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Streaming services and brokerage in the music industry crisis in Nigeria

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ABSTRACT

Following the development of digital technology, the music industry experienced a severe crisis in Nigeria, as elsewhere. This technology made the copying of music easy and enabled artistes and users to produce and share music and video content on social media and other internet platforms. The emergence of streaming services changed this dynamic again and provided new opportunities for artistes and later also for the music industry. In Nigeria, several local entrepreneurs created streaming platforms, offering Nigerian and/or African music, and soon after also global platforms and producers began to launch their services in the country. Based on digital ethnography and field research in Nigeria, this article examines the developments in the music sector and its copyright institutions and discusses the broker characteristics of the streaming platform owners. It explores how far internet platforms, or rather their owners, particularly in the field of music, can be considered brokers or mediators of the music industry crisis, and how their affordances have changed the perception of this crisis over time. The article also examines how these platforms have transformed and mitigated the piracy crisis more recently, raising hopes among the music industry and a new generation of artistes in Nigeria for a sustainable music market.

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KEYWORDS Nigerian music; copyright; piracy; brokerage; streaming; cultural industry

Introduction

With the creation of the World Wide Web in 1993 and the development of corresponding electronic devices and applications, the music industry, especially in North America, warned that these technologies and platforms would encourage rampant pirating of copyrighted music which would deprive honest and hardworking artistes[1] of their income and kill the industry in the long run (Kretschmer 1998). It proclaimed the music industry was in crisis and cited the platforms responsible for providing users with services

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that facilitated such illegitimate acts. Platform owners who created services for users, however, began to position themselves in the arena of the various interest groups in the music business and instead argued that they would contribute to democratizing music access for a greater number of users and help the music industry find paying consumers for their artistic products and services. These developments had an impact upon music in many countries across the globe, also in emerging economies, and especially in Nigeria, as a new centre of cultural production with vibrant film and music industries.

In this contribution, we present how the music industry piracy crisis unfolded in Nigeria, how the crisis narrative was understood by musicians and users and which local and international platforms and services were created in or introduced to the country. We discuss to which extent these streaming services can be regarded as intermediaries or brokers in the Nigerian music landscape and explore the different temporalities involved, including their perceived impact and long-term changes and solutions to reduce the music industry crisis. A crisis is a perceived condition; it is dynamic and may last for some time until a change becomes visible (Koselleck 2006). It is a process that can develop in various directions, but it can also 'stabilize' and turn into prolonged or even chronic conditions that also require longer-term strategies of coping (Vigh 2008, Röschenthaler 2020, p. 253).

Our findings are based on a hybrid set of methods: Röschenthaler carried out ethnographic field research in parts of Nigeria from the late 1980s. Most of what happened in the field relevant for this article, however, took place more recently, and during the COVID-19 pandemic. Our observations for that period are thus predominantly based on digital ethnographic research, and research on the recent music sector in Nigeria, on informal conversations and firsthand experience as an artiste by Adedeji.

Our argument is that music platforms, or rather their owners, have properties of the broker figure. Some of the platforms and streaming services show more of these broker properties than others, often overlapping with other roles and social categories, especially with entrepreneurs (Röschenthaler and Schulz 2016, Röschenthaler 2021), which differs from the classical broker figure (Boissevain 1974, Bräuchler, Knodel and Röschenthaler 2021). According to the classical definition, entrepreneurs own and work with primary resources, whereas brokers work with secondary or immaterial resources, but in our case, the brokers work with both and can be termed broker-entrepreneurs.

The article has three parts. The first summarizes the more recent developments in the Nigerian music sector and contextualizes the crisis narrative; the second discusses in how far the owners of music streaming platforms, developed or introduced since the 2000s in Nigeria, have assumed brokerage roles; and the third part examines the modifications in the perception of the music piracy crisis over time as well as to what extent these services have actually

contributed to finding solutions for this crisis and whether these solutions possibly created further crises for other participants in the sector.

Recent developments in the Nigerian music sector

With an estimated population of over 200 million, Nigeria offers a huge and rich marketplace for cultural entrepreneurship, especially in the domain of music (Adedeji 2016). The city of Lagos has inspired artistes and provided the environment for the evolution of popular music styles and a music industry. The urban popular culture of Lagos brought forward popular theatre (Barber 1987, Barber et al. 1997), film, home video, fashion, comedy shows, sports and various popular music genres (Euba 1989, Larkin 2008, Krings and Okome 2013), including Jùjú music (Waterman,1990, 2000), Fújì music (Barber and Waterman 1995), Fela Kuti and his Afrobeat music (Olaniyan 2004), HipHop (Omoniyi, 2006, 2009) and most recently Afrobeats (Simmert 2020).[2]

The earliest form of popular music documented in Lagos is the Palmwine music, listened to at drinking joints where palm wine is consumed for relaxation. Palmwine music soon evolved into Highlife music, popular along the West African coast. The 1970s witnessed increasing commercial activity in Nigeria due to the oil boom, followed by movement of people from within Nigeria to Lagos, the capital at the time, and commercial centre. The flow of money brought about the emergence of individuals known as super riches who actively looked for avenues to validate their new status, which encouraged an increase in the patronage of Jùjú music bands (Waterman 1990).

