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Valuing value in urban live music ecologies: negotiating the impact of live music in the Netherlands

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ABSTRACT

This paper seeks to understand the role of valuing in urban live music ecologies. It explains how multiple actors (e.g. directors of music venues, musicians, policy-makers, and real estate experts) in Dutch live music ecologies negotiate the different values of live music. To examine this dynamic, we use insights from literature on innovation ecosystems from the field of business, as well as research on live music ecologies from popular music studies literature. Enhancing the conceptualisation of live music ecologies, we distinguish four dimensions of live music ecologies (live music as a material reality, a network of actors and organisations, a social institution, and a lived cultural practice) and four values (cultural, social, economic, and spatial). We use this perspective specifically to analyse the process of valuing on the levels of musicians, venues and festivals, and cities in the Netherlands. Drawing upon 45 in-depth interviews, we demonstrate how in live music ecologies the various understandings of value need to be aligned by venues and festivals, value slippage occurs for musicians, and values should be anchored in specific places and urban policies on the city level.

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Introduction

The Covid-19 crisis exposed the vulnerability of the networks sustaining live music events in a dramatic way. Besides music venues and festivals having to cease their activities, ancillary companies and self-employed workers within the live music sector suffered great financial losses. It demonstrated that the live music sector is a complex network consisting of a diverse set of mutually dependent actors (Behr *et al.* 2016b). The people and organisations involved range from musicians to touring crews, and from catering services at festivals to local regulators.

Recently, the concept of live music ecologies has been introduced to describe the connections between these diverse actors (Behr *et al.* 2016b). Our understanding of live music ecologies is informed by Adner's definition of ecosystems as the 'structure of the multilateral set of actors that need to interact in order for a focal value proposition to materialize' (Adner 2017, p. 41). This highlights that live music ecologies centre around a range of values that need to be aligned and ultimately materialise in the practices of the actors that organise live music events. The values of live music concern the diverse benefits and outcomes of this cultural form (Getz *et al.* 2017, Van der Hoeven and Hitters 2019) such as cultural, social, and economic impact. The process of

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attributing value to live music matters, because it affects how this cultural form is legitimised and how resources (e.g. subsidies and buildings) are allocated within live music ecologies (Lamont 2012, Getz *et al.* 2017). The ways in which live popular music is valued, and which values are prioritised over others, is contested and the outcome of a dynamic process of valuing. The diverse values reflect competing interests, as, for example, a venue director is interested in live music for different reasons than a city marketer.

This paper seeks to understand the role of valuing in urban live music ecologies. We use the concept of ‘valuing value’ (Oskam *et al.* 2021) as it explains how multiple actors find agreement on the values that should be created and how to satisfy their different interests. In this process, value slippage can occur if the benefits of values are shared unequally. This is the case when one actor invests a lot (e.g. artists), but the benefits are captured by others (e.g. music conglomerates) (Oskam *et al.* 2021). To understand these tensions, we examine the following research question: How do the networked relations between the different actors in Dutch urban live music ecologies affect processes of valuing value?¹ Here, we focus on the inter-related levels of musicians, the places where music is performed (i.e. venues and festivals), and cities in the Netherlands. We draw upon in-depth interviews with different actors (e.g. directors of music venues, musicians, policy-makers, and real estate experts). Our aim is not to map the entire live music ecology, but to understand the process of valuing value on these three important levels. In this process, we acknowledge the local impact of other higher-level developments, such as the concentrated nature of the global live music industry and external disruptions like the Covid-19 crisis.

An analysis of how values are attributed by the different actors in the ecology, and the tensions that arise due to the different positions these actors take in the process of valuing, enhances the understanding of how urban live music ecologies are shaped. To examine this process of valuing value, we draw on insights from literature on innovation ecosystems from the field of business, as well as research on live music ecologies from popular music studies literature. In doing so, we enhance the conceptualisation of live music ecologies. The empirical contribution lies in the fact that this research is grounded in data collected on different levels of the Dutch live music ecology, thus addressing the lack of studies in non-Anglo-Saxon settings that we observe. Extending the literature to other geographical settings is vital given the different ways in which live music ecologies are organised (Everts and Haynes 2021). Even though they are all part of a global (touring) circuit, music ecologies vary in their size, organisation of their localised infrastructure, and level of government support. As we will argue, in terms of funding and policy-making, Dutch live music ecologies are marked by strong interconnections between industry, in particular music venues and festivals, and government actors.

This paper consists of two parts. First, we conceptualise live music ecologies and the process of valuing. Here we distinguish four interrelated dimensions of live music ecologies (live music as a material reality, a network of actors and organisations, a social institution, and a living cultural practice) and four values (cultural, social, economic, and spatial). This enables an understanding of how the values of live music are created and captured by a range of actors. Secondly, we use this theoretical perspective to analyse the process of valuing value on the levels of musicians, the places where live music is performed, and cities in the Netherlands. We argue that in this process, the various understandings of value need to be aligned by venues and festivals, value slippage occurs for musicians, and values should be anchored in specific places and urban policies on the city level. In the final section, we present an overview of how the process of valuing value takes shape on the three levels in relation to our conceptualisation of live music ecologies.

