

Defining Resilience in Remote Music Ecosystems

A Review, Analysis and Recommendations Toolkit

Executive Summary

1. Introduction

This toolkit, written by The Center for Music Ecosystems along with Globus/Nordic Culture Fund and Erasmus University Rotterdam explores the role of music and resilience in Nuuk (Greenland), Juneau (Alaska) and Tórshavn (Faroe Islands).

Defining Resilience in Remote Music Ecosystems focuses on the role and impact of music ecosystem policy and how it can best be deployed in small, mid-sized and geographically isolated communities. This work focuses on the definition of resiliency itself, in which music ecosystems have the capacity to absorb a variety of internal and external shocks and disturbances and examines how resilience is embedded in the music ecosystems of the three regions, proposing actionable ways to strengthen it. Strengthening the resilience of the music ecosystem of smaller and more isolated regions enables them to withstand shocks and better deal with ongoing change, making them future proof.

The concept of building resilience applied in this research has been developed by the <u>Stockholm Resilience Center</u> (an international center that advances transdisciplinary research for governance of social-ecological systems, and who have validated this document) and is based on the Center's **'9 Resilience Principles':** maintaining diversity; maintaining redundancy; managing connectivity; managing slow variables; managing feedback loops; fostering understanding; encouraging learning and experimentation; broadening participation and promoting polycentric governance.

The objective of this research is to demonstrate the value in making music more integral to how communities think about - and act on - the challenges they face economically, socially and environmentally. It looks at music holistically and demonstrates that by recognising and investing in making one's music ecosystem resilient - no matter the location - the entire community benefits.

For each community, the research has explored:

- The Current State of Play (how things are now)
- Future Scenarios (how things could be)

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- Resilience Building Blocks (how to get there)
- Requiring Resilience (what to be aware of)
- Threats (*current and potential*)

The recommendations outline what components of the ecosystem require resilience and what is needed to build it into policy and practice.

Methodology:

The Center for Music Ecosystems, along with local partners, conducted the work as follows:

- 2 surveys, one aimed at the local consultants in each region and the other at relevant stakeholders from each region
- 1 'ideation workshop' per region, during which the local consultants of each city, along with the team from the Center for Music Ecosystems, determined the core areas of focus in each local context
- Analysis of all strategy and policy documents provided by local consultants
- An additional set of research questions answered by local consultants
- Independent desk research
- 3 rounds of individual interviews with additional key actors from all three regions, selected by the local consultants

2. An Introduction to Resilience

2.1 What Is Resilience?

The concept of resilience originates from ecology and refers to the capacity (of an ecosystem) to bounce back to its original state after facing disturbance or crises, and was introduced by C.S. Holling in his landmark paper 'Resilience and stability of ecological systems' (1973).' Resilience is the central theme for a number of post-COVID-19 recovery policies, such as the <u>European Recovery & Resilience Facility</u>. Both local and national recovery policies exist, focused on creating a more resilient cultural and creative industry, or music sector, such as Sound Diplomacy's <u>Music Cities Resilience Handbook</u>.

However, these policies often introduce the term "resilience" without operationalizing it (i.e. providing actionable guidance and recommendations), and therefore, it can be unclear exactly how this resilience needs to be built or strengthened. This report focuses on the "how" and gives tangible and actionable recommendations for resiliency interventions.

Before introducing these interventions, it is important to understand the concept of resilience itself. Resilience can be understood on three separate, but interconnected levels:

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- 1. As a property of every individual person. On an individual, human level, we tend to consider resilience from a psychological perspective, focusing on mental health and wellbeing (e.g. the capacity to deal with disappointments or stress).
- 2. **On an organizational scale.** For example, companies and institutions building resilience from a managerial perspective via risk assessment and mitigation, often with the goal of creating buffers to absorb (financial) shocks.
- 3. On a sectorial or systemic scale and the focus of this work. Here, concepts of resilience are derived from ecology and, or, complex systems theory (an approach to science that investigates how relationships between a system's parts give rise to its collective behaviors and how the system interacts and forms relationships with its environment), and are focussed on creating an holistic system able to withstand shocks, and disturbances and handle change.

