



De Metaal Kathedraal

Outside the Box

The Added Value of Strategic Alliances for Dutch Popular Music Venues

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Table of Contents

Chapter 1: Introduction	p.5
• Chapter 1.1: Topic	p.5
• Chapter 1.2: Research question	p.6
• Chapter 1.3: Motives & Relevance	p.7
• Chapter 1.4: Structure	p.7
Chapter 2: Method	p.8
• Chapter 2.1: Introduction to qualitative research methodology	p.8
• Chapter 2.2: The method	p.9
• Chapter 2.3: Methods for data analysis	p.11
Chapter 3: Data Presentation & Analysis	p.13
• Chapter 3.1: Introduction	p.13
• Chapter 3.2: Bookings on location	p.13
○ Chapter 3.2.1: Introduction	p.13
○ Chapter 3.2.2: Changes in demand	p.14
○ Chapter 3.2.3: Changes in supply	p.18
○ Chapter 3.2.4: Cons	p.21
○ Chapter 3.2.5: Recapitulation	p. 22
• Chapter 3.3: The next step: from booker to promoter?	p.23
○ Chapter 3.3.1: Introduction: The Anglo-Saxon model	p.23
○ Chapter 3.3.2: Advantages	p.24
○ Chapter 3.3.3: Disadvantages	p.25
○ Chapter 3.3.4: Expectations	p.27
○ Chapter 3.3.5: Festivals	p.28
○ Chapter 3.2.6: Recapitulation	p.29
• Chapter 3.4: Strategic alliances and horizontal integration	p.30
○ Chapter 3.4.1: Introduction	p.30
○ Chapter 3.4.2: Advantages	p.31
○ Chapter 3.4.3: Disadvantages	p.35
○ Chapter 3.4.4: Recapitulation	p.37
• Chapter 3.5: Talent development	p.38
○ Chapter 3.5.1: Introduction	p.38

- Chapter 3.5.2: Building a chain p.38
- Chapter 3.5.3: Local initiatives p.39
- Chapter 3.5.4: Recapitulation p.40
- Chapter 3.6: Cooperation vs. Competition p.40
 - Chapter 3.6.1: Introduction p.40
 - Chapter 3.6.2: Cooperation within towns p.40
 - Chapter 3.6.3: Cooperation between towns p.42
 - Chapter 3.6.4: Finding a balance p.42
 - Chapter 3.6.5: Recapitulation p.43

Chapter 4: Theoretical Framework p.45

- Chapter 4.1: Introduction p.45
- Chapter 4.2: Properties and values of creative activities p.45
- Chapter 4.3: The Performing Arts Value Chain p.46
- Chapter 4.4: Types of partnerships p.48
- Chapter 4.5: Strategic alliances p.49
- Chapter 4.6: Recapitulation p.53

Chapter 5: Conclusions p.54

Bibliography

Sources

Appendix

Chapter 1: Introduction

Chapter 1.1: Topic

In the past ten years, the Dutch music industry developed enormously. From 'Het Grote Poppodium Onderzoek' (The Big Research on Popular Music Venues) it becomes clear that the relevance of live performances of pop music in society has boosted. The audience for live pop music has grown on average by 48% (Vreeke & Van Dalen, 2008, p. 39). Because of the increasing activities, bigger audiences and stricter Occupational Health and Safety and Environmental legislations, rebuilding and building of new venues was stimulated. The growth of capacity and turnover caused a need for changes in the organisation of the business of the music venues. Most of them arose out of the youth movements in squatted buildings working primarily with volunteers, but the latest developments pushed them to professionalise rapidly.

The economical and political climate has changed a great deal lately. The economic crisis is affecting the business of live performances. Subsidies are cut and organisations are expected to develop their entrepreneurial skills and become even more self-supportive. In 2010 the Dutch Society of Pop Venues and Festivals (VNPF) conducted a survey among their 48 members (response rate 98%) (Dee & Schans, 2010). Main conclusions the authors derive from the data of 2010 are a decrease of the number of musical activities and a decrease of visitors. They note that music venues have anticipated to the subsidy cuts forehand by taking less risks and book more carefully. Still the authors conclude that the distinct, innovative function of the venues and therefore the diversity of the supply is under pressure (Dee & Schans, 2010, p. 5).

Vreeke and Van Dalen concluded their report with a couple of issues that they consider worthy of being studied more thoroughly. The idea for this thesis originated from their advice to have a closer look at partnerships between music venues on aspects of bookings, marketing and business. They wonder what the possibilities of cooperations are and why this is not happening so far (Vreeke & Van Dalen, 2009, p. 84). The developments in the last ten years can function as a challenge for the newly professionalised venues to explore unknown territory. This study focuses upon the reasons for popular music venues to integrate partnerships in their businesses.

Chapter 1.2: Research question

The **aim** of this research is to understand the reasons for popular music venues (not) to establish strategic alliances. Interviews will be held with bookers and directors of popular music venues in The Netherlands. In this qualitative study, attention is paid to the different circumstances under which the venues operate. This is why the research question leaves space for a wide interpretation of cooperation adjusted to the environment and mission of the music venue. In this study, the following **research question** will be answered:

What are the reasons for Dutch popular music venues (not) to establish strategic alliances?

In order to answer this research question, this thesis will work with the next **sub questions**:

- *What are the reasons for popular music venues (not) to book at other locations than their own?*
- *What are the reasons for bookers (not) to work like promoters?*
- *What are the reasons for popular music venues (not) to form strategic alliances or mergers in the back office or the marketing department?*
- *How does the aspect of talent development influence choices in partnerships or not?*
- *How does the aspect of competition influence choices in partnerships or not?*

Explanation of concepts:

Music venue

For the definition of a (popular) music venue, the Big Pop Research is used which bases itself upon the criteria from the VNPF. 'A specialised pop music venue is an organisation with the booking of pop music as a main objective. The organisation is self-initiating and features a hall with a capacity of at least 150 people. The programme should consist of at least 25 concerts a year (Vreeke & Van Dalen, 2008, p. 17).'

Strategic Alliances

In this thesis the concepts of strategic alliances, partnerships and cooperations are used interchangeably. The following definition is used: Strategic alliances are inter-firm cooperative arrangements that allow firms to temporarily seek resources from others to their own benefit (BarNir & Smith, 2002; Buduru, 2010). Strategic alliances should not be mistaken for mergers and acquisitions. In the latter case two firms integrate into one. Mergers will also be discussed as a next step of professionalisation.

Bookers & Promoters

In The Netherlands each venue works with its own booker who is in charge of the program. In Anglo-Saxon countries, several promoters book artists for different venues, dependent on which one suits best.

Chapter 1.3: Motives & Relevance

This research originated out of a personal passion for live music. Being educated as a cultural economist and entrepreneur, a personal interest in the businesses of popular music venues arose. As explained previously music venues have undergone quite some changes since they were first established. Certain developments pushed them to professionalise rapidly. Nowadays it appears that the current economic crisis and subsidy cuts are cause for an even closer look at the business side of popular music venues. Both in theory (chapter 4.3) and in practice, cooperation is mentioned as a means for gaining efficiency and quality. A driving force of this research is the question whether this actually happens in reality. In what ways do popular music venues cooperate and what are their reasons to do so?

Chapter 1.4: Structure of the thesis

The next chapter explains the advantages of a qualitative methodology. The methods that are used in this research are explained. In chapter three the data is presented and analysed. The paragraphs of this chapter are structured according to the sub questions. In chapter four, some existing theories will be explained and applied to results of the data. In the last chapter conclusions will be presented and the research question will be answered.

Chapter 2: Methods

Chapter 2.1: Introduction to qualitative research methodology

For a better understanding of the appropriate research methods, this chapter refers to the book *Social Research Methods* (Bryman, 2008). Qualitative research is characterized by an inductive approach where theory is usually generated out of research as opposed to a deductive approach where theory is tested by research. Data is gathered and structured at an early stage of the research. From there on, theory is formed. “The stress is on the understanding of the social world through an examination of the interpretation of that world by its participants” (Bryman, 2008, p. 366).

The researcher stands close to his subject in order to have a better understanding of his or her context. He tries to see the world through the eyes of the participant. Research is often done in a natural environment so that the participant feels comfortable. By not structuring the research too much, there is a bigger chance of understanding the participants’ meanings. The researcher is interested in stories on a micro level because it provides rich, deep data. Several research methods are associated with this kind of research such as qualitative interviewing, participant observation, focus groups and discourse and conversation analysis. This methodology allows space for individual attitudes and motives. This is opposed to quantitative research that aims at generalizability.

Certain themes this thesis is dealing with (like artistic merit and contribution to the community) are not that easy to quantify. Every popular music venue functions with its own mission and within its own cultural climate and competitive environment. The reasons why popular music venues establish partnerships are very dependent on this and cannot be generalised. An anecdotal approach like qualitative research is most appropriate to this topic because it values the unique.

‘Every venue is a different world, has a different scale, a different way of thinking, a different relation with the municipality and a different way the organisation functions.’ –

Edwin van Andel, Melkweg

There are some critiques on this type of research that should not be neglected. Because of the researcher’s point of view, qualitative methods can be considered too subjective. The data derived from the interviews can be interpreted in divergent ways. This also causes for the problem of not being able to replicate the study. The unstructured way of questioning and the focus of the research may differ per researcher. When it is not clear how the researcher did the study and how he arrived at the conclusions, there is a lack of transparency. The way the participant responds can be affected by the characteristics of the researcher as well.

While this anecdotal approach can be a strength, it is sometimes considered a weakness. There is no way of generalising the data to all popular music venues in The Netherlands. However, that is not the aim of this research since no venue is the same. While the benefits outweigh the drawbacks (for this particular study) it is important to keep them in mind when reading this thesis.

Chapter 2.2: The method

For this multiple-case study research, semi-structured qualitative interviews are conducted. This means the researcher has a list of questions or topics but is not bound to stick to them or to their range. The flexibility that this method offers is desirable because the situation of every popular music venue is different. Some are in an advanced stage of professionalising, with their business facing a merger as a next step (Tivoli). Others still work primarily with volunteers (Vera, EKKO). This way of interviewing allows for some topics to be deliberated upon extensively with some venues and not with others. Some structure is maintained to ensure cross-case comparability.

Type of venue	Total number of venues	Used in this thesis
Big venue (>1000)	11	Patronaat, Tivoli, Het Paard, De Melkweg, Oosterpoort
Medium venue (400-1000)	23	Doornroosje & Vera
Small venue (<400)	14	EKKO & Rotown
Total	48	9

Table 2.1: Research subjects applied to VNPf venue numbers 2010 (Dee & Schans, 2010, p.7)

In order to get a broad perspective on the topic, a division across the country was kept in mind while selecting venues. Because of this, venues from several categories of capacity were picked (table 2.1). The biggest venues have multiple halls with different capacities. The popular music venues that were chosen belong to the most established venues in The Netherlands. Employees of these venues are expected to have the best insight into developments in the field. The final list of participants (table 2.2) is arrived from purposive sampling. Hereby the participants are chosen in a strategic way because they are most likely to provide answers that are relevant to the research question. The booker or the director was approached because he or she has the best vision on the mission of the venue.¹ Some participants were chosen because others

¹ It should be noted that the director might have a better understanding of integration in the back office than the booker. This is partly levelled out by the fact that the participants have been working for the organisation for a long time. They are expected to be informed about its policies.

recommended them (snowball sampling). Almost all participants have been working for the organisation for a long time. Participants were approached by email or by phone. Ten out of thirteen venues answered the request. Unfortunately Paradiso did not respond which, because of its position in the market, can be considered a loss for this thesis. Luckily, the other big venue in Amsterdam (De Melkweg) was willing to cooperate which compensates for this loss.

Before getting into the field an introductory interview was held with Frans Vreeke. Besides working as a (interim) director for several venues and festivals, he owns a consultancy agency that conducted several studies some of which commissioned by the VNPF. Because one of his studies is the inspiration for this thesis, he was asked to explain his thoughts more thoroughly. Although the topic of this thesis ultimately became broader than what was discussed in this first interview, it functions as a starting point.

Name	Venue + capacity	Function
Frans Vreeke	N/A	Consultant
Marlies Timmermans	EKKO (275)	Director
Joey Ruchtie	Rotown (250)	Booker
Jeroen Blijleve	Patronaat (950 & 225)	Director & Booker
Robert Meijerink	Doornroosje (450) & Merleyn (200)	Booker
Johan Gijsen	Tivoli Oudegracht (1.000) & Tivoli De Helling (420)	Booker
Majel Blonden	Het Paard van Troje (1.100 & 300)	Booker
Edwin van Andel	Melkweg (1.500 & 700)	Booker
Peter Weening	Vera (450)	Booker
Peter Sikkema	Oosterpoort (2.000 & 750)	Booker

Table 2.2: List of interviewees

After the introductory interview, nine semi-structured interviews with the average of an hour were conducted. The interviews took place in an empty office inside each venue to ensure a comfortable environment for the participant. Though the interview guide (appendix 1) was to a large extent the same for each interview, it was adjusted a little per participant to the situation of the venue. Also, the topic list became more advanced whilst the research developed. The conversation started with some introductory questions about the participant and the venue. Later on a mix of different types of questions (direct, indirect, probing, specifying or interpreting) were used. Some participants needed some follow-up questions and with some a

moment of silence worked very well. Most participants brought up some of the topics of the list themselves as the conversation went along. Occasionally structuring questions were necessary because the participant wandered off. Sometimes the recommendations from Frans Vreeke were brought up as a starting point for a discussion around a certain theme.