Literature review

Defining live music ecologies

Among both researchers and policy-makers, the concept of ecologies has gained prominence to describe and analyse dynamics in the cultural and creative industries. Next to live music ecologies

(Elbourne 2013, Behr *et al.* 2016b), the concept has been used to study, for example, media ecologies (Baltruschat 2010) and news ecologies (Lowrey 2012). Arguably, the popularity of the ‘ecology’ concept can be explained by its holistic approach, focusing on connections between diverse actors in a specific network or sector (Van der Hoeven *et al.* 2020). However, the analogies to the natural world have been criticised as biological concepts are not necessarily transferable to the realm of human culture (Keogh and Collinson 2016). Nevertheless, Behr *et al.* (2016b, p. 20) find that an ecological approach to live music is useful to the extent that it draws ‘out the complexities of [the] highly variegated industrial and geographical relationships’ in the live music sector as well as its wider connections to policy-making and regulation. We agree that the ecology concept can enhance our understanding of the ways in which relationships between different people and organisations shape the cultural form of live music. However, a more extensive conceptualisation is necessary to strengthen its analytical relevance. Theoretically, we seek to contribute to the understanding of live music ecologies by (1) discussing four dimensions of live music ecologies, and (2) focusing on the role of ‘valuing value’ within live music ecologies.

Based on the extant literature, we argue that live music ecologies consist of the following dimensions: live music as a material reality, a network of actors and organisations, a social institution, and a lived cultural practice. These four elements are interconnected: in order for live music to happen, a network of different actors are involved, relying on a material setting. The live show is where the lived cultural practice takes place and live music ecologies develop as a social institution. Furthermore, this conceptualisation sheds light on the power asymmetries within live music ecologies and explains how a range of actors give meaning to this cultural form.

First, a key characteristic of live music is the material setting that affords it (Behr *et al.* 2016b). The most obvious physical aspects are the stage, equipment, and the buildings or site where concerts take place. The architecture of places for musical performances shapes the concert experience in terms of, for example, acoustics and level of intimacy (Behr *et al.* 2016b, Kronenburg 2019, p. 4, Van der Hoeven and Hitters 2020). Next to the spaces for musical performance, the wider physical infrastructure is important for concerts. In particular, Whiting and Carter (2016) find that the availability of public transport impacts the accessibility of live music.

Second, live music ecologies consist of a broad network of actors and organisations with specific tasks. These ecologies are constantly ‘in action,’ maintained and adapted. They include diverse actors, from within and outside the music sector (Behr *et al.* 2016b). Live music ecologies connect to other domains such as regulation, policy-making, and urban planning. Furthermore, the networked structure connects local actors to the national and global level (e.g. global conglomerates). For example, tours are the result of international companies such as Live Nation working together with local networks of venues and festivals. Within the network, power asymmetries exist (Mercado-Celis 2017), as bigger venues, festivals, and music companies have more leverage in negotiations, while famous artists and their representatives are relatively powerful compared to their early-career colleagues.

Third, live music ecologies are social institutions, structured around formal and implicit rules that have been developed over the years. In this process of institutionalisation, relatively stable patterns of action are formed. These are the conventions on the basis of which actors in the live music ecology can cooperate (Becker 1982). Such agreements include expectations about, for example, the length of concerts, stage design, and concert rituals (e.g. encores and mosh pits). Gatekeepers like music critics and bookers have a vital role in maintaining artistic conventions (Gallan 2012, Janssen and Verboord 2015) and establishing the value of cultural goods (Lamont 2012), while more formal rules are laid down in policies and regulations. An important implicit convention for many musicians is that concerts should be accessible to a broad public, with fans being charged a reasonable price (Behr and Cloonan 2020, Krueger 2019, p. 129). As a consequence of this commitment to their fans, some artists underprice their tickets.

Fourth, live music is a lived cultural practice. A distinctive characteristic of live music ecologies is that they revolve around a cultural form that is highly meaningful to participants. Live music events

are an aesthetic experience, by definition temporary and unique (Auslander 2008, Sedgman 2019). Individuals and organisations in the network that constitute live music ecologies are committed to its intrinsic value (Crossley and Bottero 2015). Live music thus becomes part of people's identities and forms the basis for scenes and fan communities (Van der Hoeven *et al.* 2020). The values that take shape in the context of this live culture actually affect live music ecologies as social institutions. For instance, the values define norms about what is 'good behaviour' and even a 'good live show.' Values are attached to genres and practices through labelling (e.g. 'commercial and mainstream' versus 'authentic and avant-garde').

The values of live music

Put succinctly, the values of live music represent the merits of this cultural form (Getz *et al.* 2017, Van der Hoeven and Hitters 2019). As these merits are not evident for all actors that have an impact on live music ecologies (e.g. regulators and funders), valuation matters to legitimise the relevance of live music to society (Lamont 2012). In the literature on the value of culture, a distinction is often made between intrinsic value, the idea that something is valuable in itself, and the instrumental uses associated with extrinsic value (e.g. economic impact or social relevance). However, this has been criticised as a false dichotomy, since it is difficult to operationalise what intrinsic value exactly is (Gibson 2008, Behr *et al.* 2016a) and because the boundaries between values are porous (Chrysagis 2020, p. 747). An empirical analysis of the actual values attributed by a range of actors offers a way out of this debate (Allington *et al.* 2015, Behr *et al.* 2016a, p. 408). Therefore, we will discuss four broad categories of values attributed to live music, including cultural, social, economic, and spatial values. Although the emphasis is on the positive values of live music, it should be acknowledged that these values might, inadvertently, also imply negative consequences such as nuisance for residents. This leads to discussions in cities about the right balance between a focus on the cultural and economic values of live music on the one hand and the interests of residents on the other (Hitters and Mulder, 2020, p. 47–48). For example, a fenced off commercial festival in a park generates economic value (e.g. ticket sales and urban branding), but it results in the temporary unavailability of a public space and might generate noise nuisance.

