The impact of the COVID-19 pandemic on the music industry: evidence from Kazakhstan

Article

Accepted Version

Kalyuzhnova, Y. ORCID: https://orcid.org/0000-0002-5781-8837, Khlystova, O. and Imayo, A. (2021) The impact of the COVID-19 pandemic on the music industry: evidence from Kazakhstan. Journal of International Relations Theory and World Politics, 19 (3). pp. 147-156. ISSN 1811-2773 doi: 10.17994/IT.2021.19.3.66.3 Available at https://centaur.reading.ac.uk/103949/

Published version at: http://intertrends.ru/system/Doc/ArticlePdf/2335/X28ay6IOZr.pdf
Identification Number/DOI: 10.17994/IT.2021.19.3.66.3 <https://doi.org/10.17994/IT.2021.19.3.66.3>

Publisher: Scientific and Educational Forum on International Relations

THE IMPACT OF THE COVID-19 PANDEMIC ON THE MUSIC INDUSTRY: EVIDENCE FROM KAZAKHSTAN

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Abstract

The COVID-19 pandemic has had an overwhelmingly negative effect on the music industry in Kazakhstan. Music events had to close or cancel their performances, rendered unable to operate as usual. This sector has been struggling to cope with the pandemic because of the lack of the government support, digital skills, and difficulties in accessing software to record concerts or perform online. Given the need in the literature for surveys of music industry representatives on the impact of the COVID-19 pandemic in different geographic areas, this study utilised the survey approach. During the period of February-June 2021, we approached 102 representatives of the music industry across Kazakhstan. We have collected data on what impact the COVID-19 pandemic has had on the music industry in Kazakhstan. The results of the survey demonstrate that the music industry stakeholders have lost a significant amount of income due to the COVID-19 pandemic. Our study has several policy implications that could be considered when developing the recovery strategy for the music industry in Kazakhstan. The policy makers need to consider the development of financial schemes to support artists in the time of the pandemic. It would be helpful to create grants to support the creative artists who are particularly struggling from the negative consequences of the COVID-19 pandemic. Our results have demonstrated that it would be necessary to unite academics and musicians in associations that could advise them on the possibilities of obtaining grants and special support from state and independent foundations.

Keywords: Music Industry; Covid-19 Pandemic; Kazakhstan.

The creative industries have continued their growth during the recent decade and could grow significantly more as technology advances and incomes increase in transition economies. The creative industries are particularly important for culture and creativity to generate economic growth (Casson and Godley, 2000; Bosma and Sternberg, 2014). With minimal production and distribution costs, creative sectors help people escape poverty and also bolster cross-cultural exchange (World Economic Forum, 2015). The year 2021has been declared the “International year of the creative economy for sustainable development”.[1] Firms, regions, and countries will join

[1] United Nations. International Year of Creative Economy for Sustainable Development. – 2021. 2019. URL: https://unctad.org/topic/trade-analysis/creative-economy-programme/2021-year-of-the-creative-economy(access: 27.05.2021).

efforts to promote sustained and inclusive economic growth, foster innovation, and create entrepreneurial opportunities.

Prior research has emphasized a need to support developing countries and countries with economies in transition (Kalyuzhnova, 2008; Kalyuzhnova and Nygaard, 2008) in diversifying production and exports, thus reducing poverty and unemployment by creating new sustainable growth areas: in particular, creative industries. For example, UNCTAD's international trade and commodities director, Pamela Coke-Hamilton, mentioned: "The creative economy and its industries are strategic sectors that if nurtured can boost competitiveness, productivity, sustainable growth, employment and export potential."[2]

However, over the last decade, the creative industries have been ignored in the transition economies, even though they contribute vastly to economic growth and reduce inequality in developed countries like UK or Germany. Moreover, Cooke and De Propris (2011) revealed that the development of creative industries on the regional and local levels can significantly promote sustainable growth and resetting the economy. Essentially, all creative sectors are inclusive, because everybody potentially can participate and contribute to it compared with other sectors. Despite this, though, it cannot guarantee that income inequality will decrease as well as provide economic growth. For example, Florida (2012) highlighted how the cities that have the most innovative and creative economies are often associated with the worst social and economic inequality. He demonstrated a strong correlation between the presence of the creative class in metropolitan areas and income inequality; this is because the creative industry generally employs skilled workers which leads to a rise in the relative wages of more educated workers (United Nations, 2019).