Created in the 1970s (Waterman 2000, Olaniyan 2004), Afrobeat music was consolidated in the 1980s during the oil boom which created an upsurge in commercial activities. Soon, however, the Nigerian economy collapsed, ravaged by corruption and bad leadership, as evidenced in the poverty level of the people (Smith 2007). The military era of the 1980s and its attendant vices became a fertile ground for Fela's Afrobeat, making it the protest music of choice, stamped with powerful political messages in classics like 'ITT' – International Thief Thief (1980) – and 'Army Arrangement' (1985).

Fela's Afrobeat music was followed by Reggae in terms of political consciousness although in a more subtle manner. Its popularity in the mid-1980s to late 1990s reflected the harsh economic and political situation against which the Nigerian Reggae scene proclaimed messages of hope, patriotism and liberation.

When in the late 1990s, Nigeria transited from military regime to democratic government, Afrobeat and Reggae music faded in favour of a new form of musical expression, HipHop. With its gradual rise into the mainstream of popular music scene, it was gaining momentum and reflected the influence of the African-American music culture in Africa (Olaniyan 2004, p. 176). At that time, the gradual digitalization of music production and the

availability of computer-aided music recording technology were introduced. It was accompanied by the proliferation of privately owned broadcasting stations that promoted HipHop culture and a new generation of artistes with attitude and entrepreneurial swagger emerged. They appropriated existing popular music styles like Afrobeat, Jùjú, Fújì and infused the Nigerian language into it and re-territorialized and glocalized the global HipHop sound in Nigeria (Adedeji 2014, 2016). Nigeria's Afro HipHop gradually metamorphosed into the global phenomenon Afrobeats.

Emergence of a recording industry and the role of royalty collecting societies

Commodification of music and the building of a recording and music industry in Nigeria began in the 1970s in Lagos, during the oil boom, with the three major multinational companies Philips (which transited to Phonogram, later Polygram, then Premier Music), EMI (which later became Ivory Music) and Decca. They used the latest technology of the time and distributed their products (Vinyl) within an authorized marketing network. They turned Lagos into a Mecca for artistes and nurtured the monumental success of many musicians, including IK Dairo, Tunde Nightingale, Chief Ebenezer Obey, The Lijadu Sisters, Cardinal Rex Lawson, Dele Ojo, Victor Uwaifo, Fela Ransome Kuti (before becoming Fela Anikulapo Kuti), Sony Okosuns, Onyeka Onwenu and many others. Their success encouraged local investment in the music industry while most major distributors also dabbled into establishing their imprints and studios, among which are Skylark Records, Omo Aje Records, Ibukun Orisun Iye Records, Tabansi Records, Shanu Olu Records and Roger All Stars (RAS).

The booming music industry faced a downturn trend in the late 1980s due to piracy and the unfavourable political climate. Bootlegged copies of vinyl proliferated with the gradual introduction of CDs and digitization. Record companies lost revenues to pirates and labels began folding while the few remaining ones had difficulties finding new artistes to sign. The final straw came with the exit of the major multinational labels from Lagos which ended the era of the formal music industry in the late 1990s (Adedeji 2016). This is the context in which the crisis narrative emerged in Nigeria.

As the music industry collapsed, a new generation of artistes gathered momentum with a genre that was to be dubbed 'Afro HipHop'. The rapper Sound Sultan (2008) explained to Adedeji that 'in Nigeria you have to represent where you are coming from and the 'Afro' defines Africa, in a nutshell, it qualifies the Hip Hop here in Africa by putting a lot of African content in it'. A new set of players invested into the music industry and created local independent labels to cater for the industry, including Kenny Ogungbe with Kennis Music, Nelson Brown with Dove records, Obi Asika with Storm

Records, and Kevin Luciano with Question-Mark. They were Afro Hip Hop pioneers and made artistes like The Remedies, Plantahun Boiz, Sound Sultan, Baba Dee, 2Face Idibia, Eedris Abdulkareem, Jazzman Olofin and Mode 9 successful (Akande 2017). However, with the collapse of the formal music industry, these independent labels lacked a functioning distribution system.

This gap was filled by the electronics merchants or brokers at Alaba market in Lagos. They established a distribution network that gained the reputation of being the heart of the era of informal music and film marketing of CDs in Nigeria. However, most traders avoided the term 'pirates', preferring that of 'marketers' instead: 'No musician and their teeming catalogues were spared from the music pirates who later rebranded as music distribution and marketing companies' (Ajayi 2021). It was the only distribution network for music products available at the time, distributing the cheaper pirated CDs (the only format then) along with the seemingly original copies. The increasing clandestine activities of the Alaba pirates, coupled with incessant complaints from artistes and industry stakeholders over loss of revenue due to intellectual property abuse, encouraged action by the Nigerian Copyright Commission (NCC) and fuelled music piracy crisis narratives. Sensitization of the public and creation of awareness about the obligation to shun pirated copies of CDs of their favourite artiste frequently featured in the media, which were eager to pick up the topic. Moreover, the NCC also engaged in direct confrontation with the pirates at Alaba through various raids on their warehouses coupled with the destruction of pirated CDs under the Strategic Action Against Piracy (STRAP) programme.

