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NAVIGATING STRUCTURAL DISRUPTION: STATE CAPACITY AND THE ENTREPRENEURIAL STATE IN THAILAND'S MUSIC INDUSTRY

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Abstract

The Thai international music industry faces profound structural disruptions driven by rapid technological advances such as artificial intelligence and streaming platforms, creating wicked policy challenges that traditional public governance struggles to address. This qualitative study critically evaluates Thai state capacity in fostering the creative economy, utilizing comprehensive documentary research alongside twenty in-depth interviews with diverse industry stakeholders. The empirical findings reveal a severe context-problem mismatch; the state remains constrained by rigid bureaucratic bottlenecks, transient political agendas, and a distinct lack of embedded strategic autonomy, resulting in short-term symbolic policies that completely fail to protect vulnerable informal creative labor. To achieve sustainability and global competitiveness, this article argues that the Thai state must undergo an urgent paradigm shift from a passive regulator to an "Entrepreneurial State" capable of active market shaping and risk co-absorption. The study recommends deploying polycentric governance models, establishing advanced AI-driven copyright infrastructures for digital sovereignty, and creating higher education sandboxes to catalyze competency-based co-creation, thereby fulfilling Sustainable Development Goals 8 and 9

Keywords: State Capacity, Entrepreneurial State, Creative Economy Policy, Polycentric Governance, Music Industry Disruption

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Introduction

The contemporary music industry is rigorously driven by the dynamics of information technology and artificial intelligence (AI), which have fundamentally transformed consumer behavior and dismantled traditional market boundaries. These factors significantly affect the music industry's structural ecosystem, underscoring the need for synergy between state mechanisms and the private sector to drive development strategies. In Thailand, despite bureaucratic reform efforts to support the creative economy by establishing specialized agencies—such as the Creative Economy Agency (Public Organization) or CEA—to enhance administrative agility, policy implementation lacks continuity and sufficient momentum in practice. This deficiency stems from political instability and structural interventions (Hacker, 2004), which constantly alter support mechanisms. A fundamental challenge is limited Thai state capacity, which has yet to reform bureaucratic entities successfully to achieve strategic autonomy. Furthermore, political polarization and institutional shifts often dismantle policy structures and support frameworks. Consequently, strategies that should otherwise serve as long-term blueprints are reduced to mere temporary, event-driven activities. This demonstrates a severe lack of institutionalization needed to foster policy stability and secure private-sector confidence for long-term investment. Fragmented and poorly integrated, the Thai international music industry remains a cultural product intrinsically bound to the fluid role of the state.

While current literature widely discusses the promotion of the creative economy, there remains a notable lacuna in empirical studies focusing on the role of state agencies in structural management. Specifically, research remains scarce on mechanisms to upgrade bureaucratic capacity toward professionalization—equipped with a deep understanding of the music industry's unique context—and endowed with the strategic autonomy needed to navigate the volatility and structural disruptions of the Thai international music industry in the AI era. Therefore, this study aims to systematically analyze the structural evolution of the Thai international music industry, critically assess Thai state capacity to foster this sector, and propose a strategic pathway to transform the state’s role into an "Entrepreneurial State".

Literature Review

State Capacity Theory

The definition of "state capacity" has evolved from viewing the state merely as an arena for conflict management to seeing it as a proactive "core actor" that shapes societal directions. Foundational state capacity originates from fiscal capacity—the ability to manage resources and maintain a legitimate monopoly over administrative power. This capacity aims not merely at control, but at establishing bureaucratic mechanisms that systematically foster an environment conducive to economic expansion. In the bureaucratic dimension, state success hinges on administrative capacity, the ability to translate abstract policies into practice and deliver desired outcomes. The cornerstone of this capability is the creation of "embedded autonomy"(Evans, 1995) —a structural equilibrium that secures independence from interest-group interventions while simultaneously professionalizing public administration and upgrading the technical expertise of state officials. Furthermore, this autonomy must be intrinsically linked to civil society to foster flexibility in policy adaptation and build effective mechanisms for checks and balances.