This study is guided by the following research question: *What impact has the COVID-19 pandemic had on the music industry in Kazakhstan?*

2. Background

Creative sectors taxonomy and their role in transition economies

The creative industries comprise the cycles of creation, production, and distribution of goods and services with creative content, cultural and economic value, and market objectives. In this regard, UNCTAD classified the creative industries as creative services, design, publishing and printed media, visual arts, cultural sites, traditional cultural expressions, performing arts, audio-

[2] European Creative Business Network. 2021: UNCTAD declares International Year of Creative Economy for Sustainable. 2019. URL: http://ecbnetwork.eu/2021-unctad-declares-international-year-of-creative-economy-for-sustainable-development/ (accessed: 06.08.2021).

visuals, and new media (UNCTAD, 2011: 18). Meanwhile, a wide definition of the creative industries has been suggested by the UK Department for Digital, Culture, Media and Sport (DCMS) as “those activities which have their origin in individual creativity, skill and talent and which have a potential for wealth and job creation through the generation and exploitation of intellectual property” (DCMS, 2019: 7). DCMS categorizes creative industries as advertising, architecture, art and antique markets, craft, design, designer fashion, film and video, interactive leisure software, music, performing arts, publishing, software and computer services, television, and radio. A completely different approach to creative industries classification was proposed by WIPO and is known as the “copyright model”; this divides the creative industries up into three categories: core, interdependent, and partial copyright industries. This model seeks to include all the industries involved in the creation, manufacture, production, broadcast and distribution, and consumption of copyrighted works, and thus results in a rather different list from that of the DCMS (British Council, 2010).

Several studies have attempted to explore regional determinants, the effects of the presence of creative industries, and the emergence of a ‘creative class’. The city as collectors of human capital, generating new ideas and economic growth, building on Jacobs’ study (1969), was firstly formalized by Lucas (1988). In addition, Desrochers (2001) argued that cultural and economic diversities in cities are a key factor for regional economic performance, accommodated by existing variations in new creative people from varied backgrounds who come to work together in a city, as well by the increasing share of a new X-class – or, as Florida (2005) posited it, a ‘new creative class’ – that spurs in the modern agglomerations. Moreover, Godley and Casson (2000) demonstrated that culture really matters in performing rapid economic growth, which Audretsch et al. (2019) have tested more currently for European regions.

It is argued that regions with a higher share of creative class tend to have more vibrant and diverse ideas, making it easier for business to find nontrivial solutions to everyday tasks, enabling simper pathways for individuals to start a business in the region and stay within it. Diversity and the availability of well-functioning institutions will naturally attract creative human capital to a region. Hence, regions with better institutions and higher diversity have a competitive advantage in attracting creative class. Creativity is defined as ‘the ability to produce work that is both novel and appropriate’ (Sternberg, 1999). Creative industries are considered a boost for economic growth and innovation, but developing economies do not have enough capacity to take competitive advantages of it. The lack of financial resources and creative capital are one of the main issues.

In this study, creativity or creative capital is defined as an outcome associated with any new idea generated by any component of three distinct creative classes whose economic value is more uncertain than would be associated with the traditional capital for firms, such as physical or human capital. Creative capital – which is an intangible property of creative class – stems from their creative capacity, city diversity, and openness to new ideas, and is a key source of entrepreneurial opportunities. It does not per se add economic value to a region, but creates an opportunity for creativity commercialization by various entrepreneurship types.

In this regard, developed countries could be one of the main sources in supporting the development of creative industries. For instance, last year, UK researchers investigated the value of the UK's support for creative industries in emerging economies (Vietnam, Indonesia, Nigeria, and Colombia). The study found that the UK has played – and is continuing to play – a pivotal role in shaping the strategic and policy agenda for the creative economies of these countries. The research looked at how the UK's relevant creative and cultural organizations can act as valued facilitators and enablers across the creative economy. They can support partners such as municipalities, civil society organisations, or creative networks to recognise the value of clusters and hubs as critical drivers of the creative economy: essential 'safe spaces' for cultural dialogue, collaboration, and innovation. For example, it found that the British Council has significantly contributed to the development of 'Bandung Creative City': a grassroots and sector-led movement which has mobilised multiple creative activities in this major Indonesian city, with a commitment to inclusivity, gender equality, and environmental sustainability (British Council, 2019).

