotiate access to work opportunities. (3) Local, national, and cross-border music infrastructures (e.g. government-funded support for education, training and vitality of DIY activity, and night-time economies) further impact these diversities. Here too, emerging evidence shows that the pandemic has further increased the divergences between the haves and have-nots.

Yet, in order to fully understand these diversities in relation to resilience, we urgently need an integrated approach for three reasons. First, the pandemic has exacerbated already existing precarious working conditions, vulnerable earning models, and economic inequalities in music ecosystems, particularly for individual makers and small businesses (Comunian & England, 2020; Kimenai et al., 2022). In the light of societal pressure towards fair practices, new ways of managing organisational diversities (e.g. new business models) are needed to make the Dutch music ecosystem more competitive (Van Andel & Loots, 2022). Second, existing social inequalities in terms of access and inclusion of minoritised groups, women, LGBTQ+ people, and people with disabilities have increased as a result of the pandemic and subsequent measures (Eikhof, 2020). More inclusion and equity, as well as new ways of managing social and cultural diversities (e.g. inclusive hiring policies) are needed to make the Dutch music ecosystem fairer. Digitalisation has accelerated during the pandemic as evidenced by live concerts on Twitch and a surge of streaming numbers, affecting both diversities of practice and

people. For example, ‘streaming creates opportunities for diversity, but it may also favour some artists, languages or genres over others’ (European Commission, 2021). Yet, whereas scholars have focused on describing and identifying the problems related to diversities, campaigners, and activists have sought change. A prominent example is Keychange which has started their Pledge for equal representation of women artists. As many of such interventions have not (yet) been systematically evaluated, we know very little of ‘what works’ (Wreyford et al., 2021).

CONCLUSION AND POLICY IMPLICATIONS

In this chapter, we have ‘translated’ existing work on ecosystems and resilience—developed primarily for the natural world—to the popular music ecosystem. Building on the work by Gross and Wilson (2019, p. 10), we primarily focused on the ecosystem approach as ‘a descriptive and analytical perspective’, a lens to look at the popular music sector. However, it can also be ‘an approach to cultural policy, programming and practice’. What we, however, often see is an urge to map a specific ecosystem. From a research point of view, this is understandable. Yet, several core characteristics of ecosystems (open boundaries and ever-changing) make such mapping exercises not only complicated but to a degree in violation of the definition of what an ecosystem is. Hence, developing resilient music policies requires a change perspective. Where traditional policymaking is often linear, paternalistic, and reductionistic, focused on a specific part of the music ecosystem (subsector, member state, social, *or* economic impact), ecological policymaking is based on the ecosystem as a whole: its underlying structures, interdependencies, values, external structures, and resilience (De Bernard et al., 2022). This approach aims to do justice to the recent call for cultural policymaking ‘from below’, which also recognises workers and their (collective) forms of organisation to reflect on a ‘new imaginary’ for the music sector beyond the pre-pandemic status-quo (De Peuter et al., 2022). Hence, true ecosystems thinking offers a promise of equitable and inclusive governance without top-down or neoliberal implications.

Secondly, we put diversities at the core of music policies as a key ingredient in fostering resilience. Increasing diversity (as well as inclusion and equity) is of course an imperative goal in itself, as evidenced by arguments of creative justice (Banks, 2017), and pursued by initiatives such as Keychange. Yet, beyond arguments of justice, both diversities

of people and diversities of practices are arguably crucial in a music ecosystem's ability to bounce back—or better—bounce forward. Diversity, organisational and sociocultural, is able to make music ecosystems on the individual and sectoral level more resilient, and maintaining these diversities could be the way forward to diminish the wicked problems that have characterised the sector for so long. Yet, in order to achieve these goals, we need better insights into how diversities in the context of ecosystems—particularly in the case of music—manifest, and how they affect organisations and their mutual connections. As a recent report by the European Commission (2021) clearly confirmed: we should proceed to better define ‘diversity for EU-level action on music’.

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