

2021 Report

CultureSTATS-AD

**Abu Dhabi
Performing Arts
Ecosystem:
Networks,
Inclusivity,
Sustainability**

دائرة الثقافة والسياحة
DEPARTMENT OF CULTURE
AND TOURISM



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NOTES ON THE SCOPE OF DATA COLLECTION

The scope of the qualitative data collection was limited to the 35 interviews (detailed in Appendix D) conducted with performing arts professionals working in the emirate of Abu Dhabi. Consequently, the analysis is non-conclusive and is in the context of Abu Dhabi.

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CultureSTATS-AD is a knowledge platform that enables and produces cultural statistics about the emirate of Abu Dhabi. It combines existing data with new research, statistics and analysis to create a bigger picture of how culture drives the emirate forward. CultureSTATS-AD provides tools and information to build on the current understanding of the impact of culture and cultural assets on Abu Dhabi's social and economic growth. It adopts an interdisciplinary approach that requires research expertise and ongoing collaborations with social scientists, economists, urban planners, data scientists and geographers. This research enables an in-depth exploration of the Abu Dhabi culture sector and the emirate's heterogeneous cultural fabric. The study is aided by GIS mapping, and the results are documented in CultureSTATS-AD platforms for data collection, storing and interpretation, benefiting stakeholders and policymakers.

The **Department of Culture and Tourism - Abu Dhabi** (DCT Abu Dhabi) drives the sustainable growth of Abu Dhabi's culture and tourism sectors, fuels economic progress, and helps achieve Abu Dhabi's broader global ambitions. By working in partnership with organisations that define the emirate's position as a leading international destination, DCT Abu Dhabi strives to unite the ecosystem around a shared vision of the emirate's potential, coordinate effort and investment, deliver innovative solutions, and use the best tools, policies and systems to support the culture and tourism industries. DCT Abu Dhabi's vision is defined by the emirate's people, heritage and landscape. We work to enhance Abu Dhabi's status as a place of authenticity, innovation, and unparalleled experiences, represented by its living traditions of hospitality, pioneering initiatives and creative thought.

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Produced in Abu Dhabi, United Arab Emirates.

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HIGHLIGHTS

The *Abu Dhabi Performing Arts Ecosystem: Networks, Inclusivity, Sustainability* report was based on an ethnographic-research approach to primary data collection. The report aims to provide an analysis of the different elements that make up Abu Dhabi’s performing arts ecosystem. It elaborates on recommendations that inform the creation of policies and provides policymaking tools to strengthen and advance that ecosystem.

- The analysis shows that the links between governmental and semi-governmental cultural entities (on a macro-level) and smaller-scale events, venues and structures (on a micro-level) need to be developed further. The development would lead to an enhanced and better-organised support mechanism that would enrich the ecosystem. Simultaneously, stronger links need to be made between large-scale venues and events supported by the government and the singular cultural practitioners and small-scale entities. This connection would develop, encourage and strongly promote locally anchored artists.
- Some of the emirate’s regulations and strategic issues (for example, relating to visas and licences, business headquarters implementations and employment) need to be improved further. There should also be specific adaptations of absent and less prominent regulations for the cultural and creative industries (such as creative visas, support for cultural business implementation in Abu Dhabi and specific legal frameworks for artistic production). Once made available, the international and emirate-level and internal and sector regulations.

- The recognised gaps that negatively impact the sustainability and resilience of the performing arts ecosystem include:
 - The absence of performing arts education in public schools, leading to a shortage of amateur performers and audiences.
 - The absence of a unified approach to performing arts education in specialised schools.
 - Limited opportunities in the national education system for young musicians, actors and dancers to forge careers, particularly at an international level.
 - Limited knowledge of Abu Dhabi’s musical expressions and oral traditions and the lack of cohesion between these expressions and the education system and research.

Ecosystem Networks	Ecosystem Inclusivity	Ecosystem Sustainability
<div>1. Stimulate the creation of small- and medium-sized venues, artist hubs and clusters, and recording studios.</div> <div>2. Enhance access to and proximity of the performing arts.</div> <div>3. Produce and disseminate an Abu Dhabi cultural calendar of events that would include all events and would address broader stratum of population.</div> <div>4. Organise more multi-generational and open events throughout the year.</div> <div>5. Develop audiences through long-term education; perceive performing arts as generators of long-term social interaction.</div> <div>6. Create an awards ceremony to celebrate local artists.</div> <div>7. Acknowledge Arab and non-Arab components of Emirati culture; promote different traditional expressions.</div> <div>8. Identify and support local artists and entities from different backgrounds.</div>	<div>1. Implement a creative visa or other instrument to reduce the transient character of Abu Dhabi’s performers.</div> <div>2. Simplify the licensing process.</div> <div>3. Implement the organisation of rights in the form of a ‘collective management organisation’ (CMO), an intellectual property court, an intellectual property framework and a structure that would allow artists to have more direct control over their rights.</div> <div>4. Stimulate implementation of the culture businesses’ headquarters.</div> <div>5. Support marketing and funding for original content creation and production.</div> <div>6. Implement specialised platform(s) to improve communications across the sector.</div>	<div>1. Develop a performing arts curriculum in general education.</div> <div>2. Develop a national performing arts education that will nurture professional career paths at the international level.</div> <div>3. Establish a consensus on a coherent approach to the modalities of the United Arab Emirates’ performing arts education.</div> <div>4. Implement training programmes for emerging artists, managers, producers, technicians, choreographers, theatre costume designers, as well as other experts.</div> <div>5. Implement research instruments (grants and scholarships) that will enable fieldwork explorations of Abu Dhabi’s non-institutionalised artistic expressions.</div> <div>6. Create sustainable connections between institutionalised and non-institutionalised, professional and community-based expressions.</div>

Table 1 - The Abu Dhabi Performing Arts ecosystem gaps identified by the research

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Introduction

This report is an initiative under CultureSTATS-AD, a knowledge platform that produces and enables an in-depth exploration of Abu Dhabi’s culture sector and its heterogeneous cultural fabric. CultureSTATS-AD combines existing data with new research, statistics and analysis to generate a holistic perspective on the impact of culture and how it drives the emirate’s progressive development. CultureSTATS-AD is a large-scale, non-routine and complex project with a high degree of inter-task dependency categorised under separate yet interlinking modules. Each module requires a series of activities and provides unique outcomes that maximise the use of the culture sector’s potential.

The Cultural Activities Development module (CAD) analyses Abu Dhabi’s cultural activities following a baseline study Cultural Activities Baseline (CAB). In 2020, the Introductory Cultural Activities Baseline (CAB) report was delivered to create knowledge about: (1) the existing cultural activities in Abu Dhabi; (2) the development of each culture sub-sector; and (3) the existing and emerging cultural clusters.

The CAD reports map the historical development of Abu Dhabi’s culture sector through quantitative and qualitative methods. It provides the necessary information to further delve into the cultural sector and to identify and highlight development opportunities for the emirate. Whereas the analytical and technical studies give the required data and information to recognise the gaps, comprehend the needs and convey knowledgeable recommendations.

In 2020, the CultureSTATS-AD project supported Abu Dhabi’s application to become part of the UNESCO Creative Cities Network (UCCN).

The project offered a qualitative study, via interviews, to explore Abu Dhabi’s performing arts ecosystem. In November 2021, Abu Dhabi was officially named a ‘City of Music’ by UNESCO.

The *Abu Dhabi Performing Arts Ecosystem: Networks, Inclusivity, Sustainability* report comes to provide an indepth analysis of one of Abu Dhabi’s culture sector domains. This report to develop the strategic assessment tools for Abu Dhabi’s performing arts ecosystem, through a detailed analysis of qualitative data. While Abu Dhabi has a rich heritage in traditional music and performance, the situation of contemporary performing arts as a part of the cultural and creative industries in the emirate is relatively recent and has been shaped by the contemporary social, economic and political realities of the United Arab Emirates.

Limited data exists on the internal dimension of Abu Dhabi’s performing arts ecosystem. How do the locally based artists and musical entities perceive current challenges in the fields of music, dance and theatre? What distinguishes Abu Dhabi in terms of cultural production and cultural offerings in the performing arts? What must be addressed from the policymaking perspective to improve key aspects of both cultural production and cultural offerings, including audience development?

This report uses an ethnographic approach to primary data collection to provide an analysis of different elements that make up the Abu Dhabi performing arts ecosystem. It makes recommendations to inform the creation of policies and policymaking tools to advance this critical creative sector.

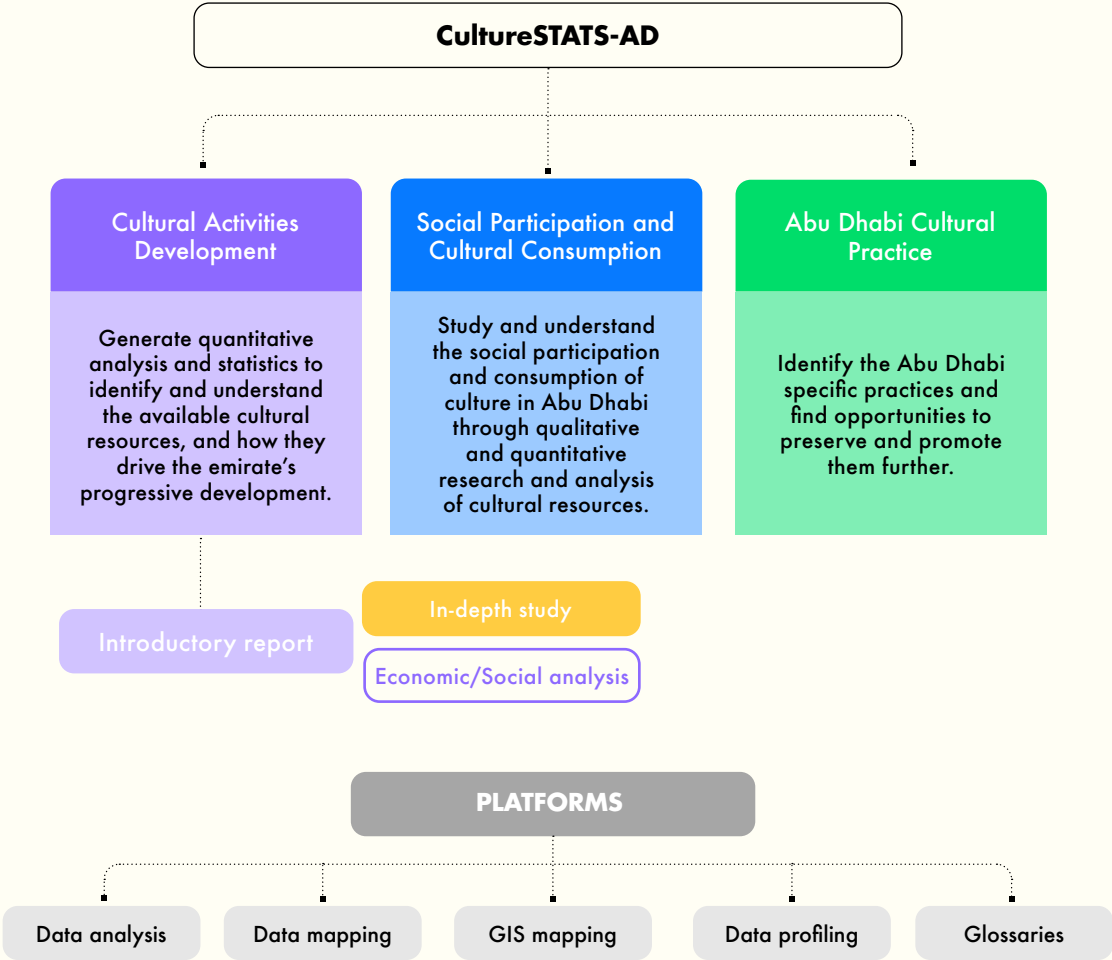


Figure 1 - CultureSTATS-AD project chart: CAD module

APPROACH AND METHODOLOGY

Much of the work in the performing arts ecosystem aims to facilitate interactions between artistic productions and the audience; between the artistic production and its environment; and among the organisations, creative practitioners and technologies that define the field of the performing arts. Exploration of the dynamics of artistic production and the wider ecosystem requires an understanding of the connections between performing arts (as a 'purely' creative activity) and organisational, technological and financial structures.

