

**RESTARTING EXPORT CAREERS: The effects of the
COVID-19 pandemic on Finnish popular music export artists**

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ABSTRACT

Thesis

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Abstract <p>The COVID-19 pandemic has severely affected the Finnish music and music export industries, and they are currently in the process of recovery. In this thesis, I research the effects of the COVID-19 pandemic on Finnish popular music export artists from the perspective of restarting export careers. My focus is on the experiences of individual export artists, whose perspective is yet to be studied much. I aim to understand what changes the COVID-19 pandemic has brought to the artist export business, what kind of support popular music export artists currently need to restart their export careers, and who should provide this support. In addition, I map out the pre-pandemic state of the artists' export careers and the effects of the pandemic on them.</p> <p>This study is qualitative multiple-case study research. Its primary data consists of five semi-structured interviews with the representatives of five popular music export artists in the growth phase of their export careers. The thematic framework is based on concepts of music export, support structures of Finnish popular music export, and previous studies about the effects of the COVID-19 pandemic on the music and music export industries.</p> <p>The findings show that before the pandemic, the career path of each export artist was unique, and the pandemic led to the loss of various resources and opportunities. According to the research results, post-pandemic artist exporting is characterized by general uncertainty. Several post-pandemic challenges but only a few new opportunities were identified in the artist export field. The results highlighted the challenges related to live music export.</p> <p>The findings suggest that the most important form of support for restarting artist export careers is financial support, particularly for live music export. Different views arose about who should provide the support, but the findings indicate a need to diversify the support field. The results highlighted the roles of the public and private sectors, Music Finland, and industry colleagues.</p>	
Keywords Music industry, Music export, COVID-19, Artist export, Export support, Popular music	
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1 INTRODUCTION

1.1 Background of the Study

The COVID-19 pandemic that started in early 2020 has worldwide affected the entire creative and cultural sector in a serious manner (e.g. Banks & O'Connor, 2021; Organisation for Economic Co-operation and Development [OECD], 2020; the United Nations Educational, Scientific and Cultural Organization [UNESCO], 2021). For example, the music industry was estimated to be one of Europe's most economically affected sectors of creative and cultural industries in 2020 (European Grouping of Societies of Authors and Composers [GESAC], 2020). As the operations of the cultural sector are often based on the human congregation and physical experiences, venue and site-based activities, such as live music, have been among those most affected (e.g. UNESCO, 2021). As early as April 2020, many European countries put restrictions on travel and gatherings to combat the virus (European Union, 2021, p. 23), further complicating many forms of music export. Alongside releases and merchandise sales, live performances and tours abroad are the core of the artist export business (Music Finland, 2017b). That is, many restrictive measures hit the artist export especially hard.

The music and music export industries in Finland have significantly suffered from the pandemic (e.g. Kinnunen, 2021; Music Finland, 2021a, 2021b, 2022a). Live export has been the most affected core area within music export (Music Finland, 2022a). Albeit the restrictions have been lifted and the music export industry has started to revive from the damage caused by the pandemic, it will still take time for the industry to recover fully. For example, the value of Finnish music export is still far from the pre-pandemic level (Music Finland, 2022a). Thus, it is highly important to study the effects of the pandemic, especially from the point of view of restarting operations to enable the recovery and new growth of the industry. To contribute to this urgent need, my focus in this research is on the effects of the pandemic on the Finnish popular music export artists whose perspective has so far received little attention.

In this thesis, I study what changes the pandemic has brought to the operating environment of artist export. Further, I focus on determining the current needs for

support of Finnish popular music export artists as they recover from the pandemic and restart their export careers.

I conducted this thesis in collaboration with Music Finland ry, the Finnish music export promotion agency. After hearing about the possibility of conducting a thesis for them, I approached the organization due to my personal interest in the music export industry. Since I have gained work experience in the field of event production, mainly in music and corporate events, my initial thought was to choose a research area I am not yet familiar with but eager to learn more about. This seemed an excellent opportunity for that.

I chose the topic for the thesis in cooperation with Music Finland. However, the process started from my interests in the music export field and was then planned further based on its topicality and the needs and interests of Music Finland. During my Master's studies, I have been highly interested in the COVID-19 pandemic and its effects on the cultural sector from various perspectives. The fact that I worked in the event industry during the pandemic and thus have first-hand experience might be one reason for this. Further, I find studies concerning the effects of the pandemic extremely relevant and important. The research process has been relatively independent, and I have been responsible for all the choices. However, I used the assistance and knowledge of Music Finland at specific points of the process. Their role was most visible in the selection process of interviewees. I explain this more in Chapter 3.4 regarding the critical reflections on the research process.

1.2 Problem Formulation

The business of artist export is characterized by the uniqueness of each artist that makes them stand out from others (Music Finland, 2017a). Similarly, the career path of each artist is unique. The process of internationalization of an artist is characterized by its dependency on support and significant investments that produce results in the long term as a result of hard work (Chen, Homan, Redhead & Vella, 2021, p. 85-86). To achieve export readiness, an artist must often have, i.e., international and domestic networks, adequate financing, territorial knowledge, and a realistic export strategy (Chen et al., 2021, p. 80; Music Finland, 2017a, 2017b, 2017c). Moreover, an artist's export capacity

depends on the local music sector ecosystem level in their country of origin, meaning how well the ecosystem supports and enables the necessary resources for export readiness (European Commission, 2019).

As Mäkelä (2008) reminds us, the export of Finnish popular music depended solely on the industry's support for a long time. However, due to the combined effect of many factors, the amount of state subsidies started to increase in the 1990s. Alongside the changed economic situation, one influencing factor was the increased global competition accelerated by international success stories, such as HIM, Darude, or The Rasmus (Mäkelä, 2008). Mäkelä describes how these success stories created an export boom, and support measures for Finnish music export also began to develop. An example of this is Music Export Finland (curr. Music Finland, the main supporter of Finnish music export), which was established in 2002 due to joint financing by the state and local record companies and publishers (Mander, 2022; Mäkelä, 2008). Today, the support for Finnish music export can be divided into public support, industry support, grants and other support forms allocated by private foundations and interest organizations, and support from industry peers and colleagues.

According to Music Finland (2020), the total market value of the Finnish music export industry has grown almost annually since the turn of the millennium until the beginning of the COVID-19 pandemic. In 2019, its value was reported to be higher than ever, reaching 81,7 million euros, and the growth was expected to continue. Further, the value of the music export core areas was almost 30 million euros in 2019 (Music Finland, 2020). However, the industry was severely affected by the pandemic. For example, the value of the music export core areas decreased by 42% in 2020, primarily due to the impact of the pandemic on the live export sector (Music Finland, 2021b).

The pandemic has brought changes and new challenges to the music and music export industries, some more permanent than others (see e.g. Jalonon, 2022; Music Finland, 2022d). In addition, these studies show that the pandemic has highlighted industry challenges that already existed before the pandemic. It is crucial to understand these changes to enable the industry to recover and return to growth. The effects of the pandemic on Finnish music and music export industries have been studied to an increasing extent. However, very little research still exists on the effects of the

pandemic on Finnish export artists and how the pandemic has changed the careers and operating environment of export artists in particular.

Considering the support-dependent nature of artist export, it is also of high importance to increase understanding of what kind of support needs these effects of the pandemic and the resulting changes and challenges create for artists' export careers. Moreover, it can be argued who could meet these support needs and who should provide support for exporting Finnish popular music in the future.

1.3 Aim of the Study and Research Questions

The topic of this study is the effects of the COVID-19 pandemic on Finnish popular music artist export from the perspective of restarting export careers. Through five case studies, I aim to understand what changes the COVID-19 pandemic has brought to artist export and what kind of support popular music export artists currently need to restart their export careers. Further, this thesis discusses who should provide the required support. My aim is to increase understanding and generate new insights into export artists' current situation and needs in the post-pandemic period, whose perspectives and experiences have yet to be studied much.

In addition, I aim to describe the pre-pandemic situation of the export artists' careers and the effects of the pandemic on them. Through this, the aim is to form a better picture of the characteristics of export careers, which helps to understand better the impact of current changes on careers and their support needs.

The study focuses on five selected Finnish case artists representing different popular music genres. All case artists are in the growth phase of their export careers. Since every artist's career path is unique, the research aims not to produce generalizable findings but to bring forward the perspectives and experiences of the five selected case export artists and their representatives. However, by choosing a multiple-case study, I can improve the study's generalizability and identify possible similarities and differences.

The main research questions are:

- What are the key post-pandemic changes in popular music artist export?
- What kind of support is needed to restart artist export careers, and who should provide and enable these forms of support?

In addition, I have set the following sub-questions to provide background and support to the main research questions:

- What was the state of the artist export careers before the COVID-19 pandemic?
- How did the COVID-19 pandemic affect the artist export careers?

1.4 Research Approach and Limitations

This research is qualitative multiple-case study research. Its primary data consists of five semi-structured interviews with the representatives of five Finnish popular music export artists. I conducted all interviews in January 2023. Qualitative research aims to achieve depth rather than breadth (Blaxter, Hughes & Tight, 2010, p. 65). Further, qualitative research involves a naturalistic approach, attempts to make sense of or interpret phenomena, and aims to better understand the subject in question (Denzin & Lincoln, 2018, p. 10).

In this study, I approach the research topic through semi-structured interviews to gather deeper insights and understanding of the perspectives and experiences of the selected five cases. The answers will reveal the characteristics and stage of each export career, the effects the pandemic has had on them, and the individual views and needs for support in light of their future export goals and the changes identified to be brought by the pandemic.

Even if the export career of each artist is unique, the study attempts to understand the phenomenon by comparing and contrasting the answers from multiple angles, as suggested by O'Leary (2004, p. 117), and finding possible similarities and differences. Choosing a multiple-case study can make the conclusions more powerful than those from a single-case study (Yin, 2014, p. 57-64). However, considering the small number of cases, my aim is not to produce results representing a generalizable view but to bring out each case's illuminating insights.

One important limitation should be recognized in relation to this study. As I write this thesis in the spring of 2023, it is important to acknowledge that the long-term impacts of the COVID-19 pandemic on artist export or the entire music industry cannot yet be seen or fully identified. This research is thus tied to the time it was conducted and is based on current knowledge and experiences on the topic. Although it is early to estimate all the effects, generating new information and understanding the current situation is highly important. It is also the only way to react and respond to the sector's needs and, thus, enable its recovery.

1.5 Structure of the Thesis

This thesis comprises five chapters, references, and appendices. The first chapter is an introduction to the research, presenting the background of the study, problem formulation, aim of the study and research questions, my personal interests, and limitations of the research.

In the second chapter of the thematic framework, I review the literature and previous research relevant to this study. The chapter explores the concepts of music export, export of popular music artists, and export readiness. Further, it introduces the support structures for the export of Finnish popular music and the key effects of the COVID-19 pandemic, emphasizing the post-pandemic changes in the Finnish music and music export industries. Lastly, the chapter includes a summary of the thematic framework.

In the third chapter, I present the study's methodological framework and justifications for the choices made. First, I discuss research paradigms and the topics of qualitative research, case study, and multiple-case study research. Then, I present the data collection and analysis processes and critical reflections on the research process. Lastly, in the chapter on the methodological framework, I introduce the five case artists and artist representatives.

In chapter four, I present the findings of the study and discuss them in light of the research questions and the thematic framework. In chapter five, I present the conclusions, answers to the research questions, managerial implications, limitations, and suggestions for further research.

2 THEMATIC FRAMEWORK

In this chapter, I present the previous studies and literature relevant to this research. In other words, I aim to form the context in which this research is situated. First, I introduce key concepts of music export relevant to this study, after which I look at the support structures for exporting popular music in Finland. The last chapter focuses on the previous research on the effects of the COVID-19 pandemic on the music and music export industries.

2.1 Music Export

Music industry has undergone a digital revolution since the turn of the millennium (Tschmuck, 2021, p. 28-67). For example, digital platforms for downloading and streaming music have emerged and become common (Tschmuck, 2021, p. 64-67), enabling quick access to music worldwide. In addition, various social media platforms have enabled novel and viral ways to promote music with an international reach (Wikström, 2020, p. 164-173). With these developments, today's music industry is in many ways international per se, and fans worldwide have access to artists' music or can connect with them through social media channels. However, it is essential to distinguish that music export means consciously made and implemented export operations. Instead, internationalization of the music industry is a broader term of which music export covers only a part.

Music Finland (2022a), the Finnish music export promotion agency, defines Finnish music export as “music-related activities carried out by Finns or persons and organizations operating permanently from Finland, which are directed outside the borders of Finland or which generate income from abroad.” They continue by adding that “the market value of music exports refers to the amount of cash flow returning to Finland from the aforementioned activity.”

However, there is no single universally accepted definition for music export. One reason might be that there is very little academic literature on the topic, despite music export being an essential part of the music industry. One of the few academic books on music export is *The Music Export Business*, released in 2021 by Chen et al. I use this book as

one of the primary references in this thesis, and its role is quite significant since it is a rarity in the field.

Another reason for the difficulty of forming one single definition for music export is the complexity of the music industry. As Chen et al. (2021) point out, most industrial definitions for export do not apply to the music industry as such since they were developed for more traditional industries, such as manufacturing (p. 28). Instead, the various organizations in the field, such as national music export agencies, as suggested by Chen et al. (p. 28), have developed their own definitions in connection with, for example, the research they have conducted. In my opinion, some kind of consensus can be observed in the different definitions, although there are differences in what is thought to fall under the concept of music export.

A similar definition to the one of Music Finland (2022a) can be found in the European Commission report (2019) on the European Music Export Strategy, where music export is defined as the movement of music across borders. This movement includes both the creators and audiences. Further, music export happens when artists, artist representatives, music companies, and other field professionals gather revenue by selling their music in different forms outside their national borders (European Commission, 2019, p. 6).

According to Music Finland (2022a), the core areas of music export are live music, recordings, copyrights, other export income, and other goods and services. In their classification, other export income includes, for instance, merchandise sales, composition and production fees, and studio services or advertising contracts. Music Finland's (2022a) definition of music export is relatively broad since it also includes sales of audio equipment and computer software, which are categorized as "other goods and services" whereas, for example, according to UK Music (2019, as cited in Chen et al., 2021, p. 28), these do not even fall under their broader definition of the music industry. This difference exemplifies how the music industry is closely linked to other industries, such as technology, and how it can create definitional differences between countries.

In their report, The European Commission (2019) approaches the definition of music export through various revenue streams it generates as the music moves across borders (p. 6). They list performance fees and merchandise sales, royalties generated, for instance, by streaming, live music performances, and broadcasting of music on the radio, recorded music revenues, sync fees, branding, and other collaborative campaigns where personal brands are utilized as the main examples of sources of revenue in the industry (European Commission, 2019, p. 6).

In addition, Chen et al. (2021) point out that music export includes several services that can be exported without crossing any physical national borders (p. 29). The authors describe that this kind of export occurs, for example, when an international visitor buys a ticket to participate in a local music event. This local event is considered engaging in export in its country even though it is held locally. On the contrary, this type of export contributing to cultural tourism is excluded from the definition of music export in the analyses conducted by the European Commission (2019, p. 6) in their report. Even though this type of activity contributes to music export, regarding the report analyses, a decision has been made to limit the focus on revenues generated when goods or services are crossing borders (European Commission, 2019, p. 6). This example only emphasizes the complex nature of the music industry. To conclude, each industry organization seems to define music export according to its own views and needs.

2.1.1 Export of Popular Music Artists

Artist export

One way to approach the music export industry is to classify it based on the export product in question. According to the classification done by Music Finland (2017a), the export product can be either a service, a song, or an artist. They describe how in the export of songs, the product is a composition or sheet music, or as is most often the case in popular music, songwriting. In service exports, the product can be, for example, the know-how of a music professional, such as a manager or an agent (Music Finland, 2017a).

The focus of this research is, however, on the third product: an artist. In artist export, the core product is an artist, a band, or a production that arouses interest and stands out from other representatives of its genre with its uniqueness (Music Finland, 2017a). In

this research report, the term artist means either a solo artist or a band when referring to an export artist. In addition, an export artist refers in this research to any artist involved in artist export, regardless of what kind of export operations they have.

The core areas of artist export are releases, such as singles, EPs or albums, live performances, and merchandise sales (Music Finland, 2017b). However, I would add here that merchandise sales have developed into a more significant and essential part of export activity in specific genres compared to others. In contrast, live export and releases can be considered critical export forms for almost all export artists.

The music export business, as well as the process of internationalization of an artist, is characterized by the long-term nature of the work, various investments that usually require various forms of support, and long time spans in seeing financial or other types of returns on export activities (Chen et al., 2021, p. 85-86; Jalonen, 2022). For example, according to the survey responses in 2018 by 405 Australian artists and artist managers, most international music activities are expected to have financial returns on average within two years (Chen et al., 2021, p. 85-86). In the results of this study, export activities such as international tours, showcase performances, and support slots are believed to produce a profit in the longer term. On the other hand, hiring an international record producer, international showcase event costs, and gaining an international tour or support slot were mentioned as activities to have caused a big part of financial losses. In addition, the results pointed to the necessity of combining different public and private support forms, such as sponsorships, donations, grants, and peer/family support (Chen et al., 2021, p. 85-86).

Popular music

Even more precisely, in this research, I focus on the export careers of artists representing various popular music genres. Similarly to the definition of music export, no generally accepted definition of popular music exists. However, to clarify who I mean and who I do not mean by popular music export artists in the context of this study, the term will be further explained.

Multiple attempts to define popular music have taken place, and many definitions have been made over the years (see e.g. Shuker, 2008, p. 5-7). Wall (2003) introduces two

ways of defining popular music (p. 1-2). The first idea understands popular music as a part of a culture that is argued about, and where the term popular is associated with the music that sells the most, as music that is for people who do not understand or appreciate more complex music or just as any type of music celebrated by its distinctive identity. In the second definition by Wall, popular music is a category for various genres, from pop to ambient and indie to techno and world beat. Similarly to the second definition of Wall (2003), Moore (2003) approaches the definition through genre classification but describes popular music as a field distinct from ‘classical’ or ‘non-Western’ music or jazz (p. 1).

Shuker (2008) emphasizes the consideration of musical, socio-economical, and historical aspects and defines popular music as “a shorthand for a diverse range of popular music genres produced in commodity form for a mass, predominantly youth market, primarily Anglo-American in origin (or imitative of its forms), since the early 1950s.” (p. 5-7).

In this study, popular music is understood, as Wall (2003) describes, as a category for multiple genres, including, for example, pop, rock, indie, metal, and their various sub-genres, but excluding art music, world music, and jazz as suggested by Moore (2003). This is an important distinction because the export operations and support structures of popular music genres are significantly different in many respects from those of other genres, such as art music or jazz music. In addition, I decided to exclude folk music export artists from this research. Although one can argue whether folk music is also popular music, the decision was mainly based on the fact that the export markets of Finnish folk music export artists are somewhat different from other popular music genres.