Cultural value concerns the artistic qualities of live music, the meanings expressed through the performance of an artist, creativity as reflected in a rich diversity of genres, and artistic experimentation (Behr *et al.* 2016b, Van der Hoeven and Hitters 2019). These meanings evoked by music at concerts are inherently connected to social values such as shared identities, because individuals express themselves and connect to communities through the performance and consumption of music. Furthermore, live performances contribute to the development of the cultural form of popular music. In urban settings specifically, the cultural value of live music includes talent development and the role of venues and festivals in enhancing the cultural vibrancy of a city (Van der Hoeven and Hitters 2019). Cultural value also concerns the effects of live music on participants in live music ecologies (e.g. musicians, organisers of concerts, and fans). Performing music and visiting concerts can make people happier, more self-confident, and empowered. This highlights the individual benefits of live music, such as mood-enhancement and well-being (Webster *et al.* 2018, p. 28–29), escapism (Kulczynski *et al.* 2016), and mental health (Packer and Ballantyne 2011). These effects of live music consist of non-economic, intangible values that nevertheless form a crucial part in the value creation process of live music (Radbourne *et al.* 2014).

The social value of live music can be understood as its contribution to the social relationships between people, a sense of belonging, and collective identity (Gallan 2012, Behr *et al.* 2020). In a study of the social values of live music attributed in urban environments, Van der Hoeven and Hitters (2019) found the three dimensions of social capital, public engagement, and identity. Social capital is about the ways in which live music offers a sense of belonging and allows people to connect to each other (Wilks 2011). Public engagement includes activities that go beyond music programming such as fundraising and citizen participation, in order to make a positive impact on cities

and their inhabitants. In terms of collective identity, live music ecologies play a vital role in the attachment to place and offering a sense of local pride.

The economic value of live music concerns its financial benefits and the relevance of live music in monetary terms (Angelini and Castellani 2017, Baker 2017). In other words, this is close to the economic understanding of value as the expression of ‘worth.’ Usually, economic value includes tourism, consumer spending, as well as value added and jobs generated by the live music industry. Some argue that economic values tend to overshadow other values in public debates (Brown *et al.* 2015). However, a risk of refusing to measure economic value is that its values might be underestimated. According to Mourato and Mazzanti (2002, p. 68):

Ignoring economic preferences can lead to undervaluing and under pricing of cultural assets. This, directly and indirectly, reduces the amount of financial resources available to cultural institutions relative to other public priorities.

Finally, spatial value describes the relationship between live music and the built environment (Van der Hoeven and Hitters 2020). This includes the ways in which the experience of urban spaces is shaped by concerts and the role of live music in the regeneration of place. In the latter case, urban planners seek to enhance the attractiveness of a place through concerts. Live music can act as a catalyst of positive change, demonstrating the potential of a particular area or building (Kronenburg 2020). In doing so, festivals and placemaking activities support urban development in neighbourhoods that are struggling with poverty and crime (Jakob 2013). Furthermore, events or iconic venues can generate economic value through tourism or rising land and housing value (Wynn 2015).

Valuing value in live music ecologies

The theories and perspectives discussed above present live music ecologies as a broad and dynamic network of actors, in which different values are attributed to live music. In this process of valuation, the various stakeholders (e.g. musicians, local governments, venue owners) attempt to align values as part of their participation in the ecology. Valuing is considered a social as well as a cultural process through which values are established in the context of an ecology. These values of live music are fluid and contested (Lamont 2012, Allington *et al.* 2015, Kompatsiaris and Chrysagis 2020). To describe this process of aligning divergent values and interests attached to them, we draw on the concept of ‘valuing value’ from the literature on sustainable business models. Adapting the definition from Oskam *et al.* (2021, p. 1061), it entails a ‘discovery process through which multiple actors search for agreement’ about what values to create through live music; how to share these values; and thereby how to satisfy each actor’s interests.

This process of valuing value is essential in developing policies and in political decision-making. Furthermore, it is vital for actors in live music ecologies to legitimise their activities and practices and to gain social and political support, specifically in the case of government subsidies from domains ranging from cultural policy to economic development. For example, venues need a sustainable business model (economic value), while supporting artists and artistic development (cultural value), complying with expectations from funders to strengthen social relationships in cities (social value), and contributing to urban development (spatial value). In countries where music venues rely on subsidies, live music does not only need to prove its values vis-à-vis other cultural forms, but also different sectors of society such as health care and sports. Particularly under conditions of austerity and populism, government support for culture is increasingly challenged (Behr *et al.* 2016a). Meanwhile, a neoliberal focus on accountability in cultural policy puts the emphasis on efficiency in public funding of the arts (Holden 2004). This coincides with the instrumentalisation of culture discussed in the previous section. Cultural organisations are expected to prove their contributions to, for example, urban development. Furthermore, it resulted in a growing emphasis on impact evaluation, even though many benefits of culture are hard to measure (Belfiore

and Bennett 2010, p. 126). This underscores once more that instead of reducing the values of live music to easy quantifiable impact measures, it is important to remain open to the diverse ways in which it is valued by different actors (Behr *et al.* 2016a).