Actor network and the creative industries

The creative industries have been considered as an important sector for the development of international relations (Braaun, Schindler, and Wille, 2019). The creative industries concept has been developing since the 1990s, with governments introducing policies to systematically develop and promote culture, the technology-intensive sectors, entertainment, and so on (Caves, 2000; Lampel and Germain, 2016). The creative industries are of particular interest to international relations and business scholars because of their inclusiveness and post-industrial characteristics, such as their flexible organisation, extensive use of technologies, and the employment of creative and technical talents (Lampel and Germain, 2016; Lampel, Lant, and Shamsie, 2000). In addition, the creative industries cover a full range of organisational characteristics and activities, from large multinationals to micro-businesses and cultural entrepreneurs (Li, 2020).

The role of key national and international actors in the development of creative industries plays a crucial role in international relations and cooperation. These actors help maintain the sector's strategies, support the network, and develop cooperation between countries (OECD, 2018; Mangifera, 2019). The cooperation between key actors in the creative industries can enhance the skills of workers who are involved in the creative industries. The well-organized actor networks can help the creative industries facilitate international cooperation between countries and international organisations and promote the sustainability and inclusiveness of the creative industries (Bazalgette, 2017). Our analysis of the literature (Daniel, 2017; Pauget, Tobelem, and Bootz, 2021; Kidd and McAvoy, 2019; Bazalgette, 2017; Mangifera, 2019; OECD, 2018) enabled us to articulate the key stakeholders within each sub-sector of the creative industries (Table 1).

Table 1

Examples of key stakeholders of the creative industries

The key area	Relevant industry body or association
General	e.g., Ministry of Culture, Ministry of the Arts, Department for Digital, Culture, Media and Sport, Ministry of IT, Ministry of Creative Economy, Ministry of Information and Broadcasting media, Ministry of Digital Transformation, National Council of Arts, Federal Trade Commission, Chambers of Commerce, Trade Unions, Nesta, European Commission
Advertising and Marketing	e.g., The Advertising Standards Authority, Advertising Industry Council, The Committee of Advertising Practice, Federal Trade Commission, Broadcast Committee of Advertising Practice, Associations of Advertising and Marketing Agencies, Advertising and Marketing Federations, Association of National Advertisers
Architecture	e.g., Architects Board, The National Council of Architecture, Institute of Architects, Society of Architects, National Organisation of Architects
Crafts	e.g., Art Pottery Associations, Craft Directory, Heritage Crafts Association, Association of International Ceramics, Ceramic Society, Society of Silversmiths
Design and Fashion	e.g., Design Centres, Design Institute, Fashion Council, The Council of Fashion Designers, Fashion Association, Federation of Fashion
Film, TV, Video, Radio, Photography	e.g., Board of Film Classification, Office for Communication, Academy of Film and Television Arts, Commercial Radio Companies Association, Communications and Media Authority, Record Industry Association, Broadcasting Authority, Radio-television and Telecommunications Commission, Society of Media Photographers, National Photographic Society, Professional Photographers Association
IT, Software, Computer Services	e.g., Association for Interactive Entertainment, Independent Game Developers' Association, Computer Services Association, Computer Society, Association of Independent Information Professionals, Association of Information Technology Professionals, Computing Technology Industry Association
Museums, Galleries, Libraries	e.g., Museums Association, International Council of Museums, National Museum Directors' Council, British Council, Heritage Without Borders, Federation of Arts Councils and Culture Agencies, Alliance of Museums, Association of Academic Museums and Galleries, Library Trustee Association, Association of College & Research Libraries, Independent Libraries Association
Music, Performing and Visual Arts	e.g., Music Retailers' Association, Music Council, Association of Independent Music, Association of Professional Recording Services, Academy of Songwriters, Composers and Authors, National Association for the Visual Arts, Society for the Performing Arts, Association of Performing Arts, Performing Arts Alliance

Publishing	e.g., Publishers Associations, Federations of Publishers, Independent Press Standards Organisation

Source: Authors.

The creative industries have been one of the most fast-growing sectors over the past 20 years, driven by technology, intensive international cooperation, content, skills, and talents. In addition, the creative industries have also contributed to international cooperation between countries towards the exchange of cultures, experiences, international projects, and programmes. In order to successfully grow and thrive, the creative industries need strong and supportive actor networks to embrace international opportunities and explore new markets.