It follows that the economic, industrial and technical factors that stimulate, limit, shape or adjust artistic activity as a part of a rationalised production process should be at the core of the exploration. It is also important to analyse new combinations of pre-existing creative practices and processes. These can result in a social or economic value-added innovation without major new scientific, technological or aesthetic contributions (for example, innovation in organisational forms of artistic production).

To understand these complexities and interactions, the Abu Dhabi performing arts scene can be analysed as an ecosystem. A system can be defined as "a comparatively bounded structure consisting of interacting, interrelated or interdependent elements that form a whole" (Susser and Susser, 1996). System thinking argues that the only way to fully understand a thing or an occurrence is to understand the parts in relation to the whole.

Social ecology is a framework or set of theoretical principles for understanding the dynamic interrelations among various personal and environmental factors (Schulze et al., 2005). The social ecosystem concept has been applied to different industries and is adopted to analyse the dynamic interactions between stakeholders in each industry or area. An 'art ecosystem approach' views the art ecosystem as a complex actor network, where each actor is guided by a different logic and decision-making principles (Bateson, 2000, Moss, 2011).

Therefore, the priorities of different actors in the same ecosystem (such as cultural policymakers and cultural practitioners) may vary or be adjusted, according to singular or specific contexts. The complexity of the art ecosystem is another important dimension, reflecting dynamic interactions and organic relations in civil society, government agencies, artists and residents, among others. Art ecosystem diversity embraces social relations, face-to-face exchanges, construction of common knowledge through various interactions, and the creation of new sources of income.

This report aims to explore, through a qualitative methodology, both the diversity of the Abu Dhabi performing arts ecosystem and the logics of the actors (creators, entities and institutions) that sustain it. The research is focused on Abu Dhabi's music, dance and theatre fields, as well as related stakeholders (including rights owner organisations and public and private entities) that comprise different parts of the performing arts ecosystem.

Researchers completed 35 interviews, and the representation of music, dance and theatre sub-sectors in the ethnography was proportional to their size, with music as the largest domain, theatre the second and dance being the smallest – represented by relatively few entities and performers – shown in Figure 2. At the same time, as the sub-sectors of the performing arts are interrelated and interdependent, many observations are transversal and concern them all.

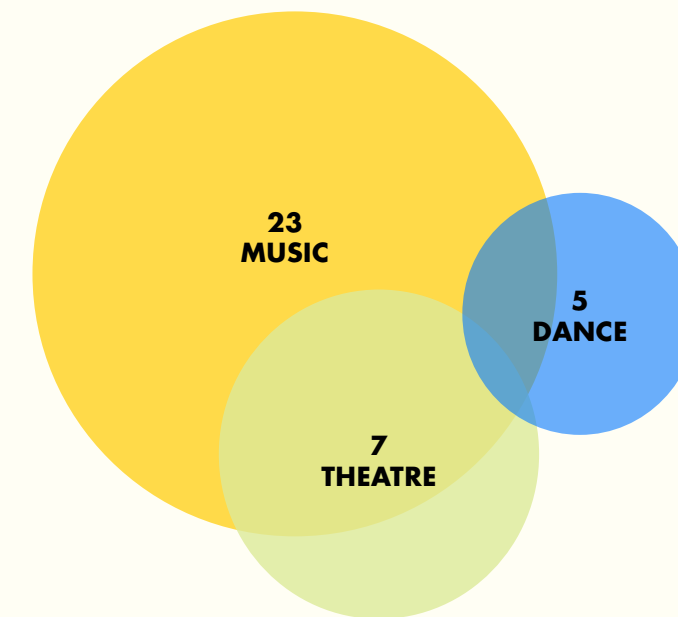


Figure 2 - Number of interviews per sub-sector (music, theatre and dance)

In the first part of the report, the interview findings are presented, analysed and structured in three interrelated blocks:

- **Ecosystem Networks** integrates the interconnected intangible resources (human resources, audiences, events) and tangible resources (venues, technical or physical infrastructure).
- **Ecosystem Inclusivity** addresses questions related to the intersecting connections of the ecosystem with the sectoral, national and international regulations, legal frameworks and adjacent sectors.
- **Ecosystem Sustainability** includes recurrent topics related to knowledge transmission, education, professional training and research in the field of performing arts in Abu Dhabi.

Each block starts with the conceptualisation of transversal (intersecting) challenges that characterise Abu Dhabi's performing arts ecosystem networks, inclusivity and sustainability, and finishes with conclusions and recommendations formulated after the data analysis.

¹ A comparable inductive approach has been used by Daniel Silver and Terry N. Clark in *Scenescapes* (2016) to define the qualitative characteristics of urban scenes.

The second part of the report offers an analysis of the ecosystem networks, inclusivity and sustainability based on a SWOT analysis (strengths, weaknesses, opportunities and threats). However, in this study, the SWOT factors have not been employed in the traditional strategic planning context, where issues are identified and assessed as one (or more) elements of the SWOT framework. Instead, SWOT has been deployed using a sociological logic in which each category is a logically coherent and conceptually neutral category that reflect intentions derived from the interviews.¹

Based on transcriptions of the recorded interviews, a list of perspectives or points of view was consolidated to describe the Abu Dhabi performing arts ecosystem. It became apparent that several of these perspectives address the same core issues. However, the specific contexts and practical ways to address these core issues raised by different cultural professionals reflect myriad underlying social processes. The analysis seeks to understand how the actors attribute different levels of importance to each subject, and how they articulate different interpretative schemes. While discourse analysis is focused on explanation, this perspective uncovers the contextual intentions that depend on the situation in which the actors find themselves (Raevskikh et al., 2021).

For example, sometimes the lack of recording studios is perceived as a weakness (*“Abu Dhabi’s recording studios are underdeveloped; in Jordan, we have more developed structures”*). In other cases, the same problem is perceived as an opportunity (*“I own a small recording studio; this field is almost unoccupied, so I work with many interesting performers”*), or a threat (*“If the lack of recording studios will not be addressed, Abu Dhabi will never integrate the international competition”*).

The contexts of some interviews combine several dimensions, when the argument is perceived, for example, both as weakness and opportunity. Based on this contextual interview analysis, each argument was extracted and assessed on a scale of 0 to 5 as an element of the SWOT framework (Table 1).

Argument	No. of repetitions across the interviews	Strength	Weakness	Opportunity	Threat
		Score 0–5	Score 0–5	Score 0–5	Score 0–5
Topic	Ecosystem Resources				
Lack of recording studios	7	0	5	3	2
Well-developed big scale infrastructure	10	5	0	2	0

Table 2 - Examples of the argument scores as per the interviewees’ contextual intentions

The analysis is non-linear, as the coverage of topics does not necessarily include all the four elements of the SWOT framework: for example, the arguments related to the ‘education’ topic are mainly discussed in terms of strengths and opportunities; the arguments related to ‘regulations’ are considered predominantly in terms of opportunities and weaknesses, and so forth. To enhance this approach and formulate strategic insights, the factors and descriptive dimensions of SWOT were juxtaposed with four new quadrants, representing the different combinations (Nolan, 2017, Figure 3):

- Comparative advantage (through combination of strengths and opportunities).
- Mobilisation (through combination of strengths and threats).
- Investment (through combination of opportunities and weaknesses).
- Damage control (through combination of weaknesses and threat).

¹ A comparable inductive approach has been used by Daniel Silver and Terry N. Clark in *Scenescapes* (2016) to define the qualitative characteristics of urban scenes.

EXTERNAL FACTORS	INTERNAL FACTORS	
	Streghths	Weaknesses
Opportunities	Comparative Advantage	Investment/Divestment
Threats	Mobilisation	Damage Control

Table 3 - Combination of factors from SWOT (Nolan, 2017)

- **Comparative advantage combines strengths with opportunities:**
 - This represents the strong and developing competitive aspects of Abu Dhabi’s performing arts ecosystem.
- **Mobilisation combines strengths with threats:**
 - This draws attention to areas where measures are needed to improve the comparative advantage.
- **Investment combines opportunities in the environment with current weaknesses:**
 - This explains the areas where targeted projects need to be launched.
- **Damage control combines the ecosystem’s current weaknesses with threats:**
 - This highlights the areas where active measures are barely possible, and where work on deeper comprehension of existing problems is necessary to improve the situation.

In the following parts of the report, the Abu Dhabi performing arts ecosystem’s networks, inclusivity and sustainability are all addressed. Next, the assessment based on the SWOT analysis will be presented. Finally, the report will offer conclusions and recommendations derived from that analysis.

Ecosystem Networks: The need for new systems of support

The empirical evidence demonstrates that Abu Dhabi's performing arts resources and related networks should be analysed in relation to (1) their scale ('big scale' versus 'small scale') and (2) the way they are implemented or organised ('top-down' with the support of the government versus 'bottom-up', carried by singular entities). There is a strong correlation between bigger scale resources and 'top-down' support from the government, which was provided at the origin of their implementation in Abu Dhabi.

The analysis shows that the links between the governmental and semi-governmental cultural entities² and smaller-scale 'bottom-up' events, venues and structures need to be developed further to ensure proper support, and to understand in more detail how this support needs to be organised in specific cases. Simultaneously, the big venues and events supported by the government need to be better connected to the smaller entities and singular cultural practitioners, with the aim of developing, encouraging and giving greater visibility to locally anchored artists (see Figure 3).

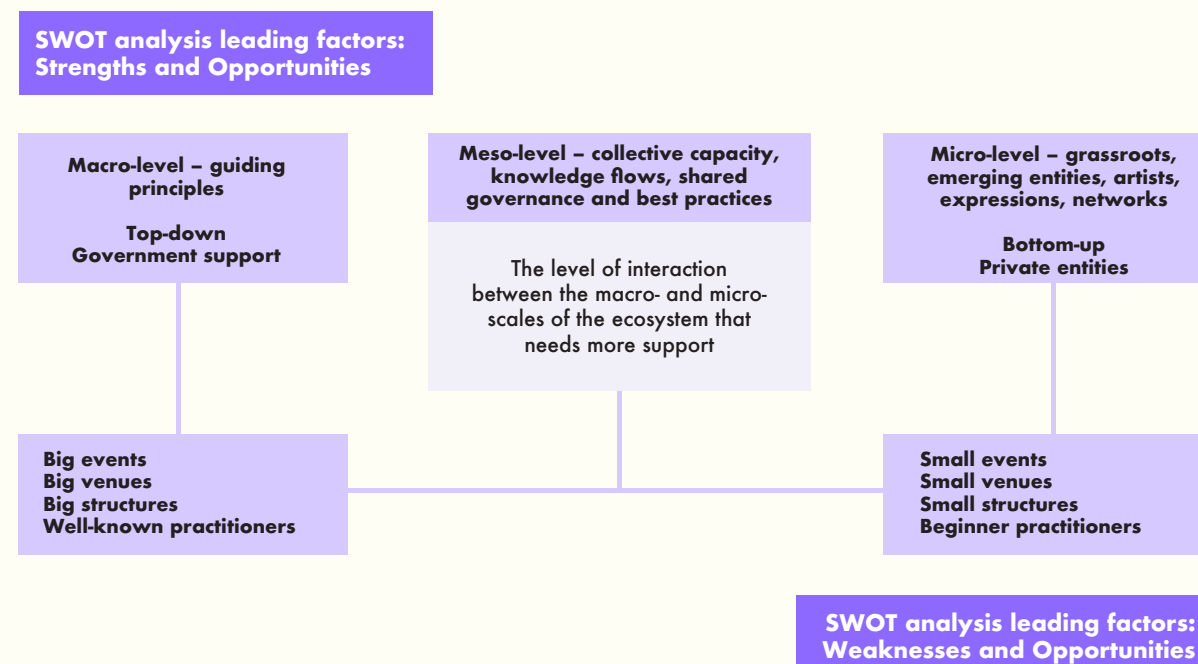


Figure 3 - A need for further development of the performing arts ecosystem meso-level: collective capacity, knowledge flows, shared governance and best practices

In the table above, the micro- and macro-levels of the Abu Dhabi performing arts ecosystem are defined according to the relative size of the symbolic and material resources related to the actors, structures and networks. That is whether there is top-down regulation and support (macro-level) or whether the entities, artists, expressions and networks are at the level of emerging spontaneously as parts of the grassroots dynamic (micro-level). Observation shows that the connections between the macro- and micro-dimensions of the Abu Dhabi performing arts ecosystem must be further developed in terms of fostering of collective capacity, knowledge flows, shared governance and best practices. Advancing these meso-level connections will support ecosystem integrity and constitute the foundation of long-term development.

