Collaborative, co-operative and collective business models in the ‘new’ music industries: a literature review

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Introduction

Much has been written about the disruptive effect of digital technologies on the music industries since the emergence of the peer-to-peer file-sharing network Napster in 1999. Some (Hughes and Lang 2003, Dubosson-Torbay et al 2004, Kusek and Leonhard 2005, Knopper 2009) have portrayed the changes as revolutionary. Others (Thompson et al 2009, Campos 2012, Moyon and Lecoq 2013, Rethink Music 2013, Rogers 2013) insist that several essential aspects have not, in fact, changed; they speak, like Rogers, of ‘evolution not revolution’ (177).

If there has been, at the very least, a significant shift in music’s value chain in recent years, due to factors such as the shift of music consumption from an ownership to an access model and the ‘unbundling’ of albums into single tracks, (Rethink Music 2015), it is widely seen (by Hughes and Lang 2003, for instance) as essentially bad news for record labels and good news for consumers. There are conflicting reports, however, as to what it means for those actually making the music. Perhaps inadvertently, Fox (2004) sums up the musician’s ambiguous position when he writes that downloadable music and its associated technologies have brought about a redistribution of power from major record companies to music consumers ‘and, *arguably*, artists’ (205; my emphasis). Feehan and Chertkow (2009) and Owsinski (2009) have written enthusiastically about the possibilities of a DIY approach for musicians, arguing that lowered costs and barriers to entry have allowed artists to disregard gatekeepers. Yet Rogers (2013) claims that disintermediation has not, in fact, occurred (145) and his title – ‘the death and life of the music industry in the digital age’ – counters the dramatic claims of musicians such as Thom Yorke that the traditional music industries represent a ‘dying corpse’ (Dredge 2013).

Erickson and Brown (2013) point out that most ‘independent’ music success stories in fact have a distribution deal or marketing partnership with a major label. Amanda Palmer, Radiohead and Nine Inch Nails are often seen as high-profile exceptions, yet Nine Inch Nails’ Trent Reznor has described Radiohead’s ‘honesty box’ pricing system for their 2007 album In Rainbows as ‘insincere: rather than a new model, he claims, it was ‘a way to promote a very traditional record sale’ (Sandoval 2008). This, he states, is because the band also made available a £40 box set and later released physical copies of the album through the XL label. Yet Reznor himself hardly is hardly representative of a long-term alternative to labels: having independently released Ghosts I-IV in 2008, he signed to a major (Columbia Records) to release the follow-up How To Destroy Angels. Reznor, like Radiohead and Amanda Palmer, had also been signed to a major label earlier in his career, and the apparent success of all three acts in exploring alternative routes to market undoubtedly owes much to the fanbases already built up with major label support (Kirkkopelto 2013). What, then, are the prospects for musicians further down in what Anderson (2009) would call the ‘long tail’?

This literature review takes as its starting point that the challenge facing the music industries – an example of what Christensen and Raynor (2003) call ‘disruptive innovation' – is primarily one of *business models*, rather than technology. After all, the shift to MP3 has surely had a far more profound impact than that to cassette or CD. Rather than attempting to cover all aspects of the music industries, I limit my focus to the effects of digital technologies on musicians themselves, specifically in terms of recordings, and their responses in terms of business models – in particular, models that could be seen as somewhere between the traditional label and the fully DIY approach. In reviewing the literature on collaborative, co-operative and collective business models, I aim to identify and define key terms; to cite the various collective, co-operative and collaborative models in the music industries that have been cited by journalists; to analyse their underlying business models as far as possible; and to define the parameters of future research.

Definition of terms

The phrase 'digital economy', popularised by Tapscott (1997), is defined by Kling and Lamb (2000) as referring to 'goods or services whose development, production, sale, or provision is critically dependent upon digital technologies' (297). According to that definition, the music industries can clearly be understood as a subsection of the digital economy. Indeed, music fits within all three of the components of the digital economy as identified by Mesenbourg (2001): infrastructure, electronic business processes and electronic business transactions, and fits with the 'horizontal' model proposed by Normann (2001) as unconstrained by time and place, as well as by what can be done and with whom.