3. Method

Given the need in the literature for surveys of music industry representatives to the impact of the COVID-19 pandemic in different geographic areas, this study utilised the survey approach (Harris, 2021). We developed a questionnaire with a range of questions on how the COVID-19 pandemic affected cultural organisations, cultural entrepreneurs, and other stakeholders (Nesta, 2020). The list of the questions is presented in Table 1 in the Appendix. We collected data from 102 music industry representative across Kazakhstan. Academic musicians from all regions of Kazakhstan took part in the survey. The data has been collected during the second and third waves of the COVID-19 pandemic between February-June 2021. The web link to the invitation to participate in the survey has been sent by email 10,000 music industry representatives (entrepreneurs, workers in theatres, operas, ballets, independent musicians, etc.). We collected the emails using the database on the workers and entrepreneurs registered in the creative industries in Kazakhstan, personal contacts and Facebook invitations, and the personal data of project participants (creative workers and individual entrepreneurs) collected within the Creative Spark Higher Education Enterprise Programme in Kazakhstan sponsored by the British Council. In order to disseminate the survey, we have also used a Facebook to approach some of the stakeholders. We targeted people with a Bachelor's Degree, a Master's Degree, and PhD students or holders. The geographical distribution of the respondents covered capital city (19%), city (79%), and village (2%). The questionnaire was designed to include open and closed questions that were duplicated in both Russian and English. In order to ensure the confidentiality of responses, the personal data of respondents was removed and replaced with "participant no.". In addition, the respondents were able to leave open-ended comments after the questionnaire, which helped when analysing the responses.

The local context of Kazakhstan's music industry and the impact of the COVID-19 pandemic

The professional art market is actively developing in Kazakhstan, in particular the performing arts and the music industry. The music industry in Kazakhstan is supported by the government and public organisations. Philharmonics, opera and ballet theatres, drama theatres – indeed, wherever a soloist or orchestral artist, choral artist, vocal and dance performer, or any such performer exhibits their work – is in demand. The music industry in Kazakhstan (academic sector) has shown high growth rates over the past 30 years. The high level of modern cultural potential resting on the rich cultural heritage of the Kazakhs has become one of the leading factors in the formation of Kazakhstan's positive image as a country with a distinctive culture and spiritual traditions that go deep into history (Zhakenova, 2014).

During the period of independence, the culture of Kazakhstan adapted to the new socio-economic conditions, which led to the renewal of national art. The changes that have taken place over the past three decades have affected all spheres of Kazakhstan's art and cultural life. Within the framework of the popularization of Kazakh culture abroad, events in the format of 'days of culture' over the past few years have covered almost all Commonwealth of Independent States (CIS) countries, the leading states of Europe and Asia, and the Middle East. Music, visual art, film, and theatrical arts are worthily represented at various international art festivals, exhibitions, forums, biennials, and competitions. The market economy has provided its own paths for realizing the creative potential of artists. Young performers belonging to the pop music industry, having managed to preserve their national identity, are developing their creativity not only in Kazakhstan but also beyond its borders.

Academic performing arts are developing both internally and globally. Kazakh music only began to be performed in far-flung international concert halls from the end of 20th century – this can be attributed to the achievements during the formation of the culture of independent Kazakhstan. An important role in organizing foreign tours of Kazakhstan's musicians was played by the activities of international organizations: UNESCO, the British Council, Soros Foundation, USAID, and others.

The COVID-19 pandemic has affected culture all over the world. For example, the CEO of the Metropolitan Opera, Peter Gelb, notified the musicians of the orchestra and choir that their work has been suspended without payment at least until 2021.[3] As another example, in Russia, musicians attached to state orchestras had received full salaries, but there are a lot of those who

[3] Stepanyan O. Music industry after the pandemic: losses, fees and new formats. RBC Style. 2020. URL: https://style.rbc.ru/impressions/5f23015a9a79477bd6ac3ae4 (access: 27.05.2021).

work independently, as freelancers, from concert to concert. The pandemic affected such performers most significantly: many of them had to look for work outside the profile, for example, become a taxi driver or a courier.

The period of the pandemic in Kazakhstan also saw restrictions implemented. It was impossible to hold events with any number of people. Concerts were cancelled. The staff in the public or private cultural organizations went into quarantine and were forced to rehearse at home so as not to lose shape. Nevertheless, budget-funded organizations also retained the wages of their employees. Freelance musicians, who were left without income, also lost their jobs and were forced to go online. At the same time, many budget organizations also involved the Internet with both archival programs and new projects in order to maintain their existing audiences' interest in their work whilst attracting new ones. Total digitalization modernized the communication processes of musicians and listeners, bringing qualities such as creativity of thinking and a tendency to creative adventurism to a new level. For many musicians, both individually and as part of a group, the first experience of going on the air happened during one of the lockdowns.