'Resilience' can also be considered in a directional sense. The first example of this is 'bouncing back' - a synonym for 'resilience'. 'Bounceback' is a reactive form of resilience, referring to the capacity of a system, organization or person to respond to disturbance, crises or change by bouncing back to their original state. 'Bounce back' resilience can be imagined as an elastic band that is stretched out and rebounds to its original form once released.

The second direction is the 'bouncing forward' form of resilience. This form is proactive. It is less focussed on responding to crises, disturbance or change, but on anticipating them, and allowing persons, organizations or systems to 'bounce forward' into a new reality. The music ecosystem is in a constant state of flux and continuously dealing with new realities and future developments. This study therefore focuses largely on this second, forward-facing form of resilience. We want the music ecosystem to be ready for 2030, not to bounce back to 2010.

For 'bouncing forward' resilience, we need to apply two questions: Firstly, what component of the ecosystem requires resiliency - and secondly, what shocks and disturbances does this component need to be resilient to? The first question refers to the actor, structure or element in the system that needs to be (more) resilient. In music ecosystems, examples of this are the socio-economic position of musicians, the location of a venue in a city, or the diversity of genres present within the ecosystem. These are all subjects that are continuously under pressure from changes in, and disturbances of, the music ecosystem.

The second question, 'to what' the component needs to be resilient, refers to the disturbance, crisis or change that impacts the system. For example, urban development, digitization, cost of living, climate change or the COVID-19 pandemic. When building resilience, it is essential to keep these two questions at the core of any strategic thinking.

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'Bouncing forward' resilience is anticipatory and pro-active by nature, meaning it is important to visualize images of possible futures. These scenarios can then guide policy in the desired direction. Considering different future scenarios also enables actors in the system to fall back on familiar terrain once a crisis or disturbance hits the ecosystem. It is an exercise that helps to anticipate both 'known unknowns' and 'unknown unknowns', and is a quintessential part of building and strengthening resilience in ecosystems. In this research, participants were asked to construct both ideal and 'less ideal' images of the future of their ecosystems.

3.0 Analysis of Each Community

Below is a concise overview of the current state of play of the city with regards to its resilience, imagined futures and an overview of the most important findings regarding the 9 Resilience Principles. It is followed with the recommendations.

3.1 Resilience at a Glance: Juneau, Alaska

Current State of Play

The music sector in this region lacks an organized music office. The creation of the organization AKIMI (Alaska Independent Musicians Initiative) aims to fill this gap and already boasts several successes in spite of its short lifespan (active since 2017). The creative industry is a growing sector, but remains small compared to traditional economic contributors such as natural resource extraction or tourism. The Juneau music sector is characterized by stakeholders as being a highly diverse hub of different cultures, genres and communities.

Future Scenarios

We have identified two key terms that describe the future ambition of Juneau's music ecosystem: 'self-determined', and 'self-aware'. This can be achieved by creating more formalized structures and organizations that benefit the music sector. In order for the sector to be successful, there needs to be truly inclusive participation across all communities and genres. The creation of "dry" (alcohol-free) or under 21 venues could benefit this process, as well as the development of an alternative funding or investment network. In terms of funding, there is potential in Juneau to explore more equitable forms of philanthropy (meaning more money goes to more diverse voices and genres), as an alternative for the very little existing public funding for music (i.e. limited grants and services from the Arts Council). Organization and monetization of the informal economy (e.g. formalizing house concerts, commercializing all peer learning systems) is not a practical approach in this instance.

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Resilience Building Blocks

Juneau has a diverse and versatile music ecosystem which supports the growth of various music genres. The human capital (i.e. the personal attributes of the actors) in the city is one of the elements fostering resilience in the ecosystem. There is a critical need for economic diversification to increase resilience, and here lies a wider interest in a more sustainable economic model. The "mystique" of Alaska provokes an excitement that the music sector can profit from. The interest of the city and tribal government in promoting Juneau as the home of Northwest Coast Alaska Native arts is promising.

Requiring Resilience

A major challenge is the lack of institutional memory and an inherent lack of awareness of the boundaries or actors that are present in the sector. High dependency on a handful of individuals creates fragility, as their potential departure from Juneau or changes in their professional or personal situation resulting in less or no involvement in the music sector threatens its stability.