The social aspect of the ecosystem's meso-level needs to be reinforced, as the developing artistic networks reflect the process of formation and elaboration of stable cultural interactions. This includes interactions between the actors and entities that contribute to sustainable meso-economic mechanisms. These might include

sustainable 'horizontal' business arrangements and procedures for mediating the provision of services. These mechanisms contribute to advancing larger goals and outcomes, such as developing local tourism, supporting cultural audience development strategies and fostering greater diversity in the cultural and creative sectors (Matkovskyy, 2012). In the longer term, these mechanisms will have a major impact on building a sustainable and dynamic Abu Dhabi performing arts sector.

Finally, in terms of policies, the meso-level of the Abu Dhabi performing arts ecosystem reveals the impact that different actors or initiatives have on macro policy, and on the necessary adjustment of the latter (Matkovskyy, 2012). If the meso-level is underdeveloped, the macro policies do not receive practice-based insights for further adjustment and maturation: "The public authorities are not always necessarily in a position of strength and must negotiate with the other actors. It is in this way, by recognising and integrating the logic of field, that they acquire and strengthen their legitimacy vis-à-vis professionals," (Demil and Leca, 2003).

STRUCTURES AND VENUES

"Formula 1 concerts are a reliable chance to see amazing and legendary music."
"The Cultural Foundation is making it normal to have live shows in Abu Dhabi; it is bringing cool independent Arab and North African artists to the city."
"Abu Dhabi has more means and infrastructure and investments compared to the other cities in the Arab World."
"Abu Dhabi has good infrastructure and has everything that it needs."

Performing arts events mentioned among the strong achievements include: Formula 1 and Yasalam concerts, Abu Dhabi Music Festival, Al Hosn Festival, Sheikh Zayed Heritage Festival, as well as television shows that have raised artists (such as Arab Idol).

The interviewees saw the Cultural Foundation as an active and inspiring space that plays a proactive role in the performing arts of Abu Dhabi. They also refer to the New York University Abu Dhabi (NYUAD) Arts Center, Abu Dhabi Music & Arts Foundation (ADMAF), Louvre Abu Dhabi, Berklee Abu Dhabi and Manarat Al Saadiyat as key nodes in this domain.

² Entities that are essentially owned by the government, but operate predominately in the private sector.

Despite these accomplishments, the Abu Dhabi performing arts ecosystem is viewed as missing several important elements. For example, artists have almost nowhere to record music. The existing recording studios are private and commercial and only available for artists with adequate budgets. Beyond a standard level of recording studios, Abu Dhabi has no studios of an international calibre:

"As we play Japanese music, we are in contact with Japanese musicians. We visited Japan and recorded several pieces there. In Abu Dhabi, there are no recording studios of an international level."

The lack of small- and medium-sized performance venues negatively impacts the development of emerging music bands and their audiences. This gap in the ecosystem was highlighted by many interviewees, who suggest that having more bars or informal venues where people can meet, perform and jam is more important than any concerns of ticket sales.

"There is no musical activity without jam sessions, without improvisation and without places in which people can gather and perform informally."

"There is a need to create venues for smaller groups to experiment in."

"It would be great to have a sound/listening cafe."

"To start with one new venue per year and have this coordinated growth over a period of time, rather than make a big statement that we are going to build a 1,000-seat stadium ... If that is a supported initiative, you will end up with an international stage in Abu Dhabi."

The same observations are relevant for dance and theatre as well as music:

"We need a sort of 150–250-person venue, not the great big sort of national theatres."

Another important observation is that events and venues are concentrated in 'far cities' such as Yas Island and Saadiyat Island meaning that the proximity of neighbourhood-level activities and venues is missing. Pop singers believe that the best places to launch their careers are the coffee shops that host 'open mic' events and which are already gathering places for the community. The theatre actors insist on the importance of fringe and small theatre companies.

"Create venues for self-expression, rather than corporates for producing products."

The cluster paradigm (model) is considered favourable for performing arts ecosystem development. The notion of a cluster describes the geographic concentrations of interconnected companies and institutions in a particular sector. The interviewees support the view that geographic concentrations of interconnected actors and entities favour innovation, creative activities and the transfer of 'tacit' knowledge (Polanyi, 2008, Nonaka and Hirotaka, 1995).

"Create subsidised clusters where there is a high concentration of artists altogether."

"Build in studio spaces, recording spaces and practice rooms and some of those facilities."

"Have an entertainment hub to study music and attend workshops."

"Create a place for people to try and experiment with new and different things."

"Create an Abu Dhabi art lab."

"Have a designated area or building, with studios, for musicians to freely express music without worrying about causing a lot of noise or disruptions."

The choice of artists invited to perform at events in Abu Dhabi should be more multi-generational, bringing together a wider spectrum of the population. The seasonal dimension of events is another variable, even though the climate allows Abu Dhabi to host open air performances during most of the year. Nevertheless, the concerts and festivals are programmed during the same, relatively tight, time periods. To improve the situation, the interviewees suggest creating regular, free events throughout the year, indoor or outdoor depending on the weather. However, they also noted:

"There are many fewer free events than before, and the number of concerts and festivals is gradually reducing because of the decreased financial support. ... Street performance is not allowed anymore. This needs to be improved."

As in the case of structures and venues, the issue of proximity is critically important for events. Some events are reliant on structures and venues, whereas other more informal activity is organised outside any specialised structure. For the latter, the interviewees recommend the regular 'dispersion' of performing arts in different parts of the city, favouring street performances on the Corniche, in public parks such as Umm Al Emarat Park or Khalidiyah Park, and having events in different neighbourhoods rather than concentrating them in the same areas.

"We need a more diverse range of audience members attending different projects in different parts of Abu Dhabi, in parks and outdoors."

"Street performances need to be allowed, so that music becomes available for everyone, and not just, you know, a financial and tourist thing."

Finally, the Abu Dhabi Calendar of events needs to be produced and disseminated. Even though several calendars of events already exist in Abu Dhabi, the interviewees argue that those calendars do not include all the smaller scale and less formal events. The dissemination of the calendar needs to include more channels to cover broader strata of the population.

AUDIENCE DEVELOPMENT

The interviewees maintain there is clear potential for audience development in the performing arts in Abu Dhabi.

"Young generations are open to new and different things."

"There is an increasing interest in the performing arts."

"There is a demand for live music."

To develop performing arts audiences further, the interviewees highlight the importance of increasing the number of people who are actively and directly involved in cultural practices (for example, audience development through wider participation in cultural creation practices). Socialisation through culture – and the social relations that shared cultural practices create – are considered a core element that will increase and perpetuate cultural engagement in Abu Dhabi.

"Create exciting, careful and loving communication through art."
"Create events and venues for people to come together, not just to watch a concert for entertainment but to go from being passive consumers to actually becoming active in it."
"Create a more organic and normal relationship with groups of artists who are willing to do these things to showcase their work; they are willing to commit to working to improve cultural life."
"Abu Dhabi needs 'rallying points' that bring the community together through venues and festivals."

At the same time, audience development for the classical performing arts is perceived as a challenge. The preference for short-term masterclasses or courses instead of longer-term music, dance and theatre education programmes in schools is highlighted as a factor that negatively impacts the progressive maturing of audiences, especially for classical music.

"Few people are interested in classical music."
"Classics appeal to a very niche audience."

To advance audience development for classical performing arts, different forms of education and familiarisation are needed to improve or alter perceptions, as they are often seen as 'elitist' or 'conservative'. The idea of founding a professional orchestra is considered to be an important anchor for classical music expression in Abu Dhabi, although not everyone's shares this view. Among the interviewees who support the establishment of a professional orchestra, views differ regarding a focus on Arabic and/or western musical traditions. Some interviewees suggest the establishment of an Emirati Symphony Orchestra that could compose and perform classical music based on both western and Arabic/Emirati traditional forms. Others recommend creating two separate orchestras, one for western classical music and another for Emirati and Arabic musical expression.

HUMAN RESOURCES

The multicultural reality of Abu Dhabi's population leads to divisions in the human infrastructure of the Abu Dhabi performing arts ecosystem. It is recommended that the rich and diverse musical heritage of the emirate be formally recognised through government policies and initiatives. This diversity can become a major strength and opportunity for the Abu Dhabi music scene and sector, including its talent base.

"The history of Abu Dhabi and its ties to the Arabian Peninsula, Balochistan, South and East Asia make it special compared to other cities in the Arab world."
"This is a global city that has an Arab identity, but also a very strong Asian identity."
"Abu Dhabi is very strong in integrating other societies and cultures."

However, the local scene is still very scattered and disconnected, in terms of genres, geographies and sustainable links between the past and present or contemporary music scene; between classical western and Arabic traditions; and between the government-supported and commercial performing arts activity of Abu Dhabi.

"The rapid growth of the country has impacted art and music – we still need to inherit whatever development existed prior that."

"The local musical creativity and the music scene in Abu Dhabi is less appealing and interesting than, for example, Cairo or Casablanca."
"There is no group that represents the UAE music scene."
"Originality does not exist; people prefer familiarity over creativity."

To improve the situation, the interviewees suggest embracing and acknowledging non-Arab components of Emirati culture along with implementing policies where ethno-cultural and racial diversity, as well as countries of origin, are acknowledged.

"Create a scene for the people who live here, for the indigenous."

Likewise, it is important to create a distinctive Abu Dhabi 'cultural footprint' that would make Abu Dhabi residents feel proud of their own performing arts heritage, a unique identity that is distinct from other cultural areas. Local artists from different backgrounds must be identified and supported. This would require (1) a collective branding of the music scene defined by its diversity, as well as (2) the articulation and promotion of diversity as a core dimension of Abu Dhabi's identity.

"So that way, no matter how many people come and go, if there were more opportunities for local artists to perform to showcase their work ... Then even if expatriates leave the country, they will remember that and will want to go back."

To prevent a 'cultural migration' of both artists and audiences from Abu Dhabi to Dubai and Sharjah, Abu Dhabi needs to invest in local music and the emerging markets, to concentrate on young and independent musicians, while at the same time opening more conversations. Among other recommendations, several interviewees recommend the creation of an award and awards ceremony/event that celebrates local artists.

"We are giving so much media attention to very, very old artists, I think it is time that they give a little push to the new ones."

