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Why isn't there an Uber for live music? The digitalization of intermediaries and the limits of the platform economy

Abstract

Online platforms have disrupted parts of the capitalist economy, but assessing the magnitude of this effect is difficult. While much is known about the major platforms, little is known about the conditions under which they take over – or fail to take over – a given market or occupation. In contrast to explanations emphasising slow takeup by entrepreneurs or resistance from workers, we argue that the historical and organizational characteristics of certain markets make them resistant to the platform model. To illustrate this, we examine live music work in Germany and the UK, where intermediaries have digitalized to varying degrees. Three characteristics of the market have combined to limit ‘platformization’: (1) the irreducibly qualitative assessment of value; (2) the complexity and contingencies inherent in the task that are impossible to unbundle (3) the fragmentation of the organizational field. Hence we show how the dynamics of work and employment in the live music market limit the traction of the platform model. However, partial and hybrid forms of digitalization still contribute towards intensified discipline over live music workers, threatening pay rates and working conditions.

Keywords

Platforms, creative work, marketization, digitalization, musicians, freelancers

Introduction

An expanding social science literature examines how digital platforms are changing capitalist exchange and production, disrupting industries, occupations and employment relationships. By quickly matching buyers and sellers, digital market intermediaries expand the ‘gig economy’ by encouraging outsourcing (Aloisi, 2018), liberalizing employment relations (Forde et al, 2017), contributing to the re-commodification of labour and imposing more intense competition on workers (Wood et al 2019). While theorists of the sharing economy emphasize the egalitarian ethos of some platforms (Schor *et al*, 2015), theorists of platform capitalism predict the spread of ‘winner takes all’ markets dominated by large players (Moazed and Johnson, 2016; Srnicek, 2017).

Literature shows that the prevalence of labour-based platforms remains limited. Huws et al (2016) find few European workers have pursued platform work full-time. Krueger and Katz (2017) find only 0.5% of American workers identify customers through an online intermediary. Wallenstein et al (2019) find that between 1% and 4% of workers in the US, Japan, and Europe see platform-based gig work as their primary source of income.

Surprisingly little is known about the limits of the platform economy. Here, we examine freelance live music, because it *prima facie* appears ripe for ‘platformization’, as PwC (2015) characterizes arts and entertainment generally. Live music has long been a ‘gig’ economy, organized as disparate one-off engagements with infrequent direct employment. Other aspects of the music industry (namely recorded music) incubated early platform pioneers like MySpace. Informal networks are important in live music, and there is an ample supply of under-employed musicians trying to overcome barriers to market entry, creating an incentive for platforms to open-up the field. Moreover, we uncover attempts to bring platform functionality to live music, and identify new actors describing themselves as “platforms”. Yet, we find that intermediaries have only partly

digitalized and those that most resemble labor-based online platforms occupy small and low-value segments of the market.

With some exceptions, there has been little theoretical discussion on the limits to platformization. We propose that the structural features of markets may create external barriers to the growth of labour-based online platforms. To evidence this, we present a dataset including interviews and a systematic review of 168 intermediary websites in Germany and the UK. We demonstrate the relatively weak presence of platform functionality in these markets, despite efforts to further platformization. We explore the qualitative aspects of work in these markets that frustrate platformization: the task, its valuation, and the organizational field. Our main contribution is to show how the limits to platformisation do not only reflect resistance by workers or inadaptability by entrepreneurs, but also historical and organisational characteristics that render certain industries resistant to the platform model.

Platforms as digital market intermediaries

The ‘platform economy’ is a centrally important figure in an often-told metanarrative in which casualization, flexibilization, and automation converge to transform capitalism. We follow Srnicek (2017:43) in defining platforms as ‘digital infrastructures that allow two or more groups to interact’, serving as intermediaries between ‘customers, advertisers, service providers, producers, suppliers, and even physical objects’.

Platforms can be typologised in various ways. Those designed to facilitate the buying and selling of labour power (i.e. labour platforms) can be contrasted with those which facilitate the circulation of investment or resources (capital platforms) (Ilsøe and Larsen, 2020). The former can be subdivided further; for instance, according to whether

they organise remote work performed online versus facilitating in-person services, or the degree of task complexity (Vallas and Schor, 2020). The paradigmatic “Uber model” refers to a platform which facilitates on-demand provision of in-person services. Likewise, live music platforms are digital methods of arranging work which is highly geographically-tethered and nearly always takes place offline: hence the question in this article’s title. Live music might be considered a particularly “complex” task with various intangible “creative” aspects. However, existing typologies do identify platforms organising complex creative work, suggesting this fact alone should not prevent platformisation (e.g. Schmidt, 2017; Vallas and Schor, 2020).

While platforms have sometimes been characterised as a kind of disintermediation, Langley and Leyshon (2021) identify them as *reintermediation*. Platforms imply a new agency that works to reduce barriers to exchange and construct new marketplaces under their own aegis (European Commission, 2016). Markets created by platforms are *multi-sided* (Kenney and Zysman, 2016), enabling direct buyer-seller connections, using tools like automated suggestion systems to enlarge individual users’ circles of contacts (Van Dijck, 2013). To this end they gather vast quantities of data (unlike simpler matching sites like Ebay or Craigslist) to facilitate the matching of supply and demand (Drahokoupil and Fabo, 2017). They can be rapidly upscaled, creating network effects and monopolistic tendencies (Moazed and Johnson, 2016). Most elements of transactions are conducted ‘on platform’, including searching, rule enforcement, and payment (Farrell and Grieg, 2016). Platforms may usurp traditional industry gatekeepers and regulators (Parker *et al*, 2016), hence their potentially ‘disruptive’ effect. Their price advantages may be intensified where they bypass government regulation and worker protections (De Groen and Maseli, 2016).

The labour-based online platform thus generates surpluses through (1) rapid transactions, (2) unbundled tasks, and (3) vast scale. Why, then, do they account for such a small share of the workforce?

