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The music industry in Senegal: the potential for economic development

DRAFT: 11th. March 2004

A report prepared for UNCTAD

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Summary of the report

The aim of this report is to review the status of the music industry in Senegal, to assess what contribution it currently makes to the economy, to explore what impact it could potentially have on the national economy, and to suggest some means of achieving this aim. The report begins by setting the national music industry in the context of the international music industry in particular it notes the growth of the 'world music' phenomena. Having established that there is a potential market for Senegalese music the report considers the actual success of Senegalese musicians in an international market. The report notes that a number of Senegalese recording artists do have a significant presence in international markets, notably Europe and North America. The paper goes on to investigate what impact this success has had upon Senegal, an impact that is perhaps less than one might expect in economic and industrial development terms. The paper explores the potential structural, regulatory and institutional challenges that Senegal faces if it to achieve further development of its music industry. The substantive focus of the report is an investigation of the character of the music industry in Senegal. The report considers the challenges and opportunities facing the industry at this time and offers some initiatives that will help to build a more sustainable industry.

The report begins from a specific perspective: to consider the music industry as an industry, rather than just as a cultural product. For many this position may represent a novel perspective. Traditionally policy makers have viewed culture in terms of social or economic products. The implication of such a perspective is to focus on end products, events, outcomes and associated cultural forms. Thus, much attention is paid to heritage sites, artefacts, crafts, language and 'ways of doing'. Viewing culture as an industry draws on an alternative perspective, that of culture as a process of material production. This perspective encourages a view not only of end products but also of origins and the means by which intermediaries shape and transform culture. Thus, we can identify a significant music-related set of activities, not simply artists and performance, which have a wider impact on the economy and society. Such an approach, more generally referred to as a production system approach, can be applied to both for-profit and not-for-profit activities. This paper takes such an approach and looks at commercial music production, the music industry. There is a strong inter-dependency between for profit and not for profit activities in this sector, this fact can raise difficult issues for agencies intent upon the promotion and protection of unique cultural resources; however, our main focus here is on for-profit activities.

From this production system perspective we ask how policy makers and advisers could help to make the music industry operate more effectively. In terms of this report, 'effective' is taken to mean to localise, and receive the maximum benefits from, the music industry value chain. The report identifies a barrier to local musicians developing their activities and audiences: distribution and audience development. It is clear that simply producing great music is a necessary, but not sufficient, task. Music has to be positioned, promoted, marketed, critiqued as well as distributed. Some of these barriers have been traversed in the past only by getting a recording contract directly with a European or American

record company. The report offers a number of suggestions as to how this barrier might be breached; however, they are neither simple nor immediate. The report highlights the challenges to adoption and implementation of intellectual property rights management protocols that will be the means by which producers will be rewarded; it points to the need for across-the-board education and training on the topic of intellectual property rights, and a raft of business management and professionalisation issues. Finally, it suggests that Senegal should devote resources to promoting, and championing, the music industry at national Government level to an international, and to a local and regional audience; implementation of this message, and others will require a more substantive audit of the contribution of the music industry to the economy.

Summary of the policy recommendations.

Policy proposal 1: Promote property rights management, and resource agencies to promote it

Implement a system of property rights management that is trusted and understood. Essentially, this is an issue of training and education. The AMS and BSDA are already making steps here. They will need help from Government with legal backing to pursue pirates and those who seek to wilfully misassign property rights. Clearly, a progression to full intellectual property rights law would help, especially in the case of income streams from media and replay rights (the Rome convention).

More specifically, it does look at present as if the BSDA is under resourced to meet the challenges that it currently faces, let alone those that it will face in the future, in terms of both managing and regulating the music rights system. Given the central role that they might play it would seem vital that they are more adequately resourced.

Policy 2: Professional training and development of musician and managers

One of the key areas of intervention could be in terms of the management of bands. We have already noted how there is a deficiency of basic business skills in management; the efforts of Tringa seem exemplary in this respect. However, we could see these issues extended such that managers became a key point of educating musicians as to their rights and their responsibilities to BSDA. More support should be given to the AMS in their pursuit of these activities, as they already have the trust of musicians.

Policy 3: Educating and training audiences and future musicians

Generally, issues of copyright and intellectual property should play a part of both the music curriculum and the general school curriculum. In the latter case the fact that most musicians do not train as musicians means that they must be accessed at school; second, the understanding of these issues is also vital for audiences so that they do not commit infringements unknowingly, and they develop respect for copyright and musicians. More generally, an audit and expansion of school level music provision should take place. The objective would be to promote a balance of listening, composition and listening skills across western classical, traditional, and modern Senegalese forms.

Policy 4: Protect and value past rights. The National Sound Archive

One of the crucial elements of Senegal's heritage is its aural history, and the 'back catalogue' of its music. Along side the re-evaluation of its ethno-musicological study, there should be a programme of recording and interpretation. One idea might be the establishment of a National Sound Archive. Such an archive would have as its objective the recording and documenting of as much existing live music that does not already have a recording, especially traditional music. One objective will be to either identify a composer, or protect the rights for the state, from exploitation, except under licence. There would be considerable interest in such an archive, and it could form part of a national music resource and music education programme to stimulate interest in Senegalese music.

Ideally this archive would be digital and on-line, perhaps a small charge for use could help to finance running costs. If it were on line it might promote international interest as well, as well as ensuring the copyright protection of musical heritage.

Policy 5: Recording studios as a regional resource

Market the use of studios to international musicians; that is to attract international musicians to record in Senegal. By recording themselves in Senegal local musicians will advertise the fact that this is possible; by attracting international musicians it will draw in foreign earnings and potentially generate more collaboration with Senegalese musicians.

Policy 6: CD pressing plant as a regional centre

We note below the notion of 'migrating' to CD production. At present there is no CD production capacity in Senegal; it is worth considering that Senegal might press its own CDs, and maybe those of the region. Making and pressing CDs, and packaging them might promote more jobs; having control of CD pressing may offer a means of reducing piracy too. The issue of potentially producing domestic CD players would also be on the agenda. Both of these options imply a joint venture with an already existing company producing these products.