Chapter 2.3: Methods for data analysis

In order to do a proper data analysis, all interviews were recorded and transcribed completely.² A large amount of data was collected.³ The most prominent ways of qualitative data analysis are by means of analytic induction or Grounded Theory (Glaser & Strauss). The data analysis approach used in this thesis is less obvious: thematic analysis. “The idea is to construct an index of central themes and subthemes.” (...) “The themes and subthemes are the product of thorough reading and rereading of the transcripts or field notes that make up the data.” (...) “For some writers a theme is more or less the same as a code, whereas for others it transcends any one code and is built out of groups of codes” (Bryman, 2008, p. 554). This approach is most appropriate because a couple of themes kept recurring while structuring the data. These themes form the different paragraphs of the data analysis (chapter 3.2 – 3.6). Within these paragraphs, the sub themes are constructed by groups of codes.⁴

“Coding in qualitative data analysis tends to be in a constant state of potential revision and fluidity. The data are treated as potential indicators of concepts and the indicators are constantly compared to see which concepts they best fit with” (Bryman, 2008, p. 542). Even though one tip by Bryman (2008, p. 551) is to code as soon as possible, topics that first seemed most interesting appeared not to be that important at all later on. Therefore the final coding could only be done completely afterwards. Going over the data again and again made it possible to structure the information more clearly. Qualitative research is done according to the following steps:

1. General research questions
2. Selection of relevant site(s) and subjects
3. Collection of relevant data
4. Interpretation of data
5. Conceptual and theoretical work

² Unfortunately, the recording of the interview with Jeroen Blijleve (Patronaat) failed. A short summary was presented to him as a final check.

³ Transcriptions are not included in this thesis for privacy reasons. They are available for internal evaluation use at EUR on request.

⁴ From the large bulk of data it can be quite unclear where to find certain pieces of information. The use of computer software has long been accepted in quantitative research, but only recently in qualitative research. Programme NVivo is considered a useful tool for structuring data. Because of the limited amount of interviews, data could be analysed manually.

- a. Tighter specification of the research question(s)
- b. Collection of further data
- c. → back to step 4

6. Write up findings/conclusions

As is the case with an inductive research approach, the topic and the research question of this thesis evolved the more data was gathered. Being in the field enabled the researcher to understand prevailing trends. Data was structured and certain topics kept recurring. The key to inductive research is to derive theory from this structured data. In chapter three, data is presented and analysed. Typical for thematic analysis is to present results in a table which is done here in the recapitulation of each paragraph. In chapter four, existing theories are explained and related to the data. In chapter 5, final conclusions will be drawn and the main research question will be answered.

Chapter 3: Data Presentation & Analysis

Chapter 3.1: Introduction

In this chapter the data derived from the interviews will be presented and analysed in order to answer the following research question: *What are the reasons for Dutch popular music venues (not) to establish strategic alliances?* The chapter will be structured on the basis of the sub questions that were mentioned in the introduction. Each paragraph will end with a recapitulation in which the sub question will be answered. Gradually in the data analysis it appeared that certain reasons to form strategic alliances can be attributed to the three dimensions of viability: artistic merit, contribution to community and organisational effectiveness (Preece, 2005). These concepts will be elaborated upon further in the theoretical framework.

Chapter 3.2: Bookings on location

Chapter 3.2.1: Introduction

One of the most important trends in partnerships is the booking of artists by venues at other locations than their own ('buy' in the make-or-buy decision). Every venue discussed in this thesis looks beyond the walls of its own building to a greater or lesser extent (Table 3.1). Beautiful churches, cosy basements and open-air stages often function as new sceneries for live performances. The venues use other locations as an instrument to deal with the latest developments in demand and supply. Almost all bookers notice this trend:

- *'I guess you could say that in general the trend is that all venues do more on location.'* - **Marlies Timmermans, EKKO**
- *'Yes, it is a trend nowadays.'* - **Johan Gijsen, Tivoli**
- *'Yes, since five years this seems to be a trend in many cities... Melkweg in the Sugar Factory, Paradiso works in De Duif... That development is clear. Popular music venues look beyond their own stage.'* - **Robert Meijerink, Doornroosje**
- *'Yes, that's a bit of a trend isn't?'* - **Edwin van Andel, Melkweg**
- *'I believe Utrecht is doing the same, Eindhoven... Rotterdam is pretty open-minded...' (...)*
'You can just see it happening everywhere.' - **Peter Sikkema, Oosterpoort**

In order to understand the development of this trend, the following sub question is answered: *What are the reasons for popular music venues (not) to book at different locations than their own?* In the paragraphs 3.2.2 and 3.2.3 several developments in demand and supply appear to have pushed this trend. There is also some resistance and some fears will be explained in the next paragraph. Finally, a short recap will be presented in order to answer the sub question.

Venue	(Incidental) Extra location	Possible location in the future
Rotown	Paradijkerk, De Nieuwe Oogst, De Unie	
EKKO	De Kargadoor, KNG 56, Zijdebalentheater	De Metaalkathedraal
Patronaat	Philharmonie, Toneelschuur, De Schouwburg & Caprera	
Doornroosje	Merleyn, Lux, De Vereeniging, De Schouwburg	
Tivoli	Vredenburg, Domkerk, Vredenburg Leeuwenbergh	Vliegbasis Soesterberg, Speelklok tot Pierement
Paard van Troje	Strandpaviljoen Zuid, Zuiderpark, PopHotSpot (Grote Markt)	In conversation with another venue
Melkweg	Sugar Factory, Rabozaal	In conversation with a special location
Vera	Kardingerplas	
Oosterpoort	Kardingerplas, MartiniPlaza, Martinikerk, Grand Theatre	

Table 3.1: Venues and the locations they book shows at

Chapter 3.2.2: Developments in demand

Call for a nicer setting

The aspect of the changing demand that bookers mention most, concerns the increasing call from their audience for a better setting for the show. Participants feel their audiences want to be surprised over and over again. Competition is big (infinite variety) and the experience becomes an important factor in their decision making process. Venues anticipate by finding a partner that offers a space that adds value to their own hall in the form of a different atmosphere.

- *'The audience always wants to be surprised.' (...) 'Something good eventually sags. Then they want something else. You should always reinvent yourself.'* – **Majel Blonden, Het Paard**
- *'The fact that Lowlands sells out before the line-up is announced, says something about the demand for experience. We take this trend seriously.'* – **Jeroen Blijleve, Patronaat**
- *'That's why I wanted to take it outside. It's more exciting, more fun. It is especially nice to have a look for a special location to do such a thing every now and then. What can you use*

to add value? I think you have to distinguish yourself more. There is a lot of supply. It has gotten quite expensive and people make choices.' – **Peter Sikkema, Oosterpoort**

- **Marlies Timmermans (EKKO)** argues that they choose for bookings like Nils Frahm in Zijdebalen Theater or festival Rumor because the concepts are so special: *'It brings character to the venue.'* About newly found summer location De Metaal Kathedraal she says: *'It adds so much to the music. The atmosphere is so good and to enjoy it together, that is the ultimate goal.'* (...) *'You just want to spread that message and get people in touch with the music and with the special location.'*
- *'When we can book an artist that is better suited in a seated capacity like the Paradijkerk or a more intimate setting like De Unie, we organise the show there.'* - **Joey Ruchtie, Rotown**
- *'It is a time where the public wishes for a more personal approach and more intimacy. They prefer to watch a small concert with 30 people over a big one in the field with 30.000 people.'* – **Johan Gijzen, Tivoli**
- *'I see it as an enrichment of pop music.'* (...) *'When the booker decides to make an event out of it, a concert or a festival, it means that it's relevant and that there is an audience for it.'* – **Robert Meijerink, Doornroosje**

It becomes clear from the responses that there is a certain request from the audience for a different experience. For the venue to make that happen can be seen as their *contribution to the community*; they supply a certain demand. On top of that, they choose for these special shows because they consider them of *artistic merit* to their programme.

Fragmented audience

The fact that demand has changed can also be attributed to the rapidly growing Internet. The filtering of music by radio and tv stations is less relevant; audiences find new artists and genres without them. This causes differentiation in music consumption and smaller segments of visitors for larger segments of genres. Participants consider it important to provide these underground acts with a stage. When a show is expected to sell fewer tickets, an alternative location can be used with a different capacity. This is a logistical choice. This *contributes to the community* because it ensures that the audience is still supplied with their favourite act.

- *'A trending topic is that music consumption is very much differentiated.'* – **Joey Ruchtie, Rotown**
- *'In particular because of the Internet, there are many fragmented little subcultures. These small groups of audiences can fill such small locations nicely. They are interested to go elsewhere instead of visit De Melkweg or Paradiso again. A certain call arose from the audience (and I think also from the supply side), to use several and smaller places.'* – **Edwin**

van Andel, Melkweg

- *'I think it might have something to do with diversity. I consider pop music to be very rich. There are so many layers in it, so many needs, styles and tastes. I think it's always up to the booker to estimate whether he will do something on any kind of level. When you think you can meet a need or demand... You make the assessment whether there will be a hundred people who find it cool to climb a couple of stairs to see a particular artist. I think that is wonderful. I think it is creative and that the audience needs that.'* – **Robert Meijerink, Doornroosje**

Diversifying the product

Booking at other locations is a way for participants to diversify their product, a condition being that the new location has added value in terms of a different setting (atmosphere), a different capacity or a seated show. In this way they can organise shows that they otherwise could not. This allows for them to provide the audience better in its needs (*contribution to community*). Furthermore, they feel the *artistic merit* of their programme increases because they have more possibilities.

- *'The most important reason must be that it belongs to your programme. That you would like to book the artist, but that your hall is simply too small.'* – **Majel Blonden, Het Paard**
- *'Depending on the artist, we at least try to book the right artist at the right place.'* – **Robert Meijerink, Doornroosje**
- *'Sometimes I get offered an artist whom I consider fantastic, but for who Oudegracht or De Helling is not suitable. Like the singer of Live, I don't like booking him within Tivoli. It should be seated so I go out searching for something else.'* **Johan Gijsen, Tivoli**
- *'It simply depends which hall suits the artist best.'* – **Peter Sikkema, Oosterpoort**
- **Edwin van Andel (Melkweg)** says about the Rabozaal: *'we can now organise seated shows.'* (...) *'It gives you a different, more theatrical event. You can do different kinds of music; world music, jazz or quieter concerts.'*
- **Jeroen Blijleve (Patronaat)** considers it a useful tool in the summer time when people are less likely to visit the venue. **Marlies Timmermans (EKKO)** also notes this aspect: *'People don't visit EKKO in the summer time, but you do have a nice offer. You want to bring those two together.'*

In order to *contribute to the community*, the venue should keep listening to its audience.

- **Robert Meijerink (Doornroosje)** considers attendance as the business card on whether to continue or not. *'The success determines whether you should keep doing it. The audience is the most honest of all, they attend or they don't.'*

Reducing risk

Changing location can sometimes be a financial matter. In order to improve *organisational effectiveness*, risks must be reduced. **Marlies Timmermans (EKKO)** explains how they booked an artist that appeals to the same audience as an act booked on that same night elsewhere in the city. Moving it to the Kargadoor costs less money, is less risky and takes off the pressure ('nobody knows' what the audience will do).

- **Edwin van Andel (Melkweg)** about the Sugar Factory: *'I use it for bands that might generate less public, but that I still want to book.' (...) 'I can offer them a stage, but a smaller one that works for everyone. In this way we can cover the costs. It's a nice way of doing it.'*
- *'Sometimes it happens that a show in Merleyn seems so promising that I estimate we can sell more tickets. Then we upgrade it to Doornroosje.'* (...) *'Sometimes it's the other way around. When a concert is not selling so well, it is much cooler to move it to Merleyn. It's better for the atmosphere.'* (...) *'The hall of Doornroosje is much more expensive so we save a lot of production and overhead costs.'* – **Robert Meijerink, Doornroosje**
- *'Sometimes it is a consideration of the costs. It is very expensive to open this place... You need security, a manager...'* – **Anonymous**

Willingness to travel

In addition to the increasing demand for different settings, the audience is said to be less bound to a club and more willing to travel. The venues feel a need to anticipate to these wishes before their audience goes somewhere else. This could potentially be a reason for popular music venues to search for other locations, but is not mentioned often and clear enough to be marked as a direct cause.

- *'What I often say to people is that the public does not come to your building, it comes to see a particular act.'* – **Frans Vreeke**
- *The public is less homebound. They are willing to see concerts at different locations. It's more customization. The wishes, the requirements are more specific. It is more care for the concert. Both for the audience and the artist.'* – **Joey Ruchtie, Rotown**
- *'It is just part of this age. There used to be a real base here to which people belonged. There were always the same people. That has changed so much and will never come back. That time is just... That need no longer exists.'* – **Marlies Timmermans, EKKO**

Chapter 3.2.3: Developments in supply

The critical artist

Besides differentiating the demand, the Internet is also globalising it. Together with cheaper flights it causes for the world to become the artists' playground. Not only the audience asks for a special experience, the artists become more demanding as well (art for art's sake). Participants believe they want to add *artistic merit* to their show by performing at a special location. Globalisation leads to fewer shows, which creates scarcity. This adds to the feeling of missing out on a unique experience when you don't have a ticket.