One answer concerns the agency of platform participants, be they enterprises or producers. Many entrepreneurs may have yet to discover how to realize the promise of platformization (Parker *et al*, 2016) or have concerns around security (Kenney and Zysman, 2016). Investors may lack the patience for entrepreneurs to adjust their platforms' operations (Manjoo, 2016), and may be losing interest in 'Uber for X' business models (O'Reilly, 2019). Platform participants themselves may define the circuits of exchange very narrowly, as in time banking or food sharing, precluding network effects (Schor *et al*, 2015). Producers may resist aspects of the platform model through shifting transactions offline and multi-homing (Maffee, 2018), starting non-commercial alternatives (Scholz, 2016), or demanding increased rights and protections (Joyce et al 2020).

A second, less common, approach concerns the internal logic of the platform model itself. Fleming et al (2019) argue that labour-based online platforms are based on a free-market fantasy of the gig economy, which provides a poor guide to the realities of business organization. They use this to explain not only why platforms employ such a small share of the workforce but also how the largest platforms remain in business without making profits.

A third approach concerns the external structures of markets. This is the focus of the present article. The literature has proposed some market conditions that enable platforms to grow. Srnicek (2016) highlights the availability of capital and dissatisfaction with existing market intermediaries. Yao (2019), studying the 'Uberization' of lawyers in China, identifies as preconditions the size of the market, a

favourable legal environment, and a supply of precarious and under-employed lawyers available for freelance work. Ticona and Mateescu (2018) show how the operators of US childcare platforms see the problem of informality as creating opportunities in markets that can be realized by platforms. We will show that, although all these conditions also apply to live music, labour-based platforms have difficulty expanding. Our contribution is not to show which market conditions *prompt* platform growth, but which ones *limit* it; a question with few answers in current literature.

Intermediaries in live music: traditional and digitalized

Live music might be viewed as ripe for platformization. It is a growing market, increasingly challenging recorded music in economic importance (Cloonan, 2011). Recorded music, with which live music is closely intertwined, was one of the first sectors to experience disruptive platforms (Meier and Manzerolle, 2018; Hesmondhalgh *et al*, 2019). Organizing work as one-off gigs is already longstanding practice. As in Yao's (2019) study of "Uberized" lawyers, there is a large supply of available freelancers, a source of frustration to trade unionists seeking to regulate labour standards (*self-citation deleted*). Organising transactions in live music can also be complex, due to the importance of informal networks in connecting supply and demand, making alternatives attractive to musicians not served by traditional intermediaries.

In live music traditional intermediaries could be the losers of platform-driven 'disruption'. The classic intermediary, the agent, has been studied extensively within wider Bourdieusian scholarship on 'cultural intermediaries' and provides an instructive contrast to platforms (Lizé *et al*, 2011; Scott, 2012). Like other cultural intermediaries, agents use their social and cultural capital and their highly specific knowledge and

prestige to shape understandings of value to their own economic advantage (Negus, 2002). As gatekeepers they distribute legitimacy in contexts where value is highly indeterminate and symbolic, trading on their ability to assess and legitimate certain producers and creating a ‘buzz’ around acts (Scott, 2012). This cements inequalities in terms of prestige and market participation (Jeanpierre, 2012), which in music are extreme: in 2003, 56% of US concert revenue was taken home by 1% of performers (Krueger 2013).

Agents are often contrasted with managers. Traditionally, the former sought out and booked engagements for clients, while the latter directly advised artists on career development, although these functions blurred in the late 20th century (Lizé et al, 2011). What we call a ‘traditional agent’ combines both functions: prospecting for work, acting as a representative in negotiating deals, and providing career advice (Sodomsy, 2014), usually tailored to the circumstances of the artists they represent (Morrow, 2013). Gaining access to an agent has typically been a vital career break for cultural workers (Sodomsy, 2014).

It is therefore clear that, historically, intermediation was vitally important in live music, shaping the distribution of opportunities within the industry. However, changing patterns of intermediation also raise other questions about live music work as it has existed historically, with direct relevance to employment relations institutions.

First, while live music markets are often presumed to be anarchic and disorganized, this depiction overlooks the historical role of collective bargaining. Certain types of music work, particularly in larger and more permanent ensembles, such as orchestras or theatre bands, have had and continue to have collective agreements (Broughton, 2001). Historically musicians’ unions even controlled these and other market segments using hiring halls (Commons, 1906; Cloonan and Brennan, 2013),

though these arrangements have been dismantled over time. Of course, other settings, such as smaller bands playing in clubs or at corporate functions, have historically been less regulated but even here there has been some organized worker voice. The Agents' Association in the UK, for instance, negotiates with entertainment worker unions, to establish guidelines around issues like commission rates, although digitalized intermediaries may evade these arrangements (*self-citation deleted*).

More broadly, the evolution of work in the industry typifies the so-called “portfolio career” (Bartleet et al, 2012). Different types of work encountered imply different types of employment relations. An individual musician may play their own music in a bar with near-total control over their own labour process, but highly casualised arrangements for a negligible fee. The next night they may deliver a prescribed repertoire of cover songs at a corporate function, as a self-employed contractor, but adhering to union guidelines about equitable rates. Then, on the third night, they may perform in a theatre band, where the musicians' conditions are directly determined through collective bargaining between the theatre company and relevant unions. All these models have long coexisted in live music and individuals undertake mixtures of them through their careers (*self-citation deleted*). As we will show, digitalization is not fundamentally reshaping this fragmented coexistence. The reverse may be truer: this historical fragmentation shapes and limits the extent of digitalization.

TABLE ONE

Table 1 contrasts the platform type of market intermediation with the traditional entertainment agent. The ideal-typical agent controls quality by restricting market access, upselling the act using a range of skills and personal networks. The platform, by

contrast, emphasizes volume and seeks to accelerate the transaction through automation and providing easily comparable data. Where the latter supplants the former, we can observe ‘platformization’. We treat the extent of platformization not as a given, but as an empirical question.

How resilient have traditional intermediaries been *contra* digitalization?