To protect the rights of intellectual property holders and ensure that artistes receive royalties due from the use of their work in the media and public spaces, the Collective Management Organizations (CMOs), as approved statutorily under the Copyright law, began to exhibit their relevance within the music industry. There were two prominent CMOs, the Music Copyright Society of Nigeria (MCSN) and the Copyright Society of Nigeria (COSON). COSON was able to secure the cooperation of many FM stations in Lagos by registering them for effective collation and remittance of royalties to artistes whose music they played. However, the efforts of NCC and the CMOs as stakeholders in the industry had little effect on piracy (Okoroji 2009). The activities of pirates continued unabated while the statistics of revenue loss in the industry kept soaring.

Digital distribution: the new normal

Digital innovation within the music industry globally brought unprecedented changes. It created avenues for new players with new artistes springing up in Nigeria using the machineries of digitization to build their music career. Digitalization altered the music business model and created new opportunities

for revenue and value creation (Kimachia 2022). It mitigated the physical methods of storing music in vinyl, cassettes, and CDs as music was now compressed into virtual files like mp3 with various allied electronic devices to play it, including the mobile phone. Distribution also shifted from the physical space online through streaming and social media platforms like Instagram, Facebook, TikTok, YouTube etc., enabling artistes to communicate globally with their fans and share audio and video files of their activities and itineraries, thus condensing time and space, as elaborated in the introduction to this special issue. Digital technology in the entertainment industry succeeded in putting artistes in control of their music publishing and marketing (Ofochebe 2020) by encouraging independence from established recording labels that had hitherto controlled the market.

Music streaming started around 2003 with the release of iTunes music store. Another turning point was in 2008 with the advent of Spotify when users were able to stream all the music they wanted for ten dollars per month (Damilare 2021). Since then, numerous Nigerian, African and international streaming platforms have emerged, offering services through subscription to teeming music fans in Nigeria. The foreign streaming platforms include Spotify, Apple Music, Audiomack, Deezer, YouTube Music, Tidal, Amazon Music and the Chinese-owned Boomplay. Among the African and Nigerian streaming platforms are Spinlet, Udux, iROKING, MTN Music Plus, Mino-Music and many others.

These locally created streaming platforms joined from the mid-2000s with the intention of developing an emerging Nigerian music streaming sector, but the majority has unfortunately ceased to exist. For example, iROKING, credited as the first wholly Nigerian streaming platform established by Jason Njoku, closed in 2018 because 'Africans still prefer not to pay for music [online]' (Adugba 2020). The founder Jason Njoku explained to the *Nigerian Guardian*:

> We started a little music distribution company called iROKING. The ambition was to replicate what Spotify had started to do in Europe, but more importantly what the Saavn folks were attempting to build in India. Alas whereas ROK [a studio belonging to iROKING, sold to Canal] has thrived into arguably one of the most valuable independent media companies in Africa, iROKING died a slow cancerous terminal death. (Akan 2020)

In Nigeria, streaming platforms have succeeded in making music available online especially replacing illegal music blogs from which people download freely. However, most Nigerians assume that when they pay for internet access, they should not be paying again to stream or download music especially in a situation where data is expensive. Despite the highly competitive music streaming scene with the heavy incursion of global brands scrambling for a share in the huge music market, some of the

local platforms developed new tactics for survival. The Nigerian streaming platform Playfre, created in 2019 by Chika Nwaogu, is an example. With a library of over 50 million songs and 2 million artistes, Playfre is currently one of the largest African music streaming services in terms of catalogue size. Currently expanding to 13 other African countries Playfre is available for download on Android smartphones from Google Play Store and offers its services for free (Delport 2019).

Boomplay is another platform developed for the African market but with a multinational business model. According to Tosin Sorinola, Boomplay's director of artiste and media relations (quoted by Mureithi 2022):

> With 60 million active users, Boomplay is the most popular music streaming service in Africa. The Chinese-owned, Africa-focused company is available throughout the continent and runs a freemium model, whereby users can listen to music free but with ads and they can pay to listen to ad-free music. The Boomplay app comes preinstalled on devices made by Transsion – the top [Chinese] phone sellers in Africa whose brands include Tecno, Infinix, and Itel. Boomplay was launched in Nigeria in 2015. It is headquartered in China and also has offices in Nigeria, Ghana, Kenya, Tanzania, Cameroon, and Côte d'Ivoire.

Just like Boomplay, the multinational streaming platforms – Apple Music, Deezer, Youtube Music, Spotify, Audiomack – also have their share of success with services tailored to suit the Nigerian music market and customer preference. These global platforms operate on a freemium, free for use and premium basis with a monthly subscription fee to enjoy advert-free music. They also offer artistes official chart opportunities that were lacking in the Alaba market distribution system, as artistes can monitor in real time how they fare in the music scene in Nigeria, Africa and globally. A peek into the subscription system of some of these platforms reveals that

[For] YouTube Music, the monthly individual subscription costs ₦900 while a family plan costs ₦1400 ($3.67). Deezer previously charged ₦1,800 for premium subscribers but has now slashed the price to ₦900 ($2.36). Apart from its free plan, Spotify users in Nigeria can upgrade to Spotify Premium for ₦900 per month. The Premium Family plan goes for ₦1,400 for up to 6 family members living under one roof. They also offer a student monthly subscription for ₦450. Apple Music has the same subscription plan as Spotify (Azuh 2021).