2.1.2 Export Readiness

In artist export, especially for artists at the beginning of their careers, export readiness is one of the most discussed terms. In their recent book about the music export business, Chen et al. (2021, p. 80) introduce the reassessed export readiness indicators: essential factors contributing towards export readiness identified based on interviews with Australian music managers. However, I argue that these indicators can also be seen as generally applicable to any country when discussing matters relevant to artist export.

The ten factors explained in more detail below in Table 1 are representation, strategic planning and infrastructure, international networks, international industry events and showcasing, territorial knowledge, financing, promotion and maintaining the story, audience/digital footprint, a “born global” attitude, and domestic activity (Chen et al., 2021, p. 80).

Table 1. *Export readiness indicators*

1. Representation	The three main actors in this space are the artist manager, label, and publisher who negotiate all deals. Some artists represent themselves when negotiating deals.
2. Strategic planning and infrastructure	Having the appropriate management team, and an export strategy are essential. This includes market research, management, an international partner, legal support.
3. International networks	Accessing an international team or community of contacts who have market knowledge or can provide access to key stakeholders and support.
4. International industry events and showcasing	Maintaining a presence at these events enables networking, keeping abreast of industry changes and opportunities.
5. Territorial knowledge	Each territory will have its own demands such as visa regulations, appropriate ground support or specialist skills.
6. Financing	Adequate financing is needed to ensure delivery of the product, international follow-up meetings, follow-up tours, and media appearances.
7. Promotion and maintaining the story	A narrative or "buzz", radio and TV broadcast are necessary to be able to get exposure and maintain the narrative with backup resources (recordings). This includes repeated airplay and broadcasts, reviews, publicists, tastemakers, influencers, and bloggers.
8. Audience / digital footprint	The size of the artists' fans and associated digital analytics such as their demographics, country, and location are important determinants for different career stages (Emerging, Breakthrough, Established, Epic).
9. A "born global" attitude	Dissemination and promotion through streaming services, social media, and sharing platforms such as Youtube and Instagram.
10. Domestic activity	Building a strong local or national audience such as awards, touring, airplay social network activities.

after Chen et al., 2021, p. 80

As Chen et al. (2021, p. 80) clarify, an export artist does not need every component from the list. Instead, they argue that an artist can have any combination of these factors and still achieve music export readiness. However, I believe multiple factors from the

list are usually essential, needed, and developed to reach the international market. Still, they do not guarantee international success.

For example, Music Finland emphasizes the importance of a combination of three elements, also adding one new element to the list of Chen et al. (2021): 1) an export product that is ready for the international market, 2) a functioning team, and networks both domestically and internationally, and 3) a clear export plan that includes, among other things, realistic goals, the selection of a suitable target market, and a plan for finances and investments (Music Finland, 2017a, 2017b, 2017c).

For an export artist to reach export readiness and collect the tools and resources they need from the list above, their home country must have entities, processes, and structures that enable acquiring these resources. The European Commission's (2019) report on European Music Export Strategy discusses the concept of the music export capacity of an artist that depends on the whole existing local music sector ecosystem and how advanced it is (p. 9-10). This ecosystem includes, for example, available support and funding, well-functioning CMOs, access to international professional networks, and supportive governmental policies. The position of music export offices and other support organizations is emphasized by stating that these organizations should receive sufficient resources from both government and the music sector to offer all or some of the resources to the export artists (European Commission, 2019, p. 9-10).

Export readiness is often discussed as the resources an artist needs to be able to enter the export market in the first place. As I see it, these components also work as tools to develop export careers toward desired goals, and they are still needed in the growth phase of an export career. In the next chapter, I look more in detail at the support structures for the export of popular music in Finland that aim to increase the export readiness and capacity of Finnish music export.

2.2 Support Structures for the Export of Finnish Popular Music

In this thesis, I aim to understand the support needs of Finnish popular music export artists in the post-pandemic era. Further, I research who should provide these forms of support. To provide context on the topic, I briefly outline the history of popular music

export support in Finland, after which the current support structures for music export are presented. Lastly, I present emergency funding created for the music industry's exceptional circumstances during the COVID-19 pandemic.

2.2.1 Development of the Support Structures

The support received by music export can be divided into public support, industry support, and grants and other support forms allocated by private foundations and interest organizations. Besides that, support can also be received from other professionals from the field, peers, and colleagues.

Since the foundations of modern Finnish cultural policy were created at the end of the 1960s and continuing into the 1970s, hardly any state support was given to popular music, and it was considered inferior to classical music and opera (Mäkelä, 2008; Saukkonen, 2014, p. 45). Mäkelä (2008) describes how during the 1960–1980s, several organizations focusing on supporting music export were established in Finland. These included, for example, the Finnish Music Promotion Centre ESEK (est. 1981), the Foundation for the Promotion of Finnish Music LUSES (est. 1970), and The Finnish Music Information Centre Fimic (est. 1966). He adds that some of these organizations also received financial support from the state. Still, their activities were mainly aimed at supporting the export of classical music and opera (though the focus has now changed) (Mäkelä, 2008). This means the state had the will to support Finnish music export, but the different genres were in an unequal position. Thus, popular music export almost exclusively relied on the industry's support; in other words, record companies and artists themselves (Mäkelä, 2008).

At this stage, the popular music industry was not interested in public support either (Mäkelä, 2008). However, there were exceptions, and a few industry professionals demanded more state support also for popular music export (Muikku, 1989, p. 71-72). Still, the situation continued more or less similar until the 1990s (Mäkelä, 2008).

The state subsidies for popular music started to increase in the 1990s, and the turn of the millennium was significant when more systematic support for exporting popular music began in Finland (Mäkelä, 2008). Mäkelä (2008) analyses that as a result of the multiple reasons related to, for example, the changing economic situation and global competition

accelerated by the international success stories, such as HIM, Darude, or The Rasmus, popular music export gained new recognition within both Finnish cultural policy and international markets, leading to increased state subsidies. As a result, the total value of music export increased from 3,8 million euros to 28,9 million euros between 1999 and 2005 (Mäkelä, 2008; Musex, 2006 as cited in Mäkelä, 2008, p. 257). The so-called export boom gained interest and recognition in Finland and abroad (see e.g. Mander, 2003; Muikku, 2000).

Moreover, in 2002, Music Export Finland (curr. Music Finland), a Finnish export office, was established due to joint financing by the state and local record companies and publishers (Mander, 2022; Mäkelä, 2008). Since its establishment and expansion in 2005, Music Export Finland was considered the most influential export organization for popular music export in Finland (Mäkelä, 2008). Although public support for popular music export has increased over the years, Mäkelä argues that the music industry's contribution to export activities is still at least as significant. I argue that Mäkelä's notion is still relevant today: music export requires the contribution and cooperation of different sectors.

The state's interest in cultural export also increased more broadly after the turn of the millennium (Luukka, 2007). Luukka argues that it was precisely the result of Finnish international success stories, especially in rhythm music. This means that the influence of these success stories extended beyond the export of popular music. The Ministry of Education's Cultural Export Division was established in 2005 (Luukka, 2007). In 2007–2011, the Finnish cultural export development program was implemented under the Ministry of Education and Culture (Ministry of Education and Culture, 2011). For the first time, the program created a goal-oriented and cross-administrative framework to promote Finnish cultural export. Its goal was to raise the creative and cultural industries to equal status and as recognized export sectors alongside other export sectors in Finland. (Ministry of Education and Culture, 2011).

In the summer of 2012, the Finnish Music Promotion Center ESEK and the Foundation for the Promotion of Finnish Music LUSES, which had a history of supporting domestic music, were merged into one organization - the Finnish Music Foundation MES (2023a). Similarly, in 2012, the operations of Music Export Finland (Musex) and the

Finnish Music Information Centre (Fimic) were integrated into a new association, Music Finland (Teosto, 2011). According to Teosto (2011), the merger aimed to strengthen music export and information services, cut overlappings, and develop the financing structure. These mergers resulted from the objective of the Ministry of Education and Culture (OKM) and the Ministry of Employment and Economy (TEM) to reduce the number of export and internationalization organizations in the creative industries (Teosto, 2011).

According to Music Finland (2020), the total value of the Finnish music export industry grew almost annually from the turn of the millennium until the beginning of the COVID-19 pandemic. In 2019, its value was higher than ever, reaching 81,7 million euros, and the growth was expected to continue (Music Finland, 2020). In other words, the industry's future prospects seemed very bright at the time.

2.2.2 Current Support Structures of Finnish Popular Music Export

The export support for popular music includes a wide range of activities enabled by the music industry, several private organizations, and state subsidies. However, it is difficult to completely separate support for popular music export or export artists from support for the entire music industry. On many occasions, an artist engaged in export activities also receives support for their domestic activities, which can contribute to their export career. Still, my aim is to focus on the key support structures for popular music export in Finland.

Public support

At the state level, the two main funders of music export are the Ministry of Education and Culture (OKM) and the Ministry of Economic Affairs and Employment (TEM) (Jakonen, Niiniaho, Oksanen-Särelä & Sokka, 2021). The Ministry of Education and Culture allocates state grants for promoting cultural exports and supports the music industry through grants distributed through the Art Promotion Center Finland (Taike) (Ministry of Education and Culture, n.d.; Arts Promotion Centre Finland, n.d.).

According to the Ministry of Education and Culture (2023), state grants for promoting cultural exports are intended for the development projects of art and cultural operators. The grant seeks to alleviate a market failure where small export businesses often do not

have sufficient resources for activities such as marketing or networking at the beginning of their export operations (Ministry of Education and Culture, n.d.). Further, the ministry states that obtaining private support for this phase is challenging. Concerning music export, Music Finland has received annual support from OKM, in addition to which support has also been granted to individual export projects or the export activities of music industry companies (Ministry of Education and Culture, 2023). For example, Finnish pop-zither (*pop-kantele*) musician Ida Elina received support for an export project as a popular music artist in 2020 (Ministry of Education and Culture, 2023).

The Arts Promotion Center Finland (n.d.) Taite is funded by and operates under the performance supervision of the Ministry of Education and Culture. It distributes approximately 40 million euros annually in grants, subsidies, and prizes to about 3500 artists and communities (Arts Promotion Centre Finland, n.d.). In the grants received through the Arts Promotion Center Finland, itemizing support for only music export is impossible. Still, support can be obtained, for example, for artistic work or as a targeted grant for a project, such as the costs of an export trip or a release (Arts Promotion Centre Finland, 2022a, 2022b).

As Jakonen et al. (2021) state, the Ministry of Economic Affairs and Employment (TEM) has provided a government grant to Music Finland for years. They describe how for example, in 2019, this grant was 0,3 million euros. The perspective of the ministry on supporting cultural exports is to promote internationalization and entrepreneurship (Jakonen et al., 2021). In addition, Business Finland, a public entity under the Ministry of Economic Affairs and Employment, finances Finnish companies' innovation, research, and development activities (Business Finland, n.d.b; Ministry of Economic Affairs and Employment, 2021). Although the organization does not distinguish music industry companies as its particular target group, there may also be business activities involving music export that have received support with Business Finland's own criteria.

However, the state level has been criticized for not recognizing the music industry well enough as an industry that includes significant business (e.g. Muusikkojen liitto, 2021). This discourse has intensified with the pandemic. On the other hand, the phenomenon has partly been seen as a problem within the industry, where the sector does not identify itself strongly enough as an industry (Jalonen, 2022). Further, a clarification of the

divisions of work between the two ministries (OKM and TEM), as well as cooperation between the ministries and involving the music industry professionals, have been insisted on (e.g. Muusikkojen liitto, 2021; Ruokolainen, Lefever & Hirvi-Ijäs, 2022, p. 3-4; Valtioneuvosto, 2021). That is, areas for improvement exist both in the state and the industry.

Lastly, the future of public funding for the music industry seems challenging. It has already been analyzed that the future and growth of the industry, both in the music sector and in the culture sector in general, cannot be exclusively built on the idea that the amount of public funding would increase (Jalonon, 2022; Pekkarinen, Siltanen & Virkkala, 2022). This means that growth enablers must be found by other means and that the proper allocation of the public subsidies available is even more critical.

Private support

The most important supporter of the export of Finnish popular music is Music Finland, whose operations and a wide range of support activities will be explained in more detail in the next sub-chapter. Alongside Music Finland, a few organizations are also significant supporters of Finnish music export, The Finnish Music Foundation (MES) being one of them. The foundation aims to promote and support the diversity of domestic music, and one of its grants is specifically aimed at music export. The support activities are financed with the funds allocated to reimburse private copying, state grants, and donations from the foundation's background communities (The Finnish Music Foundation, 2023a, 2023b). The Finnish Music Foundation (2023b) distributes financial support to various domestic music marketing and export promotion projects, regardless of genre. However, it should be noted that in several cases, according to the organization's application criteria, projects cannot receive funding if they have already received support for the same project through Music Finland (The Finnish Music Foundation, 2023b).

Teosto (n.d.), the Finnish music copyright association, supports its members internationally by funding Music Finland, providing guidance and information about contracts, and collecting royalties. Further, they provide contacts through their international networks and negotiate with international platforms on behalf of the artist (Teosto, n.d.).

In addition, several Finnish foundations support the domestic music industry, through which Finnish export artists may also receive financial support. Some of the biggest are the Finnish Cultural Foundation, The Swedish Cultural Foundation in Finland, and the Kone Foundation (Music Finland, 2022a). Further, organizations such as the Finnish Broadcasting Company (YLE) and Finnish embassies can be considered to contribute to the export of Finnish popular music (Mäkelä, 2008, p. 260).

The music industry's support, for example, through record companies, has been, and still is, significant for exporting Finnish popular music. However, the domestic music export industry has suffered from the so-called "golden cage" phenomenon for years (see e.g. Jalonen, 2022; Music Finland, 2017d; Mattila, 2023). As is narrated by these authors, "golden cage" refers to a situation where the current structures of the music industry encourage artists to choose the domestic market, and especially the mindset of major labels is not favorable for internationalization. As a result of this phenomenon, many artists choose to pursue domestic success instead of a more challenging international career (Jalonen, 2022; Music Finland, 2017d; Mattila, 2023). This kind of mindset is not favorable for the growth and development of domestic music export.

The key supporters of Finnish popular music export are summarized on the next page in Table 2.

Table 2. *Key supporters of Finnish popular music export*

	Organization	Form(s) of support	Target group(s) *
Public support	Ministry of Education and Culture (OKM)	grants for promoting cultural exports	development projects of art and cultural operators, financier of Music Finland
	OKM / The Arts Promotion Center Finland (Taike)	grants, subsidies, prizes	artists and arts communities
	Ministry of Economic Affairs and Employment (TEM)	grants	financier of Music Finland
	TEM / Business Finland	innovation, research, and development funding	companies
Private support	Music Finland	i.a. funding, coaching, mentoring, networking	music export industry
	The Finnish Music Foundation (MES)	grants	music and music export industries
	The Finnish music copyright association (Teosto)	i.a. guidance and contacts	members of Teosto
		funding	Music Finland
	Other Finnish foundations, such as the Finnish Cultural Foundation, The Swedish Cultural Foundation in Finland, and the Kone Foundation.	funding	arts, science, and cultural industries

*Support is either directly aimed at popular music export or the organization's target group(s) can include operators of popular music export.

2.2.3 Music Finland ry

Music Finland has been the most significant organization focused on promoting and supporting music export in Finland since its predecessor Music Export Finland was established in 2002. In their latest strategy for 2021–2023, Music Finland (n.d.a) defines its vision as follows: “In our vision, Finnish music is at the center of the international market and is known for many success stories.”

Music Finland represents the entire Finnish music industry and its various genres. The member organizations of the association are the Finnish Composers' Copyright Society (Teosto), Finnish Music Creators FMC, The Finnish Music Publishers Association, the Copyright Society of Performing Artists and Phonogram Producers in Finland

(Gramex), Finnish Independent Record Producers' Association (IndieCo), Society of Finnish Composers, Finnish Musicians Union, and IFPI Finland (Music Finland, n.d.b).

As its main operations, Music Finland (n.d.b) provides music professionals and companies with a wide range of services to enable their international success. The organization supports the music export industry by offering funding through various subsidies and helps to grow international networks and audiences. Moreover, it organizes export and showcase trips and various workshops and provides guides for internationalization. Music Finland is also responsible for maintaining a sheet music library, facilitating international communication about the Finnish music and music industry, producing research information from the field, and advocating for the Finnish music and music export industries (Music Finland, n.d.b).

Music Finland supports artist export in several ways. Examples of these support forms are presented below in Table 3. Support is offered in various forms for export artists in different stages of their careers and various operators involved in the artist export business.

Table 3. *Examples of forms of support aimed at artist export by Music Finland*

Financial support	
	1. Renewed export support , which consists of project and strategy support. Combines the previous supports live support (<i>live-tuki</i>), song export support (<i>teosvientituki</i>), visibility support (<i>näkyvyytuki</i>), and Takeoff export support (<i>Takeoff vientituki</i>).
	2. Fast Track music export program , which supports the creation of international breakthroughs.
Coaching and mentoring	
	1. International Music Business Masterclass : coaching and mentoring, for example, for beginning managers.
	2. Export Artist Accelerator : mentoring and coaching class for upcoming export artists.

(after Music Finland, n.d.c)

In 2021, the export promotion activities of Music Finland were financed by the domestic music industry, the Ministry of Economic Affairs and Employment (TEM), the Ministry of Education and Culture (OKM), the Finnish Music Foundation (MES),

and project-specific partners (Music Finland, 2022b). The share of funding received from the state through the two aforementioned ministries was more than 60% of all grants received by the organization (Music Finland, 2022c).

Music Finland (2022c, 2022f) receives funding from the Ministry of Education and Culture for two things: 1) for its own projects and 2) to be distributed to the industry operators' export projects and operations. For instance, in 2021, 372 766,28€ was channeled as a project and other subsidies to industry operators by Music Finland (2022c). Music Finland (n.d.a) has identified three customer groups in its latest strategy: future music exporters, active music exporters, and breakthroughs. This means that the focus of its support activities is mainly on the exporters in the early stages of their careers rather than on big and established export artists who have already made a breakthrough, such as Nightwish or The Rasmus. According to the classification of Music Finland, the case artists of this study represent either active exporters or breakthroughs.

2.2.4 Emergency Funding during the Pandemic

Various countries, Finland being among them, have created a versatile set of public and private support measures against the multiple effects of the pandemic on the cultural industries (e.g. Betzler, Loots, Prokúpek, Marques & Grafenauer, 2020; Salvador, Navarrete & Srakar, 2022). In this chapter, I present an overview of the various novel financial support instruments created for the pandemic situation to respond to the significantly increased need for assistance in the Finnish music sector due to the loss of income caused by the pandemic. It must be noted that already existing forms of support have also been distributed during the pandemic. Some changes in the amounts of these subsidies during the pandemic are also mentioned.