Evidence so far is mixed. In local ‘DIY’ music scenes, traditional agents are increasingly important as network lynchpins, building connections with other intermediaries like designers and journalists (Hracs, 2015). Increasing internationalisation has reinforced agents’ career-building functions in pop music (Morrow, 2013). However, where digital technologies create new direct buyer-seller links and new ways of sampling and evaluating creative outputs, they may challenge the specific expertise and capitals mobilized by agents, as well as their market-restricting functions (Jeanpierre, 2012). In some areas of live music, online intermediaries have made a major impact, and established agents have likened them to ‘online sweatshops’ (*self-citation deleted*).

In live music, we find digital intermediaries have expanded incrementally, but their success depends on the market segment. We observe intermediaries along a spectrum, from traditional agents to a small minority of platforms, with hybrids in-between. While traditional intermediaries dominate the top of the musical hierarchy, digitalized intermediaries have had some success at the other end, creating opportunities for beginners and semi-professionals to access markets. While writers on the platform economy stress how entrepreneurs disrupt sectors using digitalization, we argue that the sectors themselves impose structural constraints on platformization. Specifically, through 1) the irreducibly qualitative nature of value assessments; 2) the complex contingencies of transactions themselves; and 3) the horizontal and vertical

fragmentation of the live music labour market. Understanding these constraints may provide expectations about the future growth of labour-based platforms.

Methods

The initial motivation for this work was a set of interviews with musicians discussed in previous articles, which provided initial insights in the changing role of intermediaries in ‘function’ music (*self-citation deleted*). Inspired by grounded theory, we sought to understand an interesting and important phenomenon through ongoing comparisons of different kinds of cases.

We selected cases to get a diverse sample of digitalized intermediaries. We included intermediaries in two main areas of live music: ‘function’ music, in which a standardized repertoire is performed at weddings, parties or corporate events, and ‘creative’ music, where acts showcase an original artistic contribution, as with a concert at a music venue.

We included Germany and the UK, first, because both live music markets are large, potentially offering scale needed for platformization. Germany and the UK are the second and third biggest live music markets globally, after the US. 2017 ticket sale revenue in Germany and the UK were both roughly \$2.1 billion (IQ 2017), and in 2016-2017 German concert promoters overtook the book trade as largest domestic entertainment market (Spahr 2018).

Second, we were curious how platforms might be ‘embedded’ in different capitalist institutions (Krzywdzinski & Gerber 2020), and whether their marketizing properties are reinforcing liberalization trends in Germany’s allegedly less liberal economy. We found that the institutions discussed by scholars of comparative capitalism governing welfare, training, collective bargaining, worker participation,

finance, and corporate governance, neither constrained nor enabled the platforms in our sample. Germany's freelance live-music market offered little scope for liberalization, since these institutions had little relevance in this sectoral context, and we observed far more within-country variation than between-country divergence.

Our dataset includes two main sources. One is 15 semi-structured interviews with trade unionists, intermediaries, one non-profit for musicians, and other industry professionals (table 2). We interviewed managers at diverse British and German intermediaries to contextualize our database. We also interviewed two UK Musicians' Union officials, two staff at the German service union ver.di representing musicians, and two US trade unionists involved in online organizing of freelancers. These interviews provided context and corroboration for our other methodological strategy.

TABLE TWO

The other strategy was a systematic review of live music intermediaries in both countries, aiming to catalogue all such enterprises with a substantial web presence. We entered search terms likely used 1) by clients to book a band and 2) by musicians to find a gig (see table 3) into the most popular search engine (Google.co.uk and Google.de) and surveyed the first ten pages of results, recording every live music intermediary in an excel spreadsheet. We reached saturation once our search terms yielded no new results in the first ten pages. Intermediaries not included, we argue, can thus be said not to have a substantial web presence.

TABLE THREE

We browsed numerous aspects of every site: Their 'about' pages, published blogs, listings of acts, and registration pages for acts and customers. We paid attention to a number of different variables. We recorded the number of acts listed and the target market segment (I.e. function vs creative music). We identified their method of organising transactions, including how visible prices were, how search functions were navigated, how easy it was for musicians to access the site, whether customer queries went directly to musicians, and how much information customers had to input prior to the transaction. We recorded the highest and lowest prices and the median price for a four-piece band, where this was visible. We assessed the ability of these sites to muster data and present comparable offers on the market, including potential customers' ability to sort acts by price and quality and the information provided about quality (for example user-generated star ratings and data gleaned from social media). Considering these factors, we assessed whether the site aimed to represent acts (i.e. a more traditional agent function) or to provide a customer-centric venue for comparison.

Our analysis aimed to develop different models of intermediation, through this systematic searching. The variables we recorded about each site were established using theoretical considerations. Factors like openness to new entrants, online functionality, and ease of comparability were recorded to gauge the presence (or lack thereof) of characteristics of the platform model. However, the development of models was inductive. Through ongoing discussion between team members, we could identify the emergence of particular types of website with particular configurations of variables, which could be grouped into distinct categories, defined and explained below. This necessarily involved some borderline cases, necessitating further discussion to develop a consensus about categorisations. Qualitative interviewing supported and corroborated this inductive sorting process. For instance, we prompted respondents to reflect

specifically on how they characterised their own business models, and how they distinguished it from other types of actors. This iterative relationship between systematic searching and interviewing increased our confidence in our categories.

Forms of partial digitalization

We sought to identify different models of intermediation in the live music labour market. Out of 168 entries, 72 were websites of traditional agents, and 30 were listings sites enabling musicians and clients to make direct contact offline. 23 were ‘digitalized agents’, mainly for function music, using digitalization to carry out the work of traditional agents in expanded and modified form. We classified 13 as platforms, because like other labour-based digital platforms they facilitated direct on-platform interaction between musicians and clients. (The rest were idiosyncratic or general-purpose platforms such as Ebay notices that included advertisements from musicians.) The four main types of intermediary were present in both countries (table 4).