Music streaming also has created business opportunities for music middlemen (brokers) or digital marketers who link independent artistes and labels with top global digital music stores. They ensure their music is available in over 100 digital music stores globally and also offer services like management and promotions with the benefit that artistes retain 100% of the rights to their published music. Lagos, Nigeria's music capital, lodges many of these stores, including Dapper Music founded by Damilola Akinwumi in 2017 and NextXtar who has Chinedu Ebeatu as the CEO and co-founder.

Dapper music parades labels and artistes like Marlian Music (MohBad, Zinoleesky, C-Black), Dr Dolor Entertainment (Teni, Hotkid, Dr Dolor), Ice Prince, Sound Sultan and Lyta (dvppermusicng.com 2023). NextXtar operates similarly to Dapper Music. It was created to help artistes distribute their songs. With a mobile phone with internet access, artistes can upload their songs for distribution worldwide in no time. Aside from distributing to all renowned digital music stores, NextXtar provides artistes with a proper account of their music's progress, with a fan link and it promotes their artistes' music on their social media (Vanguard News 2022).

Music distribution through streaming creates new opportunities and contributes positively to assist Nigerian artistes to take their music to the global stage. Digital distribution has also encouraged new alliances of Nigerian musicians with global partnerships. In addition to the global streaming platforms discussed earlier, other multinational music companies have established offices in Nigeria and partnered with labels and independent artistes. Among them are Universal Music Group and Empire Music who signed Nigerian artistes and labels for distribution and publishing. For example, Olamides YBNL has a business deal with Empire extending to himself and all his artistes like Asake and Fireboy DML whose works are being distributed globally by Empire Music. Although digital distribution reduced the dominance of local music labels, it has created opportunities for streaming platforms as digital marketers or middlemen who are facilitators, brokering deals. They are music brokers who ensure that artistes are linked with digital music stores, where their music is adequately promoted, and, in some instances, they secure funding for releases and promotions of independent artistes.

Music platforms as brokers

This section examines the broker capacities of the music platforms. The concept of the broker describes the activities of social actors who mediate between different parties, usually in physical spaces (Boissevain 1974; Stovel and Shaw 2012; Lindquist 2015; Bräuchler, Knodel and Röschenthaler 2021). The concept was introduced in anthropology to describe the activities that can be called brokerage 'nexus work' (Lingo and O'Mahony 2010, p. 47) of specific social actors who bring parties together, bridge knowledge and information gaps and local and global cultural practices. In classic studies, as Stovel and Shaw (2012, p. 140, see also Bräuchler, Knodel and Röschenthaler 2021) noted, brokerage builds on informal, personal relationships, especially when brokers work as individuals on their own to connect various parties.

From the 1980s onwards, anthropological studies began to criticize the structural-functionalist perspective and pointed to the importance of

considering brokerage as a process that has been created, shaped, and dramatized by individuals who manage and channel knowledge and meaning (Murphy 1981, p. 667). Brokers were understood to mediate between different levels of integration in the same society and had to face the conflicts that were raised by the collision of divergent interests, which is also true as much for the marketers or pirates as for the platform owners in Nigeria. Especially, Thomas Bierschenk *et al*. emphasized the agency of brokers and the room they create to manoeuvre, for which these authors introduced the notion of 'arena of interests' (2002, p. 4, 12).

With growing digitization, scholars also started to apply the concept to internet platforms – such as access providers (Telecom, Vodafone), search engines (Google), platform operators (Facebook, Tiktok) and digital music stores (Dapper, NextXtar, Spotify). However, in that context, they tend to talk about 'intermediaries' rather than 'brokers'. For example, scholars termed digital platforms 'intermediaries' and 'information brokers' or 'brokerage firms' (Packard 2010, Gilchrist 2015, p. 193), 'knowledge brokers' or 'data brokers' (Addeo and Masullo 2021) and ascribed them innovative potential (Hutter 2005, Rammert et al. 2005, p. 4–5). Others described them as 'online intermediaries' with brokerage capacities (Rehbinder and Peukert 2018, p. 14, 169, 358), or in the case of Youtube, Facebook, and TikTok as 'content intermediaries' (Gillespie 2010, p. 348), whereby they function as 'gateway to social content' and 'connective culture' in the platform society in which we live (Van Dijck 2013, p. 67, 127).

Most of these scholars, however, do not examine conceptually in how far they can be considered intermediaries or brokers nor do they distinguish between the owners of platforms and the digital infrastructure that facilitates social and economic activities. This raises the question whether the platforms themselves are to be considered brokers, or their owners. We argue for the latter because, as suggested earlier, the platforms are the infrastructure enabling intermediation, and their owners are the brokers who have created or acquired them and are made legally responsible for the content that is created and disseminated on them. More precisely, platforms are second-order infrastructures built on top of the internet (Edwards 2020, p. 321), although they are sometimes also ascribed agency on their own (cf. introduction to this issue). With these characteristics in mind, we now examine how the owners of music platforms are to be understood as brokers, the nature of their brokerage activities and their relationship with this infrastructure.