In this process of valuing, value slippage can occur if ‘one actor invests little but captures a lot of value, while another actor invests much and captures little’ (Oskam *et al.* 2021, p. 1065). This is a tension between those who create value and those who capture it. In other words, the actors in the live music ecology that create value, are not necessarily the ones who reap most of the benefits of these activities. Therefore, we will explore how the power asymmetries in networked relations between different actors in Dutch live music ecologies affect processes of valuing value. As we will argue, this gives insight into how live ecologies are formed and develop.

Data and methods

This study has been conducted as part of the project ‘Staging Popular Music: Researching Sustainable Live Music Ecologies for Artists, Music Venues and Cities’ (POPLIVE). The project focuses on three specific levels of the live music ecology: musicians, the locations where concerts take place, and cities. It concerns a holistic approach to urban live music ecologies, analysing the relationships between different actors and their activities, both inside and outside the live music sector (Behr *et al.* 2016b, p. 19). Furthermore, it considers how the actors on different levels seek to align the diverging values of live music.

On the level of musicians, we explore their position in the live music ecology and the ways in which they create and capture value. In terms of the level of places where live music is performed, we examine the role of venues and festivals in the process of valuing value. On the urban level, we research the values of live music ecologies for cities.

This paper draws on the interview data from the project, collected in the period June 2018–January 2020. The interviews lasted around an hour to one hour and a half. All participants were selected using a purposive sampling strategy. On the level of musicians, 21 interviews were conducted with early-career musicians, focusing on their goals and motivations to take part in the music industry, their career strategies, and their understanding of and relationship with the live music industry. We selected early-career musicians, active in pop-rock genres and from different regions in the Netherlands. On the level of venues and festivals, 14 interviews were conducted with chief executives of pop music venues and festivals in eight different Dutch cities, focusing on their perceptions of the development of the live music industry, on a local (urban) level as well as on a national and international level, and the effectiveness of local networks, culture, and ecology for live music. Taking into account variation in both types of supply and size of the venue/festival, six pop venue directors, five music festival directors, and three directors of both a venue and a festival were interviewed. On the urban level, 10 interviews with real estate experts, event organisers and venue directors were conducted. We selected respondents with relevant expertise on the connections between live music and the built environment. In addition, questions about supporting healthy live music ecologies, in general, were included for all respondents. We conducted a thematic analysis to identify patterns related to the topics discussed above. As per the agreements with the ethics review board, all respondents remain anonymous.

Valuing value in Dutch urban live music ecologies

In this section, we will answer for each level the central research question: How do the networked relations between the different actors in Dutch live music ecologies affect processes of valuing value? On the basis of our analysis, we argue that in the process of valuing value:

- (1) The various understandings of value by different actors within the ecology need to be aligned on the level of venues and festivals;

- (2) Value slippage occurs on the level of musicians;
- (3) Values need to be anchored in specific places and urban policies on the city level.

Venues and festivals: aligning different concepts of value

Our analysis starts on the level of venues and festivals, where ‘the ecology is in action’ (Behr *et al.* 2016b, p.15) when gigs take place as a living cultural practice within the material context of a venue or festival. In this section, we focus on how venues and festivals, as central nodes in the network of actors and organisations in the live music ecology, align the different values of live music. The core of the business model of music venues and festivals is to bring artists and audiences together. Since the revenue model of the vast majority of the Dutch pop music venues and festivals is based on both public and private fundings, most respondents state that they are largely driven by the love for live music and by a missionary urge – not primarily by an entrepreneurial motive of making money. Live pop music executives have a strong sense of operating non-profit and consequently accept the fact that staging live music doesn’t regularly create significant economic value:

I started working in this business because I have a gut feeling for great music and good ears. I want to give people something to think about and I don’t just want to operate based on supply and demand. That’s why I started this festival, from a missionary urge. (festival director #6)²

In other words, venues and festivals stage artistic performances in order to create meaningful audience experiences, which are central to live music as a lived cultural practice. Our research demonstrates that, in doing so, venues and festivals are in an ongoing process of negotiation, contesting, and reconciliation of values with different stakeholders such as artists and their management, policy makers, funders, local communities, and visitors. Based on the outcomes of our empirical research, we discuss two key processes for value negotiation by live music venues and festivals: (1) with artists and their managers concerning value creation and capturing, and (2) with public – and in some cases also private – partners (e.g. local governments, performing arts funds, private funders) who demand financial accountability while at the same time commissioning these venues to optimise their cultural, spatial, and social value.

