between what existed before or after the coming of the digital, then channeling McLuhan, we might say the contents of media industries – if "contents" is understood in a generous manner to describe not only communicative outputs but also the entire logics structuring industry processes, practices, and belief systems – are always to some extent other media industries. For the media industries research field then, part of the challenge of grasping the mutability of "media" requires finding a balance that recognizes how the distinctive and innovative remains infused with the persistive and remediative.

From media industries to the industrial existences of media

So far, the discussion has considered how changes in both the landscape of the media industries and the accompanying body of research have problematized the meanings of "media." But what about "industry"? When researching media industries, referring to entities such as the "digital games industry" or "music industry" becomes a necessity. Indeed, similar labels appear within this chapter and throughout the collection. Yet what is being referred to when describing media as industry.

Dictionary definitions of "industry" vary in their details but commonly understand the term to mean companies engaging together in activities toward producing particular categories of goods or services for a market. Consequently, media industries are frequently labelled by the type of output generated. This seems fair enough, for what is the film industry if not the industry that makes, supplies, and presents films? Such innocent acts of labelling, however, set conceptual horizons that, if unchecked, can frame the object of inquiry in ways that can be both limiting and misleading. Using the singular *industry* (so, "the [insert relevant media] industry") implicitly conceptualizes any sector of industrial activity as a coherent totality. Several problems can emerge from this. First, it can encourage a kind of *industry essentialism*, where a particular form of output and the activities associated with its production and circulation, are presumed to stand for the whole or at least the core of an industry, and thereby ignoring how any industry produces multiple forms. For example, frequently discussions of the "film industry" unconsciously assume the narrative feature film industry. This then creates a second problem, for in privileging a particular form of output, there is a danger of industry-*generalization*, obscuring internal diversity by eliding divisions between specialized sub-sectors and hierarchical relations. Furthermore, essentialism and generalization can shade into industry-*enclosure*, compartmentalizing one industry off from other industries. This creates problems at two levels. It overlooks the *cross-media* interactions routinely enacted between media industries, but also ignores the *cross-sector* interactions that arise as media link with and often depend on non-media industries.

Any and all of these problems can emerge in how we conceptualize a media industry. When Williamson and Cloonan (2007: 316) argue "'the music industry' is … a complete misnomer," or Sterne (2014: 53) declares "There is no 'music industry,'" they are not dismissing the existence of such an industry. Rather they are provoking wider appreciation of "music industr*ies* rather than an industr*y*" (original emphasis; Williamson and Cloonan 2007: 313), and how "There are many industries with relationships to music" (Sterne 2014: 53). It is commonplace to see accounts of the music industry essentialized around what Sterne calls the "monetization-of-recordings construct" (p. 50), taking recorded music as standing for the entirety of business activities conducted around music. Centering the recorded music commodity results in a partial account that not only excludes additional for-profit activities related to live performance, concert promotion, and education or training (Williamson and Cloonan 2007: 310–311), but also overlooks the numerous other commodities "sold through, with, or around music, ranging from musical instruments, to hardware and software, to smartphones, to speakers and room architectures" (Sterne 2014: 52).

With an article asking "Is There a Comic Book Industry?" Benjamin Woo (2018) questions the presumed coherence of the American comic industry through drawing attention to its internal diversity. To many eyes, a single form defines the comics business, the superhero genre, most usually associated with the publishers Marvel Comics and DC Comics, and whose predominance has been boosted by big budget Hollywood franchise films. While this part of the industry might be taken as epitomizing the mainstream, there is a far wider spectrum of production extending to alternative or independent comics. Even once this breadth is recognized, however, Woo provides reasons for questioning such a bifurcated conceptualization of the industry. Not only are terms such as "mainstream," "alternative," or "independent" definitionally ambiguous, even with the popularity of the superhero genre, "comic books are now principally orientated toward a relatively restricted, subcultural audience of fans and collectors" (p. 32). In which case, the comics mainstream is in itself alternative, sitting outside mainstream mass taste: "even … best sellers do not sell all that well" (p. 38).

Internal divisions exist, between comic book and graphic novels publishing, between the leading "premier" publishers and small presses, and in sales channels between general trade bookstores and the direct market system selling to a network of specialty comic bookstores. To recognize rather than overlook this diversity, Woo advises "we have to keep in view the range of different models in different formats and channels addressing different audiences that characterize the field of American comic books" (p. 38). Further problematizing conceptualizations of the business is how the comic commodity intersects with the book publishing and film industries (see Perren and Steirer's contribution to this collection, Chapter 12).