Threats

There is a shared concern about the ongoing economic dependency on fossil fuels alongside tourism. Due to the high dependency on oil, on some occasions the cruise ship industry was suggested as a clean alternative to this reliance on fossil fuel extraction, despite the fact that cruises are some of Alaska's largest local polluters and can increase prices in the housing market and accelerate gentrification. Alaska's state taxation system would need major restructuring were state-wide finances to depend more on tourism rather than resource extraction.

3.2 Resilience at a Glance: Nuuk, Greenland

Current State of Play

Greenland's music ecosystem consists largely of non-professional musicians. It is only feasible for a small number of people, often for a limited amount of time to become professional musicians, resulting in a lack of full-time music employment and a lack of full-time musician role models or recognition of music as an industry to be developed. The Greenlandic ecosystem is inward-looking; largely playing Greenlandic music for people from Greenland. Greenlandic musicians tend to be from middle-class backgrounds; when this is the case, they can either afford to make music, or to take on low-paid music work, meaning that making music has to compete with non-music jobs. Though well-paid concerts do exist, there are not enough of them to accommodate many musicians. This creates a loop where the music sector's small size renders it less accessible to less affluent individuals, resulting in a lack of opportunities to professionalize or grow a music industry. The national and municipal government make statements about

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supporting the cultural sector, however little tangible action is visible. Digitization has had a profound impact on the Greenlandic music sector, which facilitates export of music, but it has not led to increased revenues or jobs in the music industry.

Future Scenarios

The future of the Greenlandic music sector will likely be shaped by a number of variables. Digitization will have further impact, and music will, to a greater extent, be released online, resulting in fewer physical sales and possibly also a negative impact on genre and cultural diversity due to, for example, algorithmic curation. Web3 opportunities could provide additional sources of income, but literacy of the ecosystem is low and requires education. Digitization has simultaneously, however, had a positive impact by increasing genre diversity through reducing the need of record labels for publishing music – as record companies are no longer gatekeepers to the publication of music in Greenland, which they once were. Greenlandic independence is another possible variable. This could potentially result in less funding for the music sector due to lower GDP. Subsequently, the increased nationalism leading up to, or resulting from independence would potentially favor traditional Greenlandic genres, pushing away outside influences, and reducing diversity. However, the new airport in Nuuk, due to open in 2024, could have a positive impact by increasing connections to the rest of the world, facilitating periodic international touring visits. Ideally, in the future there will be increased opportunity for music education, genre diversity and cultural exchange with the rest of the world, but for the time being, the risk of a closed and isolated Greenland remains a threat.

Resilience Building Blocks

The Greenlandic music sector is considered to be resilient to shocks by some of its actors. This resilience is embedded in several components of the system. Most musicians, for example, have post secondary education and some have experience with music education. This makes them potentially more capable of maneuvering through the ecosystem. The sector has high self-awareness, in part thanks to its inward-looking gaze, which results in a high knowledge of the system as well as its connections and dynamics. Strong ties with the nationalist movement and national identity result in a strong connection between certain genres and local audiences. Katuaq, the cultural venue of Greenland, is a potential stronghold for the music sector. There are several motivated individual actors such as musicians, entrepreneurs and organizers that drive the sector forward.

Requiring Resilience

The general, inward-looking scope of the Greenlandic music ecosystem makes it vulnerable to external forces, and therefore needs to be broadened. Music distribution and consumption are highly disrupted by ongoing digitization, with the island having affordable access to the Internet only recently. The number of rehearsal spaces in Nuuk is

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relatively small, and venues for non-commercial music genres are scarce. As a result, the more experimental composers and artists in the ecosystem have little space to pursue their ideas. Historically, Greenland was home to a number of record labels. Today, Atlantic Music is the only record label based in Greenland, playing an important role in releasing, distributing and marketing Greenlandic music, but the current lack of alternatives to this label and the increasing digitization impact its economic model.