Policy 7: Instrument Fair Trade and repair

The issue of musical instruments is a problem. As noted above they are produced mainly abroad, and they attract high import taxation. Consideration might be given either to a selective lowering of import taxation, or to the attempt to develop some indigenous (electrical/modern) instrument making. An alternative might be to consider developing a fair trade relationship with first world instrument second hand-resellers. Potentially, a small instrument repair facility for second hand instruments may provide a vital flow of instruments for pre-professional musicians. There are many opportunities for the development of joint ventures or partnerships in this area.

Policy 8: Migrate Senegalese music production to the CD format.

As noted above this could generate costs as CD production occurs outside of Senegal. It is only if production were internalised that there might be benefits. International agencies would object to licensing a CD plant if rights management and piracy were not under control.

Policy 9: A Senegalese, private sector, locally controlled record company.

A vital step in Senegal's ability to control its musical destiny would be to gain greater control over music production and distribution in an international market. It is most likely that a joint venture would be most likely to work. One possibility would be to use an internationally recognised Senegalese star as a broker, the other would be to broker a 'fair trade' relationship with one of the small specialist and committed independent companies (Real world, World Circuit, Sterns etc.). An objective must be to establish some more favourable distribution deals for the majority of Senegalese artists in the major market places.

Policy 10: Joint ventures with North American and European independent distribution companies

Independent distribution companies already play a vital role in developing the market for Senegalese musicians; a joint venture could give both parties reciprocal access to markets.

Policy 11: Mass media and audience development; joint ventures with European radio stations

Radio and TV need to become more aware of their potential role in audience development and critical appreciation of local, and regional music. It is possible that air play quotas might be considered; however, an alternative to simple proportional rules that promote local or regional music is to make the

objective one of educated listening. Much of the world music market in the UK and Europe has been built on the basis of radio play of this character. Given this interest, again, the notion of joint ventures and a trade in radio programming might be considered. As we noted above, the development of a West African, or pan-African regional music consciousness might be helpful in gaining access to the international music markets.

Policy 12: Audience and musician development through Regional or Pan-African exchange.

Although North America and European markets are the most valuable, there is much benefit to be gained through trading within West, and in Pan-Africa. Here the issue may not be the value of sales per se, but that of creating artistic interchange and a critical base that will sustain and innovate in style and approach. There might also be possibilities of brokering joint resources such as recording studios, touring expertise, and management skills.

Policy 13: Regulating retail, auditing sales

A system of licensed sellers, or an attempt to create more space for sellers might help. Overall, what is most important is the development of a far greater detail and extent of market information. In most developed economies there are music radio and TV programmes, dedicated music papers, music columns in weekly magazines and general papers. These not only stimulate demand, but also create a more discerning audience. Another companion element that one finds elsewhere is the production of sales data, charts, which will help to direct consumers to popular (and potentially critically appreciated) items. This would help to slim down an over crowded market place and focus on successful genres and performers; it creates an environment when skills and talents can be compared and contrasted.

Policy 14 Promoting critical listeners

The range of music available for consumption should be the development of 'listing; magazines or newsletters that review live performances and list all bands and their venues for the week. Hand in hand with this development would have to be the training of music journalists who were capable of positive critical discussion of music. This will stimulate audiences to have a more critical engagement with the musical form and act as another means of feedback to musicians seeking to improve their skill and professionalism. Such professionalism might also be encouraged through the development of professional agents who act as intermediaries between managers and venues to create a better circulation of performers across venues.

Policy 15: Support for musicians touring out of the country.

The issue of touring is vital to the expansion of the industry; as we have noted, this is one important way that musicians get their music into the market place, or, at very least into the view of the record companies. Since European and US market places are the objective, some public assistance with underwriting, or simply guaranteeing tours would help; along with the development of management and tour management expertise this would make it possible for Senegalese bands to make their own way into these market places, rather than having to rely upon European or US promoters. Joint ventures could be explored with other regional markets to promote cultural entrepreneurship.

Policy 16: Music tourism

As North American and European consumers develop an interest in local music there will be a demand for tourism related to music. Tourist strategies should consider such a focus. Music tourism, like that of cultural tourism generally, tends to attract higher spending visitors. Thought should be given

to developing a local music tourist infrastructure. As noted above, a listings magazine, as well as on-line music resources would be important; but so would local guides.

Policy 17: To view the music industry as an industry, to measure its output on a comparable basis

It is an industry that produces employment, income, and export earnings. There is a need to know and to explore the nature of growth of the music industry. There is a clear need for government to satisfy itself of such claims, and to legitimate its support to the public. At present the data availability to either audit or evaluate changes in the scale and operation of the industry are inadequate for the task. This situation must be remedied. In part, it could be solved by more imaginative and concentrated use of existing statistics; however, in large part new data will need to be collected. The barrier on this activity is lack of trust and the role of the informal economy and lack of copyright control. It is apparent that this process will only be effective if it is progressed in a step-wise fashion, rather than all at once. The key will be to have in mind a very clear objective of why the data is being collected and for who, and crucially exactly what variables are being sought (See Appendix 1). The eventual production of a report on the state of the music business in Senegal should be the objective. This report should be made available in the public realm; it ought to act as a rallying point for the music industry within Senegal, and an advertisement of the health of the industry to the world. It should increase confidence in investment as well as providing, if reviewed at regular intervals, a tool to evaluate progress.

Policy 18: Review the tax burden on music related imports.

The government might consider an evaluation of the contribution of the music industry to the economy (on the basis of the above), and in so doing they might re-consider the tax burden placed on the whole music production system. This might be the opportunity to review the possibility of selective favouring of music industry inputs as a way of promoting the industry. Reduction of taxes on import of instruments might be one issue, as might the introduction of some tax refunds associated with training (as noted above).

Policy 19: Create a music champion.