Another important insight is the need to promote different forms of traditional expression (music, dance and theatre – such as Indian traditional theatre), and to make them available to audiences. Programmes such as 'Sounds of the UAE' need to increase their offerings, along with supporting the creation of new productions that combine modern and traditional dimensions.

"If Abu Dhabi traditional music goes out of the market, more money will flow into the market. Because of that, artists will see an opportunity to grow and make a living for themselves. It can work as a 'cascade effect' and attract more resources and people."

PERFORMING ARTS ECOSYSTEM NETWORKS: INTERIM CONCLUSIONS AND RECOMMENDATIONS

CONCLUSIONS

The analysis shows that the links between the governmental and semi-governmental cultural entities (macro-level) and the smaller scale events, venues and structures (micro-level) should be developed and supported. There needs to be an understanding of how this support should be tailored to meet the needs of different groups. Government-supported events and major venues also need better connections to cultural practitioners and small entities at the micro-level, to create more visibility for local artists.

RECOMMENDATIONS

(based on interview analysis)

1. Stimulate creation of small- and medium-sized venues, artist hubs and clusters, as well as recording studios.
2. Enhance access and proximity to the performing arts.
3. Produce and disseminate an Abu Dhabi cultural calendar of events that would include the entirety of events and to address broader strata of the population.
4. Organise more multi-generational and open events throughout the year.
5. Develop audiences by investing in education over the long term; promote the performing arts as a source of long-term socialisations.
6. Create an award and awards ceremony that celebrates local artists.
7. Acknowledge Arab and non-Arab components of Emirati performing arts culture; promote different traditional expressions.
8. Identify and support local artists and entities from different backgrounds. This would require (1) a collective branding of the music scene, defined by its diversity, and (2) the articulation and promotion of diversity as an identity.

||||| Ecosystem Inclusivity: The need for adaptation and cohesion

Figure 4 illustrates concerns identified in the field of the performing arts ecosystem regulations: (1) the emirate-level regulations not specific to the cultural and creative sectors (such as for visas and licences, business headquarters implementations and hiring) that need further development; and (2) the specific adaptations of these major regulations to the cultural and creative sectors (creative visas, support for cultural businesses implemented in Abu Dhabi, and specific legal frameworks for artistic production) that are still in development.

The overall conclusion is there is a lack of alignment between (1) the international-level regulations; (2) the emirate-level regulations; and (3) the sector's regulations and needs.

The study of how to develop regulation of the Abu Dhabi performing arts ecosystem involves a description of the mechanisms of coordination, control, production and approval. These elements depend on the specific history of the sector (Salvemini and Delmestri, 2000): the performing arts entities and actors evolve according to the coordination mechanisms and their relationship to their specific context in Abu Dhabi. "It is during interactions between actors – while considering the environment in which they find themselves – that these entities and actors adopt conflict-resolution methods, decide on acceptable practices and collectively exclude certain types of behaviour," (Salvemini and Delmestri, 2000).

In the case of Abu Dhabi, the ecosystem regulations mainly address questions related to (1) visas and regulations; (2) rights organisations; (3) companies' headquarters implementation policies; and (4) other transversal areas of ecosystem support and regulations, such as employment and communication. The main reason the performing arts sector is still developing in Abu Dhabi is that existing regulations are either insufficient (such as intellectual property (IP) regulations) or not yet adapted to the specifics of the wider cultural and creative sectors (such as the absence of specific visa regulations for artists).

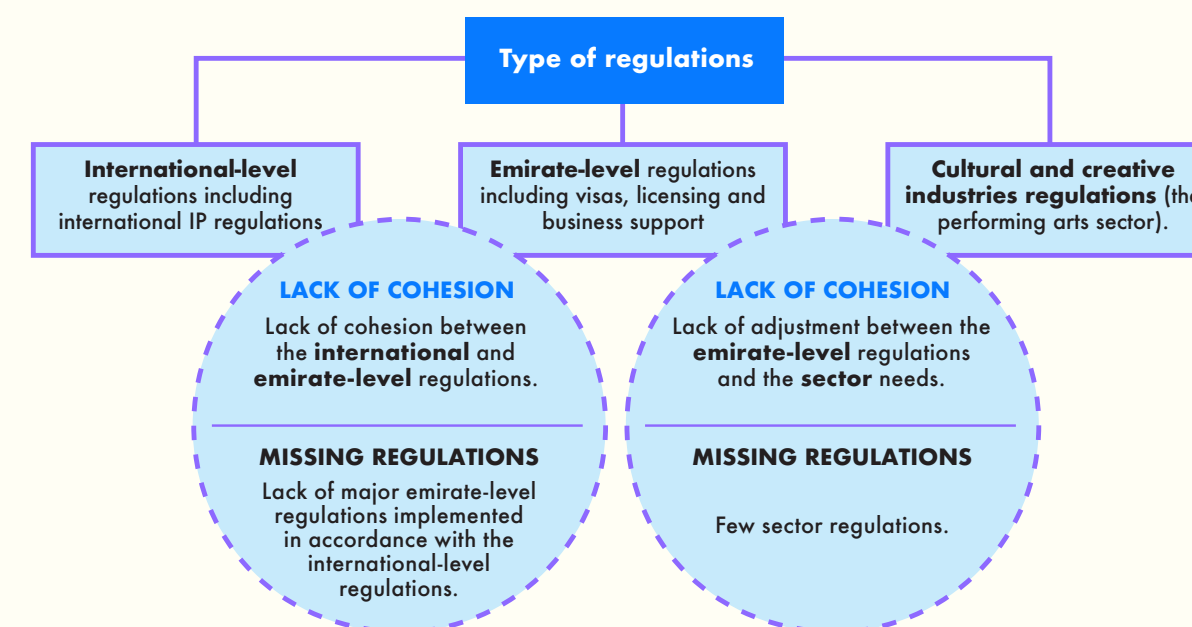


Figure 4 - Ecosystem regulations: the need for adaptation, adjustment and cohesion

VISAS AND LICENCES

The implementation of the Golden Visa and Creative Visa is considered one of the strongest positive interventions in Abu Dhabi's performing arts ecosystem regulations. One of the interviewees has received the Golden Visa and now is starting his own theatre and filmmaking business. His situation has now stabilised after 17 years of living and working in Abu Dhabi.

"Abu Dhabi is moving in the right direction with the Golden and Creative visas."

"The visa and the institutional facilities created to enable talents to settle, is a revolutionary decision."

However, despite this positive direction, the interviewees identified several obstacles. For example, the visa policies require proven artistic accomplishments, which is an obstacle for graduates and unestablished artists. The administrative status of the average Abu Dhabi-based performer does not differ from other residents. Consequently, the specifics of creative occupations (for example, uncertainties related to employment or creative deliverables) are not considered by the visa procedures. The regulations that would adapt the general administrative requirements to the creative field are still missing today.

"The 'profession' title on the visa is an obstacle, because we will not be able to do it professionally if it is not on our visas, on our residency."

"We are still not able to stay and play regularly and make a livelihood."

The freelancer visas were criticised by several interviewees as 'slow and expensive'. Also, the creative freelancer landscape is not homogeneous across the ecosystem; some creative occupations, such as that of composer, are missing from the list of freelancer specialisations. More generally, the interviewees strongly support the idea of the long-term creative visa as a core measure that should improve the situation.

The question of visas and licences is strongly interrelated with the transient character of many artists and small enterprises, events and networks in the performing arts. This is considered as a major barrier to its long-term development.

"If artists are transient, the culture will be transient too."

"With Covid and the cancellation of entertainment/live performances, people had to leave the country."

On a more general level, the transient status of non-nationals is seen to impact the performing arts ecosystem.

"If you are looking at other macro issues, the UAE has got lots of talented people who are born and raised in the UAE, but are Indian, or European or Venezuelan. And then at some point, they need to leave, and this also concerns the artists."

"The drain on the talent also harms the nationals, because they do not have other people to collaborate with."

In addition, the system of entertainment licences is perceived as 'too difficult' because of the costs and the complexity of the long approval process.

"Entertainment licences cost a lot of money, which limits the amount of artists."

"The licensing and approvals process brings obstacles."

"Licensing live music and live performances are big problems."

To improve the situation, the interviewees recommend simplifying or eliminating the licensing process, and implementing a flat annual fee for all venues.

RIGHTS ORGANISATIONS

The field of rights management is still underdeveloped in the United Arab Emirates. The only rights management entity that currently exists in Abu Dhabi is ESMAA, a private enterprise founded in 2020, invested in and used by twofour54. However, to systematise its activities and scope, ESMAA has had to change its status to a 'collective management organisation' (CMO) and join the not-for-profit sector as its public legal form.

"Artists struggle with getting someone to represent them so they can get paid through them."

"There are no legitimate artist agencies and copyrights organisations such as ASCAP or BMI, so it is impossible for artists to enforce their rights."

The opportunities related to the development of rights management include inviting international specialists in intellectual property and implementing an Intellectual Property Court. The whole legal property framework needs to be consolidated, as well as the structures that would allow artists to have more direct control of their rights and the collection of revenues.

The interviewees suggest international benchmarking of the sector's legal frameworks. As Abu Dhabi is still in the early stages of developing the organisations, the international experience is useful both in terms of implementing best practice and avoiding the mistakes that other countries have made in the past.

"Abu Dhabi needs to look how the laws have been written in other countries, and how the different companies that form that ecosystem have been allowed to operate, to learn from that to not repeat the same mistakes here."

ABU DHABI-BASED HEADQUARTERS

Attracting the headquarters of performing arts businesses would help Abu Dhabi to increase its competitive advantage in an area where Dubai is clearly leading.

"You can shape Abu Dhabi as a hub that will provide its own identity, independent of Dubai."

"Convince the headquarters to open offices in Abu Dhabi; reach out to places like Spotify, Anghami and Universal."

The opening of the Anghami headquarters is considered one of the most important recent achievements in this area.

"This is a great step, because they are now publicly listed on Nasdaq."

"Anghami is a very strong signal that Abu Dhabi is becoming an attractive place for the music scene."

The interviewees from Anghami mentioned the potential of Abu Dhabi as an emerging technology hub that combines the business dimension with a strong concentration of knowledge of technology. This expanding technological competence can enhance Abu Dhabi's attractiveness for business headquarters.

"Abu Dhabi's investment in tech/the tech hub will attract many tech companies to set up there; It is more tech-focused, less commercial-focused."

The technology dimension has become critically important for the cultural and creative industries. Digital technologies allow the cultural and creative sectors to exploit their creative assets and generate additional social and economic value, assuming that content rights tools can be established.

OTHER AREAS OF ECOSYSTEM SUPPORT

The diversity of small companies (for example, private theatre groups and event organisers) should be supported through marketing. The costs of production are high, and there is a shortage of locally based competent specialists in marketing and communications.

"Support the artists to innovate in terms of their marketing and presentation of themselves."

The funding for original content production is another important area of needed support.

"Producing content here is pricey. Because there are very few people doing it ... there is even fewer that can do it at a high level."

Artists also need greater stability in revenue to navigate the uncertainties of creative occupations. The 'typical' artist (those who are unestablished and not yet recognised) works multiple jobs, spends more than average hours in both the arts and non-arts activity, and is likely to work on short-term contracts with no sustainable career development structure.

"Outside of the international artists who live here, none of the locally based artists are able to survive with just art."

"We need to create a status such as, for instance, 'intermittents du spectacle' [part-time creative and cultural practitioners] in France."

"Being an artist is difficult, especially financially, if you are not an A-lister."

The numerous interviewees underline the lack of communication across the sector's key players: between the artists and government and private sector entities; among the artists themselves with the absence of an actors' guild in Abu Dhabi; and especially among traditional artists, who need to increase the level of connectivity among themselves and through collaborations with non-traditional artists and industries.