To start, we will analyse the value alignment between venues/festivals and the performing artists. The festival director’s quote above indicates that venues and festivals primarily operate from a cultural value perspective. In performing arts, this cultural value can to a large extent be labelled as symbolic value, which is of particular importance in markets where quality standards are contestable, and where the credibility of producers and intermediaries (venues, festivals, bookers) plays an important role in establishing this value (Lampel 2011). To better understand the idea of symbolic value, Moeran and Strandgaard Pedersen (2011, p. 30) distinguish two types of resources that the artistic performance contains: alienable and attached resources. In the case of alienable resources, ownership/control can be transferred to others; attached resources cannot be separated from the identity of those who hold them. By organising concerts, venues and festivals add value to both the alienable resources of the artist (recordings, copyrights) and the attached resources of the artist (reputation, stardom, brand equity). Consequently, value creation in live music is relative to the position of the concert venue or festival itself. The credibility of the venue within the ecology influences the value of the attached resources of the artist, and vice versa. Related to the dimensions of live music, we can conclude that besides the cultural practice of the performing artist, value is also created by the venue as a material reality (e.g. atmosphere of a building) and as a social institution (e.g. reputation). As a result, there is a complex, contradictory relationship between venues and artists in which the actors are inevitably mutually dependent but at the same time struggle over capturing the same value.

This relationship becomes even more complex when we take into account the different ways in which venues/festivals and artists value economic value. Even though the economic value of live

music is not the most important motivation for actors on the level of venues/festivals, it is a vital element in their work that needs to be aligned with the other values. In relation to the economic value of live music, three key issues have been raised by the respondents.

First, staging live music in itself is almost never profitable since box office revenues in most cases do not cover the costs of staging live music and the overall operation of the venue.

In all the things we do, the only scenario in which we make profit is by selling out our main stage. (...) We also book artists on other locations in the city and share the risk between us and the external location. This is never profitable but these are always fun nights. We do it for the liveliness of the city, to create an attractive music climate. (venue director #3)

Second, stages have to cope with a complex power relation with the artists and their management. Since the value of venues and festivals is to a large extent created by the (symbolic) artistic content on stage, an extreme sellers' market has occurred in which the venues are highly dependent on (a good relationship with) specifically top-selling artists and their management. This can be seen as a continuous process of contesting value between artists and stages. On the one hand, the venues and festivals hardly control their most important resource (top-selling artists) but on the other hand, the artists need the live stages to negotiate/establish their own values. There is a mutual dependency between these artists and stages in the way that they consecrate each other: the festivals and venues configure the identities of the artists they consecrate, and the artists, in turn, consecrate the festivals and venues (Lampel 2011, p. 338). As a result of this continuous contestation, value negotiation for early-career artists is more difficult.

Third, a characteristic of live music as a social institution is the common practice to under-price gigs (Krueger 2019, p. 138). This is a result of the fact that artists prefer to play sold-out shows and the fact that both artists and venues want to keep live music accessible: the venue because they have a (cultural) mission to stage artistic talent for a wide audience and the artist because of their reputation and relationship with their fans. Consequently, concerts are valued below the market price in order to benefit the symbolic value of the artist's attached resources. In relation to these issues concerning economic value it needs to be emphasised that 'the artist' in fact consists of a very broad range of musicians in any possible phase of their career, varying from very local and unknown amateurs to global superstars who operate in a very professional and commercial context. Another important issue in relation to the economic value of live music is the increasing tension between artistic and commercial interests from a venue perspective. Even though commercial imperatives have always played a role in the music industries, a growing tension can be observed between commercial and artistic thinking. Specifically, in the Dutch case, neoliberal politics (including reduced public funding) and the growth and commercialisation of the music industry have forced venues and festivals to increasingly act commercially while in most cases they think artistically.

Beside value negotiation between venues/festivals and artists, there is also an ongoing process of negotiating values with (local) funders and policy makers. A key defining characteristic of the Dutch live music ecology is the strong dependence of live music venues on government funding and associated cultural policy requirements. Most venues started as youth centres in the 1960s and were supported by local governments in response to the emerging youth culture (Rutten 1993). This means that originally there was a strong emphasis on the social and cultural value of live music, as the venues were places for social bonding and experimentation. Over the years, the venues were institutionalised and professionalised and were expected by local governments to also generate spatial and economic values for their urban environment. Consequently, a large share of the Dutch dedicated pop music venues are housed in expensive buildings, in many cases recently built or renewed with high local expectations (e.g. in the cities of Utrecht, Nijmegen, Eindhoven, and Tilburg). Even though local governments expect the state-of-the-art buildings to generate spatial, cultural, and social values, some of its directors express their concerns about the effects of the building on their artistic freedom:

Our business is very risky, it's difficult to look ahead further than 3, 4 months. If you combine that with the types of buildings that music venues like ours inhabit nowadays, with all the costs and the workforce that you need to keep it going, it is in fact impossible. (venue director #4)

The operating costs of these venues make them relatively dependent on local government funding. Some respondents refer to the application process for subsidies as a 'serious game,' a recurring process of negotiation and reconciling values between the cultural entrepreneur and the (local) government.