The government might consider making a symbolic as well as practice gesture of creating a 'Music minister' who would champion the cause of the music industry, and act as a roving ambassador for the industry abroad. The minister would be able to use the music status report to support claims. This office should be linked to a new Senegal music web site (linked to the National Sound Archive) that would act as a first point of information for the music public about the Senegalese music industry, and bands and performance. It could act as an internal information resource for musicians on copyright issues and on professionalisation and training matters. Another related issue that might be considered is the promotion of 'music tourism'; examples of this sort of activity are already organised in the North, Senegal could invest in this as another way of promoting its industry and heritage.

Policy 20: Promote a regular regional music festival.

A means of advertising and promoting the success of the industry might be to seek to act as host of a West African music festival that might be an annual showcase of music from the region, which would promote new bands to the region and the world; it would attract visitors and attention. It is only a matter of time before one West African state does this; maybe Senegal could take the lead. This could work in the same way as the film festival in Burkina Faso; or, the MASA arts festival in the Ivory Coast. An objective of this festival should be to record a regular compilation album that could be used to promote regional music. Again, the possibilities of joint ventures with European independent distributors, and European or North American musicians could be a way of reaching new audiences.

Policy 21: Re-assess the links between the for-profit and not-for-profit music sector

There will be a continuing need for the commercial music industry to have productive and supportive links to the not-for-profit sides of musical activity; profits should in some way provide continued support for informal music making that does not have as its objective commercial production as this will help to develop a more generally positive music culture.

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The cultural industries, music and development

This section introduces the theme of the cultural industries and economic development in general, then focuses in on the music industry and its potential.

The cultural industries

The industrial dimension of cultural activities has been identified as an object of interest to UNESCO for a number of years (see Girard 1982). Initial discussions were concerned with definitions. This problem is two fold; first it includes the familiar debate about 'what is culture' and the range of art and cultural forms that might fall within a definition, second, and most importantly it involves a debate about the 'production of culture'. The significance of defining culture in terms of its production highlights two issues. First, it distinguishes the approach from the current norm that is of 'culture as product': usually defined by elite groups and categorised by material qualities, or experiences, with a dominant reference to the past. The production of culture perspective opens up debates about culture not only to the broad range of forms, but the nature of production, support and distribution activities that are also required to sustain them. This alerts us to the range of activities, resources and social and physical infrastructures that are a necessary part of any cultural product. Moreover, it points to the fact that these activities may occur in the public or the private sector, on a for-profit or not-for-profit basis. Indeed, the distinction between profit and not-for-profit is often very unclear. However, it does open up a new perspective that we might term the 'industrial' dimension of cultural industries.

UNESCO (1998), and the EU (Eurostat 2000), have sought to define and offer recommendations for data collection of the cultural industries in this expanded form. Progress on this task has been made by a number of nation states: notably Canada, Australia, New Zealand, and the UK (DCMS 2002); although many other countries have now prepared initial sets of cultural statistics (see UNESCO 1998, Pratt 2002). The lessons of these exercises, commonly called mapping reports after the UK example, have been two fold. First, the utility of the concept of a production cycle for the cultural industries, first elaborated by UNESCO, but developed by various agencies in local contexts. Second, the difficulty of operationalising this concept with the available data.

Thus, whilst there is a robust notion of the cultural industries, one that has increasingly been adopted (in various forms) at national level, the actual measurement has been very difficult to implement¹, even for countries that have considerable resources to the task. There are two points that flow from this. First, it is not a simple task to collate cultural industries data for nation states, regions, or indeed the world. Each state offers different problems, but commonly, standard census taxonomies are insufficient for the task. As standard taxonomies, such as industrial classifications, are used to classify units for the collection of employment and output this is a hindrance to analysts. Second, there is generally a lack of detailed research understanding of the nature and organisation of the cultural industries as a whole, let alone as separate industries and activities. Both points make the cultural industries a problematic area for policy making.

Those nation states that have undertaken studies of their cultural industries have been surprised to find that these activities represent a larger segment of the economy that had been previously imagined. Figures of between 5 and 10% of all employment are common (see DCMS 2001, Siwek 2002, Feist 2000, EC 1998). Second, output, and particularly export figures where they can be

¹ Without going into detail (but see Pratt 1997, 2002) the problem is with general census classifications and taxonomies that do not sufficiently disaggregate the cultural industries, or the music industry, from other activities. In turn this renders these activities statistically invisible and denies policy makers access to an evidential base. Protocols are being developed to resolve these issues (see Pratt et al 2002).

measured, have been shown to be positive and substantial. Third, that the growth rate of the cultural industries is dramatic and outstripping traditional industries. For these reasons alone nation states, and in some cases local regions within nation states, have begun to look to the cultural industries as a source of economic potential.

The research to uncover the precise contribution that the cultural industries make to economic growth has been carried out in developed countries. It is an economic fact that most of the cultural industries tend to be concentrated in the developed world: Europe and the USA have been the major powerhouses of cultural industry production. However, this is not to suggest that cultural industries production does not, or could not, happen elsewhere. It is an inherited fact that, like traditional resource intensive industries, the cultural industries have drawn talent and resources (sometimes from the developing world) to its centres of production and market places. So, there is a possibility of reversing this flow an opening up the possibility of more localised production where places have a competitive advantage of unique and dynamic music production².

There has been an increasing awareness within the developed world that the cultural industries may play an important role in economic development (see Kozul-Wright 2003). The fact that most of the commercial cultural industries have relatively low distribution costs, and that the gains from the mass production of a 'hit' recording can be substantial, have alerted policy makers to the possibility of a more dispersed location pattern; one that possibly need not concentrate at the core. Moreover, there is acknowledgement that all countries have a potential cultural heritage elements of which might be translated into cultural industries products; in fact, in a market place where novelty is king, new ideas and novel formulations are likely to be at the leading edge.