"There is no collaborative effort from the artists, the record labels, the digital service providers, and so forth."

Information related to current regulations and other sector data (such as statistics on music production and information on the intellectual property regulations) is likewise very difficult to access. Consequently, it is recommended that a specialised platform be created to fill in this gap.

PERFORMING ARTS ECOSYSTEM INCLUSIVITY: INTERIM SUMMARY AND RECOMMENDATIONS

SUMMARY

A range of strategic development issues still require attention, including regulations for visas and licences, as well as questions related to the location of business headquarters, employment, and so forth. In addition, specific adaptations of emirate-level regulations to the cultural and creative sectors (such as creative visas, support for cultural businesses and specific legal frameworks for artistic production) are not fully developed and not yet implemented. There is also lack of cohesion between international, emirate-level and sector regulations.

RECOMMENDATIONS

(based on interview analysis)

1. Implement a creative visa or another instrument to reduce the transient character of the ecosystem's actors or entities.
2. Simplify the licensing process.
3. Implement rights organisation in the form of a 'collective management organisation' (CMO), an intellectual property court, an intellectual property framework and a structure to give artists more control of their rights.
4. Attract the headquarters of culture sector businesses through strategies such as further developing Abu Dhabi as a technology hub.
5. Support marketing and funding for original content creation and production.
6. Implement specialised platform(s) to improve access to information and communication across the sector.

Ecosystem Sustainability: The need for consensual decisions

Cultural reproduction is part of social reproduction (the continuation of social structures), through which entire societies and their cultural, structural and ecological characteristics are reproduced through a process that invariably involves a certain amount of social change (Bourdieu and Passeron, 1970). Through this prism, the sustainability of the Abu Dhabi performing arts ecosystem sustainability evokes the social process through which practices related to music, dance and theatre are repeated across generations (cross-generational transmission), and also through socialising influences of educational entities, professional training opportunities and research networks.

As “the education systems are particularly not amenable to universalist evaluation because, more than other social systems, they fulfil a function of cultural conservation and have an intimate relationship with the past of their national cultures” (Bourdieu and Passeron, 1970), the history and sociological development of Abu Dhabi does not allow comparison of the emirate to countries with longer term traditions of institutionalised forms of music, dance and theatre education. However, the debates and discourses that frame performing arts ecosystem sustainability can be considered as relatively universalist, as they are continually addressed not just in countries that have historically anchored performing arts education systems, such as in Europe, but also in countries with more recent developments in the field (such

as India, China, Australia and New Zealand). For example:

- **How should the education system articulate amateur practices ‘for pleasure’ and challenging paths of excellence?**
- **What artistic expressions need to be taught and how?**
- **How should this system articulate the written and the oral musical traditions (for example, whether it should be focused on solfeggio³ studies versus musical practices that do not require solfeggio)?**

The responses to these questions vary across heterogeneous historical, social and economic contexts and need to be addressed in Abu Dhabi.

As Abu Dhabi positions itself among clusters of artistic education on a regional and international level, the best international practices (such as the introduction of education institutions with an integrated curriculum) will need to be implemented. This should take place through the gradual adaptation of internationally approved concepts within the context of Abu Dhabi and the emirate’s cultural landscape.

Table 4 summarises the key elements of the Abu Dhabi performing arts education system and explains the gaps that exist.

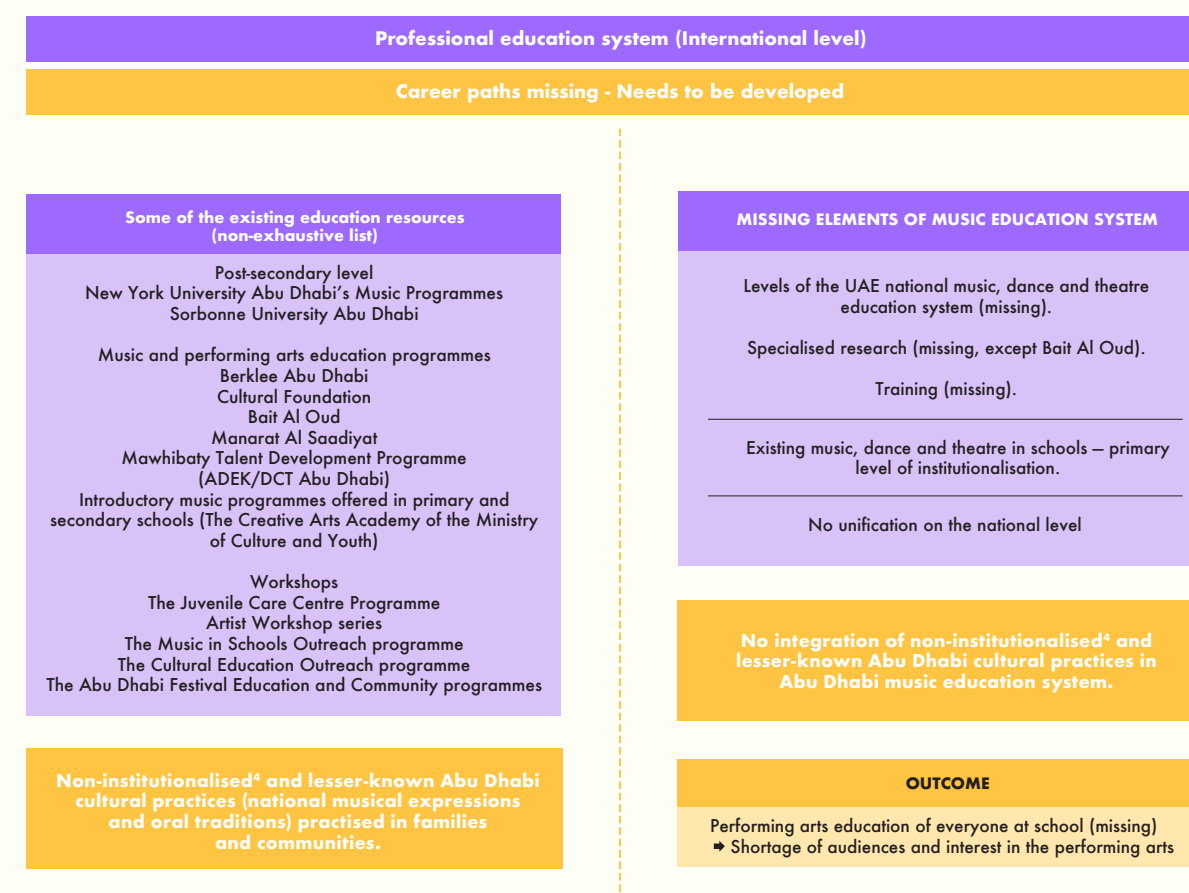


Table 4 - The existing and missing elements of the performing arts education system

Table 4 shows examples of some of the existing gaps in the current structure of the performing arts ecosystem, such as:

1. The lack of a performing arts education in the primary/secondary school curricula, which leads to a shortage of amateur artists and audiences
2. No single unified approach to performing arts in specialised schools
3. The absence of a specialised national education programme that provides career paths for young musicians, actors and dancers who want to become professionals of an international calibre
4. The partly undiscovered and unknown character of Abu Dhabi’s local musical expressions and music traditions – and a lack of sustainable cohesion between these expressions and institutional systems of education and research

The following analyses will be focused on a more detailed view of how the interviewees perceive the existing landscape of education, professional training and research in Abu Dhabi’s performing arts programme.

³ Solfeggio is a singing exercise that depends on the use of sol-fa syllables to denote scale tones.

⁴ The terms institutionalised versus non-institutionalised practices were used instead of professional versus community-based, as the community-based practices may be institutionalised (or not). The professional practices are institutionalised in most cases.

EDUCATION

Existing strengths in performing arts education are associated with the long-term presence of several private art schools. The educational programmes developed by these schools (including Fantasia Ballet and Elite Music School, among others) are adapted to the local context in terms of pedagogical approach, curricula and relations between teachers and students that come from different cultural backgrounds. The interviewees also refer to the 'big hubs' of performing arts education such as the NYUAD Arts Center and Music Programme, or Berklee Abu Dhabi. Bait Al Oud also has an excellent reputation and is qualified as "the only serious music academy in the region".

*"Berklee Abu Dhabi is a very interesting example, especially in terms of training and development."
"The college of music is a lovely investment."*

In terms of human resources, the interviewees say there are enough instructors (the supply meets demand). Also, as Abu Dhabi-based entities invite international and renowned practitioners, knowledge sharing is well developed, even compared to countries with a more established performing arts education. However, the same cannot be said for international artistic networks.

"The world's best practitioners come and share their knowledge in Abu Dhabi and this is extremely stimulating. It is almost impossible to meet these people if you live in Slovenia, for instance."

The proposed opportunities can be divided into two main areas: (1) developing performing arts education as a part of a general education, and (2) developing new professional forms of a performing arts education. For the first area, the interviewees suggest music becoming part of United Arab Emirates citizens' education and also giving it more attention in private and public schools.

"Implant classical music, dance and theatre in the education sector, media – TV especially".

The second area, focused on developing professional forms of a performing arts education, include developing spaces for education and rehearsal where artists can take part in masterclasses and can network. In addition, there is a call for implementing a conservatory of music and expanding Berklee to its full capacity. The idea of implementing of scholarships and fellowships for talented individuals has also been highlighted.

The fieldwork showed that, in the domain of performing arts education, there is a separation between private schools and newer entities that are more transient in terms of teachers or instructors who work in Abu Dhabi on a rotating basis. The older private schools, with established music and dance offerings, could form the foundation of future conservatories. They have successful, local experience of curriculum adaptation, multicultural students, and so on. These older schools expect a political decision on whether they will be recognised as the foundations for new national institutions.

*"The new national institutions should probably be small in the beginning."
"Abu Dhabi today can be compared to France under Louis XIV ... the period for the creation of the Royal Academies."*

PROFESSIONAL TRAINING AND EXPERTISE

The Abu Dhabi performing arts ecosystem is perceived as lacking resources for professional training and expertise. The professional musicians, dancers and actors who were interviewed emphasised the need for talent development programmes to showcase, support and coach or mentor talent. Managers and

producers need to be trained, as well as artists and creators. Emerging artists also need support for essential skills such as technical writing and portfolios. The lack of this support impedes the careers of young artists compared to their more established, professional peers.

There is also a shortage of technicians, choreographers, theatre costume designers and experts in technical, administrative and programming skills in the performing arts. This negatively impacts the integrity of the ecosystem and makes it, according to one interviewee, "broken on every level". Another gap is knowledge related to artificial intelligence (AI) applied to music creation and distribution and their related technologies.

*"We have the equipment, but we do not necessarily have the technologists yet."
"I would really appreciate AI professionals working there that are not only interns."*

Finally, the interviewees stress a lack of communication with performers on traditional instruments. Although musical traditions and storytelling are established among the population of Abu Dhabi, their potential as a base for new and contemporary artistic forms is underdeveloped. Consequently, the interviewees suggest training young Emiratis to interview and to record oral histories, cultivating hybrid forms of old and new.

RESEARCH

The emirate of Abu Dhabi is home to many activities relating to traditional expression in the performing arts. However, despite their potential to contribute to Abu Dhabi's unique cultural identity and artistic status, many of these expressions remain undiscovered by researchers and audiences.

Abu Dhabi-based researchers interviewed for this report say there are many opportunities for research projects on the traditional Emirati performing arts. They suggest a research grant is established to support a survey on existing artists, followed by a network analysis to locate artists and forms of expression as yet undiscovered. This research would contribute to the ongoing discovery, preservation and dissemination of Abu Dhabi's cultural heritage.