TABLE FOUR

FIGURE ONE

Traditional agents, most of whom catered either to function or to creative acts but rarely to both, were highly selective about acts represented (DE Agent 2). They tended to be relatively small, with most representing fewer than 100 acts, and the median around 50. Major exceptions include Contraband (UK), which claims over 3000 acts, from diverse forms of entertainment, featuring some extremely high-profile artists.

These sites typically lacked an ‘artist sign-up’ link, and some directed musicians to make contact offline, with reference to auditions or the viewing of multiple live

performances. They usually provided individual band profiles featuring positive quotes from selected satisfied clients, but none provided automated systems for collating positive and negative ratings for comparison. There was wide variation in the presentation and attention given to the website: some featured high-quality videos, audio and promotional image files; others were amateurish and rarely updated (one advertising a well-known solo act who died in 2012). These sites' priorities lay not in connecting with large numbers of clients online, but in developing offline relationships with larger clients such as events companies (UK Agent 1) and expanding opportunities and earnings for a core of clients (DE Agent 1).

We identified a smaller group of digitalized agents, mainly geared toward function music. These enabled clients to compare a wider range of acts, had more open online sign-up procedures for artists, and/or allowed customers to compare offers according to price or popularity. Most combined all three. They were much more accessible to musicians, who could submit an online application form together with an electronic press kit (EPK) with recordings, videos, and other marketing material. As a result, they were much larger, with a median number of acts of 200 and the minimum being around 50 (the 'traditional agent' median). The largest are Last Minute Musicians (3000) and Alive Network (6500). While traditional agents control more prestigious work through longstanding offline relationships with venues and event organizers, digitalized agents focus more on one-off buyers (UK Agent 1).

These sites' greater openness to musicians suggests a shift towards functioning as a venue for client-driven comparison rather than artist representation. Interviewees at these enterprises (UK agencies 2 and 3) conceived themselves as inherently 'client focused', rejecting the role of musicians' representative. Their stated emphasis was on quickly arranging transactions to the satisfaction of customers, rather than acting as an

advocate for musicians. While traditional agents actively negotiate prices in relation to each buyer, and commonly avoid listing prices specifically to allow tailored negotiation (DE Agent 1), managers at digitalized agencies explicitly disavowed this function, arguing it undermined their high-speed, high-volume customer service model (UK agent 3). The musician, in these instances, commits to a publicly available price before being approached by the client, forfeiting the ability to seek a higher price, thus intensifying the risk of underselling. While 30% of all in our sample displayed prices to potential customers, 69% of digitalized agents did so. Most of these enabled sorting by price.

Digitalized agencies had diverse approaches to displaying prices. Smaller, often region-specific sites, while ostensibly allowing price comparison, featured fewer acts, suggesting a higher degree of selectivity, with higher and less varied prices. For example, one UK site featured only four bands with fees between £1000 and £1200. Some larger sites had wider variation in prices. One site, with around 3000 acts in total, offered 1320 wedding bands across the UK, offering a trio with a starting price of £35 and a quartet with a starting price of £100. Hence the union guideline minimum of approximately £150 per musician per engagement in the UK is frequently undercut on digitalized agencies.

Quality comparison on digitalized agencies varied widely, with larger sites enabling more detailed sorting. 12 enabled sorting of musicians' offers according to some form of quality measurement, usually user-submitted star ratings. (Few traditional agents allowed this). This enhanced focus on comparability increases competitive pressure on musicians, which is further intensified by active managerial agency: for instance, where musicians voice concerns about not getting enough work, the usual response is to counsel them to reduce prices (UK agencies 2 and 4) despite a context of stagnating prices in the functions music industry (UK agent 3).

Digitalized agencies thus combined features of traditional agents and online platforms. While their general roster may be readily accessible for artists with little selectivity, and may allow comparisons of offer according to price and quality, even the largest digitalized agents fall short of platformization. The data they amass to facilitate comparison are limited (see below), and acts on these sites are relatively passive: they upload their profiles into a virtual ‘shop window’ (UK agent 4) and wait to be approached. Furthermore, the transaction is never fully automated. Listing of prices merely provides a starting point: once client and buyer are in contact, there is always further negotiation to obtain a final price, often mediated by a manager at the business (UK agent 5). Moreover, digitalized agents also select acts for whom they take on more representative functions, such as assisting in creating better promotional materials or actively prospecting for work on their behalf (UK agencies 3 and 5). Hence, we observed in these cases a two-tiered, hybrid model retaining features of the traditional agent.

Finally, we identified 13 “live music platforms”. These resemble platforms in various respects but still fall short of the ideal-typical platform in others. Sites in this category were mainly geared towards creative work and were by far the largest. Berlin-based Gigmit claimed nearly 60,000 acts; US-based Gigmore, 50,000; Denmark-based 123PartyMusik, 4633; Netherlands-based Gigstarter, 4500; Hamburg-based Sofaconcerts, 3600. Their size reflected their openness (most featured instantaneous sign-up without even any assessment of submitted materials) and their direct marketing to creative musicians as a means of getting gigs. They were more data-intensive, using client ratings and linked social media data. One site assigned a ‘GigScore’, generated through accumulated social media data, including Facebook followers, Youtube views, and Twitter likes. A British live music platform allowed users to assign each other

‘points’ when they perform, intended to show an act’s trustworthiness and activity levels. Another even had an automated disciplinary mechanism: ‘strikes’ are given if an act cancels a confirmed engagement. Three strikes and the act is disconnected.

Platforms appeared to occupy the lower reaches of the creative music hierarchy, featuring musicians without a traditional agent and advertising low-paid jobs in pubs or bars. Unlike traditional and digitalized agents, these sites enable profile holders to interact directly. They provided for user profiles on both sides of the transaction: venues and clients posted gig opportunities to which acts could attach their own profiles.