Commonalities with classical brokers

According to the classic definition of Jeremy Boissevain (1974), a common reference in anthropological work on brokerage, brokers are defined

through four criteria: they are an independent and ideally neutral 'third party' working on their own account; they mediate between different parties, their mediation implies a two-way process and they are often ascribed ambiguous roles; they have access to second-order resources; and they intend to make profit by taking a commission for their work. We will briefly examine how the platform owners relate to these criteria and then discuss those aspects of their work and their situation, which appears to be more complex and requires consideration of more parameters.

As our outline on music in the first section illustrates, platform owners can be considered brokers who work on their own account. They are, in Georg Simmel's (1950) words, an independent neutral 'third party' and are not paid by or receive orders from any other party. These entrepreneurial individuals – the platform owners – have spotted an opportunity and then created their own job, in our case streaming platforms, that offer specific services to users and bring together music producers and consumers, musicians and audiences, or in some cases, influencers and their followers. Most local and open platforms empower artistes and users more than the more profit-oriented foreign platforms. These brokers do not take sides in any way; they work to provide their services and struggle to survive in a competitive market.

As gatekeepers, they mediate between several parties and social actors and channel resources in several directions, depending on the type of platform, for example, music products from producers via the platform to users and money from users back to producers; in other platforms they channel music from artistes to users and enable the flow of money back to artistes. Some platforms offer services where users can download music for free, and the platform owner pays the producers via advertisement that they attract through their popularity. So there is channelling of resources in a two-way process via the platform, or the broker as a gatekeeper, that often involves several participants. The direction that the channelling takes depends on the type of the platform. If it is a closed platform that does not allow uploading and other forms of interaction between users, channelling takes place between users and music producers. In the case of an open platform, which allows downloading and interaction, more parties and directions of channelling are involved, which the music industry tries to prevent but which the users prefer, and which requires a lot of negotiation and appeasement on the side of the broker.

These brokers need to have a network of contacts to music producers and ideally also to investors who have an interest to acquire a share in the project in the hope to participate in the profits when the platform becomes profitable. The platform owners also need to advertise their service and trigger interest in as many users as possible in their music catalogue and in other services they offer such as creating personal playlists, commenting functions, or

uploading options. In future research, we also need to explore the extent to which external investors influence the policies of a platform which would have an impact on the independence of the platform owner as a totally neutral third party.

The platforms channel music and money, and posted content, and their success depends on the popularity of their service and how they present their services not only to users, but to various other parties such as companies who intend to advertise their products and media producers with whom they can partner, and to policymakers. The outcome in turn might render these brokers ambiguous figures in the eyes of society and politics, who make them responsible for what happens on their platforms. Platform brokers have innovated access and interaction between socially and geographically distant social groups but are also easily made the scapegoats for social unrest, endangering democracy and uncontrollable wealth creation. In the global context, platforms have been blamed for amplifying the crisis at first (Carlsson and Leijonhufvud 2021), but in Nigeria, they are celebrated to have reduced it (Africa Today 2021, Vanguard News 2022).

Gillespie indeed alludes to the ambiguous role of platform owners and the way they represent themselves to the various parties that is worth quoting:

> The term "platform" has emerged recently as an increasingly familiar term in the description of the online services of content intermediaries, both in their self-characterizations and in the broader public discourse of users, the press and commentators. YouTube must present its service not only to its users, but to advertisers, to major media producers it hopes to have as partners and to policymakers. (Gillespie 2010, p. 348)

From this, we can see that these brokers do have access to specialized immaterial assets, which Boissevain (and others) call secondary resources (skills, networks, knowledge). But as platform creators or owners, they must also have initial starting capital, i.e. access to primary resources, which makes them both brokers and entrepreneurs (Röschenthaler 2021). They seek to convince investors, are in a hybrid situation as they get access and can work with this capital but do not own it. The platform owners control mostly immaterial resources but there is an overlap of roles: They have brokerage capacities and are also entrepreneurs who have invested in first-order resources (the platform infrastructure with its software) and they have highly specialized technological skills, or employ specialists, and they have entrepreneurial ambitions.

Platform owners as broker-entrepreneurs

These broker-entrepreneurs also possess several of the characteristics ascribed to classical industrial entrepreneurs (see Schumpeter 1947): they

take high risks, are determined to succeed with their venture and to produce social change with their innovative ideas and enterprises (Röschenthaler and Schulz 2016). Such broker-entrepreneurs should be understood as innovators, as Marie Perinbam (1973, p. 428–432) noted in the context of trade. They invest time, energy and means to induce change with their innovative ideas but they also intend to make a living with their project by gathering a commission from their work of mediation, and they can also fail as the example of Nigerian Spinlet has shown.

The music streaming platforms extract a certain fixed percentage from the transactions on their platform, and the channelling of their products and services, and the advertisement they attract. Platforms are easily suspected of lacking transparency in their financial management – another incident of the brokers' ambiguity – but how much profit is kept by the platform owner and how much is redistributed to the various parties involved is usually the business secret of the brokers (Carlsson and Leijonhufvud 2021).