As operators in the music industry, popular music export artists may have been able to apply for these forms of support, either as individuals or as companies. The amounts of both public and private support for the music industry increased significantly in 2020 and 2021 due to the special forms of support granted in response to the pandemic (Music Finland, 2021b, 2022a).

First, I present the novel public funding instruments created during the pandemic. As explained in sub-chapter 2.2.2, support from the Ministry of Education and Culture's administration to the music industry is distributed as direct subsidies from the ministry and as grants from the Arts Promotion Center of Finland (Taite) (Music Finland, 2022a). For example, Music Finland (2022a) has identified support intended explicitly for the pandemic situation of 17,3 million euros in direct subsidies and 29 million euros through the Arts Promotion Center of Finland (Taite) for 2021. However, Taite was criticized for the fact that some of the grants intended to reduce the pandemic's effects were distributed without clarifying the impact of the COVID-19 situation on the grant recipients (e.g. Muusikkojen liitto, 2022).

The State Treasury distributed COVID-19 support aimed at companies between July 2020 and June 2022 (Valtiokonttori, 2022). There were 11 application rounds and four different forms of support, each with its own aim and criteria: business cost support, closure compensation, event guarantee, and support for uncovered fixed costs (Valtiokonttori, 2022). The support measures targeted companies in all sectors, not specifically arts and culture. According to the assessment by Music Finland (2022a), the total amount of grants received by the music industry through different forms of support from the State Treasury can be identified at about 45 million euros for 2020–2022.

In the spring of 2020, support for companies in the COVID-19 crisis was also distributed by the Centres for Economic Development, Transport, and the Environment (ELY Centres), which financed companies with a maximum of five employees (Kasvurahoitus, 2020). The financing was implemented as a grant (Kasvurahoitus, 2020). Business Finland, a government organization for innovation funding and trade, travel, and investment promotion, distributed two-part development support to companies with more than six employees in the spring of 2020 (Business Finland, 2020, n.d.a). Moreover, municipalities distributed support for music activities (Music Finland, 2022a).

Besides public support, many private foundations and organizations created new forms of support and emergency funding to support the music industry during the COVID-19 crisis (Music Finland, 2022a). For instance, the amount of support to the music industry by seven foundations, which are among the largest foundations supporting culture in

general in Finland (Finnish Cultural Foundation, The Swedish Cultural Foundation in Finland, the Kone Foundation, the Jenny and Antti Wihuri Foundation, Jane and Aatos Erkko foundation, the association Konstsamfundet and Alfred Kordelin Foundation) increased both in 2020 and 2021 (Music Finland 2021b, 2022a). According to Music Finland (2021b, 2022a), The Finnish music foundation (MES) distributed 3,2 million euros to its task areas in 2020 and 3,1 million euros in 2021. The amount for 2020 was 20% higher than the previous year before the pandemic (Music Finland, 2021b, 2022a).

Several industry organizations, such as Teosto (Finnish Music Copyright Association) and The Finnish Musicians' Union, supported their clients with special COVID support (Teosto, 2022; Muusikkojen liitto, n.d.). Lastly, a novel export support instrument intended for exceptional circumstances distributed by Music Finland in the spring of 2020 was created specifically for the emergency of music export during the pandemic (Fiilin, 2020). Fiilin describes how the purpose of the support was to strengthen the international visibility and music export of Finnish music in exceptional and changed circumstances.

Although subsidies have increased during the pandemic, Music Finland (2021a) analyses how they have only compensated for a small part of the income losses in the music industry. The industry will still need support to recover from the pandemic in the coming years (Music Finland, 2021a).

2.3 Effects of the COVID-19 Pandemic

In this chapter, I present previous research on the effects of the COVID-19 pandemic, first more generally on the music industry and then more focused on the music export industry. The emphasis is on the Finnish music industry, but a few international studies have also been included as references. In addition, I look at the post-COVID changes and challenges identified within the music and music export industries. All of these topics are central to this research because export artists operate in the fields of music and music export. My aim in this study is to understand the effects of the pandemic and especially the post-pandemic changes and the need for support from the perspective of individual export artists.

2.3.1 COVID-19 Pandemic and the Music Industry

The effects of the pandemic on the Finnish music industry have been studied to an increasing extent, although the industry is still recovering, and not all effects can be identified yet (e.g. IFPI Finland ry, 2022; Music Finland, 2021a, 2022a; Kinnunen, 2021, 2022). Most recently, the current situation and future of the industry have been mapped out by Music Finland, which published a report on the Music Industry Growth Strategy in April 2022 based on 24 interviews with professionals from music and related industries (Jalonen, 2022). In addition, Music Finland (2022d) conducted the Music Industry Barometer for the third time in 2022, the task of which has been to find out the music industry's views on the current situation and the future of the industry.

According to the latest research data commissioned by Music Finland (2022a), the total value of the Finnish music industry in 2021 was 890,3 million euros. The data shows that the value of the core sectors of the music industry increased by about 15% from the previous year. However, the total value was still clearly less than in the years before the pandemic (2019: 988,0 million euros, 2018: 944,6 million euros) (Music Finland, 2022a). For 2022, a similar study has yet to be carried out. The recovery is, therefore, noticeable, but there is still a long way to go toward the pre-pandemic figures.

The music industry's income losses rose to 470 million euros for two years (2020–2021), of which state subsidies compensated approximately 93 million euros (Music Finland, 2021a). This means these subsidies compensated only about 20% of the actual losses, a relatively small share. The value of the industry decreased by a total of 350 million euros by the year 2021 (Music Finland, 2021a).

Live music has been the core area significantly affected by the pandemic (e.g. Jalonen, 2022; Kinnunen, 2022; Music Finland, 2022a). Previously, live music made up more than half of the total value of the Finnish music industry, but with the pandemic, the value of the sector collapsed to almost half of what it used to be (Music Finland, 2022a). According to a study commissioned by the Finnish live music advocacy organization LiveFIN ry, an estimate of the turnover losses caused by the COVID-19 crisis in the live music sector in 2021 was approximately 360 million euros, about 80% of the entire year's turnover (Kinnunen, 2021). However, in 2021, the total value of the

live music sector increased by about 15% from the previous year, 2020 (Music Finland, 2022a), showing a slight recovery.

The recording market has not experienced a similar situation to the live sector because music was especially consumed through streaming platforms during the pandemic. According to IFPI Finland (2022), the umbrella organization of recorded music producers operating in Finland, the value of tax-free wholesale sales of recorded music increased by 18% in 2021 compared to the previous year. Further, they report that there has been growth for seven years in a row, and the growth in 2021 was significant. Sales of physical recordings also increased for the first time since 2003, thanks to vinyl record sales (IFPI Finland ry, 2022).

The amount of copyright income increased by 7% in 2021 compared to the previous year, but the recovery was still slight (Music Finland, 2022). According to Music Finland, the monetary decrease in copyright compensation has been primarily due to the decrease in compensation for live music. For instance, in 2021, Teosto's copyright compensation for live music and festivals was only 30% of the pre-pandemic figures (Music Finland, 2022).

As the previous studies within the music industry indicate, the pandemic has treated the core areas of the industry unequally. While some core areas have suffered significantly, others have even achieved growth. In 2021, the situation in the entire industry was predicted to return to the pre-pandemic level earliest in 2023 (Music Finland, 2021a). The worst affected live sector is estimated to recover even more slowly, and real growth may only be seen a few years from now (Jalonen, 2022; Music Finland, 2021a). Novel studies are needed to monitor the situation in the following years.

Post-COVID changes and challenges

According to the research data obtained from the music industry in Finland and internationally, various post-pandemic challenges and development trends can currently be identified in the field (e.g. Edwards, 2022; Jalonen, 2022; LiveDMA, 2023; Music Finland, 2022d). The pandemic has partly caused the phenomena, but some are also longer-term changes or challenges highlighted or accelerated by the pandemic period.

The music industry suffers from general prudence and uncertainty due to the uncertain and still-recovering economic situation, which is seen as a weakening of the investment and risk-taking ability (Music Finland, 2022d), the caution of concert organizers to book especially emerging artists (Jalonen, 2022), and changes in audience behaviors (Jalonen, 2022; Music Finland, 2022d, 2021a). The main concerns in the changed audience behaviors are regaining the trust of audiences (Jalonen, 2022), the return of audiences to events on a larger scale (e.g. Kinnunen, 2022; Music Finland, 2021a), and the new tendency of late ticket purchase (Kinnunen, 2022). In addition to the pandemic, the war in Ukraine and its consequences, such as the cost increase, cannot be ignored as one factor influencing audiences' slow return (e.g. Kinnunen, 2022). On the other hand, according to the results of the Music Industry Barometer, consumer behavior is seen both as an enabler of growth and a factor that hinders it (Music Finland, 2022d).

Statistics Finland (2022) conducted a long-term comparison of Finnish concertgoers in 2021. The study results show that going to concerts has clearly decreased and, in many age groups, has even fallen below the level of the 1980s. The most significant change occurred for 15–24-year-olds, whose concert attendance had decreased from 60% to 26% between 2009 and 2021 (Statistics Finland, 2022). The report of LiveDMA (2023), the European network for live music venues, clubs, and festivals, also mentions less predictable audience behaviors, such as non-attendance and last-minute ticket purchases, as post-pandemic challenges for the live music sector. In 2021, when the restrictions still existed, it was analyzed in the Finnish live music field that the audiences' trust in the pre-pandemic level may not be reached before 2-5 years (Kinnunen, 2021).

A surplus of events (Kinnunen, 2022) and willing performers for events and concerts (Jalonen, 2022) have also been characteristic of the current situation in the field. As described by Jalonen (2022), due to transfers and cancellations during the pandemic, the supply accumulated as the market opened. Competition has increased temporarily and can take a couple more years to clear (Jalonen, 2022).

Moreover, the pandemic has caused a loss of skilled staff as the lack of work has forced many to change their job and fields, and the challenge has been identified both in Finland (e.g. Jalonen, 2022; Kinnunen, 2022; Music Finland, 2021a), the UK (e.g.

Edwards, 2022), and Europe-wide (e.g. LiveDMA, 2023). According to the Music Industry Growth Strategy, this will be a long-term problem, as it will take time to regain the lost knowledge and experience and to retrain the new workforce (Jalonen, 2022).

The income distribution model of the streaming market can be considered an example of the distortion of an earning model highlighted during the pandemic (Jalonen, 2022). The situation has been formed for a longer time, meaning that performers, music creators, and nonfeature musicians are left in a weak position since they only receive a tiny portion of revenue from their streaming, and this has further emphasized the importance of the live music sector as a source of income (Jalonen, 2022). As the live music sector has severely suffered from the pandemic, this may have caused even bigger damage (Jalonen, 2022). The phenomenon has also been recently studied internationally (e.g. Gov.Uk, 2021; Legrand network, 2022).

The number of live-streamed events and concerts increased during the pandemic (e.g. Gloor, 2020). However, they have not aroused particular enthusiasm in Finnish industry professionals as growth enablers (Jalonen, 2022). Instead, different hybrid solutions were considered a possibility (Jalonen, 2022). Still, live streams, other online and hybrid solutions, and live events organized in exceptional circumstances signal the increased innovation, ingenuity, solution-oriented thinking, and reactivity that emerged in the industry during the pandemic (see e.g. Isolammi, 2020).

The theme of financing and investing was also discussed in the interview responses to the Music Industry Growth Strategy (Jalonen, 2022, p. 39-40). Instead of new subsidies, the responses highlighted a need for structural reforms to develop investment capacity in the music industry and a better evaluation of the effectiveness of using subsidies. Even if the music industry is characterized by the long-term nature of seeing any financial returns, especially in copyrights and export operations, the interviewees analyzed that the future of the music industry cannot be built solely on subsidies. Moreover, the administrative and strategic competence of companies in the sector needs to be strengthened (Jalonen, 2022, p. 39-40). On the other hand, in the results of the Music Industry Barometer 2022, recovery support in the post-pandemic period was identified as the second most important development target for the music industry (Music Finland, 2022d). I argue that sufficient financial support is important in the short

term to help the industry recover from the effects of the pandemic. Instead, longer-term strategic thinking can be identified from the answers to the Music Industry Growth Strategy. Larger structural reforms are needed as subsidies allocated to the recovery from the pandemic alone do not guarantee the growth of the industry in the long term.

The most critical development target identified in the Music Industry Barometer 2022 was the improvement of social security for the self-employed (Music Finland, 2022d). Indeed, the position of freelancers as those who have fallen between the cracks during the pandemic can be considered one of the main structural problems in the current cultural policy (e.g. Ruokolainen et al., 2022; Valtioneuvosto, 2021). This problem became evident during the pandemic, even if it had already existed.

Lastly, the themes of sustainable development, both in terms of environmental sustainability and equality, emerged as important development targets in, for example, the Music Industry Barometer 2022 (Music Finland, 2022d) and the report by Live DMA (2023), while they were brought up surprisingly little in the Music Industry Growth Strategy (Jalonen, 2022).

2.3.2 COVID-19 Pandemic and the Music Export Industry

The effects of the pandemic on the Finnish music export industry have been studied less than the effects on the entire music industry. The industry is obviously smaller compared to the entire domestic music industry, and very few organizations conduct research on music export in Finland. In fact, research on music export is done almost exclusively by Music Finland, either by itself or as commissioned. Thus, nearly all studies on Finnish music export and the COVID-19 pandemic are also carried out by Music Finland (e.g. Jalonen, 2022; Music Finland, 2021b, 2022a, 2022d). However, the previous research on this topic is at the core of the study since its focus is on the effects of the pandemic on export artists, one of the main export products within the industry.

Very little research focuses particularly on the pandemic's effects on Finnish export artists. The only study I managed to find is a thesis by one of the interviewees of this research, Eero Jääskeläinen (Jääskeläinen, 2020). Jääskeläinen's thesis from 2020 focuses on the release process of one album of the band The Holy. As a part of this process, it describes the effects of the pandemic on the release process and the live

export plans at the time. According to the thesis, the release schedules were postponed, and almost all booked performances were canceled or postponed as the pandemic started (Jääskeläinen, 2020). For example, Jääskeläinen reports that the release schedules of the band's Mono Freedom album, the album's second single, and the first music video were postponed due to the pandemic. The thesis also describes how in the end, only 4/42 gigs scheduled for the album's marketing in 2020 took place. Thus, the thesis highlights the comprehensive impact of the pandemic on artist export and the career plans of an export artist.

As mentioned in the sub-chapter 2.2.1, before the pandemic, Finnish music export was in a situation where its value had been growing steadily for several years, and the growth was predicted to continue (Music Finland, 2020). In 2019, the market value of the core areas of Finnish music export was almost 30 million euros (Music Finland, 2020). According to Music Finland (2021b, 2022a), in 2020, the value decreased by 42% to approximately 17,3 million euros. The corresponding value for the following year, 2021, was 17,9 million euros. On the other hand, the total value of music export increased by about 6%, from 81,7 million euros to 86,7 million euros between 2019 and 2020, and again by about 7% from 2020 to 2021 (Music Finland, 2021b, 2022a).

During the pandemic, the increase in the total value is explained by the growth of the export of digital services and, for example, sound reproduction technology and equipment (Music Finland, 2022a). The modest growth of the core areas of music export between 2020 and 2021 is mainly explained by the growth of recording export and the slight recovery in the other export income category (Music Finland, 2022a).

Previous research by Music Finland (2020, 2021b, 2022a) shows that live music export was the largest core area of Finnish music export by value before the pandemic but suffered the most and started to recover the slowest of all the core areas. According to these studies, the value of live music export in 2020 was only 3,6 million euros, while in 2019, the value was 14,5 million euros. In 2021, the value further decreased to 3,2 million euros (Music Finland, 2020, 2021b, 2022a).

On the other hand, the song export business has not suffered from the pandemic. Instead, the number of pop songs published abroad by Finnish authors has been growing

for several years, and the growth has continued during the pandemic (Music Finland, 2022e). Similarly, as in the entire music industry, the pandemic has affected the various areas of music export very differently, and some have suffered more than others.

Post-COVID changes and challenges

The current changes and challenges related to the export of domestic music are partly affected by the pandemic, but for the most part, the issues have existed already longer (Jalonen, 2022; Music Finland, 2022d).

According to the results of the Music Industry Barometer 2022, the future of music export is viewed optimistically, and the greatest growth opportunities are seen in synchronization and live music export (Music Finland, 2022d). However, the lack of financial resources was identified as the biggest challenge in the results. This result can be considered unsurprising since adequate financing is one of the key resources of music export due to its support-dependency nature, as presented earlier in this chapter on the thematic framework. The level of productization and marketing expertise, finding the right contacts, uncertain input-output ratio, and international competition were also mentioned as challenges for the industry (Music Finland, 2022d).

Export support would be needed most for live music export and the global mobility of Finnish operators (Music Finland, 2022d). In addition, support for marketing and productization and the training of export professionals was emphasized in the communities' responses, and support for song export was emphasized in the responses of the industry professionals (Music Finland, 2022d).

The Finnish music export industry is currently suffering from a certain stage of stagnation (Jalonen, 2022; Music Finland 2022d in Jalonen, 2022). Moreover, the problem is still the focus of the industry on the domestic market, in other words, the golden cage phenomenon discussed in subchapter 2.2.2. According to the results of the Music Industry Growth Strategy, international growth is currently mainly on the shoulders of independent companies, whereas major record labels are not showing that much interest in the artist export business (Jalonen, 2022). The results also demand more cooperation between major and indie companies in projects related to

internationalization. In addition, too few companies are investing in international growth (Jalonen, 2022).

The topic of financing was also discussed in the Music Industry Growth Strategy interviews (Jalonen, 2022). The answers to these interviews highlighted Finland's need for a company structure to enable the large-scale investments needed for export operations. According to the study, more ability and willingness to invest are needed. For example, sales of publishing and master catalogs, capital investments from other sectors, or identifying intellectual property rights as a potential investment target were listed as examples of practices that are not yet very common in Finland (Jalonen, 2022). Besides novel investment models from the private sector, public support from Business Finland for production development was also pointed out as one development idea (Jalonen, 2022).