Although, as I have suggested, the extent of change can be disputed, I follow Wikström (2009) in writing of the 'new' music industry – characterised by high connectivity and reduced control, music as a service rather than a product and increased amateur creativity (8). In my preference for 'industries' in the plural, I am following Williamson and Cloonan (2007), who point out that to speak of a singular 'music industry' suggests a false homogeneity – and that it is an error to use such a phrase as a synonym for 'record industry' (305). The Future of Music Coalition, for instance, have identified up to 45 revenue streams (no author, 2015). However, my primary focus is recorded music, since this is the aspect of the music industries hit hardest by disruptive technologies.

The phrase 'business models' is used to convey a number of meanings, though our understanding has been sharpened considerably by Linder and Cantrell (2000), Osterwalder, Pigneur, Tucci (2005), Chesbrough (2010a and b) and Teece (2010). For the purposes of this review, I adhere to the Osterwalder and Pigneur (2010) definition: 'a business model describes the rationale of how an organisation creates, delivers and captures value' (14). In my analysis of business models, I draw on the 'canvas' developed (Osterwalder and Pigneur 2010) which divides a business model into nine 'building blocks': customer segments, value propositions, channels, customer relationships, revenue streams, key resources, key activities, key partnerships and cost structure (16-17).

What, finally, is meant by co-operative, collective and collaborative models? A co-operative, first of all, can be defined as 'an autonomous association of persons united voluntarily to meet their common economic, social and cultural needs and aspirations through a jointly owned and democratically controlled enterprise' (Birchall 2014, 51). Typically, a co-op has seven principles: open membership, democratic control, distribution of surplus in proportion to trade, payment of limited interest on capital, political and religious neutrality, cash trading and promotion of education.

The collective business model, meanwhile, is less clearly defined. It can be understood as referring to collective business systems: co-operatives, trade associations and franchises (Marion 2006). Of these, co-operatives have already been addressed; there exist music trade associations (such as the Association of Independent Music, a non-profit-making trade organisation for independent music companies in the UK) and franchises (such as Monkey Music, who offer pre-school music lessons) but neither could be seen as alternatives to the traditional label. From Brooklyn's Animal Collective, essentially a four-person band who create music in shifting combinations, to the London-based Loop Collective, comprising 17 jazz musicians who perform in multiple configurations as well as with non-affiliated musicians, there exist many groups that self-identify as music collectives but which do not obviously adhere to one of the collective business systems defined above. A non-hierarchical management structure would appear, instead, to be their defining feature – although even this, as I will show, is not always evident.

The collaborative model, finally, is perhaps best understood as an umbrella term linked to broader discussions of collaborative entrepreneurship (Miles et al 2005) and open business models (Chesbrough 2010b). It could also be seen as part of the 'collaborative economy', also known as the 'sharing economy', 'collaborative consumption', 'the mesh' and the 'access economy', and referring to new ways of consuming, learning, financing and producing that make use of vast, distributed networks of people and goods – together with public willingness to place trust in people they have never met (Stokes et al 2014 5). The breadth of the term is suggested by the suggestion that four distinct business models can be identified within the collaborative economy: business-to-consumer, business-to-business, peer-to-peer and consumer-to-business (Stokes et al 2014 12). In terms of the music industries, the traditional business-to-consumer and, to a lesser extent, business-to-business models have been joined in recent times by peer-to-peer models as well.