- *'I think we are forced to stay creative because there is very little supply that wants to do special things. There are far fewer bands touring currently. An act releases a record and does one gig in the Netherlands, maybe two. How can you make your city attractive? They know Amsterdam, Brussels and Berlin, but what the hell is Groningen? You have to fight that.'* (...) *'Every artist wants to do something special, something different. When you give them a church you make everybody happy. There are specific requests.'* (...) *'I think it's because the act wants to distinguish itself. Doing the same tour around the world for the twelfth time... I can imagine it gets boring.'* – **Peter Sikkema, Oosterpoort**
- *'It is a bit of the zeitgeist that many artists specifically ask for it; that they want a different place than a club. I think that's nice.'* (...) *'Sometimes a concert can be very special if you put it in a place where pop concerts are not normally given. That adds something special to the experience.'* – **Johan Gijsen, Tivoli**
- *'That also has to do with the music business. There are acts that play anywhere and everywhere and there are acts that make these decisions in a very focused way. They aim at a few sold out shows. That creates a situation where people miss the boat. They will be even more determined to be there next time.'* (...) *'Sometimes the artist only looks for special locations. They approach you with the question whether you have a beautiful church in town.'* – **Majel Blonden, Het Paard**
- *'There are also artists that ask for it. They want to play at a special location.'* – **Edwin van Andel, Melkweg**
- *'Artists become more critical. They want to perform at the right place and to be promoted in the right way. They want to visit Rotterdam and to be taken care of.'* – **Joey Ruchtie, Rotown**

Stand strong together

In Groningen this feeling of scarcity is mentioned specifically as a reason for cooperation. The two main venues of the city recently booked their first show together. **Peter Sikkema** from **De Oosterpoort** explains how there are 80 different organisers who would have wanted to book

that act. The outdoor location, the extra capacity of the tent and the joint backgrounds gave them a little extra to offer to the agency. Ultimately their cooperation serves the goal of getting the artist to the city (*contribution to the community*).

- *'To stand strong towards agencies. To make sure you don't get priced out of the market or become ruled out. To take a next step.'* (...) *'The market is obviously growing. Distances become bigger, thus planning is more important. It is becoming more business-like, which you have to guard against. Cooperation is obviously a tool. Together you are stronger. The combination of backgrounds, I think.'* – **Peter Weening, Vera**
- *'You have to look further because you want to hold your position in that world.'* (...) *'When you don't go along in these developments, you can miss a turn. I think you should at this moment. You have to work together. You have to look further.'* (...) *'To be able to continue offering the appropriate stage to the act. The act that seeks something special or a different capacity. You have to work with that.'* – **Peter Sikkema, Oosterpoort**

Serving the city

Popular music venues are very aware of the function they have to *contribute to the community*. The data shows how bookers look at the bigger picture and keep the city's interest in mind. They simply want to present a certain artist (which is of *artistic merit* to their programme) to their audience, the location being of secondary importance.

- *'We started the cooperation with Lux because we have a booker who considers it important that Michael Franti or Oi Va Voi perform in Nijmegen as well. Because of that we can place the artist in the right place.'* (...) *'We try to provide in Nijmegen's needs on different levels, different styles and different target groups.'* – **Robert Meijerink, Doornroosje**
- *'I try as much not to be limited by a building and think more about the city. I find that much more important. It is more about the supply in Groningen.'* (...) *'Together with Vera, I try to get a better vision programme of the city. I do not find the location very relevant. It should be in Groningen, in the best hall, for the best audience. Then you start searching for a solution.'* – **Peter Sikkema, Oosterpoort**
- *'It is in my interest to get good artists to The Hague.'* (...) *'It is about whether there is public for it. The mission of Het Paard is to offer a varied programme. That everyone from The Hague or around, is triggered to see something a couple of times a year.'* – **Majdel Blonden, Het Paard**
- *'To bring more to the city. This is a closed venue, we want to bring some openness.'* – **Marlies Timmermans, EKKO**
- *'Rotown is rather serving the city instead of being limited by the four walls of the venue.'*

(...) 'As Rotown we feel responsible because certain artist pass Rotterdam since the disappearance of Nighdtown and Watt. There is just a gap. Certain artists are not able to play at Rotterdam anymore because there is no suited venue, no suited capacity. We are such a small venue, but we are looking around whether we can take that responsibility and fill that gap.' – **Joey Ruchtie, Rotown**

- *'It's fun to do and it's good for the city.'* – **Johan Gijzen, Tivoli**

Reach new segments of the audience

Booking on a different location can be a means to reach new segments of the audience. It is a way of reaching people who normally do not visit the venue. Finding new audiences is a very important aspect of *contributing to the community*.

- *'You just want new audiences and you want to show something special. Apparently not everybody visits this place.'* – **Marlies Timmermans, EKKO**
- *'You always reach only a limited amount of people. Different places get you in touch with different people. People normally visiting Zuiderpark, might visit a concert as well.'* – **Majel Blonden, Het Paard**
- *'We want to get the large audience that never heard of Rotown to Rotown, but we don't want to alienate our regular audience, the faithful followers.'* – **Joey Ruchtie, Rotown**

Preconditions

Cooperations are sometimes in a premature phase and develop slowly because the supply is very ad hoc. In order to make the partnership work, there should first be a good relation between the two parties. It takes time to get used to each other and establish the trust that is needed.

- *'It is certainly structural, but you should not want to do it too formally and plan too much. It only works if it matches. Some artists do not fit there so it is very dependent on your programme. Eduard can't determine in advance which shows he has on what date. He depends on the available supply. So it comes down to the basics, the basic of trust. You build on it together until it's good. From there you continue.'* – **Marlies Timmermans, EKKO**
- *'There are so many artists that it's possible, but it needs consultation. At the moment it's a little bit ad hoc. That's because the supply is ad hoc. It's not like every Monday we get a list of artist we can book that week.'* – **Joey Ruchtie, Rotown**
- *'There should be good contact first. There must be a basis. It takes time.'* (...) *'A mutual understanding must precede. You can't just build a tent like that. If there is no foundation, the stage will fall down.'* – **Peter Weening, Vera**

Chapter 3.2.3: Cons

(Labour) Expensive

Not all bookers are in favour of this new trend. There are some disadvantages that should not be neglected. It costs a lot of money and labour to move the whole infrastructure.⁵ Because of that *organisational effectiveness* decreases.

- *'You have to move the whole infrastructure. It's too costly and not a nice thing to do.'* (...) *'I think with the kind of stage we have here, it is quite a job to manage the organisation, monitor it and make adjustments. It's great fun, but to do other locations as well... You have to have someone who controls the facilities, who makes the appointments, who does the production, arranges the catering... You have to make agreements with everybody about it. That is quite labourious and cluttered.'* – **Edwin van Andel, Melkweg**
- *'It's just a little more labour-intensive and more expensive because you don't have all the facilities.'* (...) *'There is not always time to sort it all out.'* – **Johan Gijsen, Tivoli**
- *'There is a price tag to it. It must come from both ways.'* – **Majel Blonden, Het Paard**
- *'The whole year through, we work on the edge with a lot of volunteers. So we need a period of rest. In the summer we're only open once a week. You have to keep that to maintain the system. We work with limited personnel with direct control. With so much happening in a week, you need a certain pattern. When you change that, it takes energy and the minimal staff can't handle it. You're taking risks and you should always be aware of that. It's not possible. Don't push it. Don't want to.'* – **Peter Weening, Vera**

Club as a brand

Some bookers express that they do not feel the need to go elsewhere because they already have everything they need. The club is their strength and taking it outside would only diminish the quality (*artistic merit*). The more locations, the more probable are managerial diseconomies of scale. It is very likely booking on location becomes more of a necessity when you have limited recourses yourself.

- *'We have a building with a lot of different halls.'* (...) *'We have quite some space to work with ourselves. We are not interested to take that into town.'* (...) *'If we want to do a seated show, we can use the Rabozaal. We don't need a church for that.'* – **Edwin van Andel, De Melkweg**
- *'It is also about losing the overview of all these locations and what's happening over there. When you book a show, you find it important that the guest list is taken care of, that people*

⁵ This is only the case in special locations that don't usually function as a concert hall (like a church). You'd still have to 'make' the production so economies of scale are not achieved. This is not the case in halls where you 'buy' the existing infrastructure.

are treated well, that the right music is played... You are in less control of these things and they sometimes happen at other locations.' (...) 'I find it important that De Melkweg is a kind of brand. We guarantee a certain experience of pop music. There has to be a certain quality. At some locations that quality is just less. That's not bad for that location but as De Melkweg you have to wonder whether that is what you want.' – **Edwin van Andel, De Melkweg**

- *'We have a building with good facilities. Personally I'm very much against open air, festivals and so on. I'm a big fan of the club. You try to create a good sound and a nice ambiance.'* (...) *'This has to be our goal. This is the place. This is what we have worked on for years.'* (...) *'So no, I don't actively seek for different locations because of that. I think we should not want that.'* – **Peter Weening, Vera**

When you do decide to take it elsewhere (like Rotown) it is important to be aware of possible pitfalls:

- *'Rotown has a fairly clear profile, a function.'* (...) *'If we are going to organise more concerts, it should be a continuation of what we do now.'* (...) *'We are aware that we should not make silly moves.'* (...) *'Especially in the beginning we have to stick to our concept.'* – **Joey Ruchtie, Rotown**

Chapter 3.2.4: Recapitulation

Several developments form reasons (Table 3.2) for bookers to look beyond their own venues. Most important developments are the rise of the Internet and globalisation. The Internet causes audiences to become fragmented into smaller segments of visitors for larger segments of genres. Bookers consider it important to supply these small groups in their needs. They consider the experience an important theme, for the audience as well for the artist. Besides, the market for artist has become global, which is a reason for them to do less shows in The Netherlands. Venues compete for their attendance and anticipate to their requests.

From the interviews it becomes clear that bookings on location are an unavoidable trend. In the researchers opinion, the developments cause for some changes in the function of the venue and of the booker. It seems that they have to work harder in order to maintain their audiences and the artists. Bookings on special locations are an instrument to achieve this. Remarkable is that the interest of the city becomes an increasingly important factor. The researcher perceives a shift towards a situation in which the booker divides the artists over the city depending on which location suits best. This topic will be elaborated upon more extensively in the next paragraph.

Why?	Why not?
The audience asks for a nicer setting (experience)	Moving the infrastructure can be (labour) expensive
The audience becomes more fragmented (because of the Internet), leading to more (but smaller) segments which fill up locations with different capacities	The quality of the club can not be ensured at other locations
Ability for the venue to diversify their product Multiple venues offer the possibility of better logistical choices and can reduce risks	Danger of deviating from your distinct profile
The audience is more willing to travel The artists become more critical and demand a special setting	
Together venues stand stronger towards agencies because they have more to offer Seeing the bigger picture; the city's best interest	
New segments of audiences can be reached	

Table 3.2: Reasons for participants (not) to book at different locations

Chapter 3.3: The next step: from booker to promoter?

Chapter 3.3.1: Introduction: The Anglo-Saxon model

The Dutch system, where

music venues work with their own booker, is quite unusual. In Anglo-Saxon countries, cities work with a couple of promoters placing artists at different venues dependent on which one suits best. The trend of finding partners in the form of different locations can be seen as a small shift in the function of the booker towards becoming a sort of promoter. It is interesting to note that the aspect of promoting is brought up by a couple of participants themselves:

- *'In The Netherlands, it's quite unusual, but abroad every city has a promoter. A booker does not work for a venue, but for a city. When he can promote an artist, he looks for the best-suited location. In The Netherlands, every venue, every location has a booker.'* – **Joey Ruchtie, Rotown**
- *'Abroad venues don't work with their own booker. There are promoters. Sometimes there are four promoters in a city, but they all organize shows independently. They consider per act which venue they want to use.'* – **Peter Sikkema, Oosterpoort**

- *'In principle, EKKO could do without location. That was discussed in Rotterdam when Watt disappeared. Whether you should have a foundation that organises shows in the city.'* – **Marlies Timmermans, EKKO**
- *'You might as well hire one booker for the city who receives and divides everything.'* – **Peter Weening, Vera**

In this chapter the following sub question will be answered: *What are the reasons for bookers (not) to work like promoters?* From later responses from participants it becomes clear that an actual shift to a system working with promoters requires a different infrastructure of the Dutch music industry. That is why this chapter deals with promoters on a different level. The promoter would not function independently from the venue, but would still be connected to it. However, he would book for multiple locations. In the next paragraph the advantages of promoters will be discussed. While most bookers respond quite positively towards booking for different locations, they often draw the line at booking outside the city (in the region). Their fears are explained in paragraph 3.3.3. Though there is also some resistance against bookers working for multiple venues, festivals are excluded from this. Partnerships with festivals already exist to a great extent, the fourth paragraph will explain why. Finally, a short recap will be presented in order to answer the sub question.

Chapter 3.3.2: Advantages

The bigger picture

One person booking for multiple venues can tune the programme in such a way that there is a better division over the city. By looking at the bigger picture, overbooking is prevented and bookers feel that the city is better provided in its needs (*contribution to community*). The promoter is also in a better position to find the right setting for the right artist.