I've had so many policy makers here in our venue and I just have to keep explaining how the pop music business works and what the value of our venue for the city is. (...) I just keep using the terms 'talent development' and 'cooperation' because that's what they want to hear. (venue director #7)

In conclusion, the strong networked relations between local governments and music venues in terms of subsidies, cultural policy and permits leads to tensions in the process of valuing live music. Furthermore, our analysis on the level of venues/festivals in the Netherlands indicates an increasing tension between the material setting of pop music venues on the one hand and their role as social institution and hub for cultural practice on the other hand.

Musicians: value slippage

Our interviews with musicians indicate that they attribute three types of values to live music (see also Everts *et al.* 2021) that they use to formulate their goals in the live music ecology. First, cultural value is important for musicians as they enjoy making music and performing for audiences. Second, they highlight economic value because they have the ambition to create a long-term career in music, and therefore want to realise sustainable revenue streams. Lastly, musicians emphasise the social value, as they enjoy gaining recognition for their participation in the live music ecology (from press, fans, or industry professionals), the audience interaction during live shows, and the network of peers they build within the industry. Depending on which type of value is dominant for musicians, they might experience a conflict or alignment between these different values. Musicians who emphasise cultural value often feel a tension between cultural and economic value as they believe that achieving economic success requires artistic compromises lowering the cultural value of their work in music. On the other hand, musicians who mostly emphasise economic value often feel that it is possible to achieve economic success while making the music they love. In other words, even just on the level of musicians, no consensus exists on the value of live music.

Notwithstanding these tensions, all musicians are active in the live music ecology because they believe in live music as a lived cultural practice (Threadgold 2018). As one musician said:

Making music and performing are the things that make me the most happy, give me the most energy and are the things with which I can give the most to other people. ... That is why I want to do it, and why I want to try if I can actually organise my life around this. (musician #6)

As musicians share this belief in the live music ecology, as discussed in the literature review, the expressed values therefore represent the social institutions of the live music ecology. Indeed, the different values that these musicians connect to the live music ecology can be tied to existing conventions in the ecology on how musicians ought to behave. For example, the belief of several musicians in artistic integrity can be tied to traditional notions in rock music that musicians should not become too commercial and turn into a 'sell out' (Klein *et al.* 2017). The importance of social embedding echoes the values of do-it-yourself (DIY) scenes, in which the communal aspects of music-making practices are emphasised due to an anti-mainstream attitude (Rogers 2008, Chrysta-gis 2020).

We observe that value slippage occurs as a consequence of the experienced asymmetry in the relationships between musicians and music venues. Musicians invest a lot of time and resources in their act in order to reach their goals in music. Overall, the live music ecology benefits from this talent development. While the interviewed early-career musicians experience a dependency

on venues and other actors and organisations in the live music ecology, they only get a limited amount of economic value (e.g. revenues from performing that often only cover costs), some more cultural value (e.g. the opportunity to perform), and social value (e.g. the opportunity to be part of the music ecology) in return. Overall, musicians believe that the other actors seem to benefit more from the value they add than they do themselves. Here the biggest issue concerns the economic value, as early-career musicians often do not get paid enough to cover costs, and other expenses are prioritised when they perform in venues:

I find club shows so difficult. ... The fees may be increased a bit for us, but there are so many aspects. What is the ticket price that they estimate you can ask? In addition, each venue has a different cost estimate when the doors open. How many security guards do they have? What does it cost to turn on the speakers? ... I know venues where that costs 1000 euros per evening. And then only the front door is open and the electricity is on. (musician #21)

In other words, other actors in the network of the live music ecology, such as venues in this case, cannot always realise all desired values of musicians, because they need to negotiate and reconcile a variety of values on their level in the ecology. In the case of economic value, shows are for most venues often not profitable, or, as mentioned earlier, most acts do not add enough value to cover their costs. As a result, even though live pop music executives accept the fact that staging music doesn't always create significant economic value, they negotiate low fees for early-career acts who perform at their venue.

I would like to earn more money for shows. Nowadays it is really fighting for your fees. A starting band earns only so much you know. Every support act for every act in the Netherlands only earns 150 euros per show ... (musician #18)

Because of their dependency on venues, smaller acts often have a poor position when it comes to negotiating higher fees. This is made even more difficult because these early-career acts face a lot of competition due to an oversupply of new acts and often do not sell a lot of tickets yet. As a result, paying fair fees to these acts, as the Dutch cultural sector in 2017 promised to do when they embraced the so-called 'Fair Practice Code'³, is something that the venues themselves cannot do without additional government support.

In response to this experienced value slippage, musicians advocate for the anchoring of a diverse set of values in the live music ecology and creating the material foundation necessary to foster these values. For example, in the interviews musicians discuss the material setting and complain about the lack of affordable rehearsal spaces needed for their skill development and to achieve the discussed goals; they demand higher fees for playing gigs, necessary for sustainable participation in the live music ecology; and they emphasise the importance of a lively scene and both grassroots and major venues where they can play, build an audience, and interact with their peers.