Pricing on platforms operated differently from digitalized agencies. For platforms catering to creative work, fees were less likely to be displayed within artists’ own profiles. Instead, potential clients advertised gig opportunities, to which acts attached their profiles by way of application. Musicians may propose a fee, or the client may set a fee publicly in the advertisement. While this reduced the risk of freezing the act into particular fees, fees tended to be very low. Going rates of pay, important in function work (*self-citation deleted*) collapse entirely. When posting offers as a client or venue, users are typically given the option to specify a fee or select an option such as ‘no fee’ or ‘percentage of ticket sales’. For German creatives, Backstage Pro offers almost exclusively opportunities to play for ‘door deals’ (percentage of ticket sales) or no fee beyond transport costs; several UK-based live music platforms are similar. These websites increase competition by providing peripheral musicians, who previously did not have the services of an agent, enhanced access to an already hypercompetitive and anarchic market.

Platformization is not taking over live music labour markets. Something approximating the platform model only exists for “creative” jobs (and not at all for function work), but even here they appear confined to particular niches where creative

artists cannot obtain representation, perhaps because they are just beginning, or because their music has not attained a substantial profile or following. Platforms occupy a small, non-lucrative market segment. Backstagepro, for example, reports advertising 2,000 gigs a year for 40,000 musicians registered, and Gigmit reports 2,000 gigs a month for nearly 60,000 musicians and DJs, suggesting weak odds for getting work. In 2016 Gigmit claimed to have organized 11,000 gigs worth €4 million (mainly in Germany, but also in neighbouring countries), an average of €363.60 (Hofmann 2016), about 0.2% of Germany's \$2.1 billion in ticket sales in 2017. Combine this with the low fees, and it is unsurprising that many profiles on these sites are dormant. They do not appear a viable way for musicians to build careers as performers.

Live music platforms rely on diverse income streams, because the traditional agent's remuneration – a percentage share of gig fees – is usually insufficient. Like platforms in other sectors, they rely initially on investors. In Gigmit's case, this has included public subsidies including from the European Social Fund for Regional Development (EFRE Berlin, 2018), and in October 2016 media reported that Sony music had invested a '6-digit Euro-sum', acquiring a 15% stake (Hofmann 2016). Platforms also sell subscriptions to musicians. Gigmit, for example, has a free basic service and monthly subscription services: €9 for unlimited applications for gigs and better placement on the site; €29 for exclusive premium gigs and access to the promoter database (with 4923 entries); and €129 for tailored gig offers, individual booking service and personal assistance. Many platforms have a similar fee structure, though some preferred to retain the commission model because they felt that the subscription model could not offer enough benefits to musicians to be sustainable (DE platform).

Calling these intermediaries platforms requires qualification in terms of their functionality. Most provide more developed comparison mechanisms for price and

quality than traditional and digitalized agencies, but assessing musicians' offers requires studying dozens of profiles and wading through large amounts of audio, video, and text. Despite the sites' slick design, comparing the offers they put forward is time-consuming (DE Agent 2). Moreover, to our knowledge, only two enabled payment through the platform.

Digitalization may not have created an 'Uber for live music', but it has enabled some intermediaries to pursue offline profit-making strategies on an expanded scale. The fact that digitalized agencies were typically not part of industry trade bodies and associated collective bargaining mechanisms raised concerns among traditional agents about weak regulation: "there are so few people policing our industry it's unbelievable" (UK Agent 1). Some interviewees, particularly from digitalized agencies in the UK testified that, where agents did not display prices, they might keep acts' stated price secret from the client and negotiate as high a fee as possible, keeping the difference as a commission concealed from both client and act (UK Agent 2). Other interviewees (UK Agencies 3 and 4) confirmed that this was widespread in the industry. One told us, 'we could charge 100% [commissions] if we wanted to' but stressed they were deterred from this by the prospect of reputational damage (UK Agent 4). On other occasions, an agent might receive a budget from a customer, which could be unrealistic compared to musicians' going rates. Instead of advising the customer to propose a higher budget, the agent may then contact bands and try to recruit them for this original price (UK Musician). Both of these profiteering strategies would be difficult under a fully automated transaction, since they require direct human intervention, but both are facilitated by access to an available workforce expanded by online tools. This hybrid business model seeks greater profits through increased scale and volume, but keeps limits on the extent of automation.

Why don't platforms dominate?

The intermediaries discussed above are digitalized in varying respects but rarely come close to the definition of a platform. Where platform models do exist, they occupy marginal market segments. Why have live music markets not seen more platformization? Here we discuss three interrelated features of the market: valuation, the tasks, and the organizational field.

Value is irreducibly qualitative.

Platforms render quantifiable supposedly intangible qualitative judgements, simplifying them into some form of score. However, the largest digitalized agents and live music platforms in our sample show how difficult quantification is in this market. Several use comparison data such as user-generated star ratings, but most band profiles attracted few or no user-submitted ratings. Only some acts have a significant number of customer ratings – the most popular band at the Alive Network (UK) had 191 ratings at time of research. Other websites allow sorting by 'popularity' (with the definition unstated) rather than some clear user-generated measure of quality. To compare offers, visitors have to examine audio files, press photographs, video samples, and selected customer testimonials. For many clients seeking creative musicians, such a time-consuming comparative procedure is unhelpful, and assorted promotional materials do not offer sufficient clues to the musicians' suitability (DE Agent 2). This mass of information undermines the transaction-accelerating function of platforms. Moreover, where customers place emphasis on quality (for instance where venues build a reputation on the standard of their live music), personal connections are a vital part of quality control:

I know the venues, the organizers, and they know me. I don't book bad musicians. I stand with my name for them. If I sell shit to a venue, they won't book anymore with me. ... Many venues still prefer to get a call than a mail, at least at the beginning when you offer a band. So, they can ask immediately what they want to know. It is important that they know you. I have been told from venues I work with that they get 400 mails a day or more and everyone is telling you they are on tour and want to play. They delete most of them without reading them. I write specific mails to venues I know, they know me, there are two sentences at least in every mail specifically for the venue I write to. There is a personal relationship. (DE Agent 2)

Qualitative judgements are made not only by consumers hiring performers, but also by intermediaries granting performers access to their websites. In function work, one may expect the role of taste and gatekeeping to be weak, since tribute bands and acts playing well-established party repertoire are more similar, comparable, and interchangeable than groups performing their own compositions. However, the managers of digitalized agents also evaluate materials submitted by function musicians to decide whether to grant access, often based on appearance in videos and photographs and 'fit' with their site as much as musical quality (UK Agent 4). Appearances matter for the branding of what are primarily customer-oriented sites rather than multi-sided marketplaces, and gatekeepers, even at digitalized agencies, continue to use qualitative judgement in enforcing them.