- *'I can imagine us working from a higher abstract level to the location of the bookings. I don't care whether it is in Oosterpoort, Vera or somewhere else. As long as it is in Groningen. All new acts and new genres should be offered a stage here. By stage I rather mean the city than the venue.' (...)* *'I think you can't escape from it. The rest of The Netherlands is doing it as well. If you don't do it you'll lose the battle.'* (...) *'By working on the same, you work much more efficiently and together you can make a fist. I think it's in the city's best interest. Imagine we were all competing each other. It is much better to unite.'* – **Peter Sikkema, Oosterpoort**
- *'You are an ambassador of pop music. You don't only book for your own club, but you have the knowledge to do the same for different locations in the city. I completely agree with that. If it is an enrichment, which I always consider it to be, provided that there is enough audience off course.'* – **Robert Meijerink, Doornroosje**

- *'A couple of years ago, Tim Knol performed at Eurosonic in January, Vera in April, a festival in June, another one in August, Oosterpoort in September and again at Noorderslag. That is ridiculous. Who are you doing a favour? I think you should look at the limited locations you have and give the audience a supply as good as possible.'* – **Peter Sikkema, Oosterpoort**
- *'You can control the division very well.'* – **Majel Blonden, Het Paard**
- *'You prevent competition. If a club books a blues band they will not book a blues band elsewhere in the city on that same night.'* - **Frans Vreeke**

Sharing knowledge

If one booker would book for multiple venues he would be able to spread his knowledge and work more efficiently. Quality (*artistic merit*) would increase and *organisational effectiveness* achieved. This applies beyond the booking department. Knowledge can also be shared on aspects of marketing and managing.

- *'The booker from a venue has a huge network, purchasing power I would say. If you are able to spread that over multiple venues, quality will increase because it enables specialisation. That is on a level of content, but the same goes for marketing.'* – **Frans Vreeke**

This idea of Frans Vreeke seems interesting but is only limitedly mentioned by participants.

- *'An advantage for the outsourcing organisation is that the show is booked and promoted with the knowledge and network of Patronaat.'* – **Jeroen Blijleve, Patronaat**
- *'You can see De Helling is successful because of the promotion machine at Oudegracht.'* – **Marlies Timmermans, EKKO**

It is interesting how this aspect is not named as explicitly as it is in the later discussion about festivals (chapter 3.3.4). The issue of competition (paragraph 3.6) probably forms a reason why bookers are more hesitant towards sharing their knowledge with other venues.

Chapter 3.3.3: Disadvantages

Loss own identity

Bookers fear the *artistic merit* of the organisation is at stake. They think it is favourable for small venues to have a distinct character because it brings diversity to the city. Also, a little competition keeps you on edge.

- *'It is so important for smaller venues to have your own face. For us to book another venue as well... That's just not going to work.'* – **Marlies Timmermans, EKKO**
- *'We are no numbers. Vera has a very strong identity. You don't want to...' (...)'It will always be at the expense of the identity of the extreme. We are the extreme, the sharp edge.'* – **Peter Weening, Vera**

- *'The nice thing about what's happening in dB's, EKKO and ACU is that they are nevertheless different clubs.' (...) 'I consider the underground culture of smaller clubs very important. You need some competition to stay focused. If our booking team were to book all venues in Utrecht, there would be the danger of becoming predictable. That you keep using the same contacts over and over again.'* – **Johan Gijsen, Tivoli**
- *'If I were to do their programme as well we would soon lapse into bureaucratic hassle.'* – **Majel Blonden, Het Paard**

Becoming your own competitor

Jeroen Blijleve (Patronaat) explains how booking for another venue makes you your own competitor. This conflicts with *organisational effectiveness*. You would prefer to keep the best bands for your 'main venue', not the least because of the revenues from the bar.

- **Robert Meijerink (Doornroosje) and Majel Blonden (Het Paard)** confirm this thought. *'I can imagine that. Your heart belongs to your venue.'* (...) *'Maybe you should start over. If you hire one booker for the whole region you avoid the risk of his heart belonging to one venue. It is difficult. I've worked here for fifteen years, my heart would always belong here.'* – **Majel Blonden, Het Paard**
- *'I do hardly any Dutch acts in the Sugar Factory. It's better to do those in De Melkweg since that is where I sell beer.'* (...) *'The starting point is to do as much in our own halls as possible.'* – **Edwin van Andel**

Lack of time

As mentioned previously by **Edwin van Andel** and **Peter Weening**, shows need a lot of care. All venues work with limited staff and quality could decrease if attention were spread.

Organisational effectiveness is at stake because there is less time and care for the main goals of *artistic merit* and *contribution to the community*.

- *'There is enough work to be done in EKKO itself.'* – **Marlies Timmermans**
- *'You have to do some research. You have to go there, show your face and get to know the people. Before you know it, it becomes a second job, so I'm not sure whether it works like that.'* – **Majel Blonden, Het Paard**

Local roots booker

Though responses about booking for multiple venues are mixed, most bookers draw the line at booking outside their own city. Every booker emphasizes how important it is to know the city you're working for by heart. The job is about finding the audience's needs (*contribution to the community*), which is more difficult when you live elsewhere. This can be seen as the main

argument against booking for a venue outside your city.

- *'We know the public of Groningen pretty well. We know what works and what does not. Some acts we get offered are useless here.'* (...) *'In your own city you have the best feeling about it.'* – **Peter Sikkema**
- *'I find it important that a booker lives in the city and feels connected to it. I wouldn't know where to find it in Almere or Helmond, while I know everyone in Utrecht.'* (...) *'I find that very important. To constantly be in touch and to know the demand, to have a big local network. You have to be around much. I can't imagine us booking for other cities as well.'* – **Johan Gijsen, Tivoli**
- *'Bookers from small venues in the region are all really good guys that go all the way for their venue. That's something you really need as a venue.'* – **Majel Blonden, Het Paard**
- *'It is just so important for a booker to have local roots.'* (...) *'It is very important that someone is on top of that. That's only possible when you have a local connection. That you hang out here, have your friends here.'* – **Marlies Timmermans, EKKO**
- *'I think it's healthier when they have their own booker with the knowledge... They are specialists in a city. I know other cities a little bit, but I couldn't tell what to do or not to do. It might work a little but I assume everybody has his specialty and his scene.'* – **Robert Meijerink, Doornroosje**

Chapter 3.3.4: Expectations for the future

Even though some advantages are acknowledged, most participants do not think it will come as far as a whole different system. The infrastructure is the way it is and The Netherlands is too small of a country. Bookers do feel there are changes in the industry, but it is too premature to really tell what the future will bring.

- *'I think we... When the subsidies are going down, which they are, you have to. That's what I think.'* (...) *'I think we rather work as a promoter than as the booker of a venue. That is an old fashioned way of thinking'* – **Peter Sikkema, Oosterpoort**
- *'I am very pro-active in finding artists. I think that attitude, which most bookers possess, is very important. It's part of being a promoter. Promoting means knowing what's going on, but also being there on time and establishing the right contacts.'* (...) *'I do think it will become more important the next few years. The market is changing. Mojo is getting bigger competition... There are more booking agencies in The Netherlands.'* (...) *'I'm not saying... It's a very slow process that is very scattered at the moment.'* (...) *'I do believe we are slowly moving towards a situation in which each penny counts.'* – **Robert Meijerink, Doornroosje**

- *'In my opinion, the foreign model is manifesting itself in the pop music.'* (...) *'We are moving a little bit towards the model like in New York. I can't imagine that... It is quite a big step to take.'* – **Joey Ruchtie, Rotown**
- *'There is definitely something to say in favour of promoters looking for the right venue for their act as is the case in England or the U.S.A.'* (...) *'It's happening a little, but I don't think it will really change in the Netherlands. I'm not sure. We have the infrastructure of venues and bookers.'* (...) *'It's complicated. Maybe there could be small clubs like Subbacultcha, but I think Dutch cities are too small for this model'* - **Johan Gijsen, Tivoli**
- *'Because of the structure of the sector in Amsterdam with two venues being separate foundations run by different bookers, I consider it to be very difficult.'* (...) *'The structure in The Netherlands is just not like that.'* – **Edwin van Anandel, Melkweg**
- *'That could happen in the future and that might be a danger. You could arrange the whole organisation and use employees as numbers.'* – **Peter Weening, Vera**

Chapter 3.3.5: Festivals

While participants have mixed feelings on cooperating with other venues on aspects of bookings, their concerns do not apply to festivals. Festivals are not seen as competition, but rather as complementary to their own programme. Not only do most venues organise festivals themselves, most staff members are also involved in (independent) festivals. Striking is how the arguments mentioned against the booking for multiple locations were not mentioned again when talking about festivals. Mostly mentioned are the advantages of sharing knowledge (*artistic merit*) and adding something to the city (*contribution to community*).

- *'I consider Festival aan de Werf very interesting. It's a way of showing our existence. To share our knowledge with them. Obviously we don't give away Eduard's hours, but we do give a lot of expertise.'* (...) *'Why should they hire a booker when we have one? He's got the network, knows the city very well, the relations. He knows what to pay attention to. And there is less booking past each other. But we are now talking about festivals and venues. It's the same at Great Wide Open. They are all people coming from venues. Me from EKKO, the guys from Tivoli... Everybody brings their knowledge and creates something new.'* (...) *'I find it important to contribute to the important festivals of the city.'* – **Marlies Timmermans, EKKO**
- *'We did the bookings for Queens night for a couple of years. We do that in between our regular work. We are on the phone with the agents anyway. Your venue also becomes more interesting for them.'* (...) *'I don't mind sacrificing a club show for it as long as we do it ourselves.'* – **Majel Blonden, Het Paard**

- **Jeroen Blijleve (Patronaat)** explains that festivals are not seen as competition. When a booker also works for a festival, he can make sure those two are adapted to each other and prevent overbooking.

Venue	Festivals venue is involved in	Festivals employees are/were involved in
Rotown	Motel Mozaïque	Eurosonic/Noorderslag, Bevrijdingsfestival Groningen, Noorderzon
EKKO	Le Guess Who, Summer Darkness	Festival aan de Werf, Into The Great Wide Open
Patronaat	Stad als Podium, Koninginnedag festival, Haarlem Roze Stad	
Doornroosje	De Affaire, Fort A Rock, Bevrijdingsfestival	Free Your Mind, Eurosonic/Noorderslag
Tivoli	Le Guess Who, Summer Darkness	Into The Great Wide Open
Paard van Troje	Walk the Line, Dag in de Branding	Koninginnedagfestival
Melkweg	5 Days Off, Off Centre, Amsterdam Base	
Vera	Eurosonic/Noorderslag	Gideon Festival
Oosterpoort	Eurosonic/Noorderslag, Bevrijdingsfestival Groningen, Noorderzon	

Table 3.3: Venues & Festivals

Chapter 3.3.6: Recapitulation

As explained in paragraph 3.2 (bookings on location), the researcher notices a shift in the business of live music. In this chapter, the Anglo-Saxon model was elaborated upon more extensively as a possible next step. It sounds ideal: sharing knowledge in the audience's best interest; promoters who receive and divide the artists in such a way that the right act performs in the right place. In this way the distribution of artists can be controlled and overbooking can be avoided. The audience is served in the best way possible (*contribution to community*). Overall the quality (*artistic merit*) of the programme would increase because of the network of the booker. However, in the responses of the bookers, the disadvantages seem to prevail (table 3.4).

Advantages	Disadvantages
Seeing the bigger picture; the city's best interest (<i>contribution to community</i>)	Danger of losing your identity (<i>artistic merit</i>)
Sharing knowledge; increasing quality (<i>artistic merit</i>)	Becoming your own competitor (<i>organisational effectiveness</i>)
	Lack of time to do it right (<i>organisational effectiveness</i>)
	A booker should have local roots (<i>contribution to community</i>)

Table 3.4: Reasons for bookers (not) to work like promoters

Interesting is that bookers notice the changes, but are hesitant in their predictions. They acknowledge certain benefits and speak quite positively about the Anglo-Saxon model. Yet when it concerns The Netherlands, participants are in doubt. This can partly be explained because the developments are in such a premature phase; it is very unclear what will happen next. Also, it might have something to do with the position of the participant. It can be more difficult to reflect on certain developments when you're in the middle of them, even more when it concerns your own job. However, it is remarkable that some of the bookers brought up the aspect of promoters themselves. Even though the system in The Netherlands is not there yet, it is evident that the topic is part of discussion. Festivals seem to be excluded from participants concerns; they are not seen as competition, thus knowledge is happily shared.

Chapter 3.4: Strategic alliances and horizontal integration

Chapter 3.4.1: Introduction

Previous chapters discussed partnerships on a level of content. Another recent trend is to see whether efficiency and quality can be increased by means of strategic alliances or horizontal integration in the back office or the marketing department. De Oosterpoort integrated their business with De Schouwburg a long time ago, Tivoli is merging with Vredenburg and Patronaat is joining forces with three other big parties in the city. Pop music venues integrating their businesses with other pop music venues is a far newer topic. Four years ago, Doornroosje acquired Merleyn to prevent the latter from ceasing to exist. Not all alliances go as far as actual integration, but since the current crisis it has become a trend to at least think about different kinds of alliances. This chapter will answer the following sub question: *What are the reasons for popular music venues (not) to form strategic alliances or mergers in the back office or the marketing department?*

Venue	Strategic alliance with
Rotown	
EKKO	
Patronaat	Philharmonie, Toneelschuur, De Schouwburg
Doornroosje	Merleyn
Tivoli	Vredenburg: Muziekpaleis
Paard van Troje	
Melkweg	De Schouwburg: Rabozaal
Vera	
Oosterpoort	De Schouwburg

Table 3.5: Popular music venues and their allies

Chapter 3.4.2: Advantages

Efficiency

The ultimate goal of mergers is increased efficiency. Even with alliances that do not go as far as a merger, economies of scale (*organisational effectiveness*) can be achieved. At the moment this is already happening at several levels, but almost all bookers agree that it is something worth looking in to even more.