However, state capacity is not static; it fluctuates with societal contexts and strategic goals. In developing nations, state capacity is often challenged by the condition of "strong societies and weak states," where the state must institutionalize social control to ensure its regulations are accepted. Meanwhile, evaluative criteria for capacity vary across state typologies: while European states traditionally emphasize regulatory power, developmental states in Asia are assessed through developmental outcomes and industrial upgrading. For the Thai international music industry, long-term state investments in legal capacity—particularly intellectual

property protection and the reduction of sector-specific tax barriers—substantively mitigate costs and optimize the utilization of creative ideas. These elements directly reflect state capacity in establishing an environment conducive to international competition.

The Entrepreneurial State

Amid global technological change and shifting markets, a state's reactive capacity—which confines its role to a "night-watchman state" or focuses strictly on "market fixing" (Besley & Persson, 2009)—faces severe limitations in addressing contemporary challenges. Mazzucato (2016) underscores that if the state adheres solely to a reactive, damage-remedying stance, it cannot foster radical innovation. Consequently, the state's definition and paradigm must shift toward an "Entrepreneurial State" that acts as a "market shaper and creator." In this context, the state must boldly confront uncertainty and function as the "first investor," absorbing risks in innovative infrastructure investments where the private sector is unready to venture. State capacity is thus measured not by the volume of regulatory output, but by the generation of "public value" through facilitating creative spaces and flexible funding mechanisms.

The roles of the state and market liberty exist in a state of both substitution and complementarity. Mazzucato (2016) categorizes this relationship into three distinct models based on market strength: (1) the state utilizing its capacity to substitute for weak economic institutions; (2) the state reducing its role to basic infrastructure support in nations with high economic freedom; and (3) the bureaucracy rapidly accelerating capacity building to drive development in developing countries. Nonetheless, the ultimate goal is to cultivate a "symbiotic ecosystem" where the state invests in early-stage technologies while the private sector commercializes them. Critically, the state must manage returns equitably to prevent society from micro-absorbing risks alone (Mazzucato, 2013), while utilizing state mechanisms to engage civil society in co-designing targeted policies (Mangla, 2022).

In the creative and music industries, transitioning to an entrepreneurial state is paramount for navigating digital disruption. The state must deploy "dynamic capabilities" to render the bureaucracy agile and adaptive to emerging innovations (Kattel & Mazzucato, 2018). Contemporary state intervention should not signify rigid control, but rather co-investment in human capital and the orchestration of collaborative networks among state agencies, the private sector, and higher education institutions (universities) to support music research and innovation. Building an ecosystem that integrates expertise from all sectors is a vital mechanism for attracting investment and sustainably enhancing the global competitiveness of Thailand's international music industry.

Public Policy Concepts and the Strategic Drive of the Creative Economy in the Music Sector

Public policy development for the creative economy resembles a process of applied problem-solving, where the state must shift from being a mere provider of resources to becoming a strategic leader in market shaping (Kattel & Mazzucato, 2018). Successful policy implementation rarely follows a smooth, linear trajectory; instead, it frequently encounters "policy layering," which requires modifying or building upon pre-existing institutional structures (Hacker, 2004). Therefore, policy design must use instrumental reasoning and a multi-level perspective (Zahariadis, 2003) to maintain policy coherence. The overriding objective is to rectify two primary failures: "market failure" through managing public goods and monopolies, and "state failure" by restructuring institutions to include civil society and industry stakeholders in decision-making (Howlett, 2018; Kleiman & Teles, 2009; Stokey & Zeckhauser, 1978). Furthermore, the transformation of the music industry in the digital and AI era presents highly complex and volatile problems, rendering traditional top-down control inefficient (Peters, 2018).