The music industry has been negatively affected due to the Covid-19 pandemic. The crisis has particularly affected the incomes of middle-income performers. Many professional musicians in Kazakhstan are officially employed in collectives of budgetary cultural organizations of the republic, which gives a certain stability in income. However, it should be noted here that one of the equally significant sources of income for a certain number of musicians is paid performances at municipal and corporate events. Thus, the quarantine measures applied to concert activities implies the complete absence of such a source of income for these musicians during the pandemic.

4. Results

The participants of the survey have been mainly involved in concerts (61%), performing arts (38.2%), private concerts and events (36.3%), and media (10.8%). More than 30% of those who participated in the survey have an academic degree. More than 80% have over 10 years of work experience, of which about 50% have 20 years of work experience.

The results of the survey demonstrate that the music industry stakeholders have lost a significant amount of income due to the COVID-19 pandemic. The reason for this was a considerable decline in their performing activity (50%) or a delay of the concerts and other events (74.5%). Due to the pandemic, many musicians were forced to reduce their income; some were left without any income. Those respondents who are employed in budgetary organizations remained at the same income level, despite the fact that the organizations were forced to close during the quarantine period. For example, in 2019, the monthly income of the respondents varied from 500$ to 1,000$; however, during the first and the second waves of the COVID-19 pandemic, the monthly income dropped to less than 200$. In terms of the estimations regarding future income projections, 39% of the respondents claimed that they would earn the same amount of money as during the first and the second waves of the pandemic, 22% believed that their income would be 50% less than in 2020, and 20% were convinced that they would earn 25% less money.

More than 50% of respondents noted a lack of skills in using digital tools to carry on their activities online, and 20% of respondents stressed the problems with the access to musical equipment and software. Therefore, the digitalization of activities did not bring any income for more than 60% of the respondents. Only 20% of the respondents have earned some money from online activities. It is important to note that the decline in income triggered a search for new sources of income in the profession, as well as creating concerns among artists about their profession overall. In this regard, 40% of the respondents have thought about changing their profession.

According to the survey, more than 80% of the respondents were not aware of the government support programmes in Kazakhstan for handling the negative consequences of the COVID-19 pandemic on the music industry and workers. In addition, freelance musicians could not cope with the pandemic as they were excluded from all possible kinds of private or government support during the pandemic. Even if the artists could apply for the support scheme, they had some doubts about the funding or the terms and conditions.

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The COVID-19 pandemic has had an overwhelmingly negative effect on the music industry in Kazakhstan. Music events had to close or cancel performances and could not operate as usual. This sector has been struggling to cope with the pandemic because of the lack of government support, insufficient digital skills, or difficulties in accessing software to record the concerts or perform online. In addition, the cultural workers have had significant income losses due to the COVID-19 restrictions and social distancing rules. The current policy agenda should consider how to organize the cultural economy, in particular the music industry, in order to help this sector recover from the pandemic. As O'Connor (2020) highlighted: "It is also important to reset the relationship to the 'audience', to establish a different language, a new way of talking, that can re-centralize culture's role in our public life, and articulate how these relate to our collective conception of 'the good life'."

This study has several policy implications. Firstly, the policy makers could consider the development of financial schemes to support artists as the COVID-19 pandemic continues. It is evident from the results that artists require help, and the music industry will not operate as usual without government support. It would be helpful to create grants and other incentives to support those artists who are particularly struggling from the negative consequences of the COVID-19 pandemic. Secondly, our results demonstrate that it is necessary to unite academic musicians in associations that could advise them on the possibilities of obtaining grants, scholarships, and special support from state and independent foundations. For example, joining the recently created 'association of creative entrepreneurship' will allow musicians left without income to receive support and advice on legal issues, to interact with government agencies or international and public organizations, or to conduct seminars, round tables, and conferences on various issues, which can include presentation performance. Thirdly, as freelancers were at a high risk of not coping with the COVID-19 pandemic, the creation of a database of freelance musicians would make it easier for potential customers to find their services, whilst allowing musicians to navigate the pricing of their services, thus supporting their businesses.