Interrogating the essentializing and homogenizing tendencies in industry conceptualizations not only expands the scope and complexity of the object analyzed, but moreover reveals the politics of how media industries are *represented*, both in the sense of speaking for someone, and of portraying something. Returning to music for a moment, trade organization the International Federation of the Phonographic Industry (IFPA) is committed to "representing the global recording industry worldwide." While the organization's name and mission make openly clear the IFPA only represents the *recording* business, at the same time there is a sense of mission creep wherever the Federation presumes to speak for music industries more generally. Campaigning to "creat[e] a sustainable environment in which the whole music community can grow and develop," the IPFA claims broader representational authority, although the partiality of this goal is clear from how the pillars of the campaign focus on fair terms for the licensing of recordings by online distribution services, and the strengthening of copyright protections (IFPI n.d.). Furthermore, with 8,000 members, the IFPI speaks for the interests of many, but with the membership drawn from only 70 countries, claims to "global" or "worldwide" representativeness appear overstated. As this example shows, when

> single interest/industry representative organisations … present themselves as representing "the music industry" [they] are doing so in order to elicit public and political support for campaigns which may be in the interests of only *parts* of the industries and may not be in fans' interests.
>
> *Williamson and Cloonan 2007: 309; original emphasis*

What the IPFI actually represents is a globally restricted part of the "whole music community," one centered on (to use Sterne's terminology) the "monetization-of-recordings construct" in certain international territories.

Reading music industries through the recorded music commodity essentializes and generalizes the music business, and yet equally offers a point of departure for problematizing industry enclosure. Easily deployable, music recordings get to be integrated into the operations of multiple other industries. Indeed, the system of music rights provides a legal mechanism that is precisely directed as dispersing music across media and other business sectors. "Synchronization rights" license recordings for use by audiovisual industries, granting permission to "sync" music in adverts, films, television programs, and games. Managing catalogs of recordings on behalf of rights owners, performance rights organizations issue "blanket licenses," permitting radio and television broadcasters, shops, clubs, bars, restaurants, hotels, and airlines to play any works from a licensed catalog, creating efficiencies by avoiding piecemeal negotiations over the uses of individual recordings. In these cases, the rights system controls the deployments of recordings, but elsewhere, music touches many other areas of industry activity. Sterne (2014: 52) argues music playback is a consideration for "sound design in high-end automobiles … sound insulation in trendy condo developments … [and] the vast consumer electronics, computing and bandwidth industries," and although these lines of business "don't sell music, they sell music experiences."

As these examples suggest, "music industry" or even "music industries" don't comprehensively encompass the multifarious sites of industry activity where the recorded and performative commodity forms of music are produced and commercially exploited. This point extends to media overall. Media industries alone do not explain how media forms come to exist, nor the contexts in which they exist. When taking the media industries as an object of research inquiry, it is important to recognize these industries only partially represent what might be called the *industrial existences of media*. Connections between media and other industries pull in two directions. Centrifugal connections are formed as media industries reach outwards to access the outputs of other industries: think of how the consumer electronics and computer technology industries have researched, developed, and manufactured the devices on which much of the media we encounter now appears; or how telecommunication companies install fixed immobile wiring to households and other spaces to enable mobile "wireless" listening, viewing, or gaming. At the same time, centripetal connections form when, through corporate diversification or ownership structures, external industries become not only active participants in the media but also some of the most high-profile players in the sector. As the previous section already suggested, media represent meeting points for multiple industries, not all of which might be immediately assumed to be "media."

Noting how any mention of "industry" or "industries" sets conceptual limits on the object of inquiry certainly does not mean the terms should be jettisoned. Not only would this be deeply disabling, it would lose the considerable communicative value of using a language that straightforwardly and immediately connotes a regard for media-as-business. Either term works perfectly well if we consciously reflect on and interrogate what is being presumed in their usages. As Woo (2018: 40) highlights, industries are representational constructions:

> Industries are not a given. As a collective concept, industries are theoretical rather than empirical objects, although they obviously have empirical effects. What we perceive as an industry is itself the result of boundary-drawing practices imposed on a fluid, complex field of social practices. It must be constructed before it can be analyzed, but such processes of construction are never neutral.

This has implications for media industries research, for the field does not simply find an object to be analyzed but rather actively constructs its object. When analyzing industry discourse, but also academic discourse, there is a need to query the meanings of "industry," inviting such questions as: what version of the industry is proffered, why is it deployed in this context, and what interests are thereby represented and excluded?

On this note, we might consider how terms other than "industry" shift the conceptualization of media business activity. Displacing essentialist conceptualizations of industry, "network" connotates a sense of numerous components and participants engaged in cognate activities and linked through multiple lines of intersection without a center or core. For example, Andrew Leyshon (2001: 20–31) proposes a model of the music economy comprising four connected and partially overlapping networks. *Creativity* relates to music composition, performance, and recording. While this includes the familiar elements of the recorded music business (recording companies, recording studios legal services, and artists' management agencies), it also includes musical instruments and supplies, and performance venues. Sharing some of the same ground, *reproduction* encompasses the same elements of music recording while also extending to manufacturing and music publishing. In *distribution*, recording companies again feature, as does manufacturing, but by covering the dissemination of copyrighted products to final markets, this network also includes promotional activities, physical distribution of copies, and retail outlets. Finally, *consumption* represents those retail outlets, for example what at the time Leyshon was writing would have been largely represented by bricks-and-mortar shops and mail order.