- *'With the subsidy cuts to culture, it is one of the themes. People have to cooperate more. You have to broaden your look, work together. See if you can gain efficiency and generate much more output.'* – **Peter Sikkema, Oosterpoort**
- *'Our director looks at cooperative Buma deals and so on. When you join forces you become stronger. We do look into that.' (...)* *'A couple of years ago we put our own brands of liquor on the market. We sell it to Het Paard for instance. That is one way in which we try to cooperate.'* – **Johan Gijzen, Tivoli**
- *'Economies of scale can definitely be achieved when it concerns the purchase of cleaning or the purchase of beer.'* – **Marlies Timmermans, EKKO**
- **Jeroen Blijleve (Patronaat)** explains that Patronaat's beer contract has expired. They found a party in the city and together they closed a new, much cheaper deal. Hopefully more joint deals (like for instance energy) will be closed in the future.
- *'If we joined some festivals and paid Buma as one foundation, we could be able to gain a lot financially.'* – **Majel Blonden, Het Paard**
- *'It is possible. Combine the administration from Paradiso and the Melkweg for instance. To name something.' (...)* *'You could share a human resource manager for instance. We've*

grown up besides each other with different cultures so it can be difficult I think. A little bit stupid because we're only 100 meters apart. Some things we could probably do different.' –

Edwin van Anandel

An actual merger can become a necessity when the organisation is too small to be financially independent (*organisational effectiveness* is at stake). Not only did this happen in Nijmegen, also in two other venues the researcher encountered the fact that there were informal talks about mergers. These mergers are too sensitive to be recounted specifically.

- *'If Merleyn were to have its own booker and producer it would become impossible to run the place. That's not feasible. I think some sort of 'adoption' or co-partnership with Doornroosje (like it is now) is more viable than cutting it apart and hiring new people again. That would only increase overhead costs and the venue would become more expensive.'* – **Robert Meijerink, Doornroosje**
- *'There's a trend of looking whether two venues can merge. At least, they talk about it. Practice is not really there yet.' (...) "They are financially unstable and the municipality will not pay. Merging those is cheaper, off course. I consider that a wrong starting point.'* – **Anonymous**

Sharing knowledge

By working together you are able to share knowledge, which will ultimately cause the quality to rise. When knowledge is shared on administrative aspects, this can lead to higher *organisational effectiveness*. Bookers combining their power will increase the artistic merit of their programme and a joined marketing department is better able to *contribute to the community*.

- *'I think that is the power of partnerships. It is important that cultural organisations share their knowledge more frequently and when possible try to work together on a level of content to provide the audience in the needs. I think there are a lot of advantages from sharing knowledge and using it correctly. Save costs, join forces and maybe promote an evening together.'* – **Robert Meijerink, Doornroosje**
- *'Why not do such things? I think it's good and I think it's a matter of time. The scarcer resources become, the more the necessity. And the resources are becoming more scarcer.' (...) 'It would be logical if it were to happen more. Every venue has its own ticketing system. Why not try to make that one for the whole city. It would be much more efficient. I think we can only gain on this in all kinds of ways. You have a much bigger customer base so you can notify people better. I think it's ideal. I believe in it.'* – **Peter Sikkema, Oosterpoort**
- *'There is some contact between our promotion and that from De Oosterpoort. Sometimes their database is used for our purposes and the other way around. That's happening at the moment and I find that an interesting aspect.'* – **Peter Weening, Vera**

- *'Our administration also works for the Guideon festival. We have the expertise. Those kinds of new festivals start out as a mess. That is an interesting type of cooperation, off course.'* (...) *'You can help such festivals or initiatives. They don't have to deal with the aftermath and they know that it is taken care of properly.'* – **Peter Weening, Vera**
- *As a bigger venue you could do part of the administration in order to give the young organisation some space to work better.'* – **Majel Blonden, Het Paard**
- **Joey Ruchtie (Rotown) about possible cooperations:** *'Maybe work together in one office. To make use of each other's knowledge, to deliver more vigor.'*

Learning from each other

In strategic alliances with different sectors (theatre, classical music), both parties can learn a lot from each other (*organisational effectiveness*). Popular music venues can learn a lot from governmental organisations on aspects of business. On the other hand, the largely self-supportive popular music venues have something to teach about being entrepreneurial.

- **Anonymous** encounters some clashes between their methods and those of a different theatre. The latter has a lot to learn when they start cooperating: *'I really think that attitude... Also because of the crisis and the financial cuts... They really have to leave that attitude behind and do more work with less people.'*
- *'They have the vision that it should all be very high-pitched while I feel that it can be a bit more accessible. That's a way of earning money to serve the niche. They are now working on that shift. Actively renting the venue to commercial parties to generate own income.'*(...) *'We're learning from each other and I like that.'* (...) *'They have a certain competence in doing business that we sometimes miss. I'm allergic for lobbying at fancy receptions, but because of that I burn my own fingers. I think we can be more business minded in this regard. We can learn how to approach privates of foundations to get some support.'* – **Anonymous**
- **Peter Sikkema, Oosterpoort** explains how De Oosterpoort and Vera can learn from each other: *'There is quite a difference in the organisations. They've got that club feeling. They are strongly connected to their audience. We are a concert hall. We have less of a connection to our audience. They can learn from us in professionalism and we can learn from their club feeling and collectiveness. I find this very important.'* De Oosterpoort has something to offer De Schouwburg as well: *'You can learn things from the way you deal with things. The pop world is about ticket prices. How many visitors were inside and what did you earn? The theatre world is about a cost price. I take the way of doing business in the pop world with me to the theatre world.'*

Pressure from the municipality

Not only the alliances in Groningen (De Schouwburg & De Oosterpoort) and Utrecht (Tivoli & Vredenburg) originated by pressure from the municipality. **Jeroen Blijleve (Patronaat)** experienced this pressure as well. He considers partnerships to be unavoidable in these times of subsidy cuts. Most bookers can imagine such request in the future:

- *'It could be that we are forced to. When subsidies are cut...' (...) 'You become forced to build bridges between venues... I see it more as an emergency plan.' (...) 'I can imagine that if a club in Nijmegen that has to do something with pop music goes bankrupt, we are forced to merge.'* – **Robert Meijerink, Doornroosje**
- *'I can imagine that the municipality asks us to join forces.'* - **Anonymous**
- *'It is also a sign towards the municipality. They love partnerships.' (...) 'Politics are a factor off course.'* – **Peter Weening, Vera**

Because of the subsidies they receive, venues consider interference justified. They are aware of their *responsibility towards the community*:

- *'I am open to anything because I consider that our responsibility. We receive subsidy and we exist for the city. You have to strive for the optimum of the city. What is your audience and what are their needs?'* – **Anonymous**
- *'Fact is that all governments are cutting the subsidies. There is no more money. We are focussed on our main objectives but a lot of extra tasks concerning pop music are forced upon us. We have to. We are significantly subsidies by the municipality of Nijmegen. Our philosophy is that we want to live up to that money.'* – **Robert Meijerink, Doornroosje**

This is not the case in every city (although Amsterdam seems to be an exception):

- *'Not really. The municipality leaves us be. We hardly have to deal with them.' (...) 'We are for 94 per cent self-sufficient. They don't have a big say in our business.'* – **Edwin van Andel, Melkweg**

With current developments it seems as though some changes are unavoidable. An entrepreneurial mind is recommended:

- *'That's why I think organisations should, if they are wise, come with a proposal about partnerships themselves and explain to the politics what kind of advantages it can bring. When they are deciding these things for you, you are always off. That is what I try, to be pro-active towards the municipality. That the solution is there before they signal the problem.'* – **Frans Vreeke**
- *'It can become an issue in the future. In order not to be surprised I think you should have thought of it yourself. You should arm yourself against it.'* – **Peter Weening, Vera**

Chapter 3.4.3: Disadvantages

Even though there could be gained a lot on the level of *organisational effectiveness*, there are certain 'costs' to integrating (aspects of) businesses. The disadvantages of strategic alliances will be explained in this paragraph.

Danger of losing your identity

In chapter 4.3.3 on the disadvantages of promoters booking for multiple venues, four different bookers express the danger of losing your identity. That argument surfaces in this discussion as well. Venues fear that their distinctive profile will weaken and that the *artistic merit* of their programme will decrease.

- *'That is a legitimate concern. In Groningen you have De Oosterpoort and De Schouwburg in one organisation, 200 meters apart. The offices are in De Oosterpoort and De Schouwburg is the implementation. Employees of De Schouwburg said: 'There is no heart, no soul in the programme. It's all happening somewhere else.'* – **Anonymous**
- *'A big part of the organisation houses here. A small part of De Schouwburg is still there and they feel a little bit abandoned. That is difficult. I think you have to be consequent. Have one independent office from where you organise it. People have to have the feeling they're in the middle of the organisation. I find that important. They have to remain involved. That feeling they have in Vera should manifest itself more over here.'* – **Peter Sikkema, Oosterpoort**
- *'It offers us a lot of opportunities. We will have a building with five halls that will fit 6000 people. We can do fantastic things over there, we really can. It is going to be a bit of an institute so it just has to get some soul. I hope that happens quite fast.'* – **Johan Gijzen, Tivoli**
- **Anonymous** about proposals on alliances: *'It should belong to the core of our venue. So far that's not the case. Stage X just wouldn't be Stage X.'*
- *'I'm telling a story with what we organise in Rotown. If there were to be booked all these artist who I don't consider to fit in, by my colleague booker does... You have to consult a lot and if we're working for the same goal it might help.' (...)* *'You have a distinctive profile and you don't want to be some sort of rental place.'* – **Joey Ruchtie, Rotown**

Different cultures

For a partnership to be effective the organisations should be of the same calibre. Most of the smaller pop venues are in a different stage of professionalisation, which makes it more difficult for them to integrate their businesses with the bigger ones. They work primarily with volunteers and minimal means and it is hardly possible for them to produce any cheaper. Alliances between

bigger halls and governmental organisations may be more fruitful but encounter differences in the culture of the organisation.

- *'We just do and they have to consult and think about everything. It's a cliché but there is a big difference in cultures.' (...) 'Everything is so slow over there. That is quite usual and even quite logical in that sector. I can book a band for next month and they are finishing the season for next year. Then your organisation will work in that kind of tempo as well.'* –

Anonymous

- Another booker explains how his organisation books less ahead and is much more flexible. They work much faster and cooperating sometimes slows them down. The different dynamics of the disciplines sometimes cause for the venue to be left out.
- *'It is such a different culture. They function like officials. They work from 9 till.. 4 I guess. That is unknown in the pop world. You go home once you're finished. When nothing will go wrong that night. Unimaginable. They don't work that way but they will find out.'* –

Anonymous

- *'Pop music works on much shorter notice. It's a complete different culture.'* (...) *'You have to make a shift in culture. It takes a long time since it is an officialese organisation. It is very persistent.'* (...) *'We are getting used to each other and it works quite well, but you have to explain yourself a lot. You have to be on top of it and continually give it attention. Theatres are subsidised while pop music functions conform the market. That brings a different dynamic.'* – **Anonymous**
- *'They work very far ahead. It can be difficult getting the right artist at the right date.'* (...) *'Sometimes they just change things and forget to tell us. Such issues sometimes clash, but that is part of the deal. It takes time to learn from each other.'* – **Anonymous**

Lack of time

Because popular music venues are generally understaffed, they do not have the time to even look at possibilities of integrating their businesses. The transaction costs of establishing new relations and contracts are considered to high. Overall *organisational effectiveness* would go down.

- *'They are executive firms, which run from one day to another. They do not yet have the capacity in terms of money and in terms of people to get the director to take a little more distance in order to look outside. What is happening in the sector? Who are the partners in the city? What ideas can we run? That peace and that distance are scarce. Because they're all actually a little understaffed.'* – **Frans Vreeke**
- *'We are simply too busy.'* (...) *'When I go on holidays I work in advance and when I return I have to catch up. Long-term plans remain on the bench while I know we are losing money*

not doing something with it.' (...) 'We could, but it has to present itself. We are busy enough so we don't actively search for it.' – **Majel Blonden, Het Paard**

- 'It could be possible but we have our hands quite full. We are not some sort of side hall. EKKO and Tivoli are stages on themselves. There is too much work here.' (...) 'I think it's better to do this right.' – **Marlies Timmermans, EKKO**

- 'Everyone working in Doornroosje is doing this extra. We already had too much work, but since Merleyn... Our hours and wages did not improve because the money is simply not earned over there.' – **Robert Meijerink, Doornroosje**

This seems to be a general issue in the pop sector. Because they receive relatively little subsidies, few people do a lot of work. Alliances require an investment of time and effort that is hard to make.