In the economic development dimension, the creative economy paradigm has emerged as a crucial strategy to transcend the boundaries of traditional industrial economics. It leverages

human capital, cultural capital, and the transformation of creative ideas into intellectual property to secure competitive advantages (Howkins, 2001). Thailand, which historically relied on foreign direct investment and served as a low-value manufacturing base or contract manufacturer, began restructuring toward a value-based economy with the 10th National Economic and Social Development Plan. Crucially, the 13th National Plan (2023-2027) elevated the creative economy and the promotion of "soft power" to a major milestone aimed at escaping the middle-income trap. This is achieved by systematically capitalizing on cultural capital, modeled after leading Asian nations (Prasirtsuk, 2015). However, despite high policy awareness of creative economy agendas for sustainability, academic scrutiny reveals a persistent implementation gap in translating these national macro-policies into concrete, sustained actions (United Nations Educational, Scientific and Cultural Organization, 2022a; Throsby, 2010). This disconnect often stems from the structural challenges of coordinating cross-sectoral creative development within centralized governance frameworks, a phenomenon frequently observed across emerging creative economies in Southeast Asia (UN Trade & Development, 2024).

This strategic drive has materialized through state mechanisms, notably the Creative Economy Agency (Public Organization) or CEA, which incubates talent and integrates social capital with innovation (Creative Economy Agency, 2023). This mechanism builds economic value upon both tangible and intangible cultural assets (Boccella & Salerno, 2016). The Thai international music industry is a core pillar of this policy framework. Building its capacity requires robust state policy design, particularly legal frameworks and copyright protection, which are fundamental to building market confidence, bargaining power, and future competitiveness. Practical governance mechanisms within this management process must incorporate both fiscal measures and procedural policy instruments, such as collaborative networks, to drive implementation (Howlett & Mukherjee, 2018).

On the international stage, the United Nations recognizes the music sector as a vital creative industry and has expanded the definition of cultural goods and music from commercial commodities to global public goods (United Nations Educational, Scientific and Cultural Organization, 2022a). Evaluating creative economy policies in the music sector must therefore transcend traditional metrics that measure only tangible value. Interdisciplinary policy analysis is essential for understanding the underlying dynamics of power and interests inherent in development mechanisms when public policies are put into practice (Fischer & Miller, 2007).

Polycentric Governance and Co-creation for Sustainability

Sustainable development is essential in contemporary policy design. The United Nations framework emphasizes resource efficiency and multi-dimensional integration with local spatial contexts. Within the music industry, developing local ecosystems and creative spaces directly aligns with Sustainable Development Goal 9 (SDG 9: Industry, Innovation, and Infrastructure) and Sustainable Development Goal 8 (SDG 8: Decent Work and Economic Growth). Ostrom (2012) argues that achieving sustainability cannot be the sole responsibility of either the state or any single private entity. Instead, it requires polycentric governance systems (McGinnis, 2016; Aligica & Tarko, 2012) with multiple, autonomous decision-making centers operating under an overarching system of rules that collectively protect and sustain independent creative workers (gig workers).

Research Methodology

Research Design, Data Collection, and Ethical Protocols

This study employs a qualitative research design integrating comprehensive documentary research with in-depth interviews, focusing on the period from 2002 to the present—a timeframe marking Thailand's explicit integration of the creative economy into national development plans. Secondary data were systematically extracted from macro-level

authorities, including the NESDC and the CEA, and analyzed for critical blueprints such as the 20-Year National Strategy, National Economic and Social Development Plans, and National Soft Power Promotion Strategies. Furthermore, academic literature was retrieved from the TCI and Scopus databases to link theoretical frameworks with empirical state interventions. For primary data, purposive sampling selected 20 key informants with five to ten years of direct experience. These participants were categorized into three cohorts: policymakers and public agency executives (PA, n=5-7), music industry stakeholders including label executives and independent artists (MI, n=5-7), and academic experts (EX, n=5-7). To ensure strict adherence to human subjects research ethics in the absence of formal IRB approval, all semi-structured interviews—conducted via face-to-face and virtual platforms—were preceded by voluntary informed consent. The research design guaranteed absolute anonymity through a codified de-identification system, secured the participants' right to withdraw at any time, and mandated the secure storage and permanent destruction of all raw data upon institutional approval.