Places where you can perform as a starting musician ... I think that's the hardest part if you've just started a band. Then of course you are not that good and you do not have an audience yet. ... If you're not allowed to perform anywhere, you can't develop that either. So there just have to be places where you get a chance. (musician #9)

Yet, here too, musicians are not unanimous with regard to what this material reality should look like. Several musicians are grateful for the way the Dutch music ecology fosters a talent development pipeline (see also Van Vugt 2018) that helps new acts to make their first steps in the ecology, whereas others believe that this leads to an oversupply of new acts, creating competition that diminishes their chances to make it in the industry. The same goes for the size of the live music ecology in cities. Whereas some believe that the offering of a lot of venues and shows in a city builds local audiences for music, and thus for the interviewed musicians, others fear that it might have the effect that shows and venues steal each other's audiences, resulting in less attention for these musicians. Lastly, whereas several musicians ask for more forms of funding for their work, others believe that being active in the live music ecology is a privilege, and they should have the sole responsibility for the financial risks, without governmental support.

Cities: anchoring value in space

As set out in the theoretical framework, local live music ecologies can have a range of cultural, social, economic, and spatial values for cities. We argue in this section that these values are challenged because our respondents experience threats to the diversity within urban live music ecologies at the grassroots level in particular. Since live music relies on a material setting, the values can only be realised if sufficient spaces are available for all segments of the live music ecology, from small to major venues.

The concept of urban live music ecologies highlights the importance of having venues and festivals of different sizes and types, to cater for multiple genres and artists in varying phases of their careers (Behr *et al.* 2016b, p. 9). In other words, space needs to be made for the heterogeneous values of live music, as well as diverse genres and communities. Ideally, the nightlife agenda of cities is representative of their socio-cultural diversity, thus enhancing the social and cultural value of live music. In the next quotation, the director of a talent platform for urban arts explains how they seek to let cultural institutions open up for their artists, because he experiences a lack of performance spaces at festivals and other organisations:

We want to advise them how the urban scene works and explain that this scene is broader than just hip-hop, and also involves spoken word artists and dancers. [...] We approach different kinds of organisations, like: 'you are hosting a jazz festival? We have artists who make jazzy music, are you willing to make space for them?' (Director of talent development organisation #8)

To enhance the cultural values of live music ecologies, gatekeepers, programmers, and booking agents have a vital role in providing a stage for musicians in various phases of their careers and representing different styles (Gallan 2012). They need to support talent development and scene-building within the live music ecology as a social institution with its own path-dependent norms and expectations. As the quotation above underscores, it can be challenging for new and emerging artists to break through these established patterns.

Another vital challenge in urban cultural policy and planning is to manage live music's reliance on a material setting where concerts take place. Indeed, the architecture of a venue needs to be designed in a way that it optimally enhances the diverse values of live music. In the next quotation, a real estate consultant explains how subsidies and cultural policies from the municipality shape decision-making about new spaces for performing. In particular, he discusses how the budget for a building is closely linked to the kind of activities that can take place there:

For many of our projects we look at the spaces from a real estate perspective, but at the same time the uses of the buildings are affected by subsidies from the culture department of the local government. Often there are clear targets in terms of the maximum subsidy that the culture department wants to allocate. (Real estate consultant #9)

This process is challenging, he further explained, as buildings are designed for the long-term, while cultural policies and funding cycles generally have a shorter period of four years in the Netherlands. In order to adapt to changing cultural needs and priorities, buildings need some flexibility and performance spaces of different sizes. For example, to support the cultural value of talent development smaller spaces are required, while the social value of live music might necessitate spaces to meet and socialise.

Particularly at the grassroots level of live music ecologies, there are vital challenges to achieve the different values of live music. For example, our interview respondents echo concerns raised in other countries about the spatial embedding of music (Behr *et al.* 2020; Terrill *et al.* 2015, p. 41). Many small venues, which are important for the social and cultural value of live music, face issues of gentrification and increased urban density. The growing densification of cities in the Netherlands implies that more people will live closer to venues. While culture is generally valued as an amenity, noise complaints pose a risk for places booking music. Furthermore, gentrification leads to higher rents and property values for venues, putting a strain on their budget (Martin 2017, p. 10). As a

director of a music venue explains (interview #4): ‘I like this place as it is surrounded by factory towers, but I am concerned about the new residential developments. Even though I would love to stay here, I don’t think this will be possible.’ Gentrification thus leads to a lack of performing spaces for new musicians. Talent development is essential for popular music to develop as a lived cultural practice. However, as this creative producer observes, booking emerging artists requires significant investments: ‘Music is not necessarily profitable, particularly not when you want to make space for talent development’ (interview #5). Culture in general faces competition from residential buildings that generate higher economic values for investors, but this is specifically challenging for grassroots venues (Martin 2017).

The spatial embedding of live music discussed in this section thus leads to another form of value slippage through gentrification: venues and festivals can enhance the attractiveness of a neighbourhood, while the benefits of rising rents are reaped by others. When cultural events enhance the image of an area, the owners of real estate see the value of their property rise. This might ultimately displace the creatives who contributed to positive change, as they can no longer afford the rising rents (Shaw 2013, Terrill *et al.* 2015). Therefore one of our respondents stresses the need to protect the spaces of the original actors who enhanced the value of an area:

Ultimately, we see the same thing happening across the world, with art being in the vanguard. Artists settle somewhere and make something out of nothing. [...] The most important thing is to ensure that these pioneers can stay, that’s what often goes wrong. (Director of a cultural venue #6)

For commercial developers, profitable residential buildings are more attractive than social and cultural values. This underscores once more how the complex process of valuing value affects how and where the cultural form of live music can be enjoyed.