Collaborative, co-operative and collective business models in the music industries

As I will go on to demonstrate, there is no shortage of academic writing about new business models in the music industries (or, indeed, in the broader digital economy: see, for instance, Zimmerman 2000, Ng 2014 and OECD 2014). In general, the interactive potential of digital technology is opening up new possibilities for collaboration and new economic opportunities (Lucena 2015). Yet collaborative, collective and co-operative business models are not routinely discussed in specific relation to music – crowdfunding being the obvious exception. Campos (2012) and Kirkkopelto (2013) have both made insightful attempts to analyse aspects of the music industries using Osterwalder and Pigneur's 'business model canvas', but neither discusses collectives, co-operatives or other collaborative models. Nor, for instance, do other writers on new business models in music such as Fox (2004), Perritt (2011) and Bustinza et al (2013). The relative neglect of such models in academic literature is all the more surprising since the subject *is* being explored by journalists, as I will show by examining each category in turn.

To begin with music collectives, Rothman (2013) cites San Francisco's Bay Area Music Collective and Brooklyn's Mason Jar as representative of an attempt to fill the gap 'between old-fashioned labels and one-man-bands'. Calvano (2015) claims that collectives are replacing labels in dance music, citing Hegemon, Team Supreme, Moving Castle, Flow-Fi, Soulection as examples. Clarke (2015) makes a similar argument for noise rock in Leeds, citing new DIY collectives like Chunk and Slut Drop. LuckyMe (2012), who are involved with hip-hop, pop and dance music, also self-identify as part of a collective movement, citing Earnest Endeavours, Eglo, Nightslugs and Numbers as peers.

Clearly, collectives span genres: they exist across the musical spectrum from hardcore to jazz. The recent book on jazz collectives by Gebhardt and Whyton (2015) is a welcome exception to the general lack of scholarly writing on music collectives, yet their stated aim is to shift attention from the dominant perception of jazz as a site for individual expression towards the structures and social relationships that make jazz possible (x). They are not, then, primarily concerned with business models. By applying Osterwalder and Pigneur's business model canvas, however, we can instead see the musician collective as a means of adding to the *value proposition*. Their collective ethos is central, for instance, to the appeal of an anarchist punk group like Crass (Hesmondhalgh 1999, Ogg 2009, Dale 2008) or the more recent Montreal ensemble Godspeed You! Black Emperor (De Arcangelis 2015), whose co-founder Efrim Menuck self-identifies as an anarchist.

Not all collectives share such ideological underpinnings, linked by De Peuter and Cohen (2015) to Kropotkin's concept of 'mutual aid' and 'forms of cooperation that are not imposed on labour by capital in commodity production but instead spring from below' (308). Whether or not they would perceive of it in such terms, however, all collectives also provide a 'brand' that can allow musicians to reach additional *customer segments*. They can help musicians increase their pool of *resources*, which is increasingly necessary given the vastly increased range of *activities* expected of musicians taking the DIY path (Owsinski 2009 122).

Collectives can also offer economies of scale and a reduction in the risk inherent to all creative labour, although the literature does not always make clear whether collectives share *costs* and *revenue streams*. Brooklyn's Animal Collective, for instance, release in the traditional mould, via a label; the now-defunct Fence Collective, from Fife, and Brighton's Willkommen Collective, can be understood as artist-run labels. None of these 'collectives' claims to represent a new business model. Broken Social Scene, primarily based in Toronto, have been described as a collective by Ladouceur (2004), who quotes bassist Brendan Canning to the effect that, in terms of 'the way we divvy up song [royalties], a lot of people have a lot of pieces'. Again, while the creative process may be unusually inclusive, it is not clear how this would represent a new business model in the sense understood by Osterwalder and Pigneur. And though Canning might hint at a non-hierarchical structure ('everyone can take a leadership role at different times') he goes on to admit that he and co-founder Kevin Drew 'kind of have the final word' (Ladouceur 2004). San Francisco's Bay Area Collective likewise has a clear leader (Rothman 2013). Rothman cites Brooklyn's Mason Jar Music as a more typical collective, with a combined work/live space and equipment that, though not co-owned, is available to all members. Even here, however, there is a suggestion of hierarchy: 'creative projects are… tackled collectively', yet only co-founders Dan Knobler and Jon Seale, we are told, make a full-time living from the collective. In Godspeed You! Black Emperor, by contrast, all decisions are made collectively, even if that means it takes six hours to agree on a fee for a festival performance (Ladouceur 2004).