Chapter 3.4.4: Recapitulation

The economic crisis causes for resources to become scarcer and entrepreneurship to become more important. The need for venues to join forces with other organisations is only recently starting to show, but is expected to become bigger in the future. It seems as though current developments demand from popular music venues to take the next step in professionalising their business: strategic alliances. Partnerships are cautiously established on aspects of marketing or cooperative deals. It becomes clear from the interviews that strategic alliances in the booking department (like the bookings on location) aim at increased *artistic merit* in terms of quality. In the back office *organisational effectiveness* is the goal by means of increasing efficiency. Increased *contribution to the community* is named as a reason for alliances in the marketing department. These advantages are the result of shared knowledge. Both parties can learn from each other and create a synergy. Horizontal integration is becoming a topic of discussion as the next step although practice does not always seem there yet. Benefits are acknowledged but there is also some resistance.

Advantages	Disadvantages
Efficiency; increased organisational effectiveness	Danger of losing your identity (asset specificity)
By sharing knowledge the two parties create synergy	Different dynamics can cause for a clash of cultures
Both parties can learn from the other party's way of doing business	High transaction costs (a lack of time)

Table 3.6: Reasons for popular music venues (not) to form strategic alliances or mergers

Interesting is that the most important benefit from actual mergers is increased efficiency. Some participants even see it as an emergency plan to prevent venues from ceasing to exist. This monetary advantage seems to be opposed to the non-monetary disadvantage of losing your identity. Obviously a lack of identity would ultimately become a financial problem. However, there are different values that come into play. Cultural organisations function with other objectives besides monetary returns. The *artistic merit* and *contribution to the community* are part of their mission. This danger is bigger for smaller venues because they fear to be overshadowed by the larger ones. The question is whether the financial gains offset a loss in non-financial values.

Chapter 3.5: Talent development

Chapter 3.5.1: Introduction

Mostly the smaller venues consider the development of talent as being part of their mission. Partnerships can be established with other venues to ensure smaller bands are provided with a stage. Other partnerships are with local initiatives (like a dance concept) that are looking for a location. In this chapter the following paragraph will be answered: *How does the aspect of talent development influence choices in partnerships or not?*

Chapter 3.5.2: Building a chain

Strategic alliances with other venues allow for a chain. This is a way of diversifying the product; different types of acts can now be offered a stage (*artistic merit & contribution to community*). The goal is to connect artists to the organisation at an early time in their career in order for them to come back once they have grown (*organisational effectiveness*).

- *'I really see it as a stage with which we nurture local, national and international talent. The diversity we try to show at Doornroosje, we try to show in Merleyn at a developing level.'*
(...) *'By booking on locations like Lux (200 seats, 350 standing), the bigger Stadsschouwburg and De Vereeniging (1000, 1400 & 1800), we started some sort of chain. This 'mini Doornroosje' allows us to push that approach through. We now have a stage for smaller and more intimate shows where we can promote exciting new bands.'* – **Robert Meijerink, Doornroosje**
- *'Over there I want to book the bands that are still too small for us. See if we can connect them to the Melkweg, whether they are a good fit. Hopefully they can grow from there.. That is development of talent.'* **Edwin van Andel, Melkweg**
- *'For bands to continue to grow. After they had a good time here, there is still place for them when they've grown bigger. For them to know the city.'* – **Peter Weening, Vera**

- *'When bands perform very well, they move from the café to being a support act and then to the small hall.'* – **Majel Blonden, Het Paard**

Chapter 3.5.3: Local initiatives

Offering local initiatives a stage can be a way for venues to *contribute to the community*; apparently there is a certain demand. By cooperating with these local groups of people, the venue connects itself to the city. Furthermore, bookers feel that it diversifies their programme and adds *artistic merit* to it.

- *We have a lot of partnerships with parties that are complementary to us. It's mostly about the content. You look for parties that add something to your programme.'* (...) *'We really want to train people. To guide them. People come to you with an idea (like Wildgroei) which you guide until it's ready to continue to grow on to for instance Tivoli. It's very important to offer those initiatives a space.'* – **Marlies Timmermans, EKKO**
- *'It is about connecting your programme to the needs. When people come to you with an idea that means there apparently is a need for it. You look for gaps in your programme. You have a spectrum of what you want to offer. I think we have to be as broad as possible.'* – **Marlies Timmermans, EKKO**
- *'Eventually a lot of people come back to De Melkweg. They start out small, but the bigger bands need a kind of sound, facilities and production that OT301 or OCCII can't deliver. You get in contact with a fresh group of people with their own audience and organisation. You connect to the city and make use of these small initiatives. Together you create something nice. I like that De Melkweg can help out.'* – **Edwin van Andel, Melkweg**
- *'To become a 'hang out' for creative people. Stephan's job is to get creative people from Rotterdam to feel at home in Rotown. When a creative person, band or artist has a good idea, they are offered a stage here.'* – **Joey Ruchtie, Rotown**
- *'I find it very important that some initiatives are offered a stage because they take care of their own promotion. They are willing to take a certain responsibility and a certain risk. I am inclined to do it because I think they are doing a good job. You sympathize with the initiative and you sort of adopt them.'* – **Robert Meijerink, Doornroosje**
- *'It's good to have one stage that is very accessible. If bands want to perform there, they need to promote themselves. If they don't, it might happen that no one visits their show. I see it as a learning process. They have to ensure an audience, not me. I try to turn the tables.'* – **Majel Blonden, Het Paard**
- *'The band has to meet certain standards though. It is a way of helping the local scene. They do have to try to get people visit their show.'* – **Peter Weening, Vera**

A good balance should be maintained otherwise *artistic merit* will go down:

- *'You should not block your agenda too much. If you have too many arrangements, you'll see you're no longer available for that band that can only play one day. Because of the bigger circuit you should remain very flexible. If you have too many agreements, the content of your core business will suffer.'* – **Peter Weening, Vera**

Chapter 3.5.4: Recapitulation

The success of popular music venues depends on whether they realise their mission. For some, this is not only about delivering the best programme there is, but also about the development of (local) talent. By cooperating with other locations, organisations form a chain that allows them to nurture artists. Smaller acts can perform in this hall to build their career and will hopefully return once they are bigger. Another aspect of talent development is to guide creative initiators in their ideas. This is seen as a way of broadening the spectrum in your programme (*artistic merit*). These ideas arise out of a certain need from the *community* and are considered important to be given a stage. These partnerships connect the venue to the city and the city's needs. In return the venue expects a certain feeling of responsibility. It can be seen as a learning process for these young creators.

Chapter 3.6: Cooperation vs. Competition

'When discussing partnerships you can't leave out the aspect of competition.' – **Frans Vreeke**

Chapter 3.6.1: Introduction

To what degree do popular music venues experience competition? Is there a difference in their relations with venues within their own town or from outside of town? The way bookers find a balance between being colleagues and being competitors is considered an important aspect to study when dealing with partnerships. In this chapter the following sub question will be answered: *How does the aspect of competition influence choices in partnerships or not?*

Chapter 3.6.2: Cooperation within towns

Most bookers do not think in terms of competition when it comes to their own town. They look at the bigger picture of *contributing to the community* and consider other venues to be good for the cultural climate of the city. Within one city the organisations often differ in their mission, programme and target group. They are rather complementary than supplementary to each other.

- *'I consider Rotterdam too small to work against each other. There is a risk of competition but when everybody goes along I don't see a problem.'* – **Joey Ruchtie, Rotown**

- *'When there is a vibrant climate, it will be better for the Muziekpaleis. People will come here to grow to Tivoli or the Muziekpaleis later on.'* (...) *'You stimulate each other. You have a chain together in the city. A rich chain, it all fits well together. There are possibilities for growth.'* – **Marlies Timmermans, EKKO**
- *'I've always said that EKKO is of essence to the city of Utrecht. There are enough examples of bands that play there when they're small and return to a bigger venue in Utrecht because they like the city so much. That chance would be smaller if EKKO didn't exist.'* (...) *'If you have a shopping street with three stores that are alike, it will generate more public than if there was only one.'* (...) *'We can't offer a stage for small bands while EKKO can. These are the bands with which it all begins. It is important that they visit Utrecht.'* – **Johan Gijsen, Tivoli**
- *'I am convinced that their (PopHotSpot) success is ours. It's like a furniture mall. That works for a reason. When there is nothing going on in the city, there is not much reason for people to visit The Hague. They would feel there is not much going on besides Het Paard. That's not good. The more there is going on, the better.'* (...) *'I do see the bigger picture. That place should be successful too.'* – **Majel Blonden, Het Paard**
- *'I think it's an advantage that there is a popular music venue in Arnhem as well. I consider it to be important for this part of the country. (...) I don't think in terms of competition. I prefer to focus on what I can do myself and what my possibilities are.'* – **Robert Meijerink, Doornroosje**
- *'You need each other. These are no times for competition. I believe you should strengthen each other. I believe in the city of Groningen, not in competition.'* (...) *'Planning and coordinating are very important. Vera and Oosterpoort share agendas. We know what they're working on and the other way around. When you enter each other's territory, you have a conversation and that is good.'* – **Peter Sikkema, Oosterpoort**
- *'Competition is a nasty word. I don't think you should... The Dutch club circuit is subsidised and I consider competition a term from the free market. That has become out of sight lately. Competitionlike circumstances sometimes develop while I feel that shouldn't be the case. That subverts the subsidy system.'* – **Peter Weening, Vera**

Some venues even help other venues out:

- *'I sometimes send artists to Winston that are too small for me. They can take it from there and that's working quite well. They are sympathetic guys who understand the feeling we carry out.'* – **Edwin van Andel, Melkweg**
- *'When I have a band that's too small for De Helling I call Eduard, and when he can't afford it he calls me.'* (...) *'We all benefit from that in the end.'* – **Johan Gijsen, Tivoli**

Chapter 3.6.3: Cooperation between towns

Between towns there are forms of consultation. Bookers do see each other as colleagues to whom they talk about ticket prices or sales expectations. Sometimes, publicity costs are shared. None of this is really structural because of a lack in time, but most bookers consider it enough. In the past, it has happened that bookers organised a tour together. This could be something to look into in the future.

- *'Daily, with EKKO, Paradiso, Doornroosje, Vera, Oosterpoort. That is more practical. What are you working on? What am I doing? How many people visited the last tour? That kind of practical stuff... You keep each other updated on what's going on. It is more a consultation. No concrete partnerships result from that.'* – **Joey Ruchtie, Rotown**
- *'There is quite good contact within the A-circuit. Agents don't play us against each other. That is not really the culture over here.'* – **Peter Weening, Vera**
- *'Bookers call and email each other. There is a sort of natural partnership. You take each other into account.' (...)* *'It does not happen at a very pro-active level. Everybody is very busy.'* – **Robert Meijerink, Doornroosje**
- *'We are all busy enough as it is. I do want it but it simply doesn't happen. It can always be better.' (...)* *'The practice shows that, because of a lack of time, there is little cooperation.'* – **Majel Blonden, Het Paard**
- *'There can always be more, we all agree on that. It does happen sometimes.'* – **Johan Gijsen**
- *'There is some cooperation between venues. We had a rough start in February. The first thing we do is call other bookers. Compare situations and try to understand it. There is a lot of consultation.'* – **Marlies Timmermans, EKKO**
- *'In my experience we do so already. I have a lot of contact with Nijmegen, Utrecht sometimes, Amsterdam... It is rather a consultation about the ticket price or the number of visitors you expect.'* – **Peter Sikkema, Oosterpoort**

Chapter 3.6.4: Finding a balance

Between towns there is said to be more competition. Even though bookers consider each other colleagues, they are very much aware that they are all after the same bands (opportunistic behaviour and asymmetrical information may occur). Sometimes it is difficult to find a balance between being colleagues and competitors.

- *'It's a difficult issue. I always say that De Melkweg and Paradiso are both so successful because they're always competing. Even now, after 40 years, they still watch each other's moves carefully. You can't level out that energy and motivation.'* – **Frans Vreeke**

- *'I don't know. We're all after the same prey. I can tell the other what I got offered but then I will lose the deal. It has happened before, so next time you'll be careful.'* – **Peter Sikkema, Oosterpoort**
- *'It's difficult because you are colleagues but you are also competition. You both want to book that sexy band. With some bookers I can work at a level of trust and discuss certain artists. If I do this with others I'm sure I will lose it. I don't blame them; I would do the same if I worked there. You want to cooperate but in the end a band performs only three times while fifteen venues want it.'* – **Johan Gijsen, Tivoli**
- *'They are doing a good job so you have to watch your back. Tivoli and Utrecht in general are easy to reach. Their ticketing system sometimes makes them cheaper. Sometimes a band only performs once. When I'm full, they go to Utrecht. That's a bummer because I would like to have them but that's how it is.' (...)* *'You do have to take it into account. For some bands it's not good to perform six times. I tell them so. There is a certain segment of audiences for some bands.'* – **Edwin van Anandel, Melkweg**
- *'It is true that everybody pleads his own case. That is a disadvantage.' (...)* *'I think you are colleagues and competition at the same time. Many venues have great respect for each other, but are very much aware that when a band plays somewhere else, they don't have it. I am not so preoccupied with this myself, but I do notice it.'* – **Robert Meijerink, Doornroosje**
- *'Trust is the basis. It is sometimes a bit of a search for the interests that come into play. Personally I don't really believe in competition.' (...)* *'Sometimes it can be a bit exciting. Michiel organises two dance nights here that are quite popular. He will become the new booker of dance in Tivoli so how will that go? You just have to trust that something new will arise.'* – **Marlies Timmermans, EKKO**

Chapter 3.6.5: Recapitulation

When discussing partnerships, competition is an important theme. Participants see each other as colleagues. Relationships are good and bookers consult when necessary. Especially within towns, other venues are rather seen as complements than as supplements. Venues have different missions and different target groups; their products are heterogeneous. They are more likely to cooperate because together they create a vibrant cultural climate from which both parties benefit. There is often a little competition, but this is seen as an incentive to perform well (chapter 3.3.3.). As explained in previous chapters, venues can be hold back a little in their cooperation because they want to stick to their own profile. Competition causes them to distinguish themselves more.