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Appendix

Table 1. The list of the questions asked in the survey

No	Question
1	What is your average income per month from composing/performing?
2	To what extent have local and national restrictions affected you or your organisation's income?
3	Compared to 2019, has your compositional/perfoming work decreased and if so by what percentage?
4	Has a significant proportion of your work commitments been delayed, postponed or cancelled due to COVID-19?
5	If you are an organisation, since COVID-19, what percentage of your services or events (if applicable) have you had to terminate?
6	How much less than this (as a percentage) do you estimate you will earn in 2021 directly as a result of the COVID-19 pandemic?

7	If the pandemic ended tomorrow, with all social distancing measures dropped, how long would it take for you/your organisation's turnover to reach pre pandemic levels?
8	During the pandemic, what barriers to work or opportunities have you experienced?
9	To what extent have you been able to move activities online?
10	To what extent have new digital activities been able to deliver income?
11	Which of the following best describes the impact of COVID-19 pandemic on your business/ activity/ job)? ● Made me adapt or change products and services I offer to meet changing consumer demands ● Made me more optimistic about the future of my business ● Made me more focused on long term goals ● Not affected my approach to digital tools ● Made me think more about how to grow my business ● Made me lose my existing customer base ● Decreased our investments in technology and digital tools ● Made me feel technologically prepared ● Increased customer demand ● Increased marketing budget ● Made me adjust my business model ● Not affected my business's clients/audience ● Not affected the types of products and services I offer ● Made me more pessimistic about the future of my business ● Made me more focused on short term goals ● Made me reassess my approach to digital tools ● Made me think more about how to save my business ● Allowed me to retain or even grow my customer base ● Increased our investments in technology and digital tools ● Made me feel technologically unprepared ● Reduced customer demand ● Reduced marketing budget ● Not affected to my business model ● Disrupted my clients/audience
12	Did you face any socio-economic problems during the COVID-19 pandemic and did you have any government support?
13	If you are eligible for government support scheme but have not yet applied, please list your main reason why below:
14	What government support programs do you know?
15	What further measures do you think the government should introduce to support you and/or your organisation?
16	Please select your gender
17	Please select your age
18	Please select the place you live?
19	Please specify your working experience
20	What is the highest degree or level of education you have completed?

ВЛИЯНИЕ ПАНДЕМИИ COVID-19 НА МУЗЫКАЛЬНУЮ ИНДУСТРИЮ:

ПРИМЕР КАЗАХСТАНА

ЕЛЕНА КАЛЮЖНОВА
ЕЛЕНА ХЛЫСТОВА
Бизнес школа Хенли, Университет Рединга, Великобритания

АССЕЛЬ ИМАЙО
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Резюме

Пандемия COVID-19 оказала чрезвычайно негативное влияние на музыкальную индустрию в Казахстане. Её представители были вынуждены закрыть площадки или отменить выступления и не могли работать в обычном режиме. Этот сектор вынужден был искать собственные способы борьбы с последствиями пандемии в отсутствии государственной поддержки. При этом сказывался недостаток навыков работы в цифровой среде, трудности с доступом к программному обеспечению для записи концертов или онлайн-выступления. Учитывая потребность в исследовании влияния пандемии COVID-19 на представителей музыкальной индустрии в различных географических регионах, настоящая работа опирается на результаты проведённого опроса. В период с февраля по июнь 2021 г. мы обратились к 102 представителям музыкальной индустрии по всему Казахстану. Мы собрали данные о том, какое влияние пандемия оказала на музыкальную индустрию страны. Результаты опроса показывают, что участники музыкальной индустрии потеряли значительную часть дохода из-за COVID-19. Наше исследование выводит несколько следствий для политики, которые можно учесть при разработке стратегии восстановления музыкальной индустрии в Казахстане. Лица, определяющие политику, должны рассмотреть вопрос о разработке финансовых схем для поддержки представителей креативных профессий во время пандемии. Было бы полезно предоставить гранты для поддержки специалистов творческих профессий, которые особенно остро сталкиваются с негативными последствиями пандемии. Результаты проведённого исследования демонстрируют необходимость объединять исследователей и музыкантов в ассоциации, которые могли бы проконсультировать их о возможностях получения грантов и специальной поддержки от государственных и независимых фондов.

Ключевые слова: музыкальная индустрия; пандемия COVID-19; Казахстан.