What then of co-operative models in the music industries? According to Co-operatives UK (2015), there are currently 221 creative industries co-operatives, with a combined turnover of £26m. Birch (2013) estimates that perhaps 20 of these are in music, describing the Musicians' Union 2013 decision to join Co-ops UK as a 'landmark move'. Some are groups of music teachers – Milton Keynes Music Co-operative and Swindon Music Co-op, for instance – and clearly do not intend to compete with traditional record labels. Lancaster Music Co-op, on the other hand, was set up in 1985 by a group of musicians unable to find a suitable rehearsal studio, and continues to offer recording and rehearsal facilities on a not-for-profit basis. Co-operatives in the classical sphere, meanwhile, include Music Co-OPERAtive Scotland, a self-governing co-op, and Sinfonia Musicisti, the UK's only professional co-operative orchestra. In the United States, meanwhile, there is Louisiana Philharmonic Orchestra, which emerged in 1999 as ‘the only full-scale, professional symphony orchestra organisation in North America that is wholly musician-owned and operated’ (Symphony Orchestra Institute 1999 27).

Using the business model canvas developed by Osterwalder and Pigneur, it would appear that co-operatives have many of the same benefits as collectives, such as adding to the *value proposition* (more so than collectives, in fact, since co-ops seem more likely to publicly self-identify as such). According to Co-operatives UK (2015), shared ownership has a number of advantages in this regard, including boosting productivity and improving resilience. McDonnell et al (2012) suggest that the greatest advantage of co-operative entrepreneurship may be the ability to combine different skills and competencies. As with collectives, such creative benefits are hard to quantify but may well add to the value proposition.

Also like collectives, co-operatives can pool *key resources* and provide access to additional *customer segments*. Here, though, the effect on *revenue streams* is often clearer; those co-operatives that distribute profits between members can to an extent mitigate against the uncertain rewards of the music industries by sharing risk. Looking back to the 1960s, for instance, Attali (1985) states that the Chicago-based Association for the Advancement of Creative Musicians was financed in part by pooling royalties; all musicians received an equal share of the total earnings (138-9). Co-operatives can also share *costs* – which, while they may have fallen for recording and distribution, remain significant (for instance for mastering, PR, radio plugging, and the design, manufacture and distribution of any physical product).

Finally, what of collaborative business models in the music industries? The obvious example is crowdfunding, with its defining feature of ‘collaborative finance’ (Stokes et al 2014). Viewed from the perspective of Osterwalder and Pigneur’s business model canvas, however, it is clear that crowdfunding affects much more than revenue streams. Schwienbacher and Larralde (2012) divide crowdfunding ventures into three distinct business models, based on the type of ‘rewards’ offered: donations, passive investments and active investments by the crowd (13). Broadly, however, the main *channel* – as indeed the main *partner* – is the crowdfunding platform, while payments by the ‘crowd’ represent the main *revenue stream*. *Activities* will be same as for other musicians, albeit with an additional obligation to keep fans informed of the progress of the campaign; time is also likely to be spent conceiving and delivering the rewards. Providing these rewards for crowdfunders would be an additional *cost*. As with co-operatives and collectives, the crowdfunded collaborative model can add to the *value proposition*, for those fans that, correctly or not, perceive this method of releasing music as more ‘authentic’.

Amanda Palmer, something of a poster girl for crowdfunding success having raised $1.2 million on Kicksterter for her 2012 album Theatre Is Evil, claimed at the time that crowdfunding was ‘the future of music’ (Coleman 2015, 9). Yet Coleman points out that Björk’s 2013 attempt to crowdfund a project related to her Biophilia album was unsuccessful, despite being more arguably the more established of the two artists. One explanation Coleman offers is the fact that Palmer had been crowd*sourcing* for much longer than been crowd*funding*; even for an artist on the scale of Björk, it may not be easy to achieve success from a standing start. It is not, then, ‘the future’ for everyone: Mollick (2014) notes that crowdfunding ventures typically succeed by narrow margins, or else fail by large amounts.