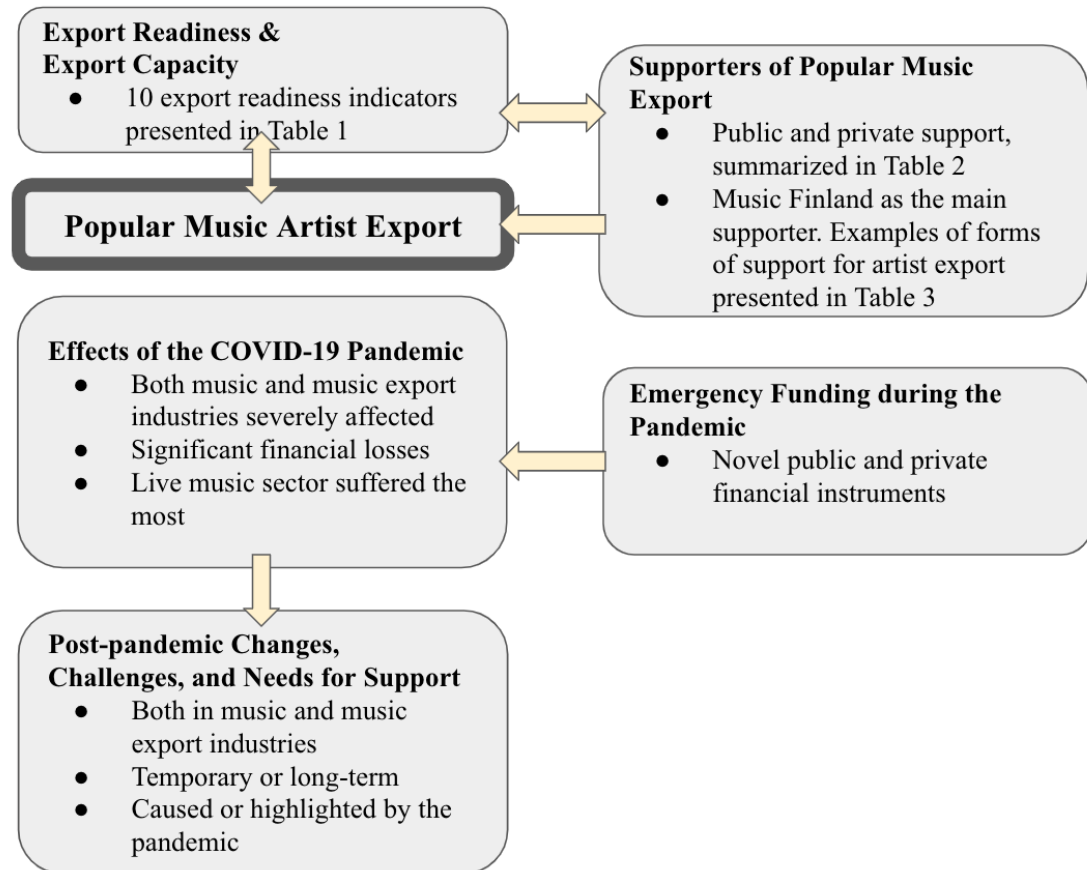
2.4 Summary of the Thematic Framework

Simply put, artist export is one of the forms of music export, where the export product is an artist or a band. Popular music export artists represent artists from several genres, such as pop, rock, indie, or metal. Their export operations include live performances, releases, and merchandise sales. One of the key characteristics of artist export is its dependency on support, especially in the early stages of the export career.

In Figure 1, I summarize the information presented in the thematic framework in illustrative form. The figure demonstrates the relationship between the concepts of export readiness and export capacity and popular music artist export. It also shows that the different forms of support are one of the enablers of export readiness. In addition, the figure shows the effects of the pandemic on the music and music export industries and the emergency funding created as a response to these effects. Lastly, the figure demonstrates the post-pandemic changes, challenges, and support needs brought about by the pandemic and its effects. In the Figure, I also refer to further information in Tables 1–3 in the thematic framework.

Even though previous research provides information from the music and music export industries in general, very little information exists on the effects of the pandemic on export artists and the post-pandemic changes and needs for support they have, in particular. Thus, there is a need to research these topics from the perspective of individual export artists.

Figure 1: *Summary of the thematic framework*



3 METHODOLOGICAL FRAMEWORK

In this chapter, I present the methodological framework of this research and aim to justify the choices and decisions made during the process. I begin by going through the research approach of the study that discusses qualitative research and multiple-case study research. Then, I present the data collection and case selection methods and justify my choices for the data collection and analysis. Lastly, some critical considerations of the research process are discussed.

3.1 Methodological Approach of the Study

This research is qualitative multiple-case study research. The method used is semi-structured interviews. According to Blaxter et al. (2010), qualitative research focuses on exploring smaller instances seen as illuminating (p. 65). In this research, I aim to achieve 'depth' rather than 'breadth,' as described by Blaxter et al. as one of the characteristics of qualitative research. Moreover, the authors add that in qualitative research, the data is mostly collected and analyzed in a non-numeric way, as is also the case in this research.

Denzin and Lincoln (2018) provide a generic definition for qualitative research, even though they also argue that any definition must consider the complex historical field and the multiple meanings qualitative research carries (p. 10). According to their definition, qualitative research is a situated activity that places the observer in the world and consists of a set of interpretive, material practices that make the world visible. In addition, this research involves a naturalistic approach, attempts to make sense of or interpret phenomena, and aims to better understand the subject in question, as described by Denzin and Lincoln (2018, p.10).

I have chosen interpretivism as the philosophical approach of this study. As the opposite paradigm of positivism, where the researcher should be objective, and the aim is to find causal links, seeking one reality and predictability, interpretivism acknowledges that interpretations of the social world are historically situated and culturally derived and aims at understanding rather than explaining the world and various phenomena and concepts (Blaxter et al., 2010, p. 61).

In this research, I focus on five case export artists, so the research can be called a multiple-case study. A case study is often used as a preferred research method when the aim is to research a contemporary phenomenon rather than entirely historical events, and it does this in-depth and in a real-world context where the investigator has little control over the events (Yin, 2014).

According to O'Leary (2004, p. 116), a case study can bring holistic, in-depth, and novel understanding to the fore of the subject or phenomenon in question. She continues that even though case studies might not be generalizable, a more profound level of understanding can be reached compared to, for instance, large-scale surveys. At a practical level, a case study helped me to set boundaries for the research regarding time resources and ease of access, as suggested by O'Leary (2004, p. 116).

O'Leary (2004) continues by stressing that selecting the proper case(s) is one of the most critical steps of a case study (p. 117). She points out how a case(s) can arise from an intrinsic value or aim to represent a larger population. In the context of this study, the number of cases is relatively small, and uniqueness is an essential characteristic of each of the export artist careers. Thus, the selected cases aim not to represent a generalizable view, but I aim to bring out each case's illuminating insights and individual aspects. However, at the same time, I attempt to see if any similarities exist.

Besides being a case study, this research is more specifically a variation of a case study, called a multiple-case study, as it consists of five cases. A multiple-case study summarizes the results of individual cases and draws cross-case conclusions from the cases covered in the research (Yin, 2014, p. 18). When choosing multiple cases instead of one, the researcher may want to contrast and compare cases from multiple angles (O'Leary, 2004, p. 117). In addition, the analytical benefit is that conclusions from multiple cases can be more powerful than those from a single-case study (Yin, 2014, p. 57-64). In this research, multiple case study allows a broader exploration of the phenomena, to find similarities and differences, and to draw conclusions based on empirical evidence from multiple sources.

3.2 Data Collection

I collected the data through five semi-structured interviews. An interview is a mutual act between the researcher and the interviewee where the interviewee can speak freely and reveal anything they think is relevant to the topic (Peer, Hakemulder & Zyngier, 2012). On the other hand, Peer et al. (2012) analyze that in an interview, the researcher can search deeper and follow up on the topics if needed. Semi-structured interviews are a mix of structured and unstructured interviews where the interviewer has prepared a set of questions but is also allowed for unplanned talk (Peer et al., 2012, p. 82). Further, a semi-structured interview can succeed in using the full potential of dialogue to produce knowledge by giving both the interviewer and the interviewee more freedom to discuss issues they deem relevant or important concerning the topic at hand (Denzin & Lincoln, 2018, p. 579).

I interviewed five representatives of popular music export artists, all professionals in the music export industry. The interviewees were:

- 1) Martin Linnankoski, a CEO & Co-Founder of Vild Music Oy and a manager for artist Jesse Markin
- 2) Teemu Laitinen, a CEO of PME Records Oy and representative for artist ALMA
- 3) Pekka Lehti, a CEO of Skär Entertainment Oy and a representative for artist Lxandra
- 4) Katja Vauhkonen, an entrepreneur and a manager for artist Stam1na
- 5) Eero Jääskeläinen, a CEO and Chairman of the Board of Synabasso Oy, and a drummer, as well as a representative for artist The Holy.

The process of selecting the interviewees started with carefully selecting the cases for the research. The criteria were to find Finnish popular music export artists in the growth phase of their artist export careers, i.e., active exporters, who had already had artist export operations before the COVID-19 pandemic, and who aim to continue the operations after the pandemic. With this criteria, I excluded artists who have just started or are starting their export operations and the most established Finnish export artists. This criterion sought a unifying factor between the cases and the possibility of analyzing the change and comparing the export operations before, during, and after the pandemic.

In terms of music genre, the limitation was popular music genres excluding folk music-oriented export artists, whose export market is slightly different. Thus, I aimed to find export artists of a specific career stage representing different popular music genres.

My decision to interview artists' representatives instead of the artists themselves was based on a consideration of who would have a wide knowledge and a comprehensive understanding of the artist export business, the support structures for music export, and the export career of the artist in question, i.e., the ability to see the bigger picture. Three of the interviewees were managers of the case artists. One interviewee was the CEO of the record label of the case artist since the manager had changed during the COVID years, and the CEO was considered to have the best overall view and knowledge of the topic. Lastly, one interviewee was a drummer of the band and a CEO of a company behind the band and managing its administrative and business activities. The band manager does not live in Finland, so I decided to interview this person as a representative because I believed he had the best knowledge and overall view on the topic. The interviewees' slightly different roles and positions in the case artists' operations were seen in their responses. Still, considering this thesis's topic and research questions, I argue they could provide the needed information and insights.

The number of appropriate cases always depends on the research question and goals (O'Leary, 2004, p. 117). Blaxter et al. (2010) point out that a case study is often ideal for the resources and needs of a small-scale researcher, which also applies to this study, even if it is a multiple-case study. I selected the cases by using handpicked sampling. Handpicked sampling is a non-random sampling method where the cases are selected with a particular purpose in mind and to meet specific criteria, show wide variance, represent 'expertise,' or are considered typical (O'Leary, 2004, p. 110). Case export artists who fit the set criteria were finally selected from Music Finland's grant recipients with the assistance of Music Finland. Similarly to the artists themselves, I also discussed suitable artist representatives with Music Finland. In this way, I could use Music Finland's knowledge and contacts from the field when asking about the artist representatives' willingness to participate in the research. However, it is relevant to point out that my interest in certain artists or subgenres also influenced the choices, and I was responsible for making the final choices.

I emailed the interviewees in December 2022, and all the original five interviewee candidates agreed to participate in the study. All the interviews were conducted as face-to-face meetings during January 2023. According to Peer et al. (2012), one advantage of an interview is that it can happen in a natural setting creating an informal atmosphere that encourages the interviewee to talk freely. I wanted to give the interviewees the power of choice regarding the location to make the interview situation as comfortable and easy as possible. In the end, two of the interviews were done in the work office spaces of the interviewees and three in workspaces I booked in the Helsinki city center. The length of the interviews varied between 35 and 70 minutes. I recorded all the interviews with the permission of the interviewees and transcribed them afterward. Even though Peer et al. (2012) stress that recording or filming an interview may de-naturalize the situation, I did not see it as a risk since, as professionals in their field and through their occupation, the interviewees were most likely used to interviews, speaking publicly, or being recorded.

I formed the interview questions chronologically around three periods: before, during, and after the pandemic. In addition, there were background information questions at the beginning of the interview. With questions about restarting export careers and the time after the pandemic, I aimed to find answers to my two main research questions. With questions about export operations before the pandemic and the effects of the pandemic on them, I aimed to find answers to my two sub-research questions and ground the topic more broadly. Music Finland commented on the preliminary version of the question body, based on which I added three more questions. I wanted the question body to be a manageable length and not exclude different themes from emerging during the interviews. However, the predefined questions made it possible to compare the answers.

The interview questions were initially the same for all interviewees. However, in the nature of semi-structured interviews, the order of the questions was slightly different between the interviews, and follow-up questions were presented during all interviews. I did not deliver the interview questions to the interviewees in advance. The question body I used in the interviews can be found in the appendices.

Interviews were held in Finnish and later translated into English to cite them in this research paper. In addition, it was agreed in advance that the names of the interviewees,

organizations, and case artists would be visible in the final research report. The validity of the research was increased by allowing the interviewees who asked for it to see their transcribed answers to check the facts before the analysis process. In the end, I sent the transcriptions to three interviewees. None of them wanted to add or change the information initially given.

3.3 Data Analysis

I recorded and transcribed the five semi-structured interviews, as discussed in the previous chapter. At the transcription phase, filler words and repetitions of words that arose while the interviewee formed their thoughts out loud were omitted. The transcriptions were made in Finnish.

As O'Leary (2004) analyses, data analysis is a process of various stages: it requires the researcher to manage and organize the raw data, systematically code and enter the data, engage in reflective analysis appropriate for the data type, interpret the meaning, and uncover findings before finally drawing conclusions (p. 185). Moreover, this should be done simultaneously, keeping a sense of the overall project that constantly moves between the data, research questions, and theoretical and methodological framework (O'Leary, 2004, p. 185).

After transcribing, I started by familiarizing myself with the data. After that, I organized the data using an Excel sheet so that the responses of the different interviewees to the same questions were displayed under each other in the same column. I divided the findings into four main categories: the pre-pandemic state of artists' export careers, the effects of the pandemic, restarting artist export careers, and post-pandemic support. The categories followed a similar chronological order as in the interview question body, except I decided to divide the post-pandemic period into two main categories according to the topics of the two main research questions. In the end, the four main categories reflected the four research questions of this study: the two sub-research questions and the two main research questions. Further, under each main category, there were 2-4 sub-categories. I formed the sub-categories primarily according to the interview questions.

The qualitative analysis used in this study can be classified as best corresponding to the form that Tuomi and Sarajärvi (2009) name theory-bound analysis (p. 96). The authors explain how the logic of reasoning is often abductive in this form of analysis: data-driven analysis and set models alternate in the researcher's thinking process. The influence of previous knowledge can be recognized from the analysis, but its purpose is not to test a theory but to channel new streams of thought (Tuomi & Sarajärvi, 2009, p. 97). In this study, my data analysis is not directly based on any theory. Instead, I aimed to find confirmations or explanations from the thematic framework for the findings that emerged from the data.

The analysis process was based on identifying themes from the data and grouping the data thematically under the aforementioned categories and sub-categories. The theming process was data-driven and based on the topics that emerged the most from the interview responses. However, I also present observations and comparisons with previous studies and literature in the analysis according to a theory-bound analysis. I used a mind map tool to help with the processes of theming and grouping. When the themes became clear, I also marked answers that could be potential for quotes. Last, I sent the translated direct quotes and the interpretations made from the data to the interviewees for review before the publication of the thesis, giving them the possibility to comment.

3.4 Critical Reflections on the Research Process

There are a few important concerns about the case selection process to bring to the fore. The decision to select cases from Music Finland's existing grantees (meaning artists who have received one or more grants during their careers from Music Finland) affects the results. It could highlight Music Finland's role in export activities. Different results would undoubtedly have been obtained if, for example, artists who have had no contact or have yet to manage to receive support from Music Finland had also been included. Thus, the voices of those not among the Music Finland grant receivers are not heard in this study. However, it must be noted that the selected artists have had a very different history with Music Finland regarding how much support they have applied for or received. In that sense, they all represent a different and unique export artist career path.

In addition, Music Finland is Finland's most significant and the only operator of its kind in supporting Finnish music export, while the export artist field is relatively small. For this reason, it can also be considered that most Finnish artists who have had export activities have possibly been in contact with Music Finland during their careers. However, this cannot be stated with certainty.

Second, the criteria set has also affected the results of the study. The results would have been different if, for example, artists who only started export activities during or after the pandemic had also been included. The starting point of such export artists would have been very different since no export resources, such as contacts or performances abroad, would have been gathered before the pandemic. In this study, I also wanted to compare the changes in artists' export careers before, during, and after the pandemic. This would not have been possible for artists who did not export before the pandemic.

Regarding external validity, five interviews are insufficient to draw thorough conclusions or generalizations. However, considering my research resources and the scope of this Master's Thesis, I find the number appropriate for this study. The five cases were carefully selected to represent a group of professionals from their field, bringing five individual and different cases and their insights to the fore. The career path of each export artist is so unique that any generalizations would be challenging even with a broader sample size. Moreover, there is still little previous research on the topic from the perspective of individual export artists, and the results bring novel insights and understanding.

Although I familiarized myself with previous studies and literature on the research topic carefully during the thesis process, music export as a research topic was new to me, as I mentioned in sub-chapter 1.1. For this reason, it may be possible that some of my interpretations in the analysis have been left incomplete if I have not comprehensively internalized the ways the music export industry operates. However, as I mentioned in the previous sub-chapter, the interviewees were allowed to read through the interpretations made from the interviews. This was done to avoid possible misinterpretations. In addition, it is notable that the interviewees had many similar

views and answers to the topics asked. I aimed to draw conclusions based on these similar views instead of single opinions.

3.5 Case Artists and Artist Representatives

As discussed in Chapter 3.2, it was agreed that the names of the case artists, their representatives, and the organizations where the artist representatives work are mentioned in the final research paper. I made this choice based on the fact that the music export industry in Finland is relatively narrow, and the details given in the interviews, even the most basic information about the export artists, such as the genre or the quality of the export activities, could allow deducing the artist in question. For this reason, the anonymity of the interviewees or case artists could not guarantee true anonymity, and it was better to ensure consent to the use of names. In addition, the various backgrounds, job descriptions, and interviewees' roles in case artists' export activities also affect their answers and perspectives.

Two artists, ALMA and Lxandra, also have another significant form of export activity besides artist export. With ALMA, this is song export, and with Lxandra, synchronization (Laitinen, 2023; Lehti, 2023). Therefore, it is essential to point out that this study focuses on the artist export business and thus does not address these career paths. However, some mentions of these aspects may appear if they are relevant to the overall picture.

3.5.1 Jesse Markin

Jesse Markin (n.d.) is a Finnish singer-songwriter born in Liberia. He started his solo career in 2018 and has released two albums: FOLK (2019) and NOIR (2021). Before his solo career, Jesse Markin made music for 12 years in a hip-hop group called The Megaphone State. According to his manager Martin Linnankoski (2023), Jesse Markin's music ventures in the middle ground of indie, hip-hop, rock, and world music and strongly aims at the international



market. Still, Linnankoski states that putting an artist like Jesse Markin in any box is difficult. Jesse Markin's singing language is English.

According to the artist's website (Jesse Markin, n.d.), after the release of his debut album FOLK in 2019, Markin won two awards in Emma Gala (Finnish Grammys): Critics Choice and Newcomer of the Year. In addition, he was awarded with Teosto-palkinto. The first album's success was also noted in many international media, and in addition to domestic performances, there were also a few showcase performances in Europe (All Day, n.d.).