Put simply, the cultural industries have been shown to be net positive contributors to economic growth; the cultural industries are not necessarily rooted in one place, production can move to the talent and visa versa; both can still have access to a market. Nations and regions that are able to make a contribution to cultural industries production may reap considerable local benefits. One might be forgiven in thinking that the problems of LDCs such as Senegal were primarily and simply one of piracy. Without a doubt, piracy, or copying of music, does siphon off potential earnings. However, as we will show, the problem is far more complex³. As with all industries a robust understanding of the conditions favourable to growth and sustainability of the industries are vital, likewise that legal frameworks are sufficient to protect the makers ideas, and that sufficient organisational control is exercised to maintain added value activities in the host nation or region.

The cultural industries have a complex relationship to markets and audiences. The role of a cultural industry is not only to make a new product, but also to build a market for that product. Novelty in cultural products is only successful when a market place that has been prepared for it. This is no different to any other industry; however, the subject matter is musical and artistic taste; audiences need to be made aware of artistic forms and how to appreciate them before they will, as a mass, consume them.

Finally, for many, the cultural industries represent a double-edged sword. Whilst there are economic benefits to be gained from the commercialisation of culture there are also considerable

² Of course, the source of this competitive advantage is itself a complex history both of music production, and audience tastes. It is an important point to make that few places in the world are likely to succeed as music production centres. Those that do succeed in the music field then go on to benefit from cumulative causation advantages. As with all cultural development strategies, growth is more likely when rooted in an existing vibrant social and economic milieu, and less likely when 'parachuted in' from elsewhere. The idea of re-producing cultural clusters, or music clusters (see Ngangue 2002), in the developing world is a proposition that requires careful understanding and sensitivity to local and international contexts, as this report will show.

³ It is estimated that the whole of Africa collected less than 0.5% of publishing revenues (Hardy, quoted in Ngangne 2002). In part this is due to piracy, but also due to inadequate registration, collection and distribution systems for royalties.

tensions experienced with regard to the preservation of traditional cultural forms, which in their pure form may not be a commercial proposition, but are culturally valuable. The interaction between traditional and commercial forms is seen as detrimental by some observers. This issue is all the more sensitive when one recognises that traditional cultural policy is focused on heritage and conservation. The new focus on the cultural industries will inevitably open up a set of difficult debates about traditional versus modernised culture, as well as the potential domination (via existing economic power) by the developed countries in his system. Thus, policy must be attentive to these pre-existing structural conditions if anything approaching endogenous production is to be achieved. Furthermore, the fact that in most countries cultural activities have tended to be managed under the aegis of the state will also present tensions. Most of the new cultural industries tend to be situated in the private sector. Not only does this raise the question of regulation and control, but also how the state may manage its cultural heritage (old and new), but also it opens up the need for the creation of a whole new set of private institutions to manage and co-ordinate these activities. Finally, the issue of transition; the system has to be managed if it is to move from one that is structurally defined by piracy to one where intellectual property rights are not only recognised but managed. This transition implies the creation of a set of institutions which themselves will need to evolve. Failure to attend to these issues could destroy the very industry that is to be promoted. LDC's are now faced with a very short timescale within which to adapt and change. The application of the WTO/TRIPs agreement to LDCs as of January 2005 thus presents a real challenge.

Music and the cultural industries

The cultural industries cover a range of activities from radio, film, television, and publishing through music and computer games, to advertising, fine art and design, to high fashion and architecture. Initial (negative) formulations such as those of the Frankfurt School, rolled all of these activities together and viewed them as part of a process of mass production of culture. The common element was mass production of cultural products; no differentiation was made between cultural forms. However, it is clear from subsequent research that there are considerable differences between the nature of organisation, process, and markets of different cultural industries.

There are also many differences between the cultural industries as a whole and most other traditional industries. In fact, many in the field of management and organisational studies have recently turned their attentions to the cultural industries as they perceive them to be the source of much insight into the management of creativity: for many creativity is the key to innovation and competitive advantage (see for example Robinson 2001, Henry 2001, Henry and Walker 2002). It is a point of some debate whether the cultural industries (or creative industries as they are commonly referred to now) are intrinsically more creative, or that there are simply some good examples to be found in these industries. In developed nations policy makers have sought to develop unique policies for the cultural industries working on the assumption that generic (or rather traditional industrial policy assumptions) will not hold for the cultural industries.

Whilst, there is an ongoing debate there is agreement that particular cultural industries do differ from non-cultural industries, and from one another. Thus, it is not surprising to note that there is a sub-group of academic and policy debate on the music industry. As we have noted above, the tension between the commercialisation of music and its traditional and modern roles in (national, local and personal) identity formation. If music is deemed to have a central importance in national identity formation then the commercialisation, and perhaps external domination, of that industry could be seen by some to be a threat to the nation state itself.

Music as a tool of development

In principle, music can sustain employment and be a significant net contributor to export earnings; as well as adding to cultural vibrancy, social and individual confidence and identity⁴. The economic aspects of this process are rooted in the adequacy of a system for the commoditisation and transmission of music. The first is usually associated with the modernisation of infrastructure (social and physical) and the development of human capital to sustain quasi-industrial forms to ensure continued output and quality. The second builds upon the first involving a means of getting the music to audiences (and consumers) and making sure that there is a reverse flow of income and earnings for the original creators. In this section we review the current status of the music production system and suggest ways in which it might be improved.

Consumption

'Engles Law' which states that proportion of income devoted to consumption of non-essential goods increases with the absolute level of wealth does seem to hold true for developed economies. The fact that, *on average*, the consumption of material goods and services is increasing with increasing wealth is a potentially positive one for all traders. The cultural sector is even more favoured as people have tended to devote a greater proportion of their available disposable income to cultural consumption. Thus, the value of the market share for cultural products is growing. This must be positive for those seeking to sell into this market. Clearly, in a world of vastly uneven distribution of resources the majority of this growth in consumption is concentrated in a few developed countries. However, if producers in the less developed world are providing these consumption goods the overall growth can benefit them too. The good news for music producers is that globally music consumption has been growing steadily (with the exception of the last few years) is both continuing to increase and it is diversifying (see IFPI 2002, Chart 1 below); diversification in the world's music industry is occurring in terms of a greater openness to a wider palate of musical genres and forms.