In mapping crowdfunding ventures to the business model canvas, a central challenge becomes clear: there is an unusual degree of overlap between the nine blocks. This overlap can be positive: Schwienbacher and Larralde (2012) talk of fans 'investing more than money', citing a crowdfunding campaign that ended early because the company realised that 'their investors would not only provide them with money, but will also build on their skills to develop, communicate and reference the website, all of this at no cost for the company' (15). In this instance, then, there is crossover between *customer segments*, *partnerships* and *key resources*. The dangers in terms of investors' expectations, emotional investment, and sense of 'ownership', seem clear. As Coleman (2015) notes, crowdfunding exists at the nexus of conflicting expectations: the musician both 'authentic' and, in maintaining an online presence through various social media platforms, necessarily playing a role, the fan blending uncomfortably with the investor.

Although it has received the most attention, crowdfunding is not the only collaborative model in the music industries. Nine Inch Nails' Ghosts I-IV, for instance, was self-released but not crowdfunded, in that it was not preceded by an 'open call' to fans of the sort set out by Schwienbacher and Larralde (2012). In releasing the album under a creative commons license that allowed fans to re-work the material, Reznor's project can still be seen as an example of the 'collaborative communities' set out by Shuman et al (2001). The potential for the music to be reworked was a key part of its *value proposition*, catering for those *customer segments* keen to actively participate in the music-making process (Wikström 2009 178-9). This is close to the 'Consumartist scenario' identified by Bourreau et al (2008), in which the frontiers between professionals, occasional producers and amateurs become blurred, and links to both the collaborative economy and to what Jenkins et al (2013) call 'participatory cultures'. The *customer relationship* is changed substantially in this model, since the customers can also be considered a *key resource*. As Wikström (2009) states, 'the structure of the Ghosts I-IV project is fundamentally different compared to the twentieth-century music industry model where vertically integrated multinational music companies control how, when and where their albums are released, promoted and distributed. The core of the Ghosts I-IV project is not the set of tracks recorded in Reznor's recording studio in the outskirts of Beverly Hills. Rather it is Reznor's relationship with his fans and in the thousands of remixes, videos, comments and blog posts uploaded to nin.com, Youtube, ninremixes.com and a host of other more or less shady places in the Cloud' (2-3).

As I submit my review, early reports have emerged of a new collaborative model: Mycelia. Spearheaded by the musician Imogen Heap, Mycelia aims to employ blockchain technology and cryptocurrencies as a new means of distributing royalties. Inherently embracing disintermediation and decentralisation with its use of vast, distributed networks, Mycelia clearly fits with collaborative notions of the 'sharing economy', 'collaborative consumption', 'the mesh' and the 'access economy'. Its very name, in fact, is a reference to thread-like fungi; Heap speaks of 'mushrooms' and 'spores' (Howard 2015)

Mycelia is still in its infancy, and even Heap does not expect the music industries to change overnight (Bartlett 2015). It is notable, however, that a recent Rethink Music report (2015) called for precisely this shift: the development of blockchain technology and cryptocurrencies to manage and track online payments through the value chain directly from fans to music creators. The potential of blockchain technology is huge: rather than a new business model, it represents a whole new *economic* model. Rifkin

(2014) goes as far as to suggest it could signal the end of capitalism. Specifically in terms of the music industries, there is much excitement around blockchain technology, as is evident in journalism (Gottfried 2015, Brustein 2015, Graham 2015). In October 2015, two events on the subject took place in London: 'The New Music Industry With Imogen Heap', hosted by Guardian Live, and 'Blockchain Technology And Data – Saviours Of The Music Industry?', hosted by Music 4.5. At the same time, it must be remembered that these are very early days for Mycelia; further research into the economic, legal and social consequences of blockchain technologies is urgently needed.