The live music platforms varied in terms of how they synthesized quantitative metrics for artists. In some cases, searching remains only slightly more sophisticated than with digitalized agencies; for instance, enabling ordering by features such as price and location, or relatively nebulous criteria such as 'best match' (as on one site with around 40,000 artists registered). A few were more sophisticated. US-based Gigmor, for example, synthesizes data from Youtube, Soundcloud, Twitter and Instagram into a

composite ‘GigScore’ to rank artists. This more advanced quantification of musical value is matched by reduced human agency in admitting artists to the platform. In creative market segments, most platforms allowed quick signup without quality control. Musicians could thus access the market without investing in promotional resources like electronic press kits, which are a major risk-laden investment (Meier, 2017).

Although live music platforms tended to weaken qualitative oversight by gatekeepers, they only enabled access to the bottom reaches of the market. Platforms have not weakened the relationships between elite performers and their agents (DE Agent 2), in which the agent’s prestige increases with the exclusivity of his or her access to the client (UK Agent 1). Hence, while there were some circumstances where in-depth quality assessments were jettisoned, and where user-facing metrics were more developed, they were confined to lower-value market segments.

In sum, qualitative assessments of value are harder to simplify into quantitative indicators in live music, with customers needing to rely on large amounts of audio-visual resources in most cases. Furthermore, intermediaries want to retain agency over quality control in many cases. Where quantification is more advanced, the gigs on offer are confined to lower value market segments.

The service is a complex and contingent whole.

Live music, as a set of tasks, resists unbundling. A live music transaction involves contingencies that vary widely between engagements, are unpredictable, and which frustrate attempts to simplify and parcel out. Consequently, the service and its price are subject to ongoing negotiation, potentially leading to conflict between producer and buyer.

In creative-oriented platforms, clients are less likely to make complex and bespoke demands on time and repertoire. Consequently, the only sites that hosted payment procedures (we counted two) catered to this market segment. In function work, there are various concerns on both sides of the transaction. Consumers would demand changes requiring adjustments to the fee, like travel distance, waiting times, food provision, requested repertoire, and particular equipment; and they may have precise requirements regarding performance times, including waiting times, to perform before and after a large function dinner (which could overrun). The equipment needed may vary depending on the venue. These factors are complex, requiring specific and sometimes detailed logistical information with price ramifications, and which musicians would want to know about before committing to an engagement and agreeing a price.

Food provision during waiting times is an example of a particularly contentious contingency. At least two Facebook groups organised by live music workers were dedicated to sharing photos and comments on good and bad food-related experiences called 'Gig Food- The Highs and Lows' (approximately 500 members) and 'Bandwiches' (just under 4000 members). This question of food does not typically appear on enquiry forms, but one function band's own website includes under

Frequently Asked Questions:

Do we need to provide the band with food? Yes, food and soft drinks are required.

Either as provided to the guests, or as £10 payment per head for a meal outside of the venue. There should also be somewhere comfortable for the band to change, eat and relax prior to the performance.

Bands' demands on their clients was a frustration for digitalized agencies, who hope for a well-disciplined roster. The website of one digitalized agent offered the following advice to musicians considering signing up:

Apart from the gigging essentials such as refreshments and a place to get changed etc, do you share our ethos that you are booked as a paid 'service' to the client and their guests (no different to caterers, florists or photographers)? **We have a ZERO DIVA policy** (we actually find the best musicians just get on with it). No other profession gets fed at work or demands hot meals on arrival. Of course, if you are at a venue for a long time (or have to set-up early) then of course we request a meal for you but it should always be seen as a bonus and never 'demanded' from our clients. (Music companies do talk to each other about band behaviour and some do have blacklists). *When chatting to brides and grooms at wedding fayres, we hear time and time again that the single biggest thing that puts them off the idea of live music is the pre-conceived idea that bands (particularly singers) are 'too demanding or too much hassle'* [bold and italics in original].

The text here gives voice to the frustrations felt by some digitalized agencies caused by complexities like food provision. Music workers often want to retain their ability to negotiate on these issues, leading to conflict with digital intermediaries whose aim is to simplify and accelerate transactions (UK Agent 3).

In function work, sites often prompt buyers to specify arrival and performance times in the initial enquiry, and the Musicians' Union encourages members to negotiate contracts that include specific arrival, performance, and packing-up times. Many sites attempted to accommodate these contingencies. Some digitalized agents, for example, left space on enquiry forms for the buyer to specify song requests, such as the first dance at a wedding. Some sites in both countries prompted clients to specify their location, generating an automatic adjustment to the initial quote. Some also enabled acts to provide options for 'packages' including different performance times. A few even offered bespoke ensembles, where clients could request a certain band size and composition. However, these features still did not eliminate human oversight; they

merely adjusted the advertised fee at the outset of the transaction, before negotiation. One of the few live music platforms that does allow on-platform payment also leaves room for offline negotiation of price depending on what happens on the day (DE platform).

These features of live music contrast with other tasks that have been more readily organized through labour platforms. In some such cases, complex tasks can nonetheless be unbundled into various component parts which can be distributed around the world, as in much clickwork. In others, as with ride sharing or food delivery, price variations depend on variables that can be calculated algorithmically, notably distance of ride and time of day. However, in function music, no digitalized agency could eschew interpersonal negotiation. On ‘creative’-oriented platforms, low-paid and unpaid engagements appear to have a more take-it-or-leave-it approach to pricing. There is no algorithm involved: the gig posting just includes a (usually very low) fee. This may be another factor preventing such sites from progressing into higher value kinds of live music work.