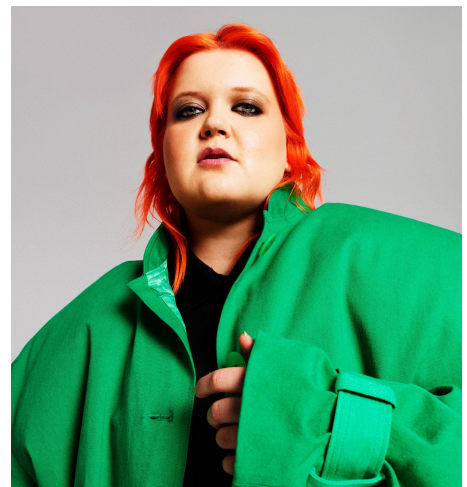
Artist representative: Martin Linnankoski

Martin Linnankoski (2023) is the CEO and Co-Founder of Vild Music Oy, a Helsinki-based independent record label and management agency (Vild Music, 2022). Linnankoski is responsible for both the record label and artist management and works as the studio operations' Client Manager. Moreover, Linnankoski works as Jesse Markin's manager and is thus comprehensively responsible for his career development in Finland and abroad. Linnankoski describes that his collaboration with Jesse Markin began when Jesse Markin started his solo career.

Photo credit: Tero Ahonen

3.5.2 ALMA

Singer-songwriter ALMA has had a recording contract with PME Records since 2016 (Laitinen, 2023). Laitinen, the CEO of PME Records describes how the record company noticed ALMA's talent and voice while she was working as a background singer in the company's then-artist line-up. In addition, she had previously successfully participated in a music competition. So far, the singer-songwriter has released two EPs: Dye My Hair (2016), Heavy Rules Mixtape (2018), and a debut album, Have You Seen Her? (2020) (Laitinen, 2023; PME Records,



2020). The second album, *Time Machine*, will be released in April 2023 (Cyberalma, 2023).

ALMA's genre is classic pop mixed with rap and classic soul music elements, and the singing language is English (PME Records, 2023). According to her record company PME Records (2020), by the release of her debut album ALMA already had over 650 million global streams, several gold and platinum singles across Europe, and multiple performances in Europe and the United States. Almost 80% of her live performances have been outside Finland (Setlist.fm, 2023a).

Artist representative: Teemu Laitinen

Teemu Laitinen (2023) is the CEO of PME Records, a member of the company's board, a member of the board of the subsidiary PME Management Oy and, according to his own words, also the acting financial director of PME Records Oy. In the operations of PME Records, Laitinen says he is responsible for i.a. finances, budgeting, all contract matters, and strategy in cooperation with the board. In principle, he is not actively involved in artist projects and daily operational activities. Still, Laitinen adds that through his responsibilities in finances and contracts, he participates in all contract negotiations and is informed about what is happening in artist projects.

Photo credit: Jordan Rossi

3.5.3 Lxandra

Singer-songwriter and multi-instrumentalist Lxandra released her first single in 2018 from Berlin, where she lived and started her musical career at the time (Lehti, 2023). She has released one EP, *Another Lesson Learned* (2019), and a debut album, *Careful What I Dream Of* (2021) (Lxandramusic, 2023). According to the CEO of the artist's background company, Pekka Lehti (2023), Lxandra's genre is pop, and the singing language is English. Lehti analyses that Lxandra's music is aimed at the international market



because music sung in English requires a bigger market than Finland to progress in a career. So far, Lxandra's greatest popularity has come from Germany instead of Finland (Lehti, 2023).

Artist representative: Pekka Lehti

Pekka Lehti (2023) is the CEO of Skär Entertainment Oy, the background company owned by Lxandra, and works under the title of business manager in the company. Lehti describes that his areas of responsibility include the company's finances, being responsible for money transactions, and being involved in contract negotiations. In addition, he is involved in brainstorming ideas, thinking about the financial side of the plans, and responsible for applying for various subsidies for the artist.

Photo Credit: Nelli Kenttä

3.5.4 Stam1na

Stam1na, founded in 1996, is one of the biggest metal bands in Finland and consists of five members (Stam1na, n.d.; Vauhkonen, 2023). The band is from a small town called Lemi and was signed to a small label Sakara Records, in 2004, before the release of their first album (Stam1na, n.d.). The band's manager Katja Vauhkonen (2023), reveals that in 2023, the band will release their tenth album. Each of the band's albums has sold at least gold in Finland, and they have won a total of eight Emma awards (Finnish Grammys) during their career (Stam1na, n.d.). The singing language is Finnish.



The band has played almost 700 performances during their career, approximately 100 of which have been abroad (Setlist.fm, 2023b). However, Vauhkonen analyses that the band is still relatively small abroad.

Artist representative: Katja Vauhkonen

Katja Vauhkonen (2023) is an entrepreneur who works in PR (public relations) and management services for several artists. One of these artists is the band Stam1na. In addition, Vauhkonen says she works with indie record labels by acting as the executive director of Indieco ry. Vauhkonen describes how she has been involved in Stam1na's PR activities since around 2009 and has been a manager since 2015, first through Fullsteam Management Oy and now through her own company.

Vauhkonen says she is responsible for managing the band and is also involved in the band's PR and marketing activities. She continues that her role in the band's export operations is relatively extensive. Among other things, Vauhkonen communicates with the band's gig agent in Germany and does productional tasks for the band's gigs and tours abroad.

Photo credit: Tero Nordlund

3.5.5 The Holy

The Holy was founded in 2014 and started active operations in 2016 (Jääskeläinen, 2023). The band consists of five members, and according to one of their drummers, Eero Jääskeläinen (2023), the fact that the band has had two drummers since the beginning has been one distinguishing factor from many other bands. Their first EP, *More Escher And Random Notes*, was released in 2016 by Soliti Records, after which they have released two albums: *Daughter* (2018) and *Mono Freedom* (2020) by Playground Music Scandinavia (Jääskeläinen, 2023; All Day, 2022). In 2023, the band is releasing its third album (All Day, 2022).

The Holy plays alternative rock, and the singing language is English (All Day, 2022). They received an EMMA nomination (Finnish Grammys) for Critics' Choice after the release of their debut album in 2019 (All Day, 2022). According to Jääskeläinen, The Holy is a very active live band in Finland and abroad. They have performed in venues and festivals across Europe in Sweden, Estonia, Lithuania, Germany, the UK, the Netherlands, Switzerland, Luxembourg, and Austria and showcased in several showcase events in various European countries (All Day, 2022).

Artist representative: Eero Jääskeläinen

Eero Jääskeläinen (2023) is one of the two drummers in the band The Holy. In the band's background is a company called Synabasso Oy, of which Jääskeläinen works as the CEO and the Chairman of the Board. Jääskeläinen analyses that he is closely involved in the strategic planning of the band's export activities and communicating with contacts with their manager, who lives in London. In addition, Jääskeläinen acts as a liaison between Music Finland and the band. As one of the band members, he is also involved in content-based strategic decisions, for instance, on what kind of artistic content the band should produce to strengthen its export activities (Jääskeläinen, 2023).

Photo credit: Rachel Lipsitz



4 FINDINGS AND DISCUSSION

In this thesis, I aim to research the effects of the COVID-19 pandemic on Finnish popular music export artists from the perspective of restarting export careers. In this chapter, I present the findings of this study through four chronologically advancing main categories that explicitly reflect the research questions of this study. As mentioned in the sub-chapter 3.3, these categories are 1) the pre-pandemic state of artists' export careers, 2) the effects of the pandemic, 3) restarting artist export careers, and 4) post-pandemic support.

The findings of each category are further divided into relevant sub-categories. I present the results in these sub-categories according to the themes most emerged from the data. I also compare and contrast the responses of the interviewees with each other. Moreover, I analyze and discuss the findings in light of the literature and previous studies presented in the thematic framework. At the end of each main category, the results and discussion of the data are summarized in response to the research question.

4.1 The Pre-pandemic State of Artists' Export Careers

My first sub-research question was: What was the state of the artist export careers before the COVID-19 pandemic? In this section, I present the results of this question and discuss their relation to the previous literature in three parts: First, I look at the artists' export strategies and teams, after which I present the pre-pandemic support for export activities. Lastly, I review what export activities had been done before the pandemic and what plans existed for the artists' export careers. The results are summarized at the end of this chapter.

Chen et al. (2021) have listed ten indicators of export readiness, presented in Table 1 of the thematic framework, that are essential for an export artist to reach international markets (p. 80). In this study, all the case artists are in the growth phase of their export careers. As mentioned earlier, these export readiness indicators can be considered essential also in the growth phase of an export career in developing necessary exporting resources. In reviewing the pre-pandemic state of artists' export careers, the following six out of ten export readiness indicators by Chen et al. (2021) are touched upon:

representation, strategic planning and infrastructure, international networks, international industry events and showcasing, financing, and domestic activity (p. 80). Still, as also noted by the authors, each export artist has their own desired combination of these components, with slightly different emphasis.

4.1.1 Export Strategies and Teams

The role of artist export and international activities in an artist's career differs greatly depending on the artist and the strategic career choices made, especially at the beginning of the career. An export strategy is essential to an artist's export readiness, as Chen et al. (2021) describe as part of their export readiness indicator number two: strategic planning and infrastructure (p. 80). However, artist export operations can strategically originate in several ways, which became apparent through the interviews.

In the cases of ALMA, The Holy, and Lxandra, exporting and targeting the international markets was the key strategy from the beginning. The CEO of PME Records Oy, Teemu Laitinen (2023), describes the situation when the company started to work with artist ALMA at the very beginning of her artistic career:

It was clear from the beginning that if we were going to do something, we would do it abroad. And if there is a success, it will certainly come in Finland as well. The thought was not that we would first start making music in Finland, which would be exported abroad. (Laitinen, 2023)

Jääskeläinen (2023) mentions that The Holy has strategically aimed abroad since the beginning. They wanted to make music for the whole world and not just for Finland. Similarly, with Lxandra, the idea of exporting has existed since the beginning of her career, and her music career was concretely built abroad in Germany from the beginning (Lehti, 2023). According to Lehti, the opportunity for an international artist career arose when a Finnish producer-songwriter invited Lxandra to Germany for a song session. Local parties noticed the artist's talents and offered contracts. Therefore, perhaps exceptionally, the export career started abroad before any kind of career as an artist in Finland.

On the other hand, an export career can be built strategically by first aiming to succeed in the domestic market. Linnankoski (2023) describes that with Jesse Markin, the strategy was first to gain a strong foothold in Finland through the first album and then with the second album to invest more widely in the international market. Thus, Jesse Markin's aim has always been the international markets, but the role of a domestic career was also considered essential.

Interestingly, Stam1na had a strategy notably different from other export artists. According to their manager Katja Vauhkonen (2023), Finland has always been the band's main market area, as exports operate under the conditions of domestic operations. In other words, artist export activities can also be a so-called side business where the artist's career mainly focuses on the domestic markets. Indeed, the band's domestic success and Finnish as a singing language have most likely been the central factors that have led to this strategy in export operations. According to Vauhkonen, the idea of export activities only arose after a few album releases and the success of other Finnish metal bands abroad accelerated it.

Maybe those trips abroad have been more of such experiments to be taken semi-seriously; however, understanding that first, we will look at the shows in Finland and where we have time...I have such an image and feeling that maybe after the third album, it was thought that we should try it [exporting]. It had been noticed that there could be potential, and the fact that Finnish metal has attracted the world in general for so many years, it was perhaps easy to jump into that tailwater with a bit of an experimental mindset.

(Vauhkonen, 2023)

All in all, it seems that every artist had had some strategy for their export career: either from the beginning or by the time export opportunities arose. However, unlike Chen et al. (2021, p. 80), most artists have not considered domestic activity, meaning building a strong local or national audience, essential to their export readiness. Indeed, it can be identified as a conscious step towards an international career only in the case of Jesse Markin. With Stam1na, a domestic career did come first, but it was not planned as a strategic step toward international success.

Both Music Finland (2017c) and Chen et al. (2021, p. 80) highlight the role of domestic and international teams and networks in achieving export readiness. In the list of Chen et al. (2022), teams and networks are referred to in connection to even three different export readiness indicators: representation, strategic planning and infrastructure, and international networks (p. 80). The interview responses also pointed out the importance of having international networks. Each artist had an export team combining domestic actors and collaborators abroad, but the emphasis between domestic and foreign collaborators varied. Similarly to the artist export strategies, the teams around export operations had formed very differently and were in different stages before the pandemic.

Before the pandemic, Lxandra, The Holy, and ALMA had the largest share of foreign partners in their export organizations. Laitinen (2023) lists Warner Music in Nordics and Baltics and Universal Music Germany as ALMA's record label partners abroad at that time, as well as a management company and a company that took care of gig sales and production, both from Great Britain. In addition, he describes how local promoters' help was used in the United States to implement the gigs. Further, the domestic organization consisted of PME Records Oy, which also manages ALMA, and a company responsible for gig sales and production in Finland. However, Laitinen highlights that they have wanted to keep the core of the artist export business in Finland in a Finnish indie label, which they are especially proud of.

According to Jääskeläinen (2023), The Holy had gig sales agencies in Germany, the Netherlands, and France. Their management company was in Great Britain, and their record label was in Stockholm. Jääskeläinen says that in Finland, the band only had a domestic gig sales agency. Thus, foreign partners had a considerable role in their export operations.

With probably the most international team before the pandemic, Lxandra's export organization comprised almost exclusively foreign partners. Only Pekka Lehti (2023), the CEO and business manager of the artist's background company, participated from Finland. Otherwise, Lehti describes how the artist had a versatile international team, including a record label, a publisher and a management company in Germany, and an international talent agency, based in London, taking care of her gigs. In addition, Lxandra had deals in Los Angeles, but her career in the United States was mainly

focused on the synchronization business and not on artist export per se (Lehti). This means the artist's export career was mainly built in Germany with a German team.

In the case of Jesse Markin, Linnankoski (2023) says the international team was just being built, and interest was being sought from abroad. He says that, before the pandemic, the foreign partners were a German agent and a PR team in Great Britain. Otherwise, the team was still domestically led, and Vild Music Oy and an agent were involved in Finland. At this point, interest from abroad had been received from France (Linnankoski). Even though the construction of the export organization was still in the early stages, Linnankoski's answer shows a willingness to acquire a wider international network of partners.

Vauhkonen (2023) describes that Stamina had a compact team at the core of their export operations, including a Finnish record company Sakara Records, a Finnish management company, and a company from Finland that helped with the pre-production of the gigs abroad. Moreover, they had a gig agency and an agent in Germany. The same company also took care of the gig production that happened abroad. Vauhkonen explains that this compact but workable team setup has been sufficient for export since the main focus of Stamina's artist activities has been in Finland. Vauhkonen's response suggests that having some international partners seems necessary even with fewer export activities.

Interestingly, none of the export artists had a record deal with a major record label in Finland. For those artists with a Finnish record label, the company was an indie or small record company. Instead, artists' foreign partners included major record companies, such as Warner Music and Universal Music. This arrangement is consistent with the recent view within the industry, where in Finland, music export is considered chiefly the responsibility of indie record companies instead of major record companies (Jalonen, 2022).

4.1.2 Export Support

Based on the interviewees' answers, supporting artist export in the beginning and growth stages of careers, or in general if the export artist is relatively small abroad, has been a lifeline for international activities. The common message of the interviewees was

that, before the pandemic, no profit had been made from the artist export business, even though some money had come in. Building an export career based on significant investments in the early stages of it seemed self-evident to the interviewees and was considered a characteristic of the music export industry. However, it was not perceived as an easy equation.

...if you look at just the music export part, it is really expensive and requires investment. (Jääskeläinen, 2023)

It is rarely, if ever, possible to make any quick profits in Finnish music exports. Instead, they are years-long projects, big investments. (Laitinen, 2023)

Laitinen (2023) adds that due to this earning logic and the large investments that must be made at the beginning of the export career, believing and trusting in the artist and their potential plays an important role. Jääskeläinen (2023) also points out that as long as the band's position is not established enough or playing gigs abroad is not financially profitable enough, it is impossible to do live export cost-effectively. Jääskeläinen continues that the lack of resources and short time spans directly affect export plans. He analyses that showcase gigs or other one-off gigs (*pistokeikka*) are expensive and not cost-effective compared to a well-planned tour. The interviewees' notions align in many respects with the survey results by Chen et al. (2021): an artist's internationalization process is characterized by the long-term nature of the work, various investments, and financial returns seen on average within two years (p. 85-86). The same authors also list adequate financing as one of the export readiness indicators, and clearly, it is also considered a necessity among the interviewees.

According to survey results on Australian artists and artist managers, the artist export business requires various forms of support (Chen et al., 2021, p. 85-86). Similarly, all case artists' export activities depended on support before the pandemic. Although there were various income streams, such as synchronizations on Lxandra and merchandise sales, especially on Stam1na and The Holy, live export, particularly, had relied on subsidies, which was emphasized in the answers. Having said this, it is unsurprising that all export artists had also received some kind of support for artist export before the pandemic. The survey results by Chen et al. (2021) also point out the necessity of

combining different support forms: public support and various private support forms, such as sponsorships, donations, grants, and peer/family support (p. 85-86). Further, the export supporters of Finnish popular music include various public and private entities, as presented in Table 2 in the thematic framework. A versatile selection of different supporters can also be identified from the pre-pandemic support received by the case artists.

All the artists had been involved with Music Finland, the main supporter of Finnish music export, and received at least some financial support from the organization. Here, it is good to remember that the case artists were initially selected from Music Finland's grant recipients, so this result was predictable. Nonetheless, the answers emphasized Music Finland's vital role as a supporter of export activities and its unique position in the Finnish music export field. Jääskeläinen (2023) particularly emphasizes the organization's role as the band's main and only supporter and their excellent relations before the pandemic. In addition, the representatives of The Holy, Jesse Markin, and Stam1na mention receiving help from Music Finland to create networks and contacts (Jääskeläinen, 2023; Linnankoski, 2023; Vauhkonen, 2023). Jääskeläinen and Linnankoski also point out the sparring help received through Music Finland.

Besides the support from Music Finland, Laitinen (2023) emphasizes the importance of international label partners as enablers and financial supporters of ALMA's artist export career. Similarly, Lehti (2023) mentions tour support Lxandra had received from a record company. Lehti adds that the artist received a year-long grant from The Swedish Cultural Foundation in Finland. Vauhkonen (2023) explains that Stam1na's biggest financier of export operations has been their record company and the band itself. This is made possible by a successful domestic career. Further, Vauhkonen highlights the importance of other Finnish metal bands and artist colleagues in creating new networks and opportunities. Lastly, YLE (The Finnish broadcasting company) was mentioned as a supporter of Jesse Markin's Eurosonic showcase gig by Linnankoski (2023). Even if public support is not mentioned separately in the responses, the state is the biggest single financier of Music Finland (2022c). Thus, there is also a contribution from the public support system involved.