Thus, *in principle*, less developed countries have a growing export market opportunity. If they are able to capitalise on these sales they may provide an important stimuli to their local industries, regions and nations. In this way music could become a tool of development. The alternative is that nations will lose talent through out migration, or via non-beneficial licensing or copyright arrangements or piracy. In this respect music is not different to any other industry, if there is limited control over raw materials, active export processing operations, and access to markets then many potential gains could be lost. The particularity of music industry organisation of production and particularly intellectual property issues point to the need for careful analysis of the music industry, and the consideration of appropriate policy responses.

⁴ Not all music is appropriate for commoditisation. Moreover, commercial forms often rely upon an archive of traditional forms for inspiration or re-interpretation. Hence, the relationship between the two is complex and uneven.

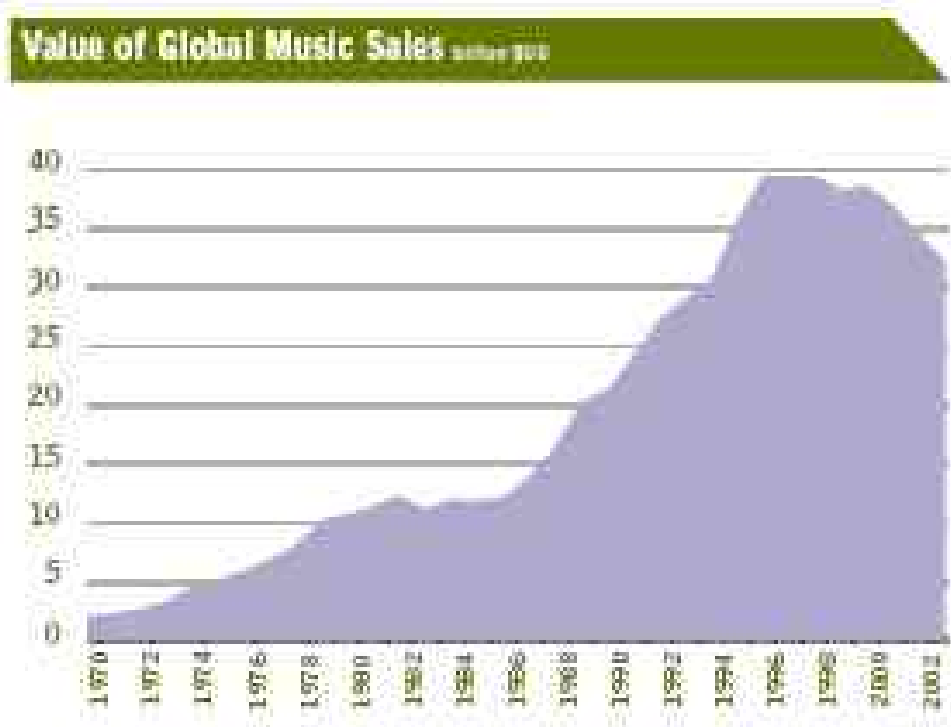


Chart 1: Value of music sales world-wide 1970-2002 (Billion \$ US). Source: IFPI(2003)

Multiple objectives

We have already noted that cultural industries activities may overlap significantly with notions of national identity and heritage; there is another vector of tension that can be highlighted as well: social benefits. Research in the UK in recent years has shown the contribution to repairing social exclusion and improving social well-being that participation in cultural activities might bring (see DCMS 1999). There is a problem here of conflicting objectives and instrumentalism. Of course, there is nothing intrinsically wrong with an instrumental programme of social welfare that uses cultural activities to achieve its ends; however, the objectives of producing inclusive or socially bonding experiences, and those of making excellent cultural interventions, and/or making a profitable cultural business are not coincident except in the rarest of circumstances. It is for this reason that cultural industries policies that are clear in their objectives, in what they seek to achieve, and that which they do not (although this may be an unintended or indirect benefit) are most effective. In the field of culture, where so much is at stake, it is best to be explicit and clear about objectives, and correspondingly careful and precise in their evaluation of outcomes.

Music as an international industry

The aim of this section is to highlight some salient characteristics of music as an economic activity, and the role of technology and organisation. We also want to sketch in the context of the internationalisation of the music industry in order to set a context for exploring the Senegalese music industry.

The music industry

It is useful to bear in mind the origins and development of the music industry when considering the situation of a new entrant such as Senegal. The opportunity to commercialise music was first

possible through two means, live performance and the collection of royalties on sheet music. Live performance, as Baumol and Bowen's (1966) proposition argues, is subject to the 'cost disease' as wages increase factor productivity decreases as the elements of the performance are limited. The main opportunity is available through licensing multiple performers, or simply the musical text. This was in fact the initial basis for the commercial operation of the music business, the sales of sheet music; innovation, in the form of new music, ensured a continued flow of 'products', and performance helped to popularise, and sell more, sheet music. In turn sheet music sales depended upon a musically educated market place, one that could read and perform music.

The arrival of the phonogram introduced a revolution and in time showed that Baumol's proposition was linked to technology, namely to live music (see Throsby 2001). New technologies of reproduction have enabled one performance to be endlessly re-produced and reap increasing profits for a fixed labour input. The potential for monopoly profits was clear, this time dependent on the availability of playback instruments (record, tape, cd and MP3 players), and a broader and less specific musical education of the audience. The development of the popular music charts and the associated marketing functions created a very effective means for institutionalising innovation and promoting a rapid turnover of product.

The organisational forms associated with record producers shifted toward vertical integration that linked retail, distribution, publishing and production of music. The classic format developed in the 1950s and 1960s the US and Europe was of the self-sustained and motivated band that builds up a fan base through live performance. Commonly bands had a manager who would negotiate a fee and book the venue. With more success record company 'scouts' (Artists and Representation: A and R) would select a successful band for a recording contract; here a negotiation would take place between manager, band and the record company. There was a necessary identification of intellectual property rights, and a proportion of sales promised the band, the manager, the songwriter, and a proportion going to the record company to record, promote and distribute the record. Commonly, the contract would spread over several singles, or later albums. In the 1960s it was common for bands not to perform their own songs, however, performance and composition of new songs became common later. As the industry was relatively new the role that managers were thrust into was a new one, few had any expertise, after all this was a new occupation. In the 1960s radio and then TV came to play a more important role than specialist newspapers in the circulation of knowledge about and promotion of new music.