Data Analysis and Trustworthiness

Qualitative content analysis was systematically applied to the gathered data through a rigorous three-step process. First, during the data reduction phase, the researcher filtered, coded, and categorized raw qualitative text from interview transcripts according to the conceptual definitions of state capacity, public policy design, and preliminary field findings. In the data display phase, the researcher organized the systematically categorized data and cross-examined them against national policy blueprints using a matrix approach that highlighted convergences, discrepancies, and institutional paradoxes between officially declared public policies and the empirical outcomes produced by state operations. Finally, the researcher synthesized the findings to address the core research questions, generate abstract insights, and formulate concrete, actionable policy recommendations. To ensure the validity, reliability, and academic rigor of the findings, the researcher triangulated data by systematically cross-checking and comparing qualitative data from three distinct sources—the state, the private sector, and independent experts. Furthermore, these multi-stakeholder perspectives were cross-verified with empirical evidence from formal policy documents, effectively neutralizing potential researcher bias and ensuring strict analytical objectivity.

Research Results

Structural Evolution of the Thai Music Industry

The transformation of Thailand's international music industry is closely tied to technological and societal shifts, evolving through three distinct eras. During the analog era, the industry emerged as a cultural commodity; while initially confined to elites via vinyl records, the introduction of cassette tapes in the 1970s birthed the monopolistic "record label era" (Techaburana, 2016). By 1994, independent radio stations catalyzed an alternative music phenomenon, leading to the creation of indie labels like Bakery Music, which reflected a middle-class youth culture seeking liberation from mainstream aesthetics (Thruadmarakha, 2013). Although slowed by the 1997 Asian financial crisis, this era successfully dissolved the analog monopoly. Subsequently, the digitalization era of the late 1990s triggered severe structural disruption. The transition to compact discs (CDs) and MP3 compression, alongside internet expansion, dismantled traditional distribution channels, forcing major labels to pivot into content providers amid an intellectual property piracy crisis (Williamson & Cloonan, 2007). At the same time, lower production costs empowered emerging artists, fostering a highly decentralized network (Frenneaux, 2025). Currently, in the streaming and artificial intelligence era, consumption has shifted from ownership to access-based models. Creators now face hyper-competition under algorithmic hegemony, compelling the production of algorithm-friendly content with shortened durations (Morris, 2015; Prey, 2020). Furthermore, Generative AI as a "co-creator" introduces the risk of a capability trap, potentially eroding human musical skills

and artistic authenticity (Hong et al., 2021; Strachan, 2017). This evolutionary trajectory highlights a profound shift from a closed corporate monopoly to a hyper-complex ecosystem that demands resilient state infrastructural support.

Thai State Capacity in the Music Industry

An assessment of Thai state capacity through the lens of an innovation ecosystem reveals that state mechanisms still face significant structural obstacles, particularly in political culture and traditional policy implementation models. Since 2002, the Thai state has pursued bureaucratic reform to reduce administrative redundancies by establishing "public organizations" to decouple specialized sectors from traditional civil service structures. This led to the creation of entities like the Thailand Creative & Design Center (TCDC), now elevated to the Creative Economy Agency (CEA). In practice, however, strategic implementation often deteriorates into a cycle of rebranding organizations, merging departments, and executing short-term projects aligned with incumbent government agendas rather than building resilient infrastructure. This inertia stems from rigid "bureaucratic regulations," as a policymaker (PA-01) noted. Regardless of a project's importance, initiatives fail if they cannot align with strict bureaucratic budgeting that does not accommodate the organic nature of creative work. While international capacity assessments traditionally focus on tangible, physical capital investments (Mazzucato, 2013), applying these conventional tools to the creative economy creates a stark alienation from the music industry's intrinsic nature, leaving the state trapped as a passive "supporter" under a rigid "regulator" structure. Furthermore, Thai political culture—deeply tied to factions—severely disrupts policy continuity; as an expert (EX-02) corroborated, new administrations routinely dismantle previous projects to stamp their own political branding, resulting in a succession of superficial, event-driven "quick wins" rather than a fully constructed structural foundation. Consequently, the state remains unequipped to transition into an "Entrepreneurial State" prepared to co-absorb initial risks, creating a severe "context-problem mismatch" (Peters, 2018) in which command-and-control paradigms fail to cultivate the "dynamic capabilities" required for the digital era (Kattel & Mazzucato, 2018).