Certain elements are missing from Leyshon's model that should be counted as part of the music economy: collecting societies, music education and training organizations, and most crucially, the consumption network does not include consumers, the end users of music received in any form. Also, since Leyshon originally posed his model, popularization of paid downloads, and subsequently streaming services, demands some reconceptualization of this network. However, the point here is not to query the detail but rather to recognize how the network concept refigures the industrial existences of media. By not essentializing the business around music recordings, a network perspective recognizes how music features in the production of other commercial outputs, for example, live performances, or musical instruments. Additionally, activity is not anchored around a particular center. In Leyshon's model, recording companies appear in three of the four networks, and so exercise more power and influence than other participants, yet they do not define the entire system. Thinking of media industries as sets of network arrangements provides a means for appreciating a fuller range of participants and the various activities they engage in.

Another means of conceptualizing the industrial existences of media is suggested by the term "ecosystem". Adopting an explicitly ecological metaphor for organizational research, James F. Moore (1996: 26) described a "business ecosystem" as "[a]n economic community supported by a foundation of interacting organizations and individuals … This economic community produces goods and services of value to customer, who are themselves members of the ecosystem." Moore's concept gained traction in business studies but also among business practitioners. Separately, references to "ecosystems" have appeared in some studies of media, although often without explanation or lacking theoretical elaboration. Addressing precisely this conceptual gap, Ivana Kostovska, Tim Raats, Karen Donders, and Pieter Ballon (2021: 13) survey the relevant literature to arrive at a definition of "media ecosystem" as "a multi-layered and dynamic structure of interdependent organisations and stakeholders that interact and co-evolve around one or several local firms, that provide media products or services, to create a joint value proposition." In this account, it is that joint commitment to a "value proposition," the value promised to customers who acquire a product or service, that links participants in a media ecosystem.

Concepts of business and media ecosystem share some common ground. First, by inhabiting an ecosystem, participants are separate actors but are brought together in relations of interaction, interdependence, and coevolution. Second, while ecosystems include actors conventionally thought of as participants in an industry (i.e., companies and their competitors and suppliers), the system also involves multiple categories of non-industry actor: Moore included government agencies, regulators, standards organizations, and most crucially, consumers. In an ecosystem, multiple stakeholders therefore come together, not all of whom might be defined as "industry." Third, just as a natural ecosystem has no set spatial limits, so Moore (1996: 28) argued a "business ecosystem does not respect traditional industry boundaries," for any company might be seen as participating in multiple ecosystems that cross industries, but also an ecosystem exceeds national borders. On the latter, with regard to media ecosystems, Kostovska et al. (Kostovska, Raats, Donders, and Ballon 2021: 12–13) offer a corrective, for geographic boundaries can still hold sway wherever the conduct of media industries is influenced by policy formation at national and regional levels. Also, we might further add how the technologies of regional lockout (region coding for DVDs and games consoles, and now geo-blocking online entertainment services) circumscribe media ecosystems within electronic boundaries (Elkins 2019).

Adopting an ecosystem approach can therefore help avoid tendencies to essentialize, generalize and enclose media industries, yet certain conceptual problems still arise from the ecosystem metaphor. In order to provide some analytical parameters, we might ask what is the scope or scale of an ecosystem? Moore (1996: 28) saw the scale of an ecosystem as flexible, equally referring "to small business initiatives or to vast collections of enterprises," and similarly Kostovska et al. (2021: 8) regard ecosystems as having "scale-independence." This elasticity gives the concept broad currency while at the same making it nebulous. Linking back to the previous section, how effectively can the concept guide analysis if one particular online television platform, or the full range of options for distributing television programming online, can equally be regarded as ecosystems? Also, due to the multiple interdependencies enacted between participants, control of an ecosystem is viewed as dispersed and decentralized, yet Kostovska et al.'s modeling of actors into "core," secondary and tertiary levels, implies centers of influence still operate. For example, the core level is occupied by "ecosystem orchestrators" and "focal firms" (p. 14). If the "overarching aim of the media ecosystem is to succeed in creating a common ecosystem value proposition" (p. 15), actors are being viewed as joining in a unity of purpose, yet this seems to downplay the potential for competition and discord between participants. For example, labor unions, positioned in the model at the tertiary level, rightly feature in media ecosystems, but their goal of securing value in terms of a better settlement for members could be quite a different objective to that of say a production company seeking to make a film within budget. For union representatives and their members, the goals of organized labor are "core" not subordinate to whatever the overall ecosystem is seeking to achieve.

Whatever the terms applied, the research field benefits from recognizing and assessing the presumptions locked up in how we conceive of and represent media as industries. Thinking beyond essentializing and enclosing representations provides ground for theorizing more broadly the industrial existences of media. As representational lenses, ecosystem or network metaphors provide conceptual coordinates for thinking through *intra-* and *inter*-industry relations. Again reflecting on the previous section, taking an ecosystem perspective gives some ground for looking beyond "the media" to encourage recognition of how the information technology sector has become integral to media in the digital economy. By thinking beyond the boundedness of industries while foregrounding multi-stakeholderism and interdependencies among industry and non-industry actors, with some conceptual and analytical refinement the ecosystem metaphor can effectively encourage more expansive imaginings of the industry landscape in which media exist.