Like most industries, when they began record companies specialised in their national area, and then later formed alliances, mergers and takeovers of other companies. Arguably, the nature of popular music production favours companies who can make full use of vertical integration to control the value chain, also such that they can have numerous artists and thus spread the risk. Music is a very risky business, few bands recoup the investment made in them by the record company; a few are excessively successful. The music industry grew on the back of the consumption growth of the 1960s and the super-groups; bands that achieved success in more than one nation, and continuing sales of their product. At present the majority of international music sales take place in North America and Europe.

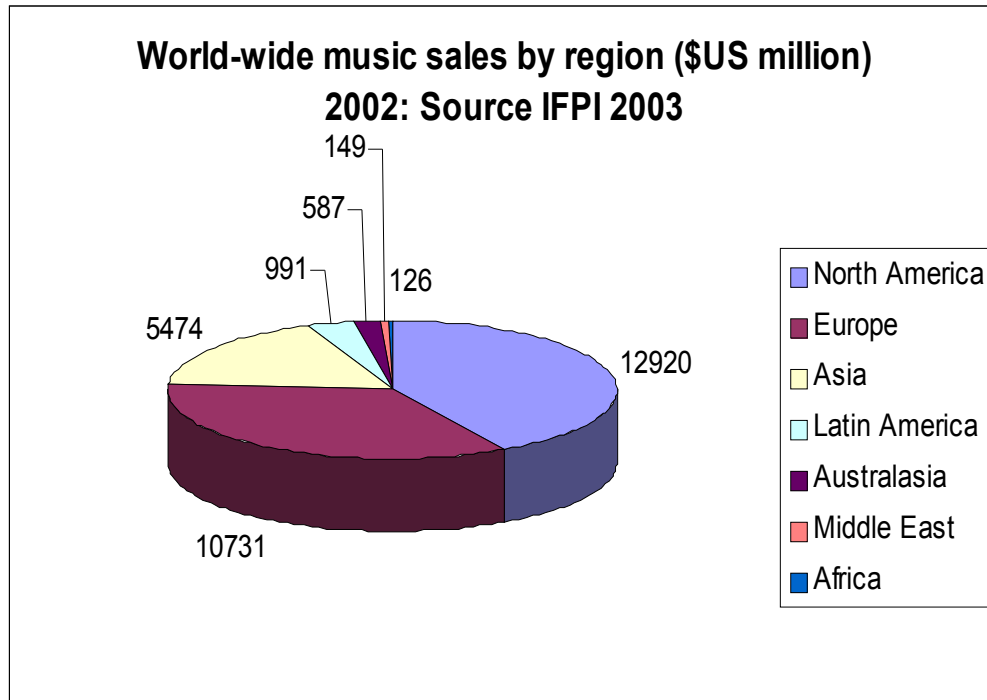


Chart 2: Worldwide music sales by region 2002. Source IFPI

The whole system is underpinned by an intellectual rights regime that is concerned with the assignment of ownership and copyright (the Berne Convention, last revised 1971) and the right to collect royalties on broadcast of recordings (Rome Convention, last revised 1961). Whilst most countries have signed the former, fewer – including Senegal – have signed the latter. These treaties are in effect being superseded by the WTO/TRIPs agreement on Trade related aspects of intellectual property rights to which all WTO members (Senegal joined in 1995) must comply by 2005 (see IFPI 2003).

New formats, from cassette tape, to CD and MP3, have presented record companies with a challenge. On the whole, they have sought to maintain their business model of collecting money on the sale of the physical record that allows private replay, and special licensing for radio, TV, and for public places. In the latter two cases the local collecting agencies were set up by musicians to manage the royalty collections and payments. Record companies, and the WTO, have fought a vigilant battle against the use of recording technologies that allowed reproduction of music out of licensing arrangements: piracy. The record industry is seeking to reap the 'zero distribution costs' that are the potential of the MP3 format, but at the same time to limit copying through software encoding. The industry has been fortunate in that new formats, especially CDs, have encouraged consumers to buy duplicates of their vinyl collections and continue to boost sales.

Internationalisation and 'world music'

By the 1990s record companies, now numbering the 5 majors (greater than three-quarters of the world market; see Chart 3 below), had an international reach. They had incorporated a number of national 'labels' and companies, and most importantly the intellectual property rights to a range of performers and music. Previously, national pop music charts structured national music; this had an effect of limiting variety. However, in the 1980s and 1980s in recognition of the falling percentage of music sales in singles charts were constructed not only for albums, but for different sub-genres of

music. Into this decline stepped a number of very small independent record companies who re-vivified the music industry; just many of the bands had been before, these independent companies were gradually incorporated into the majors.

How can we account for the development of the genre, or marketing category, world music? There are at least two broad arguments here (see Negus 1999; Glanvill 1989). One account is that in the 1990s the national music catalogues of companies were selectively exploited to fuel a 'world music' genre, and early fore runner was the experience of Jamaica and Reggae. This is an overly economic determinist reading. A second, more complex argument, highlights an increasing openness amongst some European performers to other nations' ethnic music, in part this paralleled in the cosmopolitan metropolitan experiences that have resulted from the distinctive patterns of south-north migration and second generation settlement in European countries. One might see openness in industrial terms as a search for innovation and novelty. Thus, a market for ethnic, national music, and hybrid forms linked to already popular performers (in the north) was achieved⁵. Linked to this was a reaction by some to the 'safe' and 'sanitised' mass market for music that developed in the 1970s. In part a movement, punk rock, was a reaction to this; it too spawned a large number of independent record companies.