Compounding these issues is the rigid bureaucratic governance structure that hampers soft power strategies, such as efforts to propel Thai music (T-Pop) globally in contrast to South Korea's state-led successes. The core challenge is not a lack of strategic knowledge but rather a siloed working culture, fragmented budgeting, and a distinct absence of "embedded autonomy" (Evans, 1995). The Thai bureaucratic system operates on an inflexible 18-month "fiscal calendar," and emergency disbursements (budget glang) face hyper-strict audits, forcing agencies to redefine existing routine budgets to fund urgent market demands. An operational policymaker (PA-02) illustrated this bottleneck, noting that merging collaborative projects is legally impossible because procurement and fiscal regulations fall under entirely different, non-intersecting legal frameworks. This temporal mismatch relegates state interventions to perpetual "lagging support" and alienates the state from market realities. Although entities like THACCA were established to dissolve these silos, deep coordination friction persists, reinforcing Palit's (2017) findings that centralized governance vulnerable to political instability severely constrains soft power policies. Another policymaker (PA-01) revealed that because 'Soft Power' became a political buzzword backed by funding, ministries simply renamed routine projects to claim budgets, resulting in disorganized execution disconnected from THACCA's core mapping. This reliance on rigid bureaucratic directives (nangsue sangkarn) ultimately leads to a profound chasm between actual economic outcomes and policy implementation mechanisms. The state evaluates economic value based on "tangible assets." In contrast, the music industry thrives on "intangible assets." It relies heavily on "informal labor" (gig workers) outside conventional taxation systems, causing multinational streaming revenues to be omitted from national GDP calculations. Consequently, the state struggles with systemic policy coherence (Howlett & Mukherjee, 2018), fails to invest in essential public

goods like Live Houses, professional educational programs, or tax incentives, and continues to overlook music as critical human-capital infrastructure.

Transforming into an Entrepreneurial State and Overcoming Structural Constraints

In the era of generative artificial intelligence (Generative AI), data infrastructures and advanced technological architectures dictate competitive power in the global music market. However, the Thai state has largely neglected investment in centralized big-data systems and standardized metadata architectures for intellectual property (IP) management, particularly for public domain works. This institutional laxity allows foreign platform conglomerates and AI developers to execute widespread data scraping of Thai cultural assets without regulatory oversight, resulting in a loss of "digital sovereignty". To prevent algorithms from structurally exploiting domestic creators, the state must use its statutory authority to establish a centralized "Single Clearing House" for copyright management while building IP literacy across society. The current laissez-faire approach, which allows too many fragmented and redundant Collective Management Organizations (CMOs) to operate disjointedly, creates prohibitively high transaction costs for commercial enterprises and undermines creators' IP literacy. Amid digital disruption, the state must shift from a passive regulator to an active provider of digital public services; otherwise, initiatives like the 2018 establishment of the CEA and the Ministry of Culture restructuring will remain crippled by budget shortages and an outdated paradigm that views music merely as entertainment rather than a vital public service. The state must act as a "first investor," cultivating a symbiotic ecosystem through a collaborative interface among state organs, universities, and private industries to de-risk innovative infrastructure (Mazzucato, 2013).

This transition requires overcoming profound organizational structural constraints and an ongoing public investment crisis. The Thai state's cognitive framework often reduces "soft power" to transient political buzzwords, systematically overlooking international frameworks (United Nations Educational, Scientific and Cultural Organization, 2022b) that explicitly recognize music and cultural arts as vital "social infrastructure" for mitigating inequalities. By misconceptualizing public subsidies for cultural spaces as wasteful expenditures, the state offloads the financial burden onto independent actors. A glaring consequence is the lack of investment in localized creative spaces; as one industry stakeholder (MI-01) emphasized, dedicated performance venues like Live Houses in provinces like Chiang Mai or Khon Kaen are essential localized anchors that foster organic diversity and link creative work directly to regional economies. Rather than organizing short-term, event-based festivals, the state must reposition these venues as "cultural commons" owned and managed by citizens (Ostrom, 2012) and use polycentric governance models (McGinnis, 2016) to advance Sustainable Development Goals 8 and 9 at the grassroots level. Furthermore, exponential technological disruption has created a severe skill crisis in the labor market, leaving traditional university curricula misaligned with the empirical realities of a digital music industry that now demands cross-disciplinary human capital spanning finance, digital marketing, and data analytics. The state must therefore act as an institutional architect, creating learning spaces that lower the cost of trial and error for youth and systematically nurture the behind-the-scenes professionals required to drive a fully integrated, self-sustaining music ecosystem.