Cooperation within towns	Competition within towns
Building a chain; creating a good climate	Keeps you focussed / prevents predictability
Sharing knowledge; creating synergy	Causes a certain energy & motivation that enhances quality
Stand strong towards agencies (in competition with other towns)	
Better alignment of artists	

Table 3.7: Cooperation & Competition within towns

Between towns, more competition is felt. There are more venues of the same size that offer 'homogeneous artists'.⁶ Especially in urban environments like De Randstad, they attract the same audiences. The amount of competition that is felt depends on the location of the venue. Almost all bookers experience a certain competition from Amsterdam since this is the place artists prioritize to visit. Bands do a limited amount of shows, while many organisations want to work with them. Too much cooperation brings a certain risk: opportunistic behaviour. Because of this competition, less cooperation takes place.

Cooperation between towns	Competition between towns
Consultation structure	Scarce supply; limited segment of audience for certain artists
Share publicity costs	Opportunistic behaviour
Organise tours (in the past)	

Table 3.8: Cooperation & Competition between towns

To a greater or lesser extent, bookers experience competition from venues within or outside town. Both competition and cooperation contribute to the viability of the organisations. Finding a balance is what participants struggle with.



⁶ Cultural products are often not homogeneous because of infinite variety. However these bookers are all after the same artists.

Chapter 4: Theoretical Framework

Chapter 4.1: Introduction

When analysing the data, some themes kept recurring. In this chapter, these themes will be related to existing theoretical concepts. The cultural sector is characterised by special properties. Different values besides economic ones are important. In the next paragraph it will be explained how these properties and values influence choices of partnerships. In the data presentation it is shown how reasons for partnerships can be related to the three dimensions of viability. This topic will be elaborated upon in paragraph 4.3. In paragraph 4.4, reasons for strategic alliances are explained and applied to the data. Finally, a short recapitulation will be presented.

Chapter 4.2: Properties & values of creative activities

The classic economic perspective looks at the arts from an industrial framework in which, according to David Throsby, “cultural goods and services can be seen as commodities just like any other” (Throsby, 2001, p. 11). Caves and Klammer counter this by emphasizing the special features of the cultural sector. In his book on creative industries (2000), Richard Caves stresses that “creative goods and services, the processes of their production, and the preferences or tastes of creative artists differ in substantial and systematic (if not universal) ways from their counterparts in the rest of the economy where creativity plays a lesser (if seldom negligible) role” (Caves, 2000, p. 2). This is because properties of creative activities differ from other activities.

One very important aspect of creative goods is that **‘demand is uncertain’**. It is extremely hard to predict how consumers will value a newly produced cultural good. “A creative good is an experience good and the buyer’s satisfaction will be a subjective reaction” (Caves, 2000, p.3). Asymmetric information (is not so much the problem, it is rather symmetrical ignorance: ‘nobody knows’ whether the product will be a hit. Producers try to predict the product’s success since the problem grows bigger when production costs are sunk. In the case of live music, it is the booker’s job to estimate the demand and to make the right fit. Building a chain by establishing partnerships can reduce risks.

When product A is considered better than product B, they are vertically differentiated. Typical for artistic products is that they are also horizontally differentiated: **infinite variety**. This property is used to “invoke either the universe of possibilities from which the artist chooses, or the array of actual creative products from which consumers or intermediaries choose” (Caves, 2000, p. 6). Consumers are offered so many choices that the selection of the programme becomes an important task executed by, in this case, the booker. Partnerships in the form of bookings on location can be a means to distinguish from this endless choice.

In economics it is assumed that workers care about their wages and working conditions, but not so much about the product they deliver. This is very different from creative activities where “the creator cares vitally about the originality displayed, the technical prowess demonstrated, the resolution and harmony achieved in the creative act” (Caves, 2000, p. 4). “The prevalence and strength of tastes that affect the qualities and quantity of creative effort we call the **art for art’s sake property**” (Caves, 2000, p. 4). This is reflected in the resistance towards certain partnerships. Efficiency can be increased, but participants care about more than just monetary returns. They are afraid the quality of their art is at stake.

This last property is in line with ideas of different kind of values as explained by Arjo Klamer. He states that “art as activity and as experience has a value that is beyond measure and therefore clashes with the form of money (Klamer, 1996, p. 25).” Besides economic values, he distinguishes cultural and social values (table 4.1). These different types of values explain certain choices in partnerships. Bookings on location are not always the best choice financially, but can have important artistic value. Partnerships with local initiatives enhance social value and therefore contribute to the organisation’s mission. Interestingly enough, Klamer’s notion of values seems related to the three dimensions of viability that Preece (2005) distinguishes in the next paragraph 2.3. Economic value relates to organisational effectiveness, cultural value relates to artistic merit and social value relates to contribution to community.

Goals values		Functional values
Cultural values	Societal values	Profit, financial arrangements, lobby, power, audience, etc.
Artistic	Community	
Historical	Identity	
Scientific	Education	
Spiritual		
Personal values	Social values	
Relations		
		Qualities ↔ Quantities

Table 4.1: Klamer’s classification of values (Klamer, 2011, p. 4)

Chapter 4.3: The Performing Arts Value Chain

In his article, Stephan Preece introduces the Performing Arts Value Chain (PAVC): “a decision-making tool for performing arts organisations” (2005, p. 22).⁷ This tool distinguishes between

⁷ In the article, performing arts organisations are the organisations that execute a performance (theatre, dance groups). In this thesis the model is applied to facilitating organisations of the performing arts: popular music venues.

primary activities (programmemeing, personnel, promotion and production) and support activities (governance, administration, fundraising and outreach). Without any one of the four primary activities, a performance cannot take place. Activities are all related to each other and each contributes to the overall viability of the organisation. Their combination forms the value chain. Because each organisation serves its own purpose, there is no general measurement of success. Therefore the article uses the term viability as defined by the American Heritage Dictionary: “the capability of success or continuing effectiveness” (Soukhanov, 1992).

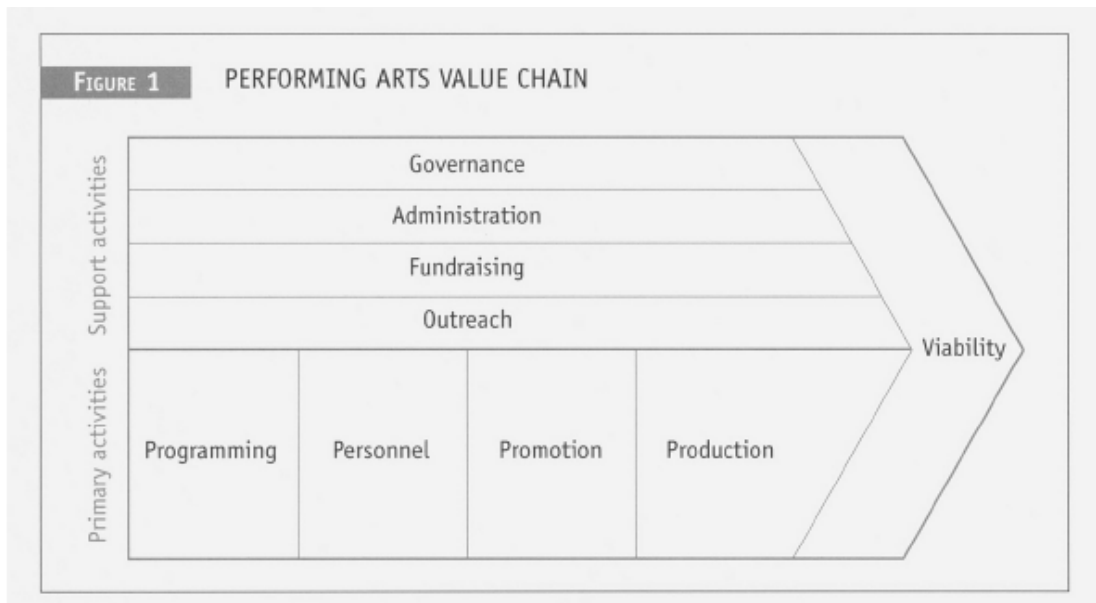


Figure 4.1: The Performing Arts Value Chain (Preece, 2005)

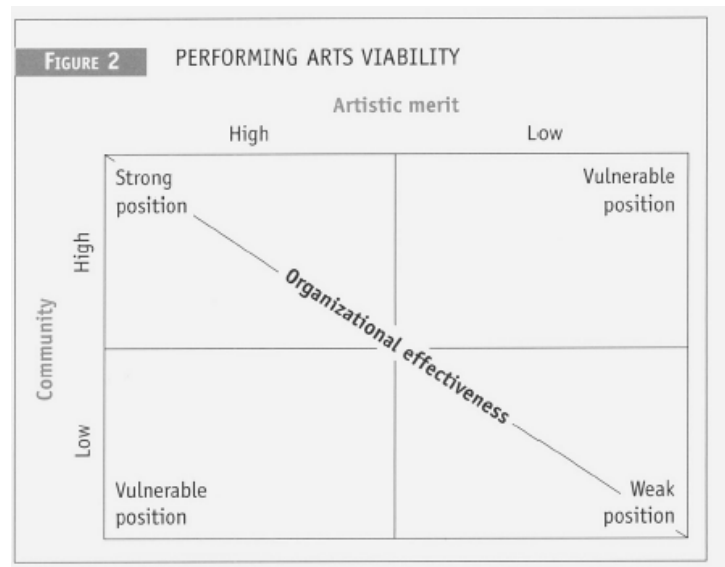
It is obvious to say that partnerships are established to improve the viability of the organisation. Preece’s approach is relevant because of the three different dimensions he attributes to viability: artistic merit, contribution to community & organisational effectiveness. In the data analysis it is shown that these dimensions keep recurring as reasons for cooperation. As explained previously they relate to the cultural and social values that are so typical for the cultural sector.

Artistic merit has been subject to debate for ages and a definition is impossible to give. It very much depends on the organisation and its mission. **“Contribution to community** is defined as the quality of the organisation’s interaction with the public, the engagement and participation of its community, the quality of the education, outreach and audience development actions of the organisation, and its responsiveness to the diversity and variety of its community” (Preece, 2005, p. 25). This is also very dependent on the organisation and its mission. Because of its not-for-profit status, the organisation is assumed to need to have an impact on people beyond the people that are directly involved. **“Organisational effectiveness** is defined as the ability of the organisation to achieve its mandate, the quality of its management of its human resources

(staff, artists, managers, board), its success in controlling expenses, generating non-government revenues and using its monies to best effect, its ability to anticipate, plan for and take positive actions to manage change successfully” (Harvey, 1999, as cited in Preece, 2005, p. 25).

The PAVC is a tool for considering the merits of important decisions like partnerships. Partnerships can be seen as a way to achieve a better balance between the three dimensions of viability as explained previously. All three dimensions are interrelated. Organisational effectiveness is needed in order to create artistic merit or to contribute to the community and vice versa (figure 2.2). Preece describes how

Figure 4.2: Viability (Preece, 2005)



the interrelationships between the different types of activities should be kept in mind when making such decisions since the decision can influence the viability of the organisation. Every activity that is relevant to the decision should be considered.

“PAOs have the choice of carrying out primary or support functions, either (a) within an organisational umbrella (hierarchy), (b) through a collaborative relationship (partnership), or (c) in an arm’s-length transaction (market)” (Powell, 1990, as cited in Preece, 2005, p. 23). With the exception of governance, every activity in the PAVC can take one of these forms. In this thesis, partnerships on both primary and support activities are discussed. With actual mergers, all functions become co-operative. This is the case with the future Muziekpaleis in Utrecht. These kinds of partnerships ask for the biggest investment; every activity influences the viability of the organisation and should be monitored carefully. Bookings on location only concern the primary activities of programming and promotion. In Haarlem, Patronaat found alliances on support activities. The director of Patronaat considers these types of partnerships inevitable in current times of subsidy cuts. Most other venues agree that this is something worth looking into. In these cooperations, cultural and social values are less at stake.