Threats

There are several forces pressuring the Greenlandic music ecosystem that can cause disturbance and change. Digitization is an important force, having already disrupted the distribution and consumption of music, though also creating space for new formats and consumer and production trends. The isolated position of Greenland, and some forms of nationalism, can be a potential threat as they could further isolate the Greenlandic music ecosystem from the rest of the world. The institutionalization of alcohol and its connection to the live music sector negatively impacts the music ecosystem. The Greenlandic economy at large is based on both the extraction of natural resources (e.g. fish stocks) and financial support from Denmark. A global shift in the economic model (e.g. through changes in pricing for shrimp and halibut) may cause a lower GDP in the short term and possibly lower the funding of the music sector, although that could change with increased digitization or investment in music and cultural education.

3.3 Resilience at a Glance: Tórshavn, Faroe Islands

Current State of Play

Tórshavn's music ecosystem is described as a welcoming, mostly horizontal in structure, small ecosystem, characterized by its openness and accessibility. Despite its small size, most main actors are present: a record store, a publisher, record labels, studios, festivals and several venues. The character of the ecosystem is mainly determined by a small number of highly motivated, passionate, and hands-on individuals, for which the Faroese language has a special term: *Eldsálir* or "Fiery Souls."

Future Scenarios

The future of Tórshavn's music ecosystem is imagined as one where the music sector has greater political leverage, due to political and public awareness and appreciation. A positive impact is expected from the newly established Tónleikasamband Føroya, the musicians' union (which also represents all music professionals), which will enable greater involvement in the political and governance processes impacting the music sector. In terms of infrastructure, more rehearsal spaces are needed. These are under continuous pressure from rising real estate prices and urban development. The Faroes have had an explosive population growth over the last ten years, growing from 48.000 inhabitants in 2012 to 54.000 inhabitants in 2022, putting pressure on the housing market, especially in

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Tórshavn. The key concern for the future is another economic crisis. The Faroese economy at large is vulnerable with 90% dependency on the fishing and fish farming industries and on fish trade and fisheries agreements with Russia among other nations. The current war between Russia and Ukraine makes this a tangible current threat. Further music sector specific challenges are connected to the increasing reliance on Digital Streaming Platforms (DSPs) for music distribution and consumption, and the accompanying discussion around fair remuneration. Lastly, respondents expressed the desire to lose the external perception of the Faroe Islands being 'a whale-killing, football country'.

Resilience Building Blocks

The ecosystem has a number of components in which resilience is embedded. First and foremost, these are the 'Fiery Souls' such as Kristian Blak, founder of TUTL Records, who has had a profound and lasting impact on the ecosystem since the 1970s. In contrast with these highly influential individuals, there is a high degree of collectivization though unions, in which a relatively large number of music sector actors are united in some capacity. The Føroya Tónleikasamband (FTS) organization is referenced by participants as a major player, given the fact that it includes representatives of all sectors related to music. Participants in the Tórshavn and Faroese music ecosystem overall display a high degree of digital literacy. Combined with a highly-developed digital infrastructure, this contributes to the anticipatory capacity of the sector in which participants have a high level of awareness of social, economic, cultural and political trends worldwide and have the technological means and capacity to respond to these. An important building block for creating resilience is the open and welcoming attitude that characterizes the sector. New people and ideas are welcomed, and change is generally embraced rather than opposed. There are a variety of funding opportunities from both public and private origin, but several matters need to be addressed so that they can become a strong basis for the development of the ecosystem; expanding the number of Faroese funds or cultivating a culture of sponsoring events or initiatives, for instance.

Requiring Resilience

The Tórshavn music ecosystem has several key components wherein resilience needs to be strengthened, with its dependence on a handful of key individuals, such as Kristian Blak, being the most urgent challenge. Should these individuals leave the ecosystem for whatever reason (migration, change of career, death, etc.) their knowledge, experience and network needs to be sustained. Currently, this happens only sporadically. Other components requiring resilience are those with low redundancy, such as record label TUTL (the largest record label in Tórshavn), and the scarcity of rehearsal spaces.