A parallel reaction was a greater openness to non-traditional music. Particularly well known is the case of the UK based artist Peter Gabriel, who organised an annual 'World music and dance: WOMAD⁶' festival which both acted as a showcase and a means to interact and perform with a wide variety of musicians. One of the early WOMAD attendees was Senegal's Yossou N'Dour. WOMAD became a spring-board for recording and publishing, as well as performing music; by the late 1990s WOMAD festivals themselves had internationalised. The most successful 'world music', especially that originating in Africa, has been marketed and promoted by independent record companies, many based in France, Belgium and the UK. Thus, world music can be positioned along a continuum that ranges from a function of the attempt by international record companies to re-cycle their intellectual property in new market places, or, as a means of opening up new innovative strands of potential profits. Or, it could be seen as an alternative to the music business, close to an ethnomusicology, that operates along a 'fair trade' model. However, it is worth noting that much independent world music, even if faithful to its roots is still recorded, mixed and managed in the north; thereby reducing the potential value added benefits to the host nation of the performers.

Global music market shares 2002

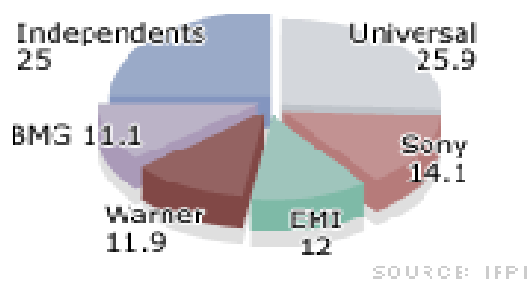


Chart 3: Global music sales by record company. Source: IFPI

It is very difficult to quantify this changing market share. This is related to the inconsistent definitions of world music by different countries contributing to the IFPI data. As noted above, the two

⁵ See this fRoots (2000) magazine article on the history of the marketing term 'world music' which it dates as first used in 1987 see reprint here http://www.frootsmag.com/content/features/world_music_history/

⁶ First WOMAD festival 1982 in Bath, UK continues annually, and has multiple world locations; More on Womad <http://www.womad.org/>

largest markets for music, are Europe and North America (75% of all sales, 2001)⁷, have between a 0.5 and 3.0% share of world music. Given world sales of music in 2001 were 33,500 million US dollars; a ballpark figure for the world market may be anything between 160-900 million US dollars. Due to the data collection problems, it is not possible to plot growth; however, given that world music did not exist a decade ago, growth must be positive⁸. Again, due to data inadequacies, we cannot identify the contribution of West African artists to these figures⁹. All of the above, as we will note discounts music making that takes place in West Africa as virtually no music is exported on CD, and a very small amount on cassette¹⁰. Clearly, this is a barrier to the benefit of export earnings¹¹.

All we can note is that world music and Rap are new genres that Senegalese artists are making a visible contribution as evidenced by album sales and music awards¹². Even a small penetration of the US or European market could have a huge monetary impact if it was returned to Senegal.

⁷ All data from IFPI annual reports, and correspondence with IFPI, London.

⁸ IFPI data does not have a world music category until 2001, previously it is aggregated with 'Gospel, New Age and Ethnic pop'. Of course, there is no data on sales within Senegal. Rap, as a category, emerged in 2001.

⁹ The best way to make such a calculation would be to collate individual artist sales information direct from record companies; given the relatively small number of international artists one might estimate the potential earnings of the industry.

¹⁰ IFPI has no data on music sales for West African states, in fact only Zimbabwe and South Africa in the whole of Africa; this is due to problems of piracy and non-participation in IPR agreements.

¹¹ A proportion of earnings will return if artists still reside for personal or business tax purposes in Senegal.

¹² We can note for example that N'Dour's breakthrough single with Neneh Cherry- 7 seconds- in 1994 sold 1.5 million copies. The 1998 world cup official song 'La cour des grands' was also a million seller.

Senegal

The aim of this section is to explore in detail the situation of the music industry in Senegal, after a short contextual section we sketch in some details of the changing form of music, and the prior music policy, and substantively the music production system.

Geography and situation

Senegal was previously a French colony; it gained its independence in 1960. Senegal still retains many aspects of the French legal system, and has strong cultural and educational links with France. Senegal joined with The Gambia to form confederation of Senegambia in 1982, however, the union was dissolved in 1989. Senegal has a population of 10.5 million, a median age of 18 years, with 44% of the population aged 14 and under. Some 94% of the population are Muslim, and 5% Christian. Most people speak at least two languages, French is the official language, and Wolof the most popular, others are Pulaar, Jola and Mandinka. Literacy levels are around 40%.

The composition of GDP from agriculture is 18%, industry 27% and services 55%; although 70% of the labour force is employed in agriculture (source: world fact book). Close to 25% of the total population is concentrated in and around the capital, Dakar (approximately 2.5 million). Secondary cities predominantly on the Western littoral of Senegal are, in order to importance are, Thies, Kaolack, Saint-Louis, Rufisque, Ziguinchor and Dioubel. In 1994 Senegal undertook a structural adjustment programme that began with a 50% devaluation of the CFA (Central African Franc, linked in value to the French Franc). This programme has led to reduction of many government subsidies. In the period from 1995 onwards, significant positive growth in GDP has been recorded, inflation is under control and investment continues to be attracted to the country. However, there are significant problems associated with poverty: unemployment is 48%, some of which is 40% accounted for by urban youth. This economic profile means that the informal economy is a very significant part of life in Dakar.

Despite these economic problems Senegal has sustained a reputation within West Africa for its pioneering efforts to promote cultural activity and to develop cultural policies. This is helped by the Franco-cosmopolitan atmosphere of Dakar. The 1966 World Festival of Negro Arts held in Dakar highlighted President Senghor's policy of negritude (Cathcart 1998).

Music in Senegal

Musical performance and form in Senegal has four important strands. First, one that is strongly rooted in folk traditions and ways of life. In this form hand crafted instruments and local languages are the medium of expression. Performers were commonly 'griots' who held inherited positions and performed ceremonial roles to both communicate news, history and traditions, a sub-group of performers, troubadours, carried on a more popular role performer and acrobats, creating general entertainment. The position of a musician was a respected one that was generally passed down through the patriarchal line.