*"For example, we need to find out if there are still living forms at weddings (other than Al-Ayyala)."
"Do a qualitative ethnographic research project in the various corners of Abu Dhabi."
"Get teams of researchers, including young Emiratis, to go out and find, through family connections, individuals who were performers, singers or poets."
"Archive their work so that younger generations will be aware of them."*

Among the weaknesses related to research in the performing arts, the interviewees highlighted the small number of scholars who focus on the music of the United Arab Emirates, compared to the researchers who work in Kuwait, Bahrain and Oman. Some of the reasons included: (1) a misconception that there are only modern expressions, particularly in Abu Dhabi; (2) doubting authenticity and depth; and (3) isolating Abu Dhabi from the non-Emirati or non-Arab context.

"That if it is not Emirati or Arab, then it is not worth studying. It is not really part of what Abu Dhabi is."

A stronger awareness of specific research topics is needed, such as knowledge within the international research community related to Abu Dhabi's non-institutionalised artistic expression. This could feed into the implementation of research grants, scholarships, and so on, that would allow ongoing fieldwork explorations.

PERFORMING ARTS ECOSYSTEM SUSTAINABILITY: INTERIM CONCLUSIONS AND RECOMMENDATIONS

CONCLUSIONS

The gaps that negatively impact the sustainability and resilience of the performing arts ecosystem include:

1. The lack of a performing arts education in schools, leading to a shortage of both amateur artists and audiences.
2. No single unified approach to performing arts education in specialised schools.
3. The lack of a national education programme which could provide career paths for young musicians, actors and dancers who want to reach the international professional level.
4. The partly undiscovered and unknown character of Abu Dhabi musical expressions and oral traditions, and a lack of cohesion between them and education and research institutions.
5. The lack of coherent responses to core debates that frame the creation of a national performing arts education system in any country, namely:
 - How should this system articulate amateur practices 'for pleasure' and challenging paths of excellence?
 - What artistic expressions need to be taught and how?
 - How should this system articulate the written and the oral traditions?

RECOMMENDATIONS

(based on interview analysis)

1. Develop a performing arts education plan as a part of general education programmes.
2. Develop new institutionalised forms of a performing arts education that would offer career paths for young musicians, actors and dancers who want to become professionals at an international level.
3. Establish consensus on a coherent approach to the United Arab Emirates' performing arts education programme and its modalities.
4. Implement training programmes not only for emerging artists, but also managers, producers, technicians, choreographers, theatre costume designers and other experts.
5. Implement research grants and scholarships that would allow fieldwork exploration of Abu Dhabi's non-institutionalised artistic expression.
6. Create sustainable connections between institutionalised and non-institutionalised artistic expressions and between professional and community-based artists.

INTERVIEW ARGUMENTS:
A CONTEXTUAL ASSESSMENT

This report offers an overview analysis of the ecosystem networks, inclusivity and sustainability based on a SWOT analysis factor combination. As previously described, instead of identifying the issues by assessing them as one (or more) elements of the SWOT framework, categories of SWOT were assigned to specific issues derived from the interviews. The SWOT factors have been used more as a set of logically coherent and conceptually neutral categories that reflect interview contextual intentions, than as parts of SWOT as a recognised strategic planning tool.

Table 5 below is based on the interview analysis and shows the recurrent topics mentioned by interviewees, as well as the dominant contextual intentions in which the actors find themselves

(that is, whether they perceive an observable phenomenon as a strength, weakness, opportunity or threat).

To achieve a synthetised visualisation of the analysis, the interview arguments were assessed under the thematic blocks corresponding to the structure of the current report and then aggregated. The ‘Leading Factor Combination’ column represents comparative advantages (through a combination of strengths and opportunities), mobilisation (through a combination of strengths and threats), investment (through a combination of opportunities and weaknesses) and damage control (through a combination of weaknesses and threats) (Nolan, 2017).

Recurrent interview mentions	Strengths	Opportunities	Weaknesses	Threats	Leading factor combination
Ecosystem Networks: dominant dimension for this block is Strengths .					
Structures and venues	*	*			Comparative advantage Need to develop competitive aspects.
Events	*	*	*		Comparative advantage Need to develop competitive aspects.
Audience development	*		*	*	Mobilisation Measures need to be taken. Damage Control Work on the proper understanding of existing factors to improve the situation.
Human infrastructure	*	*	*		Comparative advantage Need to develop competitive aspects. Investment Targeted projects need to be launched.

Recurrent interview mentions	Strengths	Opportunities	Weaknesses	Threats	Leading factor combination
Ecosystem Inclusivity: dominant dimensions for this block are Opportunities and Weaknesses .					
Administration and policies		*	*		Investment Targeted projects need to be launched.
Rights organisations	*		*		Investment Targeted projects need to be launched.
Visa regulations		*	*	*	Investment Targeted projects need to be launched. Damage Control Work on the proper understanding of existing factors to improve the situation. Mobilisation Measures need to be taken.
Headquarters	*	*			Comparative advantage Need to develop competitive aspects.
Ecosystem Sustainability: dominant dimensions for this block is Opportunities .					
Education	*	*			Comparative advantage Need to develop competitive aspects.
Professional training		*	*		Investment Targeted projects need to be launched.
Research		*	*		Investment Targeted projects need to be launched.

Table 5 - Recurrent topics mentioned by the interviewees, as well as the dominant SWOT elements in each of these topics

Table 5 shows that major elements of the Abu Dhabi performing arts ecosystem require further development through targeted projects and policies. Priority measures include audience development and visa regulations. Damage control applies to these two aspects as well, as the Covid-19 crisis negatively impacted non-national individuals and entities, many of whom were forced to leave the country. Damage control for audience development is largely related to the inadequacy of current approaches to education and socialisation, leading to a shortage of performing arts audiences and, therefore, a growing gap between culture projects and events and the general appreciation of the population.

CONCLUSIONS

The main aim of this study was to strengthen research and the evidence base related to the Abu Dhabi performing arts ecosystem. This has been done by conducting a qualitative ethnographic survey, followed by in-depth interview analysis. The data has also been structured in relation to the SWOT framework and identified the vectors of development of the principal elements of the ecosystem, including the aspects that require further public intervention and policymaking. The major conclusions are as follows:

First, the analysis shows that the links between governmental and semi-governmental cultural entities (macro-level) and smaller scale events, venues and structures (micro-level) need to be developed further, in order to ensure proper support, but also to understand in more detail how this support needs to be better organised. Simultaneously, the large venues and events supported by the government need to be better connected to individual cultural practitioners at the micro-level, in order to develop, encourage and to give better visibility to local artists. Support at the 'meso-level' of relations (the fostering of collective capacity, knowledge flows and shared governance) is vital to enhance the coherence of the Abu Dhabi performing arts ecosystem and for its development.

Second, the emirate level regulations need to be developed further. The specific adaptations of major regulations to the cultural and creative sectors are still insufficient. There is a lack of cohesion between the international, emirate-level and sector-level regulations. The regulations related to visas, licences and legal frameworks need to become more flexible. The transient status of a significant element of the Abu Dhabi population leads to the transient character of many performing artists and arts initiatives; the enhanced visa regulations need to contribute to the stabilisation of the local cultural landscape. Similarly, the business, event and freelancer licensing processes need to be simplified in order to benefit a larger number of stakeholders. Government support is equally needed for implementing proper rights organisations at the federal level. Additionally, the lack of communication within and across different parts of the performing arts ecosystem must be addressed through appropriate measures.

Third, even though education in the fields of music, dance and theatre is gradually developing, the education entities, approaches and curricula are still far from being organised into a coherent national system equivalent to international measures. This negatively impacts the development of Abu Dhabi cultural professionals and slows down the progressive growth of cultured audiences and amateur artists. A coherent approach is needed to rationalise the performing arts education system and to balance its various elements. Research, professional training and expertise also need more support as the lack of knowledge and competencies inhibits spontaneous artistic collaborations.

LIMITATIONS

Because of its exploratory and interpretive nature, this study, by definition, raises more questions than it answers. More research is needed to refine its findings. The study has shown the general tendencies and defining characteristics, but it was not possible to show in detail how each of them refracts in the different facets that make up the performing arts ecosystem. That is to say, the study cannot show what relates to the specificities of classical music versus pop music or other genres; classical dance versus traditional dance; or stage acting versus film acting. Gathering local qualitative data, as well as small-scale statistical data (issued from ticket offices, questionnaire surveys, supplementary interviews and so forth), will be useful to deepen knowledge and understanding in the field.

Also, the organic connection of the performing arts ecosystem with the wider local environment will influence its further development. Its growth will be inseparable from negotiations between different political, economic and cultural actors, relating to the particular dynamics of place and community within the emirate. Evaluating these negotiations can provide new insights for decisionmakers and alert them to existing tensions or challenges. Finally, consideration should be given to how a comparative approach that examines the case of Abu Dhabi in relation to international cases could contribute to understanding how the performing arts entities, actors and networks anchor and develop according to the characteristics of the surrounding environment.

1. Interviewees speaking about audience development in Abu Dhabi

The interviewees maintained that there is clear potential for audience development in the performing arts in Abu Dhabi.

"Young generations are open to new and different things."

"There is an increasing interest in the performing arts."

"There is a demand for live music."

Socialisation through culture — and the social relations that shared cultural practices create — is considered a core element that will increase and perpetuate cultural engagement in Abu Dhabi.

"Create an exciting, careful and loving communication through art."

2. Abu Dhabi Culture Population Survey 2020: Music audience profiling

ATTENDANCE

A typical attendee of the performing arts (music and/or theatre performance) in the emirate of Abu Dhabi tends to:

- Belong to a higher socio-economic class
- Be a westerner, Asian or Emirati
- Not reside in Al Dhafra.

GENERAL MUSIC-RELATED ACTIVITIES IN LEISURE TIME

For general music-related activities (listening, playing and streaming), the most likely practitioners are:

- Young men of nationalities other than Arab (Emirati or otherwise)
- Members of higher socio-economic groups (AB).

PLAYING A MUSICAL INSTRUMENT IN LEISURE TIME

The typical person playing a musical instrument in the emirate of Abu Dhabi tends to be:

- Asian, western or South Asian and male
- A member of a higher socio-economic group (AB).

3. Household expenditure data

According to the Statistics Centre Abu Dhabi (SCAD) Household Income and Expenditure Survey (HIES), expenditure on entertainment activities such as concerts and theatres has increased dramatically, **from 0.2 per cent in 2014 to 13.7 per cent in 2019.**

THE COVID-19 PANDEMIC'S EFFECTS ON NON-NATIONAL PERFORMING ARTS EMPLOYEES

The issue of visas and licences is strongly interrelated with the transient character of many artists and small enterprises, events and networks in the performing arts. This is considered a major barrier for the long-term development of the performing arts.

"If artists are transient, the culture will be transient too."

"With Covid and the cancellation of all entertainment/live performances, people had to leave the country; they could no longer afford to be here, they needed to be supported and protected."

On a more general level, the transient nature of non-nationals is seen to contribute in a significant fashion to the fragility of the performing arts ecosystem.