The setting outlined in the previous section requires some refinement: The arena of stakeholders in the music business includes the national government which is responsible for the legal framework and the implementation of copyright, the music industry i.e. the label owners and producers, the royalty collecting societies that also often have a critical view of the platforms, the artistes, and the users and/or consumers. There are multiple directions in which resources are channelled and the hierarchies are complex. These brokers negotiate conditions for their platforms with the music industry or with the artistes themselves in their endeavour to include as many albums and singles in their catalogue as possible to attract users. They may need to negotiate with government representatives who make the legal framework, pleading to consider their particular situation in which they operate.

In addition to the criteria corresponding to the classical broker figure, the examination of the role of the streaming platform owners, also in Nigeria, shows that the relationship between owners (brokers) and infrastructure (platform) and their role in the arena of interest groups is complex. They do not work on their own as an individual and exposed mediator, but their most important tool or instrument is the platform, behind which they stand in the background, or one could almost say, try to hide. It is no longer their individual actions, but the algorithm programmed into the platform that undertakes the work for them as brokers. So, there is a double mediation. The platform as a medium mediates the objectives that the owner, as a broker and gatekeeper with the help of his programmers has set up, to perform the task of channelling products and money while bringing the different parties together.

In addition to their construction of indispensability – that things do not work without their intervention – brokers often create a sense of threatening

power. Therefore, Pype (2017, p. 114) notes that these new 'technology experts' need to be situated

> among the other types of masters and specialists upon which they draw or with which they contest or compete. If we want to take technology in Africa seriously, then we need to study how doctors, professors and healers (all nganga), as well as blacksmiths and radio practitioners, computer engineers, and robot experts, within the same society relate to their tools, acquire their skills, and converse with one another

most of whom are also power brokers. In Nigeria, these considerations apply more to the owners of foreign multinational players than to those of local platforms.

The global music industry seeks to impose their dictum of considering users not as active participants but as mere paying consumers; the government makes the owners responsible for what happens on the platforms; the artistes and the users are difficult to control; they vote for more free opportunities and liberties as content creators; they subscribe and unsubscribe in a largely unpredictable manner. The history of Spotify, which as mentioned earlier, has an office in Nigeria since early 2021, is full of stress and telling in this respect (see Carlsson and Leijonhufvud 2021). However, as the ventures of Nigerian streaming services are still recent, it is too early to give a final estimation of their successes, failures and vulnerabilities.

The brokerage or intermediary activities that platform owners enable are in many ways distinctive and involve a complex set of interests in a competitive market. They differ from the brokerage activities in, for example, rural-urban brokerage where information and resources are channelled between village people and the state (Murphy 1981) or development organizations (Bierschenk et al. 2002) in both directions, often in chains of brokerage activities and in a seemingly hierarchical relationship. They also differ from the type of brokerage in the tea trade between China and West Africa where there are alternating brokerage chains between brokers and traders in the nodes of the network along the trade route (Röschenthaler 2021). The platform brokers no longer bridge only physical space but also virtual space on a global scale. They are experts in compressing time and space when they bring together users and producers from all over the globe on their platforms.

Platform capitalism (Srnicek 2016) also entails that their owners seek to reduce the number of stakeholders in a cultural production arena, and to perform all the various activities themselves: be producers of artistes, own the labels, create their own repertoire or catalogues and offer them for streaming on their platforms. Some of the platform enterprises grow by acquiring and sometimes cannibalizing new, innovative platform start-ups, trying to accumulate access to the entire value chain (music production, royalty collection, streaming and distribution, which reduces the

flow of resources between various stakeholders), thus becoming media power brokers (Ford 2017, p. 416). They become contractors, copyright and platform owners in personal union, thus reducing conflict and efforts of negotiation. This process again reduces the scope of their brokerage role, the brokerage aspect becomes less visible and dominant. Their role shifts from brokers to broker-entrepreneurs to virtual platform capitalists and owners of almost all the resources. Some of them also own other platforms such as social media platforms, which provides space for other brokers, i.e. for intermediaries and social influencers (Abidin 2017) – and there are social media users in Nigeria who again work on their own account and connect their followers with each other and also companies with potential consumers through attracting their attention to advertisement across large geographical spaces.

Have platforms influenced people's perception of the crisis?

The introduction of the internet, of telecommunication providers and mobile phones as multimedia devices provided unprecedented digital affordances for users in an emerging environment of proliferating communication opportunities, or polymedia (Madianou and Miller 2012, p. 170). Concomitantly, with the growing dissemination of information through the world wide web, fears of the loss of control over the new media arose; especially governments feared losing their monopoly on the shaping of public opinion (Nyamnjoh 2005). These developments created a diverse range of responses that resonated well with the narrative of crisis that the music industry had disseminated since the introduction of digital technologies for copying and sharing of content and that some of the Nigerian artistes picked up while others argued the pirate distribution networks were more beneficial for their careers.

The crisis narrative that was disseminated by the multinational music industry convinced the World Trade Organization (WTO) to request a functioning copyright legislation as a requirement for membership in the organization. WTO member countries, Nigeria included had to sign the Trade Related Aspects of Intellectual Property Rights (TRIPS) agreement regulating trade in intellectual property. The music industry postulated the crisis narrative in the name of artistes and provided a convincing argument for musicians (Kretschmer 1998). Member countries were encouraged to organize sensitization campaigns to make the narrative widely known and combat what they considered illegal practices.