Chapter 4.3 Types of partnerships

As mentioned in the introduction, the research of popular music venues by Vreeke and Van Dalen (2008) ends with the recommendation to look into structural cooperations. Cees Langeveld shares this idea (Langeveld, 2009, p. 28). Langeveld wants to study the issue of

seeking the optimum of the interests of the performing arts, public and public costs. He shows special interest in the regulation of the production chain, which he considers too little dynamic. New models should be considered like a different geographical administrative responsibility or forms of integration. Another report on the business of the performing arts by Wils and Van Klaveren confirms the actuality of the topic as well (2008, p. 9-11). They focus on problems that are derived from a survey from the field and think about improvements in the sector. It is also one of their conclusions that there is too little horizontal and vertical cooperation. They consider the infrastructure of venues too fragmented. Every municipality wants an attractive cultural climate that entails its own stage. These venues are often limited in their facilities, which causes for a structural lack of time and money. Wils and Van Klaveren recommend (2008, p. 33-35):

- **Organisational partnerships:** establishment of service organisations that execute administrative and support affairs; joint marketing at local; regional and national level; setting up pools with specialized staff; joint housing.
- **Partnerships on levels of content:** experiment with price agreements between producer and venue; tuning the summer and winter supply; joint bookings on regional level
- **Economies of scale by mergers:** mergers between organisations with the same sort of activities whereby strategic and supportive functions can be bundled;

Relevant for this thesis is their emphasis on sharing knowledge as a means for professionalism (Wils & Van Klaveren, 2008, p. 35). Also interesting is the example of unconventional booking that is named as a solution for the problem (Wils & Van Klaveren, 2008, p. 37). Booking outside traditional locations is named as a means to generate new audiences. Wils and van Klaveren note how in practice these types of cooperations do not really take root yet. Popular music venues are in a preliminary phase of some examples of these partnerships. Most important barrier for participants of this study appears to be the danger of losing your own identity. They fear for the cultural and social value of their organisation.

Chapter 4.4: Strategic alliances

One of the most important decisions managers have to make is whether to 'make-or-buy' the components of the production chain. By 'making' you can control the process, but the organisation might become large and unwieldy and suffer from diseconomies of scale in management. 'Buying' means specialisation in terms of lower costs but it puts you in the hand of the suppliers. The way that is dealt with this issue determines the size and structure of the organisation (Towse, 2010, p. 129-130).

Strategic alliances are inter-firm cooperative arrangements that allow firms to temporarily seek resources from others for their own benefit (BarNir & Smith, 2002; Buduru,

2010). Both partners remain autonomous and independent in their objectives and strategies. According to the resource-based theory 'a firm can sustain competitive advantage by configuring its tangible and intangible assets in such a way that is difficult to imitate, or by acquiring resources, skills and capabilities that are durable yet not perfectly transferable or replicable. Where it cannot access all the resources it seeks, it can engage in a strategic alliance (Buduru, 2010, p. 7).' 'This theory can be couched in terms of transaction costs if the sustainable competitive advantage is thought of as a specific asset. Transaction costs are the costs of establishing and maintaining property rights over resources (e.g. monitoring transactions, negotiations etc.) (Buduru, 2010, p. 7).' Cooperative behaviour leads to cost reductions because transactions become organised.

The more heterogeneous the products, the better the synergy (homogeneous products create rivalry). Existing alliances are between organisations that differ in size, mission and content. However, they can cause for some management and operational challenges because the organisations are likely to differ as well. Possible opposites are: firm vs. group interest, short vs. long-term orientations, rigidity vs. flexibility in structure, different firm goals and competitive environment, power differentials and asymmetric interdependence (Buduru, 2010, p. 13).

Buduru (2010, p.25) provides an overview of reasons to join strategic alliances from which quite a few are related to themes that emerged from the data (table 4.2). Popular music venues are largely self-sufficient and therefore subject to market forces. Still, it should be noted that they experience less competition than other sectors because of their public function. Especially within cities, organisations see the bigger picture. This social value is typical for such non-profit organisations and can function as an incentive for partnerships that is not mentioned by Buduru. Possible threats like opportunistic behaviour and asymmetric information are less likely to occur.

Buduru shows reasons to joint strategic alliances, but he does not mention the costs that are involved. Participants already mention a lack of time as a reason not to look for partners. This means they consider the transaction costs too high. The most important cost that can be derived from the data is the loss of identity. Participants fear they have to give in on their cultural and social values when joining alliances. Again, it becomes clear that the special features of the sector influence choices in partnerships.

Reasons to join strategic alliances		Examples of themes (chapter)
Risk reduction	Lower asset exposure for SMEs	N/A
	Accelerate access to markets	Sharing knowledge (3.3.2 & 3.4.2)
	Lower total capital investment	Efficiency (3.4.2)
	Reduce fixed cost	Efficiency (3.4.2)
	Diversify portfolio	Bookings on location (3.2)
	Reduce environment uncertainty	Stand strong together (3.3.2)
Economies of specialization, scale and scope	Use complementary of competencies	Sharing knowledge (3.3.2 & 3.4.2)
	Reduce innovation costs	N/A
	Lower average costs via larger volume	Efficiency (3.4.2)
	Facilitate product development	Diversify the product (3.2.2); Talent development (3.5)
	Economize on transport costs	Cooperation between towns (3.6.3)
	Gain configuration flexibility	The bigger picture (3.3.2)
Complementary technologies	Capitalize on local externalities	N/A
	Capitalize on technological synergy	N/A

Reasons to join strategic alliances		Examples
Co-opting or blocking competition	Block competition via a defensive SA	Stand strong together (3.2.3)
	Increase cost of rival via an offensive SA	N/A
	Improve strategic position	Stand strong together (3.2.3)
	Deter market entry or exit	N/A
	Move competition at the alliance level	N/A
Overcome a government mandate barrier	Operate as a “local” entity because of local partner	N/A
	Satisfy local ownership requirement	N/A
	Conform to legal/regulatory requirements	N/A
Vertical quasi-integration	Gain access to materials, technology, labour, capital	Sharing knowledge (3.3.2 & 3.4.2)
	Gain access to distribution channels	N/A
	Gain access to information about markets	Sharing knowledge (3.3.2 & 3.4.2)
	Draw on existing market establishments	Sharing knowledge (3.3.2 & 3.4.2); Reach new segments of audiences (3.2.3)
	Reduce TCs by using an appropriate market mechanism	N/A
Learning	Learning via interaction	Learning from each other (3.4.2)

Table 4.2: Reasons to join strategic alliances (Buduru) applied to the practice of popular music venues (Buduru, 2010, p. 25)

Chapter 4.6: Recapitulation

Creative activities are said to have special properties (Caves, 2000). This is because in the cultural sector there is not only concern about economic values, but also about cultural and social ones (Klamer, 2011). Preece (2005) argues that decisions such as partnerships can influence several activities within the Performing Arts Value Chain. Ultimately this influences the viability of the organisation. This viability is measured on three dimensions: artistic merit, contribution to community and organisational effectiveness. These dimensions keep recurring as reasons to establish partnerships, probably because of the related values that come into play.

In several studies about the performing arts in The Netherlands it is concluded that there should be more cooperation within the field. Wils and Van Klaveren (2008) recommend organisational partnerships, partnerships on a level of content and economies of scale by mergers. These reflect some steps that are taken in the field of pop music venues. Buduru (2010) provides a list of reasons to join alliances. Buduru's list is applied to results of the data.

Chapter 5: Conclusions

From several studies it becomes clear that more cooperation between performing arts organisations such as popular music venues is advised. This thesis originated from that recommendation with the aim of understanding current partnerships. Qualitative unstructured interviews were held with ten bookers and directors of leading pop venues. In chapter three, the data that was derived from the interviews was presented and analysed in order to answer the sub questions of this thesis. In chapter four, the data was related to theoretical concepts. In this last chapter, conclusions will be drawn and the main research question will be answered: *What are the reasons for Dutch popular music venues (not) to establish strategic alliances?*

Eventually, all organisations make decisions such as entering into partnerships in order to enhance their viability, music venues being no exception. However, the viability of performing arts organisations can be measured on three dimensions: artistic merit, contribution to community and organisational effectiveness. In the data analysis, these dimensions keep recurring as reasons for strategic alliances. It is distinctive for the cultural sector that the first two are not about financial values, but about cultural and social values. Several developments are identified as reasons for venues to reconsider their business with the aim of increased viability.

From the participants' responses, it becomes clear that there are some major developments in the music industry. Most important developments are the growth of the Internet and globalisation. The Internet causes audiences to become fragmented into smaller segments of visitors for larger segments of genres. Due to globalisation, artists do fewer shows in The Netherlands. Participants consider experience an important theme, both for the audience as well for the artist. By booking at different locations, venues anticipate these changes. According to the researcher, this trend seems part of a bigger development. The interest of the city becomes an increasingly important factor in these partnerships on level of content. The researcher notices a shift in the function of the booker to some sort of promoter who divides the artists over the city depending on which location suits best. While participants are hesitant in their predictions, the researcher sees it as a step towards more cooperation.

There are also developments on economic and political level. The economic crisis asks for some changes in the structure of the performing arts. Subsidies are cut and cultural entrepreneurship becomes more important than ever. The need for venues to join forces with other organisations is only recently starting to show, but is expected to become larger in the future. It seems as

though current developments demand from popular music venues to take the next step in professionalising their business: strategic alliances. Levels of alliances differ per venue. Some are actually merging their businesses, while others cautiously explore partnerships on aspects of marketing or cooperative deals. It becomes clear from the interviews that strategic alliances in the booking department (like the bookings on location) aim at increased *artistic merit* in terms of quality. In the back office *organisational effectiveness* is the goal by means of increasing efficiency. Increased *contribution to the community* is named as a reason for alliances in the marketing department. These advantages are the result of shared knowledge. Both parties can learn from each other and create a synergy. It is remarkable that cooperations with festivals are ahead in this aspect. Hereby, competition is less of a factor.

The viability of popular music venues depends on whether they succeed in their mission. For some, this is not only about delivering the best program there is, but also about the development of (local) talent. Partnerships can be a successful way to achieve this; it connects the venue to the city and the city's need. Monetary returns are less relevant to these choices. It is much more about *artistic merit* and *contribution to the community*.

While participants acknowledge the advantages of joint forces, practice is not always there yet. Respondents express some resistance. The most important reason against any type of cooperation is the fear of losing one's identity. Again, this is closely related to the cultural and social values that are considered very important in this sector. Furthermore a clash of cultures and a lack of time (high transaction costs) are mentioned as arguments against alliances. Hesitation can be attributed to the premature phase that developments are still in. It is unclear what the future will bring for the venue and for the participant. The researcher feels that this adds to the perception of high transaction costs. Strategic alliances demand a certain investment that is not easy to make. In order to make cooperations work, one must embrace its opportunities instead of treat it with suspicion.

When discussing partnerships, competition is an important issue. Overall, participants see each other as colleagues. Relationships are good and bookers consult when necessary. Between towns there is a certain level of competition since bookers are after the same artists. The degree to which this competition is felt is dependent on the location of the venue. Too much cooperation brings a certain risk: opportunistic behaviour. Within towns this barrier is not experienced. Other venues are rather seen as complementary than as supplementary. Venues have different missions and different target groups; their products are heterogeneous. They are

more likely to cooperate because together they create a vibrant cultural climate from which both parties benefit. Strategic alliances within towns are considered most fruitful.

Strategic alliances have become a topic on the agenda of Dutch music venues. All popular music venues differ in scale and in mission and have therefore different reasons for joining strategic alliances. Partnerships can be on level of content or in the back office or marketing department. Overall, it can be concluded that developments like the Internet, globalisation and the economic crisis are the main causes. Participants fear that the different dimensions of viability of their organisation are at stake if they do not anticipate to these developments. Typical for the cultural sector are the dimensions of artistic merit and contribution to community. In these dimensions, cultural and social values are paramount. It is also because of these values that a loss of identity is feared. This is a main argument against strategic alliances. Although some fears and threats are expressed, current developments make lateral thinking, outside 'the box' as it were.

Future research

At the moment most partnerships are still in a very premature phase. The effects of the crisis are just starting to show and strategic alliances as a means to deal with the crisis has only recently become a topic on the agenda. So far, few venues actually feel the need to undertake action but this might change rapidly the upcoming years. These developments should be monitored closely. Furthermore, it should be noted that the venues that participated in this research belong to the top in their field. They are more likely to be ensured of financial support by the government than their smaller regional 'brothers'. It would be interesting to study the difference in the way they experience the need for allies.

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Appendix: Interview design (Example: Peter Sikkema, Oosterpoort)

Naam, functie, zaal, capaciteit?

Wat zijn momenteel jullie belangrijke partners? (Podium voor initiatieven in de stad?)

Samenwerking met Schouwburg, waarom, doelstellingen, problemen baten? Wat kunnen jullie leren van de Schouwburg en andersom? Denk je dat meer podia hier aan moeten geloven? Waarom gebeurt het nog weinig?

Samenwerking met Vera (Bon Iver), waarom, waarom juist nu, doelstellingen, problemen, baten? Wat zouden jullie kunnen leren van Vera en andersom?

Vaker buiten Oosterpoort zonder Vera? Trend buiten eigen podium programmeren?

Promotor model in Groningen? Zie je hier mogelijkheden in voor de toekomst? Podia buiten Groningen stad programmeren? Lokale roots programmeur?

Wat zijn de doelstellingen betreft het aantal samenwerkingen? Is dit veranderd de afgelopen 10 jaar? De komende 10 jaar?

Honkvast publiek/ meer zorg voor de show / kritische artiest? Beleving?

Inspelen op een veranderende vraag? Of verandert het aanbod?

Klimaat Groningen? Ervaar je hier concurrentie (van Vera, van buiten de stad)? Samenwerken met podia buiten Groningen? Samen tour organiseren/sterk staan?

Betrokkenheid bij festivals (Eurosonic) - Kennis delen. Verschil in samenwerking met festival of podium?

Eigen concurrent? Balans competitie/partner?

Verschil partners zelfde stad, buiten de stad? Kunnen samenwerkingen beter binnen/buiten de stad? Grotere rol VNPF?