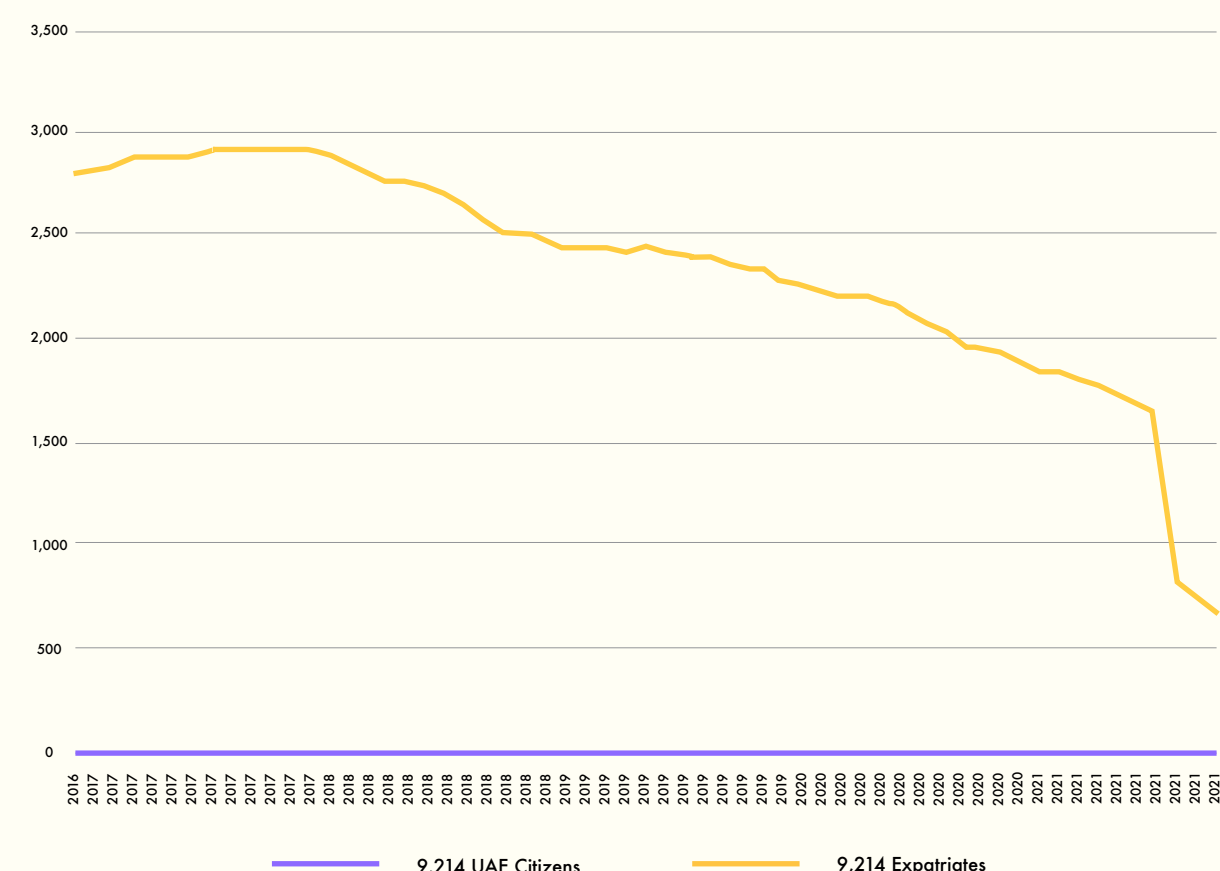


Figure A9 – Number of permanent employees in Abu Dhabi in the dramatic arts sector

"If you are looking at other macro issues, the UAE has got lots of talented people who are born and raised in the UAE, but are Indian, or European or Venezuelan, or whatever. And then at some point, they need to leave, and this also concerns the artists."

"The drain on the talent also harms the locals because they do not have other people to collaborate with."

APPENDIX A: ECOSYSTEM MAPPING

To discover the variety of elements that articulate the performing arts ecosystem in Abu Dhabi, a systematic method was adopted that “offers a generic way to construct and present valid, relevant and rational representations of the most diverse, changing situations” (Garbolino et al., 2018). Networks, collaborations, organisations and entities mentioned by the interviewees have been collected separately and mapped against the theoretical representations of ‘what’ a typical performing arts ecosystem should represent. This approach allowed us to continually cover missing elements, but also to discern gaps (for example, the entities related to the performing arts rights market are clearly part of the ecosystem but are underrepresented in Abu Dhabi).

Figure A1 shows an ideal-typical representation of a performing arts ecosystem (Bonet and Schargorodsky, 2018).

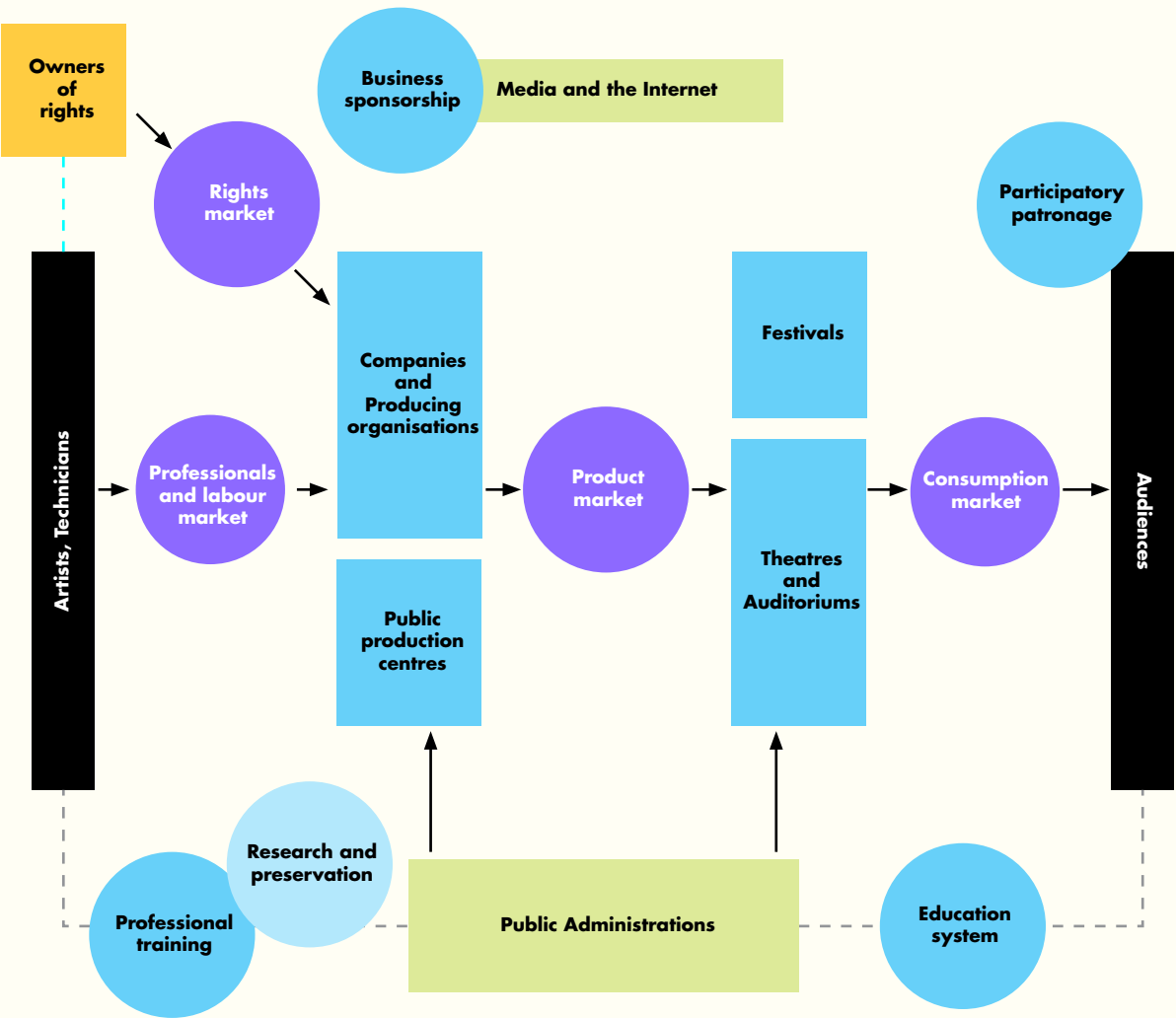


Figure A1 – Performing arts ecosystem ideal-type (Bonet and Schargorodsky, 2018)

Table A1 below summarises the frequently mentioned gaps and achievements related to each element of the performing arts ecosystem ideal-type, along with the key mentions, which allows key actors and entities to be discerned in each part of the ecosystem.

Ecosystem element	Frequently mentioned gaps	Frequently mentioned achievements	Key ecosystem mentions
Artists, technicians	Lack of ecosystem connection on the meso-level. Lack of trained technicians. No actors' guild. Transitory artistic scene.	New visa policies. Developed 'big scale' infrastructure. Increasing social demand for cultural participation.	Golden visa. Creative visa. DCT Abu Dhabi.
Rights market	Licensing and visas are very expensive and slow. No Intellectual Property Court. No local rights organisations at the federal level.	Launch of ESMAA.	ESMAA.
Professional and labour market	The hiring process is an obstacle.	Abu Dhabi is moving in the right direction with the Creative Visa. Abu Dhabi Global Market: one of the entities that helps with licences for staff; rebates on development; office space; accommodation; and access to talent.	Creative visa. ADGM.
Production market: festivals/concerts	No private or small to medium-sized venues. No orchestra. No complete or well-disseminated calendar of events. Festivals and live performances are concentrated in distant areas. Events are seasonal. No 'open mic' events. No rehearsal spaces. Very few recording studios – need more non-profit studios. No street performances (buskers). No entertainment hubs/nightclubs.	Formula 1 concerts are a good opportunity to see legendary artists. TV shows have raised artists (Arab Idol). With the Al Hosn Festival and the Sheikh Zayed Heritage Festival, more attention is being paid to music. The Cultural Foundation has made a positive change since 2019: "making it normal to have live shows in Abu Dhabi".	Formula 1. Yasalam. Arab Idol. The Youth Hub. Al Hosn Festival. Sheikh Zayed Heritage Festival. Louvre Abu Dhabi. Manarat Al Saadiyat. The Cultural Foundation. ADMAF. The National Theatre. ADIHEX. Chopin Piano Competition.
Participatory patronage	Support and funding for private practitioners.		twofour54. Abu Dhabi Investment Office.
Education system	Few music education programmes, scholarships and fellowships for talents. No effort in promoting classical and traditional music. Need to expand Berklee as a college.	Educational programmes have been developed. Art schools are interconnected, providing venues and talent and have easy access to an audience. No shortage of instructors. Berklee Abu Dhabi will be offering courses and resources.	
Research and Preservation	Need to train young Emiratis to collect traditional expressions. Need to archive traditional Emirati music and ease access to it, for example to make it available online. Need to study the expressions of different cultures in Abu Dhabi.		
Professional training	Emerging artists need professional training.	Berklee Abu Dhabi is a very interesting example, especially in terms of training and development.	Berklee Abu Dhabi. The Young Filmmakers. Workshop (Image Nation).

Table A1 - Mapping key elements of the Abu Dhabi performing arts ecosystem

APPENDIX B: CONCLUSIONS AND RECOMMENDATIONS SUMMARY

I. PERFORMING ARTS ECOSYSTEM NETWORKS

Conclusions

The analysis shows that the links between the governmental and semi-governmental cultural entities (macro-level) and smaller scale events, venues and structures (micro-level) should be developed and supported, while at the same time understanding how this support can be tailored to address the needs of different groups. Simultaneously, the major venues and events supported by the government should be better connected to the micro-level of cultural practitioners and small entities, with the aim of developing, encouraging and giving better visibility to local artists.

Recommendations (based on interview analysis)

1. Stimulate creation of small- and medium-sized venues, artist hubs and clusters, recording studios, and the like.
2. Enhance access and proximity to the performing arts.
3. Produce and disseminate an Abu Dhabi cultural calendar of events that includes all events and aims to address broader strata of the population.
4. Organise more multi-generational and open events throughout the year.
5. Develop audiences through investing in education over the long term; promote performing arts as a source or generator of long-term community interaction.
6. Create an award and awards ceremony that celebrates local artists.
7. Acknowledge Arab and non-Arab components of the Emirati performing arts culture; promote different traditional expressions.
8. Identify and support local artists and entities from different backgrounds. This would require (1) a collective branding of the music scene, defined by its diversity, as well as (2) the articulation and promotion of diversity as an identity.