The argument, following Locke's dictum of the labour theory of value, was that investment of time, labour and capital should be financially rewarded (Moore 2005, p 107–108), and that artistes, too, had a right to make a living from their creative work which piracy denied them. Soon Nigerian

artistes began to feel that those who copied and sold their music were depriving them from legitimate income. Hence 'the very process of the production of the crisis turned into a self-referring chain' (Mbembe and Roitman 1995, p. 325). The crisis narrative resonated well with an already existing and ongoing heightened sense of postcolonial crisis that thrived in many African countries (Roitman 2016), Nigeria included.

At this point, the broker-entrepreneurs came in with the development of music streaming platforms. At first, the music industry attacked that they were encouraging pirate practices with freemium models and contributed to illegal behaviour among users. The music industry negotiated high licences for their music catalogues that almost killed the start-up streaming platforms, in case they wanted to include songs from them, as can be concluded from an examination of Spotify's history (see Carlsson and Leijonhufvud 2021). With time, however, the music industry had to accept that at least twice as many users were voluntarily subscribing to paid consumption of music than those using Spotify's freemium model, at least in Europe.

The creation of streaming platforms also promised to be an answer to the music industry crisis in Africa. At first, the multinational platform owners hesitated to offer their services in Africa, so local developers created their own streaming services to cater for African audiences' and users' desire to get affordable access to African music. In many African countries, local specialists created various types of platforms for music, for streaming, uploading, downloading and promotion, as was explained in the first part of this article with the example of Nigeria. Music streaming was obviously 'responsible for the viral explosion of Afrobeats globally' (Ajayi 2021). For example, Burna Boy's fifth Album *Twice As Tall* had over 5 million streams in less than an hour while Wizkid's *Made in Lagos* album attracted over 10 million streams upon release on Spotify alone with a record of the most streamed Nigerian album in 2020, giving credence to the statement of Jide Taiwo of Boomplay that 'streaming has helped artistes reach greater numbers of fans and provided them with opportunity to again cross borders more than physical music sales would have done' (quoted in Damilare 2021). Music streaming has become the major music distribution model putting a halt to the Alaba informal music distribution system which before was the heart of physical (CD) music distribution in Nigeria.

Among the various types of platforms, open platforms allow for the interaction of users, for downloading, sharing and commenting, and some also offer online listening. However, these platforms are often accused to have a crisis creating potential because of the content that is posted and shared on them is difficult to control. These platforms are attractive to all those musicians who do not have contracts with labels but want to make a living from selling music. This was particularly important during the pandemic when concerts were impossible.

In contrast, the closed platforms do not offer social interaction but see users as paying consumers. In their most recent form, they offer listening to music only online, and no longer allow downloading. In this way, users are successfully prevented from copying and sharing because they can no longer have the songs on their devices, own and share them. It seems that in this case, more resources are channelled in one direction than in both directions, as they are closed for interaction. These platforms have, however, been less attractive to Nigerian users.

Over the course of the past two decades, access to music has been transformed from illegal to legal filesharing and from free download to paid download and to the renting of music. Because local Nigerian platforms prefer the freemium model, they will always have difficulties to negotiate affordable licences with big multinational music labels. For years this was the most challenging problem for Spotify. Many platforms, especially in African countries offer users to choose which model of music consumption they prefer. Musicians can make an income via the platform and users can choose from the catalogue local music they like to listen to. Some platforms also offer uploading and downloading of music against payment and thereby empower users and up and coming musicians to remain independent from the industry. Users may also become influencers by posting further content and attracting advertisement and have an impact on public opinion. Locally created streaming platforms contributed to reduce the feeling of crisis among the music industry, especially as the multinational streaming platforms began to see a market again and returned to open offices in many African countries, including Nigeria.

Brokerage with streaming platforms will continue as they are a viable business model even when the crisis narrative has fallen silent, and the music industry is sufficiently mollified through rising revenues. It is uncertain however, whether the problem of an income is solved for all the various musicians. Another issue is to what extent Nigerian users actually support local streaming platforms and are ready to pay for streaming. The streaming platforms offer various models that both must comply with the producers and to be attractive for capricious users. Only a certain percentage will accept paid offers. What worked with Spotify in Europe may turn out differently in countries where median income is low or lacking and users prefer to download music for free, in order to share it with their friends, as they perceive the sharing of music as a promotion of their stars. Musicians may earn a living from being invited to play concerts. Despite attractive offers from local platforms, most Nigerian users, if they are ready to pay, however, prefer to pay the big multinational players that offer the global range of music in their catalogues. This also means that those economic actors or brokers who have initially created solutions to the perceived crisis in Nigeria have difficulties to survive in the market. The Nigerian-created platforms Orin, Music Genie,

Gidilounge, Vuga, MusicPlus and Spinlet all have ceased to exist. Future research has to show whether music producers – not the brokers – continue to promulgate on the crisis narrative and continue to accuse street vendors – and also of local platforms with freemium models – of making a living from illegally selling music.