4.1.3 Export Activities and Plans

Due to the artists' diverse backgrounds, different career stages, and the previously discussed various export strategies, the artist export activities done before the pandemic were also very diverse. Jesse Markin was the artist with the most minor export activity before the pandemic. This was natural because the artist's export career was only in its early stages, and as mentioned, the focus of his first album was on the domestic market. According to Linnankoski (2023), Jesse Markin had done some promotion abroad in connection with the first album release and performed at the Eurosonic showcase festival in early 2020, which had successfully served as a springboard in building the live export plans while approaching the release of his second album.

Linnankoski (2023) says that the goal was to find new international partners through the Eurosonic performance and to book gigs in Europe so that after the release of the second album, it would be possible to do a small-scale tour in Germany and Europe. The strategy was to expand artist export through live export, and bookings had already been made to several European countries due to a successful Eurosonic performance (Linnankoski, 2023).

Showcasing and appearances at international industry events also emerged in other responses, the importance of which Chen et al. (2021) emphasize in achieving export readiness (p. 80). Jääskeläinen (2023) highlights the role of showcase performances at the beginning of an export career when describing the history of The Holy's export operations. He says the band's export activities had been very active, and the most active live export peak was just underway before the pandemic. Jääskeläinen continues that within a few years, The Holy had done, i.e., two headline tours and over 80 gigs around Europe, mainly in German-speaking countries. He lists how they had performed at several showcase festivals, such as Reeperbahn, Eurosonic, and JaJaJa clubs, and most recently, at Iceland Airwaves. The Iceland Airwaves performance was recorded live for a large US radio channel, KEXP, in January 2020 (Jääskeläinen, 2023).

Jääskeläinen (2023) analyses that the band initially approached artist export through showcases. These appearances have been the most significant performance abroad and started to bear fruit before the pandemic. He describes the band's future plans just before the start of the pandemic as follows:

In January-February 2020, we had over 35 festival gigs booked around Europe—also really big and important festivals. And the album was coming out in April. Moreover, a big Finnish tour was planned right after the album's release, and then a club tour to Europe for the fall of 2020 starting from Scandinavia: Stockholm, Gothenburg, Copenhagen, then Hamburg, a big part of Germany, through the Netherlands, and even to Belgium and France. And then there was this showcase performance in London, which we would have done in a church. (Jääskeläinen, 2023)

Showcase performances have also been essential to Lxandra's international artistic career. According to Lehti (2023), Lxandra did at least two Eurosonic and other showcase performances in Great Britain and Germany before the pandemic. In addition, Lxandra had been a warm-up act for Dua Lipa and had done, for instance, individual gigs in Europe and London in spring 2020, but no own tour yet. Lehti analyses that before the start of the pandemic, the export career was building well. The release of the debut album was planned for 2020, after which there were plans for a headline tour to Germany and Britain and new warm-up gigs in Europe. The goal was to build a new audience through live export. The showcase performances before the pandemic aimed to further these plans (Lehti, 2023).

While the artist export activities of Jesse Markin, The Holy, and Lxandra were mainly focused on Europe and the German-speaking region, according to Laitinen (2023), ALMA had done artist export not only massively in Europe but also one headline and one support tour in the United States before the pandemic started. Laitinen describes the situation of ALMA's artistic export career and future plans on the eve of the pandemic in the following words:

I think there were two European tours and a US tour: the album release tours in Europe and the US, the plans for which were then pulled down the toilet when we could not enter the world at all. The album came out in May, and we were supposed to be at a point when it would be great to be able to promote the debut album at big concerts abroad. (Laitinen, 2023)

Slightly different from other artists, Stam1na's export activities have been shaped by opportunities to perform abroad brought by their genre, metal. These activities have included, for instance, a Caribbean cruise called 70000 Tons of Metal in the US and a couple of visits to Japanese indoor festivals, with a robust existing fanbase for Finnish metal music (Vauhkonen, 2023). Vauhkonen continues that the band has released a few of their albums worldwide, performed abroad annually, and done a lot of warm-up gigs around Europe and one-off gigs at festivals. According to Vauhkonen (2023), before the pandemic, the band was living a time between two album releases, and as in previous years, there were plans for a warm-up tour in Europe. In addition, she says that there were preliminary plans for a trip to the United States with a few other Finnish bands.

To conclude, the artists' pre-pandemic export activities and plans consisted of various forms of live music export and releases, also mentioned as the core areas of artist export by Music Finland (2017b). Besides its intrinsic value, the interview responses refer to live export as a tool to reach new audiences, promote new releases, and find new international networks. In addition, Music Finland (2017b) includes merchandise sales in these core areas. The interviews only mentioned it as one income stream but not a separately listed export activity. It might be that merchandise sales are considered mostly a side business related to the live music export and not that relevant export activity on its own. In addition, based on the responses, a certain kind of cycle can be observed from the export activity, alternating between the release of new music and the subsequent gigs, tours, and showcase performances.

The pre-pandemic state of the case artists' export careers is summarized below in Table 4.

Table 4. *The pre-pandemic state of the artists' export careers*

	Strategy	Team	Export Support	Activities	Future Plans
Jesse Markin	aiming to international markets through a strong foothold in domestic markets	domestically led, a few international partners	Music Finland, YLE	Eurosonic showcase performance, promotion abroad	expand exporting through live export, a small-scale tour in Europe, finding new international partners
ALMA	aiming straight to international markets	more international than domestic partners	International label partners, Music Finland	extensive export activities in Europe, one headline, and one support tour in the US	album release tours: two European tours and one tour in the US
Lxandra	aiming straight to international markets	more international than domestic partners	Record company, Music Finland, The Swedish Cultural Foundation in Finland	2 Eurosonic and other showcase performances, a warm-up act for Dua Lipa, gigs in Europe	release of a debut album, a headline tour and warm-up gigs in Europe
Stam1na	main focus in domestic markets, exporting as a side-business	a compact domestically led team, a few international partners	Record company, the band, Music Finland, other Finnish metal bands and colleagues	a few worldwide album releases, annual gigs abroad (70000 Tons of Metal in the US, a couple of festivals in Japan), warm-up gigs, and one-off festival gigs in Europe	a warm-up tour in Europe, trip to the US with a few other Finnish bands
The Holy	aiming straight to international markets	more international than domestic partners	Music Finland	2 headline tours and over 80 gigs in Europe, several showcase performances, KEXP recording	over 35 booked festival gigs, booked tours in Finland and in Europe, showcase performance in London

To sum up the answer to the first sub-research question about the pre-pandemic state of the export artists' careers, it can be concluded that the career path of each export artist has been unique: in a different stage, approached with different strategies and made with

various teams and goals. However, all artist export careers were in a growth phase and actively being built, except for Stam1na, whose growth goals were not as determined.

Despite the unique nature of each export career, their similarities aptly point out four key characteristics of the artist export business:

- 1) Building an international artist career requires international partners and contacts from the export target areas
- 2) The earning logic of artist export is challenging and long-term by nature
- 3) Artist export career in its early stages is dependent on subsidies
- 4) Live music export and showcase performances have an essential role in the artist export business

4.2 Effects of the Pandemic

My second sub-research question was: How did the COVID-19 pandemic affect the artist export careers? In this chapter, I discuss the results together with the thematic framework by first going through the effects of the pandemic on the export artists and the support received. Then, I review the changes caused by the pandemic in export teams and strategies. Lastly, I look at the interviewees' views on recovery.

According to previous studies by Music Finland (2020, 2021b, 2022a), the Finnish music export industry suffered severely from the pandemic, and for example, the value of the music export core areas decreased significantly by 42% in 2020 compared to the previous year. Moreover, these studies by Music Finland show that live export was the core area that suffered the most and has started to recover the slowest.

As expected, the pandemic significantly affected also the export careers of all case artists. The most common theme that emerged in the responses was the stoppage of live export after the pandemic started. Thus, as in the entire music export industry, live export was the most affected area by the pandemic, also for individual export artists. Laitinen (2023) aptly describes that the opportunities to export music during the pandemic were minimal. Lehti (2023) says it was impossible to build an export career during the pandemic because live encounters and performances are such an essential

part of it. Linnankoski (2023), the representative of Jesse Markin, describes how opportunities, such as showcase performances, spawned new bookings before the pandemic. He analyses that some of them were successfully rescheduled and implemented later. Still, most gigs were canceled entirely. In addition, Linnankoski mentions that, during the pandemic, foreign radio channels tended to play only local music, making it even more difficult to promote new music internationally.

Based on the interview responses, the pandemic also disrupted most artists' album release schedules and export plans made in connection with them. Jääskeläinen (2020) presents similar effects in his thesis, according to which the release schedules of the band's Mono Freedom album, the album's second single, and the first music video were postponed as a result of the pandemic. The thesis also describes how only a few performances scheduled for the album's marketing in 2020 took place. The common thought from all the interviewees was that all plans were changed, an era began when planning, in general, became impossible, and all activities were characterized by uncertainty.

Whereas live performances were almost impossible to implement, artists could focus on making new music. This was especially emphasized in the responses of the representatives of Stam1na, Lxandra, and ALMA (Laitinen, 2023; Lehti, 2023; Vauhkonen, 2023). For instance, Laitinen says that the team and background companies aimed to guarantee ALMA the most stable financial situation possible during the pandemic so that the artist could use the time to make new music.

The Holy, Jesse Markin, and Stam1na had managed to do at least one live performance with special arrangements abroad during the pandemic (Jääskeläinen, 2023; Linnankoski, 2023; Vauhkonen, 2023). However, both Vauhkonen and Jääskeläinen (2023) point out that the rise in prices made one-off live gigs abroad financially unsustainable at some point, even if they were available. In addition, Jääskeläinen (2023), Laitinen, Lehti, and Vauhkonen, the representatives of The Holy, Stam1na, ALMA, and Lxandra, also mention that they tested the possibility of streaming performances during the pandemic. A similar increase in solution-oriented thinking and ingenuity can be observed in the artists' activities, as Isolammi (2020) discussed in

connection with virtual and hybrid implementations in the music industry during the pandemic.

4.2.1 Support during the Pandemic

During the pandemic, support was received for two things: explicitly for the export activities with those who had had them and for maintaining the background companies' operations or covering the artist's living expenses. As presented in sub-chapter 2.2.4 of the thematic framework, various novel funding instruments were created during the pandemic to respond to the increased need for support in the music industry. In addition, already existing support forms were distributed. Both can be identified from the support received by the export artists during the pandemic.

During the pandemic, the case artists turned to familiar support organizations but also had to seek support from new stakeholders. The responses highlighted the difficulty of defining when the pandemic ended and the post-pandemic time started. Indeed, the transition has been sliding and also varied by the country. During the interviews, I explained that the post-pandemic period could be considered to have started when all COVID restrictions were lifted. However, it is essential to highlight this challenge since it may have influenced what each interviewee interpreted as having happened during the pandemic and what happened afterward.

Laitinen (2023) and Vauhkonen (2023) explain that no support was applied or received for the export operations of ALMA or Stam1na since there were none. Instead, Laitinen describes how all possible COVID support measures that the background company or the artist could receive to maintain their basic operations during the exceptional times were sifted through. Lehti (2023) also mentions a COVID subsidy from the Ministry of Education and Culture, which was based on the lost income from the planned performances of Lxandra.

Instead, Jesse Markin, The Holy, and Lxandra had received some support for export operations during the pandemic. Support that could be explicitly targeted at export activities had been received from, for example, Music Finland, Arts Promotion Center Finland (Taike), and the Ministry of Education and Culture. These subsidies were a mix

of public and private support and included both new forms of support created during the pandemic and already existing export subsidies.

However, Linnankoski (2023) and Lehti (2023), the representatives of Jesse Markin and Lxandra, describe that the subsidies received were relatively small or smaller than applied or wished for. Further, the representatives of The Holy and Lxandra mention subsidies that were applied for but not received (Jääskeläinen, 2023; Lehti). These subsidies were from Music Finland, MES, and the Ministry of Education and Culture. In addition, Jääskeläinen continues by criticizing the application process of Music Finland, which had become more complicated during the pandemic. Jääskeläinen adds that receiving support decisions was prolonged and, thus, created even more uncertainty for The Holy's export operations.

According to research by Music Finland (2021b, 2022a), the amounts of public and private support for the music industry increased significantly in 2020 and 2021 due to the novel emergency funding instruments created during the pandemic. The music industry's income losses rose to 470 million euros for two years (2020-2021), of which state subsidies compensated only approximately 93 million euros (Music Finland, 2021a). The findings suggest that the support received by the export artists during the pandemic was also inadequate on some occasions. This may have contributed to deepening the damage caused by the pandemic and slowing down the recovery process.

4.2.2 Changes in Teams, Strategies, and Views on Recovery

The export artists' teams, strategies, and goals have partially changed compared to the pre-pandemic time. Some of the export careers have, so to speak, continued where they left off, while some have undergone more changes. Once again, the uniqueness of each export career emerged. However, the responses show an expectant mood; all the artists already have concrete export plans.

Teams

The pandemic has had different effects on the teams of case artists and the partners with whom export careers were made before the pandemic. The teams of ALMA and Stamlna have remained more or less the same (Laitinen, 2023; Vauhkonen, 2023). Jesse Markin's team has remained the same but has already grown with a new

international partner (Linnakoski, 2023), which shows slight signs of recovery in his export operations. On the other hand, changes have also occurred. The Holy has a new record company that has changed from international to domestic (Jääskeläinen, 2023). The most significant change has occurred at Lxandra, where almost the entire team has changed (Lehti, 2023). Lehti explains that only a tiny part of the utterly international team of Lxandra that preceded the pandemic has remained, and a new team is currently being assembled. Now, the artist has a Finnish record company as a new collaboration partner. This means that with The Holy and Lxandra, the focus has changed from international to domestic. However, it cannot be directly concluded from the responses that a change from international to domestic partners would necessarily be only a negative thing.

Strategies and views on recovery

Due to the pandemic, no significant strategic changes to the construction of export careers have occurred. With ALMA, The Holy, Lxandra, and Jesse Markin, it still means increasing export activities and promoting an international career with active measures. On the other hand, Stam1na's goal is to continue with the existing strategy. For them, this means pressure-free export operations alongside a domestic career and openness to new opportunities.

Since the existing plans have naturally backtracked during the pandemic, I asked the artist representatives how they see the state of recovery of the artists' export careers. As a result, the concept of recovery was viewed very differently. Instead of recovery, the representatives of The Holy and Lxandra talk about a reset. Lehti (2023) describes the mindset of Lxandra and their team: “The concept of recovery can perhaps be completely forgotten. This is now the situation we are in. The pandemic was total, and after that, we had to think about everything in a completely new way.”

Jääskeläinen (2023) describes that The Holy's export career has not recovered because the pandemic hit their career badly. Instead, recovery will take a long time, and Jääskeläinen mentions that long-term plans have already been made for the next few years. Jääskeläinen adds that the band is now living in a reset state and in a time of reconstruction, where former methods of operation have been critically examined. They have been thinking about how to act in the new era and operate more cost-effectively.

Laitinen (2023) agrees that a reset was required after the pandemic. Still, he says it has already been possible to start artist export activities with ALMA, and the artist has already made a mini tour, a radio promo tour, and released three singles. Further plans that have been made are waiting to be realized (Laitinen, 2023).

Vauhkonen (2023) points out that it is difficult for her to see to what state the artist export has recovered. Her thought reflects well the current atmosphere, where the music export industry is still in a certain kind of intermediate state, where on the one hand, it has already been possible to restart operations. Still, it is being determined what conditions the industry is settling into in the longer term. Vauhkonen continues that in the case of Stam1na, she rather sees the situation as unchanged, and there is no reason to talk about recovery.

Linnankoski (2023) analyses that the recovery was furthered by the fact that, in the case of Jesse Markin, it was somehow possible to utilize the show-case gig that preceded the pandemic and the opportunities that came from it. Indeed, the long-term nature and the cycle of artist export that is based on momentum, such as a release or a showcase performance, and the activities that follow them, was emerged in the interviews. For example, Jääskeläinen (2023) analyses that “albums are seldom released, and if that momentum is not used, you will only get it again with the next album.”

Lastly, there were some changes in the export target markets. Both Linnankoski (2023) and Lehti (2023) describe how the focus of Jesse Markin and Lxandra's export market has now changed based on the feedback received. The focus will shift from Germany and Central Europe to the United States for both. Jääskeläinen (2023) also mentions activating the markets in the United States more as one long-term goal for The Holy.

All in all, the responses indicate some signs of recovery, but at the same time, many resources have been lost. This development is supported by recent studies from the music industry, which analyze that the industry's recovery is still in progress, and in the live sector, the recovery can even take a few years (Jalonon, 2022; Music Finland, 2021a).

To summarize the data discussion and as a response to the second sub-research question, “How did the COVID-19 pandemic affect the artist export careers?” I present three main points:

- 1) The findings show that various already achieved resources and opportunities to improve artist export readiness were lost during the pandemic. Live export was the artist export core area that suffered the most, but the pandemic also disrupted most artists’ album release schedules.
- 2) During the pandemic, support was received for export activities, maintaining the background companies' operations, or covering the artist's living expenses. Support was received from the public and private sectors, including new forms of support created during the pandemic and already existing export subsidies. However, the results indicate that on some occasions, the support was inadequate.
- 3) The findings suggest some signs of recovery. However, in many respects, the recovery is still in progress.

4.3 Restarting Artist Export Careers

In this chapter, I discuss the results of my first main research question, “What are the key post-pandemic changes in popular music artist export?” in two parts. The first part analyzes the post-pandemic challenges, and the second part the post-pandemic opportunities in artist export.

4.3.1 Post-pandemic Challenges in Artist Export

As presented in sub-chapters 2.3.1 and 2.3.2 of the thematic framework, various post-pandemic changes have been identified in the music and music export industries currently changing and challenging the industry operations (see e.g. Jalonen, 2022; Music Finland, 2022d). In this sub-chapter, I present the five main challenges identified from the responses: changed audience behaviors, increased competition, loss of staff, making up for lost opportunities, and an atmosphere of uncertainty and unpredictability. Besides challenges, a thought of basic principles of artist export remaining unchanged also emerged.

Changed audience behaviors

The theme of changed audience behaviors was the challenge most mentioned in the interviews. Linnankoski (2023) mentions audiences' changed behavior as one of the current challenges for artist export. He describes how fewer people go to concerts than before, tickets are bought closer to the concert, and especially new artists sell worse. Linnankoski adds that, in addition to Finland, a similar signal has also come from Germany and all over Europe. He says it is difficult to analyze how long-lasting the change will be. Vauhkonen (2023) agrees by stating that, at the moment, it is difficult to get the audience to the concerts, and tickets are bought until the last minute.