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Threats

A number of developments and threats have been identified as having a potentially negative impact on Tórshavn's music ecosystem. These are of both internal and external origin. One significant threat is the prevailing ideas that the arts, including music, should be freely available, and that music is a 'side job'. These are deeply rooted and prevent development and professionalization of the sector. The ongoing lack of political leverage is another factor to be taken into account. Ongoing disruption of the distribution and consumption of music by DSPs and the subsequent low remuneration of creators could have a long term negative impact on the ecosystem. Finally, the greatest threat identified is that of a new economic crisis, impacting the music sector on all levels, along with everything else.

4. Recommendations

Recommendations are presented in time-based categories (short term: up to 6 months; medium term: 6 months to 1 year, and long term: over 1 year). This time-based approach is underpinned by two ecological principles that determine the strength of the ecosystem: 1) the structure of the system and 2) the connectivity in and of the system. Recommendations have been discussed with each local consultant with local stakeholders equally invited to input. For the purposes of the executive summary, recommendations are presented as shared recommendations to be enacted across each of the three regions. For detailed recommendations relating to each municipality, please refer to the full length 'Resilience Review, Comparative Analysis and Recommendations Toolkit'. Each recommendation also references which of the Stockholm Center's '9 Resilience Principles' it primarily addresses.

In total, the research offers 29 general recommendations. The comprehensive report goes into extensive detail about what each means in each community.

Resilience Principle Number	Definition
1	Maintaining diversity
2	Maintaining redundancy
3	Managing connectivity
4	Managing slow variables

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5	Managing feedback loops
6	Fostering understanding
7	Encouraging learning and experimentation
8	Broadening participation
9	Promoting polycentric governance

Short Term (Up to 6 Months)	Resilience Principle(s)
1. Launch a communications campaign to promote the value of music locally.	4, 6
2. Conduct a comprehensive mapping exercise of venues (noting profile, audience, challenges and possibilities of hosting live music), individuals and organizations. Identify gaps in the music offer, such as underrepresented genres. Launch a community dialogue to form a common agenda for the development of the sector.	1, 2, 3, 5, 6
3. Map existing training gaps through interviews with key actors in the municipality. Identify where training is required. Organize a series of digitization workshops with musicians and music practitioners. Develop a strategy towards hybrid music events, using live streaming or Web3 opportunities as a tool for state-wide, national and international promotion.	6, 7
□ 4. Compile music-related successes in the last 5-10 years, e.g. the establishment of new venues, a new communication strategy, new advisory boards, etc. Identify the elements that work, why they work, and how synergies can be created.	5, 6
□ 5. Map the departure or stepping down of actors in the music sector. Conduct research on the main reasons for artists and professionals to detach themselves from the music sector and identify action gaps that can potentially be addressed.	2, 5, 6
6. Create more comprehensive data outlining the value of music for policy and decision makers. Open dialogue to	4, 6, 8, 9

 ensure complete alignment with regards to COVID-19 recovery agreements, for example, to ensure their complete and fair delivery. Communicate these common interests, as well as the importance and potential of the music sector to politicians and businesses in a language they understand, showcasing aligned interests among several economic sectors. 7. Open dialogue with local radio stations with a view to understanding and then addressing any reticence to paying performance rights. 8. Address dichotomies between urban or rural musicians and genres. Break silos by creating exchange programs and mentoring programs stimulating collaboration. Maximize existing networks, like PULS. 9. Start dialogue with programmers of existing venues regarding the character of the programming and discuss how to create more room for young and emerging artists and artistic experimentation. 		
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Mid Term (6-12 Months)	Resilience Principle(s)
1. Explore membership quotas, cover charges, pay-as-you-can-ticketing and more assertive or flexible tipping options as alternative financing modes for music venues (listening rooms, 'dry' venues, underground circuits) and music organizations.	1, 2, 7
2. Identify economic priorities of other key sectors (tourism, retail, real estate, workforce development and hospitality). Evaluate the most suitable potential collaboration nodes and partnerships.	3, 6, 9
□ 3. Create a partnership between higher education institutions (where they exist), music actors and organizations and public bodies such as Arts Councils to develop digital, hybrid and/or in-person courses on key matters identified through preliminary research.	3, 6, 7, 8
	1, 3, 8, 9