Conclusions and discussion

This paper set out to understand how the networked relations between the different actors in Dutch live music ecologies affect processes of valuing value. The ecology concept is increasingly used in both academia and policy-making, but often without specifying how actors relate to each other and create value. This paper has contributed to the existing literature on live music by conceptualising the dimensions of live music ecologies: live music as a material reality, a network of actors and organisations, a social institution, and a lived cultural practice. Furthermore, by drawing on the concepts of valuing value and value slippage from the field of innovation ecosystems, we are able to analyse how actors in the ecology seek alignment and agreement on the diverse values to provide (i.e. cultural, social, economic, and spatial values). Our analysis of the inter-related levels of musicians, venues and festivals, and cities in the Netherlands, extended the existing research on live music ecologies to a non-Anglo-Saxon setting.

In our analysis, we find that actors in the Dutch urban live music ecology are mutually dependent but at the same time struggle to satisfy each other’s interests. The unequal power relationships between actors in the live music ecology lead to a dynamic process in which there is no stable understanding of the central values of live music that is shared by all actors. How values are aligned changes over time, as the live music ecology is affected by social, political, and economic developments. As a consequence of their competing interests, the actors are continuously negotiating the different values. Table 1 presents specific findings for the relationship between our conceptualisation of live music ecologies and the process of valuing value on the three levels.

In particular, we identified three forms of tension and value slippage. First, as venues and festivals in the Netherlands rely on government support and funding, they need to comply with the expectations of funders. Local governments expect music organisations to generate social, spatial, and economic values, while the live music actors are primarily concerned with cultural value. Second, venues and festivals rely on the availability of talented artists, but at the same time, they

Table 1. Valuing value in Dutch live music ecologies.

	Venues and festivals	Musicians	Cities
Live music as a material setting	Value is created at the intersection of the material setting and the audience experience.	Musicians experience a lack of affordable spaces for the cultural value of talent development.	Value slippage occurs as venues and festivals contribute to placemaking (spatial value), but do not benefit from the economic values that gentrification generates.
Live music as a network of actors	Venues and festivals attempt to align the different understandings of value of a dense network of actors.	Value slippage occurs as musicians generate cultural value, but do not capture sufficient economic value.	Cities benefit from and are part of a network of actors that support the different values of live music.
Live music as a social institution	Professionalisation of venues and festivals puts pressures on the values of live music as a social institution.	Several musicians do not focus on economic value, as 'selling out' or becoming commercial is not accepted.	The live music sector is structured around norms (e.g. authenticity) that often diverge from the interests of other actors in cities (e.g. economic value).
Live music as a lived cultural practice	Venues focus on cultural value because of their intrinsic mission to facilitate artistic performance and to entertain the audience.	Musicians participate in live music ecologies because they believe in live music as a lived cultural practice (cultural value).	Urban policies and planning can support the meaningful aesthetic experience of live music (social and cultural value).

struggle to provide sufficient fees to early career-artists in particular. In recent years, the importance of paying fair fees to these acts is a central objective in Dutch culture policy. However, complying with the fair practice code is complicated for venues as they work on a tight budget themselves, mainly caused by the high operating costs of their material setting. Talent development is essential for the cultural value of live music, but it hardly generates economic value in the short term. Third, the material setting of live music leads to another form of value slippage, as venues and festivals might contribute to placemaking, but do not benefit from the economic values that are generated if neighbourhoods become more attractive. In fact, particularly small venues struggle to sustain their business under conditions of growing density in cities. If artists, venues, and festivals are not able to capture sufficient value, this threatens the sustainability of live music ecologies as a whole.

These challenges are compounded by the Covid-19 crisis, which has been particularly damaging to a live music sector and which relies heavily on the lived cultural experience shared by large groups of people. In order to sustain post-covid live music ecologies, it is vital to mitigate the observed tensions and value slippages through policy-making and urban planning. As densification and gentrification lead to a scarcity of suitable spaces and threaten the sustainability of live music ecologies, it is essential to articulate the value that music can have for cities and to anchor these in local policies. In terms of urban planning, this means that cities need to be designed in ways that enhance opportunities for performing (Van der Hoeven and Hitters 2019), including public performance spaces and affordable buildings for cultural venues. Furthermore, the different values of live music ecologies need to be anchored in cultural policies that provide directions to institutional practices within live music ecologies. Next to subsidies, such policies can support fair pay initiatives and representative bodies such as music boards, talent development organisations, and night mayors. These bodies represent the interests of the nightlife sector and cultural scenes and lobby for favourable policies and regulation. Of course, such measures need to be tailored to the characteristics of specific live music ecologies. This requires more research on our conceptualisation of live music ecologies in other geographical settings, where the relationships between the network of actors is likely to be different. Finally, since our study focused on three levels, further research is required on other actors in the live music ecology such as audiences and international music conglomerates. The latter are particularly important as global actors such as Live Nation significantly affect local practices in the Dutch live music ecology.

Notes

1. We use the plural 'ecologies' to highlight that each city has its own ecology.
2. The numbers refer to the interviews conducted as part of the level mentioned in the respective section headings.
3. See <https://www.fairpracticecode.nl>, [Accessed 25 April 2020].

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