The organizational field is fragmented.

The lack of a coherent ‘live music’ field limits the possibility of network effects, obstructing the scaling-up opportunities afforded to platforms in other sectors. There is no ‘one-stop shop’ platform that connects musicians across all market segments, and musicians who work in both function and creative work can easily ‘multi-home’, frustrating the rise of monopolists. While fragmentation of the field and its embedding in separate networks may in some cases be an incentive for greater platformization, the kind of segmentation in music imposes limits on what digitalized intermediaries can accomplish. Horizontally, live music is divided between function and creative music,

with different kinds of work, motivations, and buyers. Vertically, any scene will have a hierarchy, with musicians having unequal access to the most prestigious and well-paid engagements.

Function and creative gigs involve fundamentally different expectations by producer and consumer, different modes of working, different norms around going rates and working conditions, and different reasons why musicians work in them. The same musicians may work across both domains, but the other market participants differ radically. The buyer in function work is a corporate or private client looking for musicians to perform a service, comparable to catering staff. The buyer in creative work is a venue or member of the audience. In function work, these buyers will be looking for slick promotional materials and professional renditions of established repertoire, as well as budget (UK Agencies 2 and 3). In creative work, 'buyers' are more likely looking for artists with a distinctive creative output and potentially a 'cool' factor, and fees will be advertised by the venue. Hence, the kinds of promotional material musicians need to provide in each case also differ. Creative and function music also contrast in terms of expected pay levels, with much more stringent going rates in function engagements. Thus, although many of the same musicians work in both domains, market fragmentation renders a one-stop platform catering to all market segments impractical.

Intermediaries who attempt to work across different subsegments often struggle. The supply side is not the problem, since musicians move between function and creative work regularly, like platform workers in other sectors who move between different fields of work (Forde et al, 2017). The problem in music is the fragmented demand side, and the differing logics governing interactions with different types of buyer. Within these broad differentiations between 'function' and 'creative' work, there are further specialist niches revealed in our data. Several intermediaries on our list, particularly but

not exclusively the listings sites, specialize in weddings, often alongside non-musical wedding services.

Live music – both creative and function – is also segmented vertically. Some intermediaries attempted to move up-market or to combine creative and function work (UK agent 3; DE platform). Bridging these divides, however, turned out to be difficult. Gigmit, for example, started with a business-to-business model of digitalizing bookings with live music venues. Later, it re-positioned itself at the bottom of the musical hierarchy, marketing its subscription service to beginners and amateurs. It has recently attempted to move back upmarket by forming partnerships with agents, but with little success:

A lot of the platforms contact me and other agents, try to convince us to work with them because they want to get interesting music to be announced on their web sites, making it part of their portfolio... but I do not see that happening. They keep asking me to meet, to work with them, but I don't like it. Sometimes I think maybe I should, if the whole music business changes and becomes totally electronic... but I do not see that coming, at least not soon. If you want a good gig, an agency is better. (DE Agent 2).

A representative of a more “traditional” UK Agency (UK Agent 1) likewise argued that digitalized models were struggling to build lasting relationships with prestigious clients like events companies and were still confined to one-off buyers who did not provide repeat business.

Overcoming fragmentation thus entails hybridisation rather than platformization. At least two digitalized agencies the UK stated that their organisational strategy was to progress from one-off work to becoming preferred suppliers for larger events companies (UK agencies 2 and 5), often by hybridizing digitalized and traditional approaches. One strategy is simply to add additional functions. These often involve personal services, as with two UK digitalized agencies (UK agencies 3 and 5) that have introduced more

proactive prospecting for higher-value work for a select core of acts. UK Agent 3, for instance, will prospect for work more proactively- and even negotiate higher prices- on behalf of approximately 60 acts that they judged the most marketable on their 1500-strong roster. Similarly, Gigmit offers personalized services for musicians and for clients if they pay more and supply sets of bands to festivals. Backstagepro works with smaller radio stations and newcomer and talent events. Sofaconcerts promotes single artists and bands and scouts for companies, advertisement, and film. In order to increase revenues and access more prestigious market segments, highly digitalized intermediaries are thus adding the kinds of offline services provided by traditional agents, rather than ushering in the platformization of the sector.

Discussion and conclusions

The literature on platform capitalism describes numerous reasons for live music labour markets to become 'platformized'. The growing size of the live music economy, the potential value savings in transaction costs from breaking out of existing gatekeeper relationships and networks, and the extent of an under-employed, highly motivated workforce point to potential platformization. Moreover, live music has long been a 'gig economy,' with direct employment relationships unusual. However, we found that, despite considerable digitalization of existing intermediaries and some high-profile efforts to introduce platforms, platformization did not take place.

Our first contribution to the literature on platform work concerns our explanation of this finding. While there is recognition that platforms remain a marginal presence in the world of work as a whole (Forde et al, 2017; Krueger and Katz, 2017), the focus has generally been on the agency of participants. Entrepreneurs can be slow

(Parker et al, 2016), investors impatient (Manjoo, 2016). Fleming et al (2019) point to the internal limitations of labour-based platforms, in particular the weaknesses of neoliberalism as a guide to organization. Critical scholarship emphasizes worker resistance to platformisation, which can set back implementation of the model (Forde et al, 2017; Maffee, 2018), and comparativists point to differences in national institutions that shape the development and effects of platforms (Krzywdzinski & Gerber 2020).

By contrast, we have sketched out a different explanation and in doing so opened further avenues for research. We argue that historical and organisational characteristics of a given industry may present ingrained barriers to platforms as an organisational model. While our selected industry is a distinctive and specific one, this general point merits consideration much more widely, and connects with important questions we believe are under-investigated. In a given labour market, what are the structural factors limiting platformization? Do certain labour markets have characteristics that render them inherently difficult to platformize, and if so, what are they?