Conclusion and Discussion

This study reveals that the Thai state has struggled to overcome structural constraints and transition into an "Entrepreneurial State" (Mazzucato, 2013) because a hyper-complex bureaucracy designed for command and control remains rigid. Although public organizations were established to infuse flexibility, their policy directions remained tethered to transient political agendas and quick wins, leaving the state trapped in the dual role of rigid regulator and passive supporter. A genuine paradigm shift requires conceptualizing music as a vital

"social infrastructure" and a baseline citizen right, aligning with global cultural policy frameworks (United Nations Educational, Scientific and Cultural Organization, 2022b) that recognize music as a pivotal instrument for achieving the SDGs and systematically developing cross-disciplinary skills in youth (Kwon, 2024). When evaluating regional competitive capacity, nations such as South Korea (K-Pop) and Japan (Cool Japan) demonstrate that success relies on a "developmental state" approach (Johnson, 1982; Woo-Cumings, 1999), where the state acts as a strategic architect securing policy stability, long-term infrastructure, and "embedded autonomy" (Evans, 1995). In stark contrast, Thailand's political volatility reinforces "path dependency," preventing the systematic accumulation of policy capital and highlighting a severe legal lag. The statutory frameworks remain anchored in a traditional industrial economy that values physical assets, leading to an institutional paradox where the state fails to rectify market failures and instead acts as an active "risk generator" through obsolete legal codes (Mazzucato, 2013; Pradella, 2017).

Consequently, the current architecture of the Thai music industry reflects a profound institutional gap between public administrators who prioritize regulatory compliance and private-sector practitioners who target commercial viability. Building state capacity requires establishing autonomous "intermediaries" that can translate creative works into economic bargaining power. While initiatives like the National Soft Power Strategy Committee (THACCA) represent attempts to deploy the Triple Helix Model of Innovation (Etzkowitz & Leydesdorff, 2000), they currently operate as a "statist triple helix" under top-down bureaucratic command without genuine budgetary or strategic autonomy. To effectively propel the Thai music industry into the global arena, this administrative friction must be resolved by radical institutional restructuring. The state must establish a lead agency endowed with genuine embedded autonomy (Evans, 1995)—insulated from short-term political interference and liberated from rigid bureaucratic silos—capable of shifting from a reactive regulator to an entrepreneurial state that invests heavily in digital infrastructure, intellectual property security, and human capital.

Recommendations for Future Research

To build on these strategic policy shifts, future scholarship should conduct an in-depth comparative institutional analysis of Collective Management Organizations (CMOs) in leading music nations—such as South Korea, Japan, and the United Kingdom—to design the institutional architecture for Thailand's proposed "Single Clearing House" as effectively as possible. Such research must rigorously determine which administrative structures can successfully transcend the rigid constraints of the Thai bureaucracy and cultivate the "embedded autonomy" necessary to drive the creative industry (Evans, 1995). Additionally, robust political economy and legal impact assessments are required to understand how Generative AI disrupts traditional production value chains and creative labor markets. Future studies should explore strategic pathways to safeguard "digital sovereignty," explicitly assessing the feasibility of developing proprietary AI models trained on the collective intellectual property assets of Thai creators under frameworks that guarantee equitable revenue sharing. Finally, if these policy recommendations are operationalized, subsequent area-based longitudinal research must evaluate the socio-economic impacts of regional cultural decentralization and critically analyze the efficacy of polycentric governance (McGinnis, 2016) in transferring decision-making authority to local communities.

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