Notwithstanding, as we show, local and foreign music streaming platforms have contributed to mitigate the crisis narrative, revigorated the music industry and opened more options for artistes and users. Streaming platforms as the digital brokerage infrastructure have in any case turned out to be a much more efficacious means to combat the crisis than the copyright law. Streaming platforms have contributed to tame music piracy in Africa, as journalists in most online magazines agree (Africa Today 2021). Mureithi (2022), for example, is sure that music streaming services such as Boomplay have emerged on the continent to use digital technology to combat piracy and help artistes earn income, converting illegal consumers of music in Africa to legal listeners. In so doing, they greatly contributed to the reinvigoration of Africa's music industry. The booming music market has encouraged the music industry and the multinational platforms to open offices in African countries, which can be interpreted as an indicator that they consider the crisis to be tamed, at least to a certain extent.

Conclusions

This contribution has shown that the proliferation of the crisis narrative presented new opportunities for brokers who have developed strategies that permitted them to benefit from the crisis (see also Röschenthaler 2020, p. 254–256). As stated in the introduction to this SI; crisis creates spaces for brokers to operate and eventually make their contribution to alleviate a critical situation, the first major disruption to the Nigerian music industry occurred with the exit of the major international labels and their distribution networks. This created a space and opportunity for the Alaba electronics merchant to come in as music marketers (brokers) that gave the evolutionary Afro hip hop the platform in getting their music (CDs and VCDs) to the consumers. Digitalization created the current disruption and crisis giving way to the incursion of the streaming platforms that played the role of intermediaries using their relevant expertise in the emerging and volatile crisis (Introduction, this issue).

The example of platform brokerage illustrates how the process of meaning making through the narrative of the music piracy crisis connects to multiple wishes and anxieties, fears and hopes (Koselleck 2006, p. 371–372). As has been shown, it is also necessary to broaden the broker constellation, which is mediating between multiple parties, via the infrastructure of platforms that are governed by algorithms and develop a life and logic of their own, yet their owner is liable for the outcome. For clarity, brokerage constellation

in the Nigerian music industry consists of major key players like the record labels, the music distributors, talent managers, the event producers and the influencers. It is within these multiple players that the streaming platforms operate using their expertise for collaborations and network dynamics in fostering their major aim towards shaping music consumption, promoting and distributing music in the cloud globally.

The internet has greatly reduced the work opportunities of many of the classical broker figures – the marketers in the Alaba market for example – due to its affordances of instantaneous purchase and sale via various platforms. As has been shown in this contribution, digital technology also offered opportunities for new types of brokers and infrastructures for brokerage relationships (see also Koenig and Whittaker, this issue). When the music industry began to complain about the loss of income and disseminated the piracy crisis narrative (Reyman 2010), broker-entrepreneurs in Nigeria and elsewhere spotted the opportunity to create their own jobs, make a living from the commission they subtract and sourced a percentage of revenues from both sides. They aspired to bring different parties together, negotiate their interests, keep the transactions secret or at least opaque and bring artistes and audiences together without them meeting directly. Music platforms as intermediaries (Gillespie 2010), gateways, or mediators (Van Dijck 2013) and their owners are involved in several ways with crises: they mitigate the crisis through their services (range of offers on the platform) and they have a crisis solving potential through their new model of renting music. However, the owners of interactive platforms can create further crises by being unable to control the activities of users on their platforms.

In Africa, Nigeria with its vibrant music sector was particularly active in creating various models of such platforms, as presented in the first section of this article. Broker-entrepreneurs constructed platforms that enabled users to access music for payment or offered a freemium model. If users got used to renting music through online streams, then they would no longer download them and were thus prevented from sharing them in uncontrollable ways. The process however took time and first the acceptance of various models by users had to be tested.

The owners use the platforms as an infrastructure through which they accomplish their brokerage work. They have characteristics that match in many ways those of classical broker figures, but they also show overlapping roles, in particular their entrepreneurial aspirations, as was outlined in the second section. The creators of the streaming platforms are one example of economic actors who took the music industry crisis as an entrepreneurial opportunity (Röschenthaler 2020) and developed a new way of dealing with the circulation of music. The internet with its capacity to facilitate the 'compression of time and space' (Harvey 1990) has transformed and facilitated the work of these brokers. They no longer need to bridge physical space in the

geographical sense and gaps in time but can provide instantaneous access through its digital infrastructure to widely dispersed sources to their users. The bigger streaming platforms have the advantage that they can include music in their catalogues from all over the globe and make it accessible to users wherever they are. This makes these platforms attractive.

Notwithstanding, platforms were and still are confronted with daily challenges of bankruptcy and being cannibalized by more powerful platforms. Although the platform brokers offer potential solutions to mitigate the crisis, observations of the Nigerian music industry reflect the brokers' vulnerability and the temporal dimension of brokerage, as outlined in the introduction to this special issue. They constantly must renegotiate their position in the highly volatile setting that requires capital to survive, navigate the quickly changing preferences of users and resist critical views from politics and music industry of the services that they offer through their platforms. The platforms have a promising potential but whether they can survive and continue to reduce the crisis can only be revealed in the future.

Notes

1. Note that in the Nigerian context 'artiste' follows the Francophone spelling, as Nigerian musicians prefer this notation.
2. Note the difference between Fela Kuti's Afrobeat and the recent Afrobeats genre that became globally known when it climbed the Billboard Hot 100.

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