The platform capitalism literature sees the limits outlined above as challenges to be profitably overcome; it provides reasons why the three factors in themselves should do not necessarily prevent platformization, Quality can be reduced to quantities, making low price an ever more important determinant of success on the market (Caliskan and Callon, 2010). Complex services can be unbundled, facilitating these comparisons, and potentially devaluing the work that goes into producing the services (Huws, 2015). Fragmented organizational fields can be unified, with local services transformed into global 'clickwork' (Graham et al, 2017).

Nonetheless, these three factors take intractable forms in live music because they are combined. Qualitative judgements in live music cannot be transformed into

simple quantitative ones by isolating initial introductions. Given the nature of the task, considerable offline negotiation is needed, even if the intermediary appears to be highly digitalized. The fragmentation of the field comes about not only because of different word-of-mouth networks, but also because of fundamental differences in motivations and kinds of work. While platforms provide powerful tools for enterprises to grow in the face these challenges, intermediaries in live music face all three challenges simultaneously: value is assessed qualitatively, the task involves complex contingencies, and the organizational field is fragmented.

The distinctiveness of the industry we have studied could be construed as a limitation of this research. There are aspects of live music that might seem to give it its own unique identity, limiting generalisability. For instance, live music is often seen as providing a unique cultural and interpersonal “experience” (including factors like the “atmosphere” of the venue and audience) that might reduce the attractiveness of digital organization (Behr et al, 2016). This uniqueness, however, should not be overstated: for instance, in function work, as we have seen, musicians are normally engaged in a transactional and instrumental way where these intangible considerations are less applicable, yet platformisation was still deeply limited. Similarly, worker resistance and national institutional differences are less relevant to this sector given that, even in Germany, live music is an anarchic and ultra-liberal marketplace with little regulatory oversight. Nonetheless, given declines in union membership and longstanding liberalization trends internationally, live music in this respect may not be unique, or even unusual.

Our general theoretical argument about historical and organisational limits to platformisation may have some wider applicability. Qualitative valuation, complex and contingent tasks, and fragmented organizational fields are not unique to music and are

likely to be relevant to varying degrees in other sectors. This is most obviously the case in other creative/cultural industries which have clear similarities to music, such as other performing arts occupations. However, we may also expect these factors to be relevant to fields like childcare, elder care, or home repairs. Note that we do not rule out the progression of platforms in these sectors. Nonetheless, our analysis suggests that platforms in these markets will occupy limited market niches without revolutionising the sector in ways anticipated by some platform theorists. The more successful sites, while they may well become highly digitalized, are likely to fall short of the specific platform organisational form. In short, our study's main contribution is to sketch out a preliminary understanding of where the organisational boundaries hemming in the platform model may lie. Conceptually, it therefore also points to an important distinction between the idea of digitalization and platformization as they relate to work and labour markets, which are too often conflated.

In our data, digitalization of market intermediaries was partial and uneven, and fell well short of the definition of a platform when taken strictly. Some sites in our sample provided customer ratings, displayed prices, facilitated quick and direct communication between clients and musicians, created convenient ways to join, and even compiled and displayed data from social media. However, most simply facilitated offline transactions organized by traditional intermediaries, agents, and information was displayed in a way that did not facilitate quick price and quality comparisons. These platforms only rarely handle payment, and when they do, part of it takes place offline. Without exception, these websites occupy small market niches: bands seeking members, function bands seeking work at weddings or corporate events, or creative musicians seeking work in clubs, festivals, or private homes. Hence another contribution of our paper is methodological: to show how digitalization of market intermediaries in a sector

can proceed incrementally, generating hybrid models, without necessarily satisfying a definition of platforms. In making this argument, we therefore call for a more forceful rejection of deterministic and one-sided accounts of “platformisation”, which view it as a transformative new technology whose influence is reshaping the world of work. We do not minimise the potentially major effects of platform technologies, but we note that the existing social relations in a given sector, as they have developed over (in the case of live music) many decades, are not so easily swept aside. Instead, we observe a clash between these established social relations and the organisational changes made possible by digitalization. We have examined the strategic choices made by enterprises, who have adopted some digital innovations while discarding others, as they seek to maintain control over the organisation of transactions and make the pressure of intensified competition work to their advantage. In doing so, we see a complex web of hybrid models emerging, rather than an industry simply being “disrupted”, still less revolutionised.

The slow and uneven spread of digitalization, however, does not make it irrelevant to the lives of workers or the quality of their jobs. In our view, the most promising way to look at digitalization is as a vector for marketization. Even if they do not reduce all qualities to quantities or unify the organizational field, digitalized intermediaries can still increase market discipline on producers, as Fleming et al (2019) and others have argued. This is readily apparent in function music organized via digitalized agencies, where full-time professional musicians have to compete with other actors who do not necessarily respect wage norms and are willing to post extremely low prices to attract business. The price-comparison functions of large digitalized agents undoubtedly facilitate this. Showing how digitalization affects rates of pay (or other factors such as food provision) however, is a matter for a future paper. This would

require a more in-depth study obtaining data from working musicians and strategic case studies of particular sites, which could reveal the market effects of digitalized intermediaries.

Another notable finding from this study is that the platforms we uncovered almost all operated using a commercial logic. None of them displayed the ‘sharing economy’ ethos of the platforms studied by Schorr et al (2016); none resembled Scholz’s ‘platform cooperatives’ (2017); and we found no evidence that unions or collectives were creating platforms to improve the terms of exchange on live music markets. This surprised us, because, despite being only very infrequently collectively organised, historical evidence gives plenty of examples of collective mobilisation over working conditions by musicians (Cloonan and Brennan, 2013). Future studies could explore the conditions under which commercial logic dominates and reflect further on the potential for alternative forms of digitalization to emerge.

Even more mysterious are the means through which these platforms realize returns for investors. This is difficult to study because so much profit extraction in live music is covert, a major grievance of musicians themselves. It may be that many of these models can only function with an unlimited appetite for investors to invest in ‘Uber for X’ business models. In the longer term, hybrid models may be more profitable than platforms, since they extend existing market intermediaries with proven business models.

Data availability statement

Data can be made available on request. Interview data has not been made publicly available due to ethical considerations regarding informants’ privacy.

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