Conclusions

The music industries have been profoundly affected by broader shifts in the digital economy, notably the move to downloads and streaming: the decline in revenues from recorded music is not in dispute (Ingham 2015), while only a 'tiny elite' find that live income makes up the shortfall (Hogan 2015). The wider discourse of entrepreneurialism and an emphasis on what Hesmondhalgh (2007) calls 'going it alone', not to mention the strong ethical and aesthetic premium placed on institutional independence by musicians, can make a DIY approach appear an appealing alternative to traditional models (174-5). Yet while it is often assumed that artists are actively rejecting labels, musicians may in fact be self-releasing not out of a sense of empowerment but because they feel they have no other option. Examples of genuine DIY success in the music industries remain elusive.

New business models that represent a 'third way' between the traditional label model and the fully DIY approach, then, are vital – yet, at least according to my research into co-operative, collective and collaborative models, they remain hard to identify. (The exception is crowdfunding, which can be understood as one collaborative model, but its prominence in the literature has created a somewhat distorted picture.) The gap is particularly striking given that, in terms of the digital economy as a whole, there *is* interest in co-operative (Fensom 2014) and collaborative (Ghosh 2006) models, although these may be exceptional cases. Mazzarol et al (2014) state that, though co-operatives are found in all industry sectors and almost all countries, the academic literature has almost ignored them, although they detect a change for the better in recent years.

This may be because even acts that self-identify as collectives, for instance, apparently understand the term in different ways. 'Social enterprise', 'mutuals', 'co-operative' and 'collective ownership' models describe a 'complex and overlapping' range of organisations (Local Government Group 2011 11), while 'mutual' is an umbrella term for several different ownership models (Department for Business Innovation and Skills 2011). The situation is not helped by the lack of a legal definition of a mutual or co-operative and the fact that the two terms are sometimes used interchangeably (No author, 2012). Birchall (2014) has taken useful steps towards a taxonomy of member-owned businesses, with co-ops and 'mutuals' as subsections. More could perhaps be done on this front, in particular in relation to the music industries.

The use of the business model canvas developed by Osterwalder and Pigneur represents a step towards clarity in understanding these models, and such clarity is much needed: Masnick (2009), for instance, is clearly not making use of all nine building blocks identified by Osterwalder and Pigneur when he claims 'Connect with Fans (CwF) + Reason to Buy (RtB) = The Business Model'. More needs to be done, however, to identify a robust theoretical framework for discussing new business models in the 'new' music industries.

I have mentioned some of the examples of co-operative, collective or collaborative music ventures cited by journalists. Since they often do not explore business models in depth, however, there is a clear need for academic research to identify, and analyse, specific collective, collaborative and co-operative models, perhaps including some examples cited above. The failure to identify concrete examples may seem dismaying, although the absence of such examples in the literature does not necessarily reflect a gap in practice. As I submit my review, the most obvious cause for cautious optimism – not just for music but for all creative content (Howard 2015) – is the plans for Mycelia. The proposal meets the 'collaborative' model in being musician-led (despite the involvement of developers, coders and others). I also stated near the beginning of this review that my focus would be on business models, rather than technology, and Mycelia is already seen in such a light. As Bartlett (2015) puts it, 'the greatest challenge is not whether the technology will work – I'm confident that it will – but whether… people will want to pay for something they are now getting for free.'

Detailed investigation of the potential of Mycelia is beyond the scope of this project -= not least because, as noted above, it would represent something much bigger than a new business model. Having only been discussed so far by Forbes and The Guardian, and alluded to in general terms by Rethink Music, the need for further research into Heap's proposal is acute. Bartlett (2015) suggests it could 'completely transform' the music industries. What is the evidence for such a claim? The urgent need for further research is encapsulated in what the Rethink Music report (2015) calls the 'enduring question that only gets louder: why do music creators… seem to continue to have problems earning fair financial returns on their efforts, even as more songs are played for more listeners than ever?'

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