□ 4. Develop creative residency programs inserting music and music-related activities within other sectors, such as arts institutions, primary and higher education institutions (where they exist) and healthcare or other social benefit institutions, with participation being a priority.	1, 9
5. Increase the presence of music and music-related activities in public space through revision of busking regulations and placemaking techniques.	1, 6, 8
6. Conduct a diversity and inclusion audit to include all actors in the system as well as style and genre.	
 7. Further, or initiate, unionization processes, by encouraging and incentivizing music sector actors that are currently not part of any association to instigate or join. Challenge any idea that culture and music are exclusively hobbies, and should always be freely available. 	5, 8, 9
8. Launch an awareness campaign focussed on youth, explaining and showcasing the richness of each music sector, featuring examples of important actors within the music sector, creating role models of successful music sector professionals to incentivize younger generations to pursue a more serious career in music. Enable younger generations to participate in the music sector by lowering barriers for entry, e.g. through supplying more free or cheap rehearsal spaces, setting up instrument libraries or free tuition for music school.	1, 4, 5, 8
9. Relationship-building and collaboration with advocates of social change. Enter a dialogue with ambassadors of social or cultural rights and explore what role music can play towards their cause, e.g. regarding gender or Indigenous diversity.	f
□ 10. Recognize the urgency of the future impacts of climate change and educate the sector accordingly. Learn from leading climate change organizations how the music sector can be made more environmentally sustainable.	4.7
11. Address funding insecurity through three main approaches: secure long-term stable funding for organizations to make them more resilient to political and economic fluctuations (i) propose an evaluation of the government support packages during Covid-19 pandemic and identify key aspects for the development of a crisis-specific fund (ii); map existing funding streams for cultural proposals and propose a	2, 6, 9

 revision of their allocation mechanisms. Include music associations (i.e. collectives, trade organizations, unions and special interest groups) to take a step forward and participate more in sector governance and decision-making. 12. Use existing music festivals as opportunities to strengthen international connections, for example through exchange programmes with artists and professionals from other territories. 	3, 8
Long Term (12 Months Plus)	
□ 1. Where one does not exist, create music offices functioning as an umbrella organization or union, featuring participants from all sectors of the music ecosystem, that can enable dialogue with representatives of other economic sectors, policy-makers and service providers (i.e. healthcare). Create two divisions within music offices: first, a Public Relations division to lead on music export, establishing partnerships with international journalists, tourism boards, and similar key organizations and lead communication work to professionalize musicians. Second, a Legal and Financial Advisory division to assist musicians and music professionals with legal, financial and administrative matters	2, 3, 6
2. Establish community-run "dry" (alcohol-free) venues that also function as rehearsal spaces. Ensure that all genres and collectives have a chance to use it, in particular giving space for experimentation by youth.	1, 7, 8
3. Establish a scholarship programme through the most appropriate body for individuals outside of the three municipalities in technical (eg. sound and light engineering), creative (eg. music making) and administrative (eg. booking, production) aspects. Develop a procedure to have the trained professionals stay in the municipalities after training and teach on-site.	5, 7
4. Establish municipal music training alternatives, incorporating existing entry-level music teaching and adding specialized courses. Consider intensive learning such as music camps. Create these programs in partnership with key arts and education institutions.	1, 7, 8
5. Start dialogues with the municipality, funders and local businesses on the creation of a potentially self-run music	1, 2, 6, 7, 8, 9

venues and rehearsal space complex catering towards the needs of the music sector. More room for experiment and niche styles of music, and low barriers for participation. Involve urban development, tourism sector and other relevant sectors.	
6. Develop a pilot for a guaranteed basic income scheme for artists, in partnership with local governments.	2, 5, 7 ,9
□ 7. Create 'safety nets' such as a benevolent fund to protect musicians in times of crises. This can be a public - private effort, where unions, government and organizations can play a role.	3, 8, 9

5. Conclusion

The objective of this research is to outline that by investing in music, it can make a community more resilient, no matter where it is. It also demonstrates that no matter how isolated the community, there are reasons to invest in, and expect a return from, music in all its forms and functions. This research can apply to any community and the recommendations can be adapted to any local circumstance. This is our objective and the next steps we will take with this work. We will work with all three communities to promote the work and implement the recommendations, while at the same time welcoming new communities into a learning lab and network, to further this link between music and resilience.

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