The same opinion is also shared by Laitinen (2023), who analyzes the topic as follows:

The COVID crisis did leave a permanent change in people's concert behavior regarding ticket sales. If it used to be a big trick to sell out an arena or a stadium in days, it still happened all the time. Now it feels like it will never happen again. In a way, I understand this consumer behavior: when you have to move the festival ticket for enough summers, from now on, you buy it closer to the event. Maybe it will not necessarily bring significant changes for us as a record company. But the gigs, which are nevertheless also a highly essential part of the record export, have been left with unpredictability or uncertainty.

(Laitinen, 2023)

Laitinen's comment suggests that the changed audience behavior regarding changes in ticket purchasing would be a more permanent phenomenon. Laitinen adds that the share of advance ticket sales, in particular, has also weakened, and this equation brings uncertainty to the planning and profitability of live export. He continues that this leads to a situation where trust and confirmation must again be sought from faith in one's work and the music.

Similarly, Lehti (2023) points out that a change has happened in audience behavior but analyses it also through increased competition. According to Lehti, the competition for audiences has increased, and the artist must work harder to get the audiences physically to the gigs. However, he continues that audiences also became more cautious and used to spend their time in other ways during the pandemic.

Overall, the responses align with the results of several previous studies in Finland and Europe. These studies have identified changed audience behaviors, such as non-attendance and the slow return of audiences to events on a larger scale (e.g. Kinnunen, 2022; LiveDMA, 2023; Music Finland, 2021a) and last-minute ticket purchases (e.g. Kinnunen, 2022; LiveDMA, 2023), as current challenges for the music industry and its live sector. Since live performances are integral to artist export, the same challenges naturally affect the artist export field and the entire music industry.

Increased competition

Increased competition due to canceled performance opportunities during the pandemic was mentioned as a current challenge for export artists by Linnankoski (2023) and Lehti (2023). According to Linnankoski, there is currently a rush, for example, for the performance slots of showcase festivals. The competition has also increased because of new artists who entered the industry during the pandemic. However, Linnankoski believes that the rush and competition will eventually ease. This is in line with the results of the Music Industry Growth Strategy, where increased competition and accumulation of willing performers were identified as challenges but seen only as temporary and to be caused by the accumulated supply (Jalonen, 2022). Lehti agrees by stating that there is currently a lot of competition among artists for performances. The surplus of events, a characteristic of the post-pandemic time in the music industry mentioned in a study by Kinnunen (2022), was not mentioned in the interview responses. Instead, they highlighted the competition from the perspective of an individual artist.

Loss of staff

Vauhkonen (2023) describes that during the pandemic, particularly technical staff began to move from the music industry to other jobs. Jääskeläinen (2023) agrees by stating there has been a shortage of technical personnel. For example, he describes that this was seen in the summer of 2022 when at least five regular band technicians were on the verge of burnout and caught up in bigger projects. In addition, Jääskeläinen says that in Germany, the band's agent, who had worked with them since the beginning, changed because they had left the industry. Fortunately, only the person was changed, and the agency remained the band's partner.

The experiences of Vauhkonen and Jääskeläinen are similar to the results of several studies in Finland (Jalonen, 2022; Kinnunen, 2022; Music Finland, 2021a) and other Europe (Edwards, 2022; LiveDMA, 2023), where the loss of skilled staff has been identified as a current challenge for the music industry. Further, the Music Industry Growth Strategy identified the music industry's labor shortage and the loss of skills and knowledge as longer-term challenges (Jalonen, 2022, p. 16-17). Although the theme emerged in this study, its permanence was not discussed. However, as the music export industry is only starting to recover from the pandemic, it is still difficult to know which changes are short-term and transitory and which are more permanent and part of the so-called new normal. The predictability of the phenomena is thus still weak.

Making up for lost opportunities

In addition, Linnankoski (2023) worries about getting back the resources lost during the pandemic. What he considers a challenge for export artists is that opportunities or momentum that existed before the pandemic, such as interested partners or already arranged gigs, cannot be regained, and export operations will not recover. Linnankoski's concern is very relevant. Even if some of the lost opportunities could be restored, they may not be able to be utilized according to the original plan due to the changed circumstances.

An atmosphere of uncertainty and unpredictability

According to the results of the Music Industry Barometer 2022 (Music Finland, 2022d), the music industry currently suffers from general prudence and uncertainty due to the uncertain and still-recovering economic situation, which is seen, for example, as a weakening of the investment and risk-taking ability. A similar theme can be identified from the interview responses regarding the careers of individual export artists.

According to Jääskeläinen (2023), the biggest challenge in artist export is the general unpredictability, which has increased with the pandemic. Uncertainty can be seen, for example, in getting funding for export operations. Jääskeläinen describes that, at the moment, exporting feels quite lonely, and solutions for different problems must be searched for alone. Jääskeläinen adds that this leads to not daring to take risks like before, and many things can be undone.

Vauhkonen (2023) describes that prudence has increased, and the ability to take risks has decreased, making exporting financially more challenging and anticipation more difficult. Vauhkonen continues that international partners in the export industry should have their faith restored in the recovery of music exports. She believes the industry is currently discouraged and should gain new enthusiasm again.

The uncertainty was also analyzed to be caused by the uncertain economic situation and price rise. Although the interviews primarily discussed the effects of the pandemic on artist exports, it must be noted that the war in Ukraine has naturally also affected the rise in prices alongside the pandemic. Jääskeläinen (2023) points out that the price rise is a significant threat and challenge for artist export and is already making live export particularly difficult. He says that for live export, it will mean even more precise planning; for example, doing one-off gigs will be more difficult. Jääskeläinen adds that this challenge is especially emphasized in exports from Finland because artists have to leave Finland by plane or ship due to its geographically remote location. In addition to Jääskeläinen, Vauhkonen (2023) also mentions the economic uncertainty currently affecting artist export and its possibilities.

A general atmosphere of uncertainty was also noticeable in the answers of other interviewees in connection with other mentioned challenges. Thus, uncertainty and unpredictability can be seen to unite all the current challenges of the artist export industry.

The basic principles remain unchanged

Despite the many changes and challenges in the sector, both Linnankoski (2023) and Lehti (2023) state that the basic principles of artist export have remained the same. Lehti describes that the biggest challenges for export artists are still the same as they have always been: Does the artist's songs resonate with the audience, and does the artist even get to a situation where they can try this? According to Lehti, the challenge is getting visibility so people can find the artist.

Lastly, the theme of sustainability was named an important development target of the music industry in the Music Industry Barometer 2022 (Music Finland, 2022d). Perhaps surprisingly, the theme of sustainability was visible in the interviews only when

speaking from the perspectives of economic sustainability in live export and the challenging earning logic of the artist export business.

It is noteworthy that all the post-pandemic challenges mentioned in the interview responses have already been identified as current challenges in previous studies regarding not just the artist export industry but the entire live music and music industries (e.g. Jalonen, 2022; Kinnunen, 2021; LiveDMA, 2023; Music Finland, 2022d, 2021a). Thus, no novel post-COVID challenges characteristic only to artist export emerged. This indicates that the post-pandemic challenges in the operating environment of artist export are similar to those in the entire music industry.

However, I would like to point out that in the interview responses, the challenges were primarily related to the live music export. The equation, in which live export has suffered significantly during the pandemic and is now affected by several novel post-pandemic phenomena, is challenging for artist export. This is important to recognize in the industry. The challenging situation of the live export business also emerged in the findings related to the support needed for post-pandemic artist export. This will be further discussed in Chapter 4.4.

4.3.2 Post-pandemic Opportunities in Artist Export

In contrast to challenges, the interviewees found it difficult to recognize that the pandemic would have created any changes that could be considered new opportunities for the artist export business. In fact, Jääskeläinen (2023) and Linnankoski (2023) could not mention any. Laitinen (2023), Lehti (2023), and Vauhkonen (2023) each mentioned only one theme as a new opportunity. However, this theme was common for all of them and was related to the digitalization accelerated by the pandemic. The theme was described as an opportunity concerning music creation, remote working, and networking.

Laitinen (2023) analyses that remote working, specifically in music creation, such as virtual sessions, is here to stay. Lehti (2023) agrees but also points out the creation of networks and remote meetings as issues that can positively affect the industry. Lehti continues that appearing on social media can also be more natural now that we are used to using different platforms. Similarly, Vauhkonen (2023) lists remote working, virtual

communication, and meetings as things she sees to create new opportunities for artist export business.

On the other hand, digitalization was seen as a minor opportunity in connection to live-streaming concerts. Laitinen and Vauhkonen describe that they mainly see the future of live-stream concerts as an add-on tool alongside live shows. However, Vauhkonen points out that streaming concerts could serve as a first impression of the artist instead of organizing physical export events but would not replace the live experiences. The interviewees' views align with the interview results of the Music Industry Growth Strategy, where live-stream concerts were not considered growth enablers for the music industry, but different hybrid solutions were seen as a possibility (Jalonen, 2022).

To summarize the results and discussion of the first main research question, “What are the key post-pandemic changes in popular music artist export?” I present the following three points:

- 1) The findings suggest that the COVID-19 pandemic has brought many changes to the operating environment of artist export. The majority of the post-pandemic changes are phenomena that challenge the current artist export business, whereas very few new opportunities were identified. Changes in audience behavior, increased competition among artists, the difficulty of making up for lost opportunities, and loss of staff emerged as current challenges. In addition, an atmosphere of general uncertainty, unpredictability, reduced risk-taking ability, and prudence was identified and analyzed as caused by the uncertain economic situation, rising prices, uncertain financing, and lack of enthusiasm in the industry. The only new opportunity was seen with digitalization.
- 2) All the post-pandemic challenges that emerged in this study have been identified as current challenges in previous studies from the music industry (e.g. Jalonen, 2022; Kinnunen, 2021; LiveDMA, 2023; Music Finland, 2022d, 2021a). Thus, the findings suggest that the post-pandemic challenges in artist export are similar to those in the entire music industry.
- 3) An era of uncertainty: Overall, the findings refer to a general increase in uncertainty, a decrease in predictability, and difficulty in planning. The situation

is challenging for the artist export careers, which are already fragile after the loss of resources during the pandemic and are now further challenged by several post-pandemic phenomena.

4.4 Post-pandemic Support

The second main research question of this thesis was: What kind of support is needed to restart artist export careers, and who should provide and enable these forms of support? In this chapter, I first look at the support the case artists have already received after the pandemic. After that, I discuss their current support needs in two parts: the first part discusses financial support, and the second part networks, knowledge, and industry attitudes. Finally, I asked who should enable and provide these forms of support to popular music export artists. Interviewees' views on this question are presented and discussed in the last sub-chapter, 4.4.3.

An artist and their team are not the only ones to influence the success of an artist's export career. As stated in the report by the European Commission (2019), the music export capacity of an artist depends on the whole existing local music sector ecosystem. It includes, among other things, available support and funding, access to international professional networks, supportive governmental policies, and the vital role of local music export offices (European Commission, 2019). Due to the earning logic of artist export, export careers can rely on various subsidies for many years before operations reach a cost-effective and profitable level. A sufficient level of export capacity is achieved through support structures that meet the needs of export artists in this new post-pandemic operating environment. Especially in the current uncertain and changed operating environment described in the previous chapter 4.3, uncertainty can be reduced by providing export artists with the necessary support to restart their careers.

Every case artist has already gotten some export support for their activities after the pandemic restrictions eased. The export activity has still been relatively small, but the received subsidies indicate that it was already possible to restart artist export in 2022. The subsidies received are also proportional to the extent of export activity after the pandemic. The familiar support channels and export strategies created before the pandemic were recognizable in the subsidies applied for and received.

For example, Laitinen (2023) mentions that ALMA has already done a small mini-tour and one radio promo tour abroad with an eye on future export career plans after the pandemic. As mentioned earlier, in the case of ALMA, one of the main principles of building the export career has been the strong participation of international partners as financiers of export activities. Similarly, Laitinen mentions that industry partners, such as live agencies and record companies, financed the mini and the promo tours. In addition, Laitinen says that Takeoff export support (*Takeoff vientituki*) was applied but not received from Music Finland. According to Laitinen, there had been a large number of applicants for the support.

Both The Holy and Jesse Markin have received live export support from Music Finland, the main supporter of their export activities before the pandemic (Jääskeläinen, 2023; Linnankoski, 2023). According to Vauhkonen (2023), Stamlna received financial support for their only live performance abroad in the summer of 2022 from MES (The Finnish Music Foundation). Moreover, Lehti (2023) says that in 2022, Lxandra received a special grant from the Ministry of Education and Culture for cultural exports. This grant could be allocated to, for example, performance expenses and various purchase services (Lehti, 2023).

Thus, the support applied for and received so far has been a combination of public support, industry support, and the contribution of private interest organizations, such as Music Finland. The support was received the most for live export operations.

4.4.1 Financial Support

Financial support emerged as the most crucial support for post-pandemic artist export. Once again, several interviewees pointed out the earning logic of artist export, also highlighted by Chen et al. (2021, p. 85), where investments and financial support are needed since financial returns can usually be seen only in the long run.

Laitinen (2023) emphasizes the high cost of live export and describes that especially going outside of Europe, such as the United States, will be a financially challenging equation for ALMA for a long time. Lehti (2023) and Vauhkonen (2023) also point out the problematic earning logic and high costs of live exporting. Vauhkonen adds that in addition to financial support, in live export, it is crucial to anticipate the purchasing

behavior of the audience of the concert destination in terms of tickets and merchandise sales. However, now that predicting the audience's purchasing behavior has become more complicated, I argue that the need for financial support for live export is even more crucial.

Besides live export, Linnankoski (2023) mentions marketing, Lehti marketing, and various purchasing services, and Vauhkonen hiring labor in the target market for marketing measures as areas needing financial support. A need for marketing support for music exporting also emerged in the responses of communities of Music Industry Barometer 2022 (Music Finland, 2022d). Jääskeläinen (2023) describes that long-term strategic financial support for development would be the most critical support for The Holy. With such support, the band would be able to allocate funding to the necessary activities freely, and it would enable long-term planning. According to Jääskeläinen, the support could be used for live export and marketing investments, for example, so that the band could get a foothold in both existing and new markets.

All artist representatives mention financial support as the most crucial support needed, except for Linnankoski, who lists financial support and creating opportunities to show the artist's talent as the two most important forms of support for Jesse Markin. The needs of the export artists correlate with the results of the Music Industry Barometer 2022, where the lack of financial recourses was named the biggest challenge for the future of music export (Music Finland, 2022d). Further, the results of this thesis emphasize the need for financial support with live export. Similarly, live export was also one of the two areas where financial support was most needed, according to the Music Industry Barometer 2022 (Music Finland, 2022d).

4.4.2 Networks, Knowledge, and Industry Attitudes

Networks

As discussed in sub-chapter 4.1.1 about case artists' teams before the pandemic and emphasized by several references (e.g. Chen et al., 2021, p. 80; Music Finland, 2017c; European Commission, 2019, p. 9-10), networks are an essential part of export artist's career and export readiness. Finding the right contacts was also listed as one post-pandemic challenge for the music export industry in the Music Industry Barometer 2022 (Music Finland, 2022d). However, the answers were quite different when asking

the artist representatives what support the artists currently need regarding networks and contacts. They reflected the stage and goals of each artist's export career.

According to Linnankoski (2023), Jesse Markin needs customized consulting and match-making to find new networks. He describes how similar active cooperation worked well already before the pandemic with Music Finland. Linnankoski adds that support is needed to create opportunities where the artist can get in front of the right people and thus have better chances of proceeding in their export career. Similarly, Lehti (2023) talks about customized networking, stating that networks alone will not work if the export product, i.e., the content, is not at the required level or the product and the contact meet.

Jääskeläinen (2023) agrees that every meeting where interests coincide is valuable, and the band is happy to accept help in this regard. He points out that The Holy would benefit from support in finding local and valuable contacts when targeting new export markets. Support for networks related to a new target market is also pointed out in the response of Laitinen (2023). Laitinen describes that ALMA's setup and networks are currently in order. Still, if the export procedures are to be done in the United States, it would be helpful to get assistance to find a local entity with whom it would be easier to handle the tour planning and administrative side.

In addition, Vauhkonen (2023) points out gatekeepers responsible for playlists on various digital platforms as contacts that would be useful to reach. By getting in touch with these people, the band would get more audiences and, thus, new performance opportunities.

Knowledge

Each territory will have its own demands such as visa regulations, appropriate ground support or specialist skills.

(Chen et al., 2021, p. 80)

When asked about the need for support for new knowledge and competence, the theme of novel target markets of artist export emerged in the responses of Linnankoski (2023), Jääskeläinen (2023) and Vauhkonen (2023). Linnankoski (2023) and Jääskeläinen

(2023) mention the bureaucracy and visa regulations related to entering the US market, where additional information and assistance could be needed. In addition, Jääskeläinen lists post-Brexit Great Britain and former Eastern Bloc countries such as Poland as regions whose current market situation would be helpful to get updated information on. Jääskeläinen continues that information could be available more broadly about different market areas for artist export and their possibilities. He describes how in the case of The Holy, the market areas were selected mainly according to Music Finland's strategy and focused on the German-speaking area, and how, for instance, there was not much talk about possibilities in Asian markets.

Vauhkonen (2023), on the other hand, points out that new research data and updated information about which new market areas could be potential for a metal genre band would be useful. She adds that aiming at new target markets would require local contacts who know the market area and can help with planning. However, Vauhkonen emphasizes that if the band needs help with, for example, production solutions or networking, the primary source of support is other bands and organizations that have exported, and not, for example, Music Finland. In Vauhkonen's opinion, the most important lesson can be learned from those who have gone through the same process and reached a point where they can profit from tours.

Competence related to new target markets is not necessarily an urgent need directly related to the post-pandemic era. However, it is interesting that the theme emerged in several interviews.

In addition to new target markets, Lehti (2023) points out more marketing knowledge, especially about storytelling and productization, to make the artist and export product stand out and resonate with the public. Productization expertise also emerged as a current challenge in the Music Industry Barometer responses (Music Finland, 2022d). Laitinen (2023) mentions that they do not need support with new knowledge. Instead, the export career with ALMA has been made long enough to find the necessary competence through current contacts and partners.

Industry Attitudes

The interviewees were also asked if there could be a need for support regarding the appreciation of the artist export industry and the attitude towards it, which would also benefit the export careers of the case artists. The question raised thoughts about the golden cage phenomenon that has affected the domestic music export industry for several years (e.g. Mattila, 2023; Music Finland, 2017d) and the need for a new generation of export artists and new Finnish success stories. The golden cage problem was also highlighted as a growth barrier for the music export industry in the interviews on the Music Industry Growth Strategy (Jalonen, 2022).