II. Performing Arts Ecosystem Inclusivity

Conclusions

A range of strategic development issues still require attention, including regulations for visas and licences, in addition to questions related to locating business headquarters and employment. In addition, the specific adaptation of emirate-level regulations to the cultural and creative sectors (creative visas, support to cultural businesses in Abu Dhabi, specific legal frameworks for artistic production, and so on) are not fully developed and implemented. There is also lack of cohesion between international, emirate-level and sector regulations.

Recommendations (based on interview analysis)

1. Implement a creative visa or other instrument to reduce the transient character of the ecosystem's actors and entities.
2. Simplify the licensing process.
3. Implement a rights organisation in the form of a 'collective management organisation' (CMO), an intellectual property court, intellectual property framework and a structure that would allow artists to have more direct control of their rights.
4. Attract the headquarters of culture businesses through such strategies as further developing Abu Dhabi as a technology hub.
5. Support marketing and funding for original content creation and production.
6. Implement specialised platform(s) to improve access to information and communication across the sector.

II. PERFORMING ARTS ECOSYSTEM SUSTAINABILITY

Conclusions

The gaps identified that impact the sustainability and resilience of the performing arts ecosystem are:

1. The lack of a performing arts education in schools, leading to a shortage of artists and audiences.
2. No one unified approach to performing arts education in specialised schools.
3. The absence of a national education programme which could provide career paths for young musicians, actors and dancers who want to reach an international professional level.
4. The partly undiscovered and unknown character of Abu Dhabi musical expressions and oral traditions, and a lack of cohesion between these expressions and education and research institutions.
5. The absence of coherent responses to core debates that frame the creation of a national performing arts education system, namely:
 - How should this system articulate amateur practices 'for pleasure' and create challenging paths of excellence?
 - What artistic expressions need to be taught, and how?
 - How should this system articulate the written and the oral traditions, and so on?

Recommendations (based on interview analysis)

1. Develop a performing arts education as part of the general school curriculum.
2. Develop new institutionalised forms of a performing arts education that will enable career paths for young musicians, actors and dancers who want to reach the international professional level.
3. Establish a consensus on a coherent approach to the United Arab Emirates performing arts education system and its modalities.
4. Implement training programmes, not only for emerging artists but also for managers, producers, technicians, choreographers, theatre costume designers and other experts.
5. Implement research grants and scholarships that would allow fieldwork explorations of Abu Dhabi artistic expressions.
6. Create sustainable connections between institutionalised and non-institutionalised, professional and community-based expressions.

APPENDIX C: MUSIC ECOSYSTEM AND ITS STAKEHOLDERS

The music ecosystem as part of Abu Dhabi's growing culture sector economy

- The music sub-sector is transversal to several cultural and creative industry sectors that increasingly contribute to the emirate's gross domestic product (GDP) and which are supported by both public and private entities.
- The (relatively) leading category of small and medium music businesses in Abu Dhabi is Music Training. Entertainment businesses (such as the organisation of parties) are also related to this sub-sector in most cases. Among the Media Zone Authority (MZA)-supported businesses, the strongest music activities element is seen in Content Production (Audio-visual and Digital).

The sectors supported by public entities (including Abu Dhabi Media and MZA) show particularly remarkable growth and contribution to GDP.

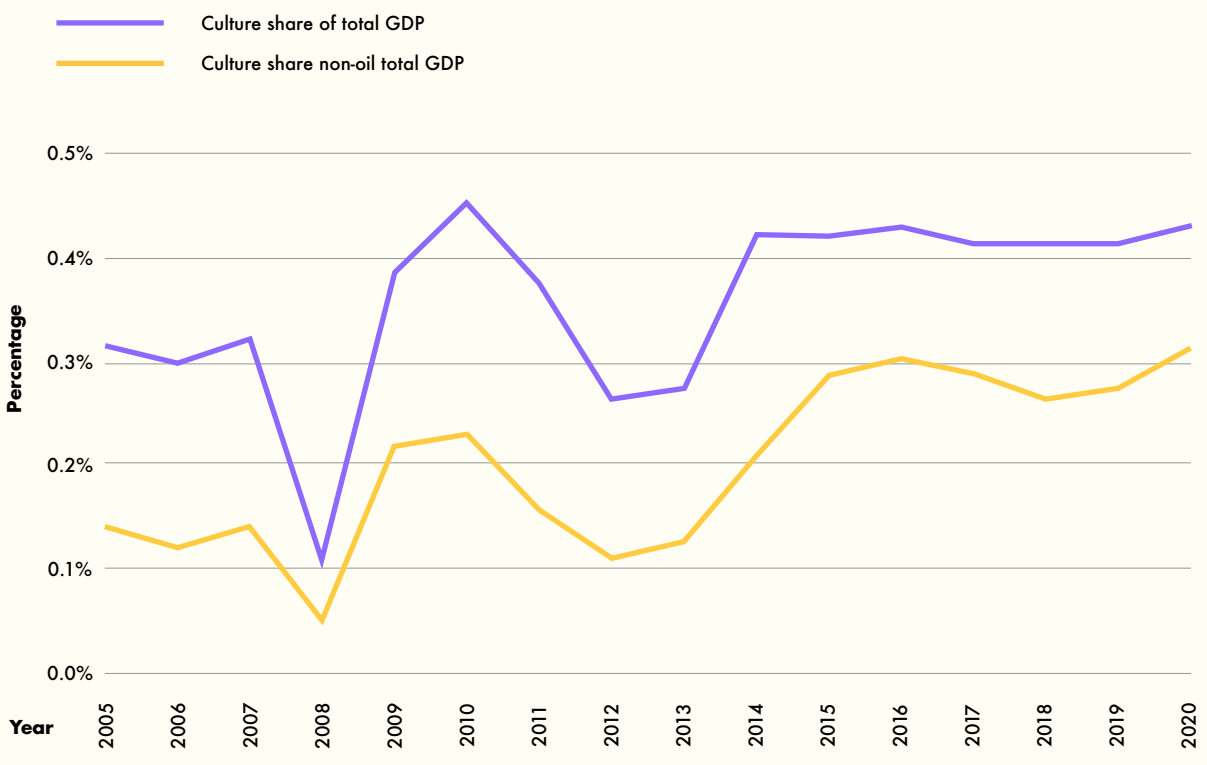


Figure A2 – Abu Dhabi's GDP dynamics

APPENDIX D: LIST OF INTERVIEWEES

Anonymised Interviewee Number	Entity (If relevant)
1	New York University Abu Dhabi
2	twofour54
3	Berklee Abu Dhabi
4	Department of Culture and Tourism - Abu Dhabi
5	Grand Central
6	Salama bint Hamdan Al Nahyan Foundation
7	Kharsha Drums
8	twofour54
9	PopArabia
10	Anghami
11	New York University Abu Dhabi
12	Abu Dhabi Music & Arts Foundation
13	Berklee Abu Dhabi
14	Emirates Music Summit
15	The BarCoe Studio
16	Cranleigh Abu Dhabi
17	New York University Abu Dhabi
18	Cultural Foundation
19	ESMAA
20	The National
21	Image Nation
22	Abu Dhabi Investment Office
23	Abu Dhabi University
24	Elite Music School
25	Berklee Abu Dhabi
26	Fantasia Ballet
27	United Arab Emirates University
28	United Arab Emirates University
29	Berklee Abu Dhabi
30	Individual Practitioner
31	Individual Practitioner
32	Individual Practitioner
33	Individual Practitioner
34	Individual Practitioner
35	Individual Practitioner

Culture GDP by Activity (Million AED)								
Activity	2005	2006	2007	2008	2009	2010	2011	2012
Creative, arts and entertainment activities	38.8	40.9	46.4	37.1	19.2	29.8	31.5	36.4
Libraries, archives, museums and other cultural activities	0.0	0.0	0.0	0.0	0.0	1.1	4.9	7.0
Information service activities	16.4	20.3	27.3	16.7	0.0	9.7	6.9	3.4
Motion picture, video and television programme production, sound recording and music	22.6	23.8	33.9	14.6	323.6	189.0	217.7	102.0
Programming and broadcasting activities	0.0	0.0	0.0	0.0	0.0	695.2	542.1	175.3
Publishing activities	147.0	176.6	260.6	88.2	557.7	310.7	323.2	536.8
Other manufacturing	3.1	3.6	0.6	7.4	8.6	17.8	16.4	10.3
Printing and reproduction of recorded media	299.6	344.5	417.2	160.6	209.9	195.2	174.9	126.6
Total	527.5	609.6	785.9	324.5	1,118.9	1,448.5	1,317.5	997.7

Table A2 – Abu Dhabi's GDP dynamics by sector

2013	2014	2015	2016	2017	2018	2019	2020	Average (2005-2020)	Percentage share of culture GDP Average (2005-2020)
34.1	38.0	36.5	37.3	39.2	38.0	19.9	19.1	33.9	3.4%
14.4	10.8	11.5	17.4	18.2	113.0	46.8	38.3	17.7	0.8%
0.6	1.0	0.8	0.8	0.8	14.9	15.7	15.9	9.4	1.2%
117.5	143.1	149.5	167.7	173.6	182.5	185.9	188.1	139.7	9.3%
95.5	874.4	924.1	949.9	909.8	853.9	898.5	879.6	487.4	24.5%
656.0	778.2	887.4	953.1	930.5	958.3	970.9	960.2	593.5	38.0%
14.7	16.6	15.9	18.5	20.9	23.2	23.7	22.5	14.0	1.0%
187.9	199.5	193.6	191.2	210.6	161.8	185.5	193.2	215.7	21.9%
1,120.6	2,061.6	2,219.3	2,335.9	2,303.6	2,345.7	2,346.9	2,316.8	1,511.3	

MUSIC ECOSYSTEM RESOURCES: SMALL AND MEDIUM-SIZE PRIVATE SECTOR-DRIVEN MUSIC AMENITIES

GENERAL OVERVIEW

There is a strong concentration of private music schools, music shops, recording studios and entertainment businesses in downtown Abu Dhabi. There is a strong correlation between Abu Dhabi’s younger population and private music schools, music shops and entertainment businesses.



Figure A3 - The mean centre is the average (x, y) coordinate of all the features in the study area (Abu Dhabi emirate)



Figure A4 - Correlation between Abu Dhabi’s younger population and music ecosystem resources

SMALL AND MEDIUM-SIZE PRIVATE SECTOR-DRIVEN MUSIC AMENITIES: PROXIMITY IN RELATION TO THE EMIRATI POPULATION

A WEAK PROXIMITY RELATION

Both in Abu Dhabi and Al Ain, there is a weak correlation between the Emirati population and small and medium-sized private sector-driven music amenities (private music schools, recording studios, music shops and entertainment businesses).



Figure A5 - Abu Dhabi: the density of the Emirati population is shaded in green



Figure A6 - Al Ain: the density of the Emirati population is shaded in green

Small and medium-size private sector-driven music amenities and proximity to other communities: Filipino and Egyptian populations as examples.

Both in Abu Dhabi and Al Ain, there is a weak correlation between the Emirati population and small and medium-sized private sector-driven music amenities (private music schools, recording studios, music shops and entertainment businesses).



Figure A7 - Abu Dhabi: the density of the Filipino population is shaded in blue



Figure A8 - Abu Dhabi: the density of the Egyptian population is shaded in orange

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