All interviewees agreed that there is a need for new artists who want to aim for international markets. With new export artists, there would be new success stories that would once again inspire future artists to strive for an international career. Vauhkonen (2023) and Jääskeläinen (2023) point out that there should be new success stories from different genres to pave the way for others. Thus, a new export artist can find an example in their own genre to ask for advice and get synergistic benefits, such as knowledge and contacts. Jääskeläinen (2023) describes the current situation as follows:

We would need new artists who would generally like to leave [Finland]. In my opinion, that is Finland's biggest stumbling block. We make them [artist careers] for the Finnish market, which is really small. We need some kind of artist refineries that develop artists for the global market. In my opinion, there will also be synergistic benefits when someone already knows how this [artist export] works. At least we have had to start from scratch. There are no examples. (Jääskeläinen, 2023)

Laitinen (2023) and Linnankoski (2023) point out that too much time has passed since the previous turn of the millennium success stories. According to Linnankoski, the domestic market should appreciate export artists or English-speaking artists more. Laitinen also emphasizes that the industry could be more encouraging in general and that, for example, in the case of ALMA, the media seems to always pick up on failures. Lehti (2023) approaches the need for novel export success stories to increase the attractiveness of the entire industry. He explains how music export would need success

stories to make the sector attractive to new talents. This would bring new skills and workers to the industry, benefiting the entire industry and its artists.

The Finnish music export industry last experienced a real export boom at the turn of the millennium, when several international success stories emerged, such as HIM, The Rasmus, and Nightwish, and more systematic support for exporting popular music began (Mäkelä, 2008). Luukka (2007) argued that the state's interest in supporting cultural exports after the turn of the millennium resulted from Finnish international success stories in rhythm music, in particular. Mäkelä (2008) argued that even if state support increases, the music industry's contribution will still be at least significant. The results of this research point out the need for a new export boom and new success stories in popular music artist export to increase the general attractiveness of the industry. However, I argue that in the current situation, the Finnish music export industry does not have the opportunity to first wait for new success stories. Instead, more support and a change in the industry mindset are needed first.

4.4.3 Support Providers

The interviewees had different views on who in Finland should offer and enable support for artist export. First of all, Jääskeläinen (2023) and Linnankoski (2023) emphasize the role and responsibility of Music Finland and see the organization as the primary supporter of Finnish artist export in the future as well. Linnankoski highlights the organization's role, particularly with match-making, organizing export events, and creating opportunities for emerging export artists. Jääskeläinen points out the exceptional role of Music Finland as a support organization that provides both financial and other forms of support under the same roof.

Laitinen (2023) agrees that it is exceptional and great that Finland has an organization like Music Finland, which is admired abroad. He also mentions that the support received from the organization has also been decisive for ALMA's career. However, according to Laitinen, the Finnish artist export cannot rely solely on public support, and he would like to diversify the support field. Laitinen describes how novel financing models could be created for the industry, making the business profitable also without public support. For instance, funding could come from the private sector, be based on an investment against a share, or combine private and public support. Laitinen continues

that exporting is financially challenging, and live export, which is the most financially challenging, lacks a clear responsible partner who should finance it (cf. record companies' responsibility for releases). He analyses that the industry needs creative and new means to find someone who wants to join the process. Laitinen concludes that in order to achieve this, the industry needs new export artists and the attractiveness that such new models can be born. This kind of structural reform and the need to increase the investment ability in the music export industry were also recognized as development areas in the Music Industry Growth Strategy (Jalonen, 2022).

Lehti (2023) finds things to develop in both the public and private sectors. He hopes that the industry's attractiveness, the understanding as a business, and the understanding of its value creation would give the public administration a reason to channel more support for music export, specifically through Business Finland and The Ministry of Economic Affairs and Employment (TEM). A similar thought can be identified in the responses to the Music Industry Growth Strategy, where the role of Business Finland in channeling novel support forms for music export also emerged (Jalonen, 2022).

In the private sector, Lehti (2023) sees opportunities to develop private investment in the music export industry. According to Lehti, this is still challenging because it is difficult for the music industry to determine the value of its assets, such as the value of copyright as an investment. The same theme was discussed in the Music Industry Growth Strategy in relation to new potential investment targets within the music export industry that are not yet that common in Finland (Jalonen, 2022). For instance, Lehti mentions the audiovisual sector, where this activity already exists. For this, the industry would also need a new kind of know-how. However, Lehti adds that the current support systems are relatively functional for a single export artist if they succeed at getting support from them.

Vauhkonen (2023) emphasizes the role of the government and public support by stating that, especially after the “chaos” of the COVID era, the government should see the music industry as an industry and support it. Vauhkonen describes how music export is a business where trade is conducted all the time, and the government must understand this and finance the sector.

The discourse to which both Lehti (2023) and Vauhkonen (2023) refer, where the Finnish state does not recognize the music industry as an actual industry that includes significant business, is supported by previous literature. There has been a broader discussion of the phenomenon within the industry that accelerated during the pandemic (e.g. Muusikkojen liitto, 2021).

Moreover, Vauhkonen (2023) points out that the support processes should be examined critically in terms of the criteria by which the money is distributed and whether it goes to the right parties. On the other hand, applicants should do their preliminary work properly and examine whether their export plan is realistic. Similarly, a better evaluation of the effectiveness of using subsidies was highlighted in the responses about financing in the Music Industry Growth Strategy (Jalonen, 2022).

Lastly, Vauhkonen (2023), Jääskeläinen (2023), and Linnankoski (2023) mention that even if support for export activities can be applied from organizations other than Music Finland, such as MES, according to their experience, support cannot be obtained from both. Their experience is confirmed by the information from the website of MES, where according to the MES application criteria, projects can not receive funding if they have already received support for the same project through Music Finland (The Finnish Music Foundation, 2023b). According to Jääskeläinen, support is rarely obtained from MES. Thus, I argue that it can put pressure on export subsidies for Music Finland if there are few support channels or if they are mutually exclusive and leave the responsibility of supporting music export primarily to Music Finland.

The development of public and private support structures can be seen as corresponding to the need for financial support in the sector. The Finnish music export industry, with individual export artists as a part of it, seems to need a more diverse and innovative financing and investment system involving a more versatile set of stakeholders to meet the needs of a sector that is characterized by large investments. The state of public funding is also strongly reflected in Music Finland's operational possibilities, as the state is its largest financier (Music Finland, 2022c). Instead, the findings suggest that Music Finland and the knowledge obtained and shared from industry colleagues and other export artists could best meet the support needs regarding networks and new knowledge. However, the golden cage phenomenon identified in this study and earlier

by Jalonen (2022), Music Finland (2017d), and Mattila (2023) has been one influencing factor that has resulted in the lack of new international success stories within the domestic artist export. Therefore, I argue that, in various genres, this challenge is currently preventing the synergetic benefits and exchange of resources from happening and, thus, the industry's growth.

The discussion of the data to the second main research question, “What kind of support is needed to restart artist export careers, and who should provide and enable these forms of support?” is summarized below in four points:

- 1) The findings indicate that the most needed support for restarting artist export careers after the COVID-19 pandemic is financial support, especially in connection to live music export.
- 2) Regarding networks and contacts, the responses pointed out a need for customized support and finding valuable networks, especially in new target markets. The topic of new target markets also emerged the most regarding the need for new knowledge.
- 3) New international success stories are needed to attract new export artists and create synergetic benefits for the domestic music export industry. However, this would require a change in the current industry mindset that still suffers from the so-called golden cage phenomenon.
- 4) The study revealed different opinions about who should enable and provide the required support for popular music artist export. On the one hand, the stronger role of public support and the state was called for, where the music export industry could be better recognized as an industry and a recipient of support under TEM and Business Finland. On the other hand, creating novel financing and investing models in the private sector was seen as a potential development area. In addition, the role of Music Finland as the main supporter of Finnish music and artist export was emphasized. All in all, the findings indicate a need to diversify the support field.

5 CONCLUSIONS

In the final chapter of this thesis, I present the study's conclusions, answer the research questions and present limitations and suggestions for further research.

5.1 Conclusions

In this thesis, I have studied the effects of the COVID-19 pandemic on Finnish popular music export artists from the perspective of restarting export careers. The research topic emerged from a personal interest in understanding the music export business and the urgent need to research a current phenomenon, the effects of the COVID-19 pandemic. As the music export industry is currently recovering from the pandemic, I considered studying the effects of the pandemic from the perspective of restarting export careers as the most appropriate to produce relevant and valuable knowledge for the field to enable its recovery and growth. In addition, I aimed to increase understanding and generate new insights into the topic from the perspective of artist export, especially individual export artists whose perspectives and experiences have yet to be studied much. The thesis was conducted in collaboration with Music Finland.

I interviewed five representatives of Finnish popular music export artists. The selected case artists represented a set of different popular music genres but were all exporters in the growth stage of their export careers. With the interviews, I aimed to gather insights about the individual experiences and needs of the five artists and their teams. Artists' representatives were selected to be interviewed to get the broadest view and knowledge of the topic.

At the beginning of this thesis, I set two main research questions for this study. In addition, I set two sub-research questions to provide background and support to the main research questions. In the first sub-research question, I mapped out the pre-pandemic state of the artists' export careers. It can be concluded that the career path of every export artist was unique: in a different stage, approached with different strategies, and made with various teams and goals. Still, the results highlighted that a challenging earning logic, a need for international partners from export target areas, an

essential role of live export and showcase performances, and dependency on subsidies characterize the artist export business.

In the second sub-research question, I aimed to understand the effects of the COVID-19 pandemic on artists' export careers. The findings show that multiple achieved resources and opportunities for artist export were lost during the pandemic. The most affected was live music export which, according to Music Finland (2020, 2021b, 2022a), was also the most affected core area by the pandemic in the entire Finnish music export industry. The artists had received support during the pandemic from both the public and private sectors, but the findings suggest that on some occasions, the support was inadequate. Although some signs of recovery could be identified, the effects of the pandemic are still visible, and the recovery of export careers is still in progress.

My first main research question was: What are the key post-pandemic changes in popular music artist export? The findings suggest that the post-pandemic time in popular music artist export is characterized by increased uncertainty, which manifests in various challenges in the field. Changed audience behaviors, increased competition, the difficulty of making up for lost opportunities, and loss of staff emerged as current challenges. On the other hand, the only new opportunity was identified in digitalization regarding creation, networking, and remote work. The post-pandemic challenges that emerged in this study have already been identified as current challenges for the entire music industry in previous studies (e.g. Jalonen, 2022; Kinnunen, 2021; LiveDMA, 2023; Music Finland, 2022d, 2021a). Thus, the findings indicate that the post-pandemic challenges in the operating environment of artist export are similar to those in the entire music industry. In addition, the findings emphasized challenges related to live music export.

Lastly, in the second main research question, I aimed to understand what support is needed to restart the artist export careers and who should provide this support. The need for financial support emerged as the most crucial for the post-pandemic artist export, especially concerning live music export. This finding correlates with the results of the Music Industry Barometer 2022, where the lack of financial resources was identified as currently the biggest challenge for music export, and live music export was one of the two most crucial support targets (Music Finland, 2022d). Regarding networks, the need

for customized support and support for finding valuable contacts in novel target markets emerged. Similarly, new knowledge was most needed in relation to new target markets.

Views on who should provide the different forms of support varied, but the findings indicate a need to diversify the support field of popular music artist export. The findings suggest that the need for financial support could be met by the joint contribution of public and private support structures, both in which areas for development were identified. On the other hand, the support need for networks and knowledge could be met best by the contribution of Music Finland and industry peers and colleagues. However, the golden cage phenomenon and the lack of new international breakthroughs from different genres currently hinder the possibilities for utilizing the full potential of synergies and assistance from other industry colleagues.

I believe that with this research, I have produced new and valuable knowledge in the field of music export. This research has complemented previous studies about the effects of the COVID-19 pandemic on the music export industry and its recovery by bringing out the perspective of popular music artist export and especially the experiences of individual export artists. However, not all the effects of the pandemic can be identified yet, and new studies are needed in the future, as discussed in the next sub-chapter, 5.2. In addition, I hope this research has increased the understanding of the current situation in the artist export field in a way that Music Finland and other industry operators can consider useful. Music Finland already supports domestic popular music export artists in several ways. However, I hope this research can provide tools for developing those support forms and inspire further studies on the topic.

5.2 Limitations and Suggestions for Further Research

During this thesis process, various opportunities and needs for further research emerged. Since the Finnish music export industry is only at the beginning of recovery from the COVID-19 pandemic and the long-term effects of the pandemic cannot be fully identified, it is evident that further research is needed on all sectors of the Finnish music export industry for a more in-depth analysis of the situation and the processes of recovery and growth within the industry.

From the point of view of artist export, this study can be considered an opening that could only explore the topic through five unique cases, and thus, it can be complemented with novel studies. First, it could be interesting to research the changes and support needs brought by the pandemic on export artists from other genres, such as folk, jazz, or classical music, and possibly also compare and contrast them to the results of this study and other previous studies. On the other hand, the topic could be studied from the perspective of export artists from one specific sub-genre of popular music.

Secondly, an interesting research object could be export artists representing a different career stage, such as artists who started their export operations during or after the pandemic. Their export careers are similarly still highly dependent on support, but the starting point of their export careers would be very different.

As already addressed as one of the limitations of this study, I selected the cases of this study among the grant receivers of Music Finland. Thus, the voices of those who have yet to apply for or receive support from Music Finland were not heard. One suggestion for further research would be to study the effects of the pandemic and the support needs of these export artists.

Lastly, research with a larger sample size could produce more generalizable findings from the field of artist export.

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APPENDICES

Interview questions for Martin Linnankoski (5.1.2023), Teemu Laitinen (10.1.2023), Eero Jääskeläinen (16.1.2023), Katja Vauhkonen (17.1.2023), and Pekka Lehti (18.1.2023). Interviews were held in Finnish, and the questions are translated into English for the purpose of the appendix. The question body was preliminary and changed slightly in each interview.

Finnish

Taustatiedot

1. Mikä on roolisi ja työnkuvasi organisaatiossasi?
2. Mikä on roolisi ja työnkuvasi (*artistin nimi*):n artistivientitoiminnassa?
3. Kertoisitko lyhyesti artistin taustoista (esim. laulukieli, musiikkityyli, kokoonpano, milloin aloittanut artistiuran, julkaisut)?

Ennen pandemiaa

4. Kerro lyhyesti artistin vientitoiminnasta ja miten artistivientiä tuettiin ennen pandemiaa? *Vientituilla voidaan tarkoittaa laajasti erilaisia vientiuran tukemisen muotoja liittyen esimerkiksi rahalliseen tukeen, verkostoihin ja kontakteihin, osaamiseen, tietotaitoon ja yleiseen asenneilmapiiriin ja arvostukseen.*
 - a. Tuliko kansainvälisestä toiminnasta rahaa ennen pandemiaa ja mistä se kertyi, jos kertyi?
 - b. Millaisella organisaatiolla vientitoimintaa tehtiin (esim. yhteistyökumppanit ulkomailla, kotimaiset taustajoukot)
 - c. Mitkä olivat vientiuran tulevaisuuden suunnitelmat ennen pandemian alkamista?

Pandemia-aika

5. Kuvaille vapaasti, millaisia vaikutuksia koronapandemialla on ollut artistin vientiuraan?
6. Miten artistin vientiuraa tuettiin pandemian aikana? Mistä saatiin tukea?
 - a. Oltiin saatu tukimuotoihin tyytyväisiä? Miksi oltiin tai miksi ei oltu?

Vientiuran uudelleenkäynnistäminen

7. Mikä on artistin vientiuran tilanne nyt – onko tullut selkeitä muutoksia esimerkiksi taustajoukkoihin, rahoitukseen, yhteistyökumppaneihin tai tavoitteisiin verrattuna pandemiaa edeltäneeseen aikaan?
8. Mitkä ovat pandemian tuomat keskeisimmät toimintaympäristön muutokset populaarimusiikin artistivientiin?
9. Mitkä ovat mielestäsi pandemian jälkeen keskeisimmät haasteet populaarimusiikin artistiviennille?

- a. Entä uudet mahdollisuudet?
- 10. Millaisia suunnitelmia ja tavoitteita artistin vientiuran uudelleenkäynnistämiseksi on tällä hetkellä?
 - a. Miten vientiura on palautunut pandemian jälkeen/rajoitusten kevennyttyä?
- 11. Miten artistin vientiuraa on jo tuettu pandemiarajoitusten kevennyttyä?
- 12. Millaista tukea artistin vientiuralle tarvittaisiin tällä hetkellä seuraavissa osa-alueissa, jotta nämä mainitut suunnitelmat ja tavoitteet voidaan saavuttaa?
Esimerkit voivat olla myös käytännönläheisiä ja spesifejä tarpeita.
 - a. rahoitus/rahallinen tuki
 - b. verkostot ja kontaktit
 - c. osaaminen ja tietotaito
 - d. alan asenteet ja arvostus
 - e. muu tuki
- 13. Mikä näistä tuista on mielestäsi kaikista tärkein ja oleellisin ja miksi?
- 14. Kenen mielestäsi tulisi tarjota tai mahdollistaa näitä erilaisia tukia?
- 15. Tiedätkö tarjoaako jo jokin taho Suomessa mainitsemiasi tukimuotoja?
- 16. Haluaisitko vielä lisätä jotakin, mitä en mahdollisesti ole aiheeseen liittyen kysynyt?

English

Background information

1. What is your role and job description in your organization?
2. What is your role and job description in the artist export operations of (*artist's name*)?
3. Could you briefly tell us about the artist's background (e.g., singing language, genre, line-up, when the artist's career started, and publications)?

Before the pandemic

4. Tell me briefly about the artist's export activities and how artist export was supported before the pandemic.

Export support can mean various forms of support for an export career, such as financial support, networks and contacts, expertise, know-how, and general attitude and appreciation.

- a. Did international operations generate money before the pandemic, and where did the money come from if it did?
- b. What kind of organization was the export activity carried out with (e.g., partners abroad, domestic background forces)?
- c. What were your plans for the future of the export career before the pandemic started?

During the pandemic

5. Please describe freely what kind of effects the COVID-19 pandemic has had on the artist's export career.
6. How was the artist's export career supported during the pandemic? Where did the support come from?
 - a. Were you satisfied with the forms of support received? Why were you or were you not?

Restarting the export career

7. What is the situation of the artist's export career now - have there been any apparent changes in, for example, background groups, financing, partners, or goals compared to the time before the pandemic?
8. What are the key changes in the operating environment brought by the pandemic to popular music artist export?
9. What are the key post-pandemic challenges for popular music artist export?
 - a. What about key new opportunities?
10. What plans and goals are for restarting the artist's export career?
 - a. How has the export career recovered after the pandemic/after the restrictions were eased?
11. How has the artist's export career been supported after the pandemic restrictions have been eased?
12. What support would currently be needed for the artist's export career in the following areas to achieve these plans and goals?
Examples can also be practical and specific needs.
 - a. funding/financial support
 - b. networks and contacts
 - c. competence and know-how
 - d. industry attitudes and appreciation
 - e. other support
13. Which of these forms of support do you think is the most important and essential, and why?
14. Who do you think should offer or enable these different forms of support?
15. Do you know if any entity in Finland already offers the forms of support you mentioned?
16. Is there anything else you would like to add that I may not have asked about the topic?