Second, the importation of French colonial forms and preferences of musical performance; these traditions were modified through the early post-colonial period via the popularity of Latin American styles, sung in Spanish, as well as the emergent North American soul and rhythm and blues¹³. Slowly, traditional Senegalese instruments were re-introduced and local languages, notably Wolof, used. A

¹³ The 1971 'Soul to Soul' concert in Accra, Ghana was symbolic in making link between US soul performers and Africa. However, US soul music has drawn little if anything from Africa per se.

central figure in this early modernisation phase was Ibra Kasse, who was based at the Miami nightclub; he attracted a number of imitators and emulators.

In the late 1970s and 1980s a third shift can be noted, that of the infusion of electrical instruments with traditional forms, as well as a more modern *mis-en-scène*. The ready availability of cassettes that made possible both the recording and listening of music with a greater ease and portability than either reel-to-reel tapes, or vinyl discs, had a great impact on the diffusion of musical styles. There was also a growing self-confidence in musicians to develop their own styles; initially with jazz forms, and later with a unique Senegalese sound, notably Mbalax¹⁴. This period marked the first wave of European successes, the second wave, in the 1990s, coinciding with the emergence of 'world music' and epitomised by artists such as N'Dour, is of artists who have developed an international reputation, but retained strong links, and residence, in Senegal.

Fourth, at present there are a new wave of bands, such as PBS, Daara-J¹⁵ and Pee-Froiss, performing a local form of rap and hip hop music that has made Dakar a world node (after New York and Paris) of this art form. The latest shift in the music business in Senegal has been the rise of women performers such as Viviane N'Dour, Coumba Gawlo¹⁶, Ajah Sa, and My Sane. Gawlo has had significant success in France (signed to the label BMG), being awarded a platinum disc for her 1998 album *Yo Malé*.

The box shows a number of pen-portraits of successful bands. They indicate a development model. First, an existing folk tradition that is overlain with a colonial form. Second, a post-colonial pattern of hybridisation, an interweaving of western pop, jazz and Latin traditions with Senegalese instruments and forms. Third, a reassertion of folk forms, with modern instruments, and a re-embroidering of hybrid forms with traditional instruments and language. Fourth, in an early phase the physical re-location to Europe to tour and record music; Paris is commonly the base (see Stapleton 1998). Fifth, European and international touring linked to world music festival circuits and western world music performers; but, artists remaining based in Senegal and recording music locally.

One of the most successful early bands was Xalam, formed in 1969, who toured Africa with Hugh Masekela and Miriam Makeba in 1975, and they first toured Europe in 1979 when they won a major award at the Berlin Jazz festival; they continue to tour. Toure Kounda formed in the 1970s, and moved to Paris in 1979 where they are still based and play Mbalax inspired afro-rock.

The founding of a Dakar nightclub in 1970, the Baobab, was instrumental in providing a home and a springboard to what has become a major band: Orchestra Baobab. Baobab's sound drew upon the Latin music that had been popular across West Africa from the post-war period; initially they sang in Spanish, but later Mandinka and Wolof lyrics were introduced. In recent years some of Baobab's back catalogue has been re-issued by World Circuit records¹⁷ this has been enormously successful and has led to the reformation of the band, and the recording of an album, to tour Europe. Remarkably, for a band that most in Senegal have consigned to history, Orchestra Baobab were voted best band in BBC Radio 3 world music awards in 2003¹⁸.

Perhaps the best-known star of Senegalese music is Youssou N'Dour; through various bands, *Etoile de Dakar*, and *Super Etoile* from the 1980s onwards N'Dour has created a unique Mbalax style. The link with British performer Peter Gabriel was cemented, post-Womad, by N'Dour's

¹⁴ See this link for notes on the Mbalax style, literally 'rhythm of drums'
<http://www.artandculture.com/arts/movement?movementId=720>

¹⁵ Daara J won the WOMEX 2004, Africa category. The 2003 album *Boomrang* was their breakthrough.

¹⁶ Gawlo is a 'stage name' and means *girot* in Pular; Gwalo hails from a musical family.

¹⁷ World Circuit recorded and promoted Buena Vista Social Club.

¹⁸ The shortlist was voted on by delegates to WOMEX, the annual world music expo, held in October in Essen. Winners are chosen by a jury of an international world-music experts from BBC Radio 3 and its partner organisations. <http://www.bbc.co.uk/radio3/world/awards2003/>

performance on Gabriel's So album (1986); the Super Etoile subsequently went on a world tour with Gabriel. N'Dour is linked for many as the archetypical and most successful product of the WOMAD festivals. N'Dour has also had success with artists such as Paul Simon, Ninah Cherry and Bradford Marsalis. In 1988 N'Dour was involved in the Amnesty International 'Human Rights Now!' tour with many famous western musicians. Since then N'Dour has enjoyed international success. N'Dour's was initially with Virgin records, then signed to Spike Lee's '40 Acres and a Mule Music Works'. N'Dour (and Baobab's) back catalogue is handled by Stern's¹⁹ of London, an influential independent distributor in the world music scene.

Other significant performers who have an international presence are Ismael Lo and Baaba Maal. Lo was a guitarist for Super Diamano, a mbalax blues band, for five years before leaving to start his own solo career. Maal is an exception in that he benefited from a classical training at the music conservatory in Dakar and the Ecole des Beaux Arts in Paris. While in Paris Maal joined up with singer Mansour Seck, they returned to Senegal and formed the group Dande Lenol. Their major release, *Firin' in Fouta*, was worldwide success. Maal also has an acoustic 'folk group' that uses only traditional African instruments.

Positive Black Soul (PBS) was one of the first rap and hip-hop bands from Africa that signed a contract for a European label. In 1992, the French Cultural Centre of Dakar produced a CD, which sought to represent current Senegalese music, "Dakar 92, mbalax, jazz et rap", it featured PBS. This event got them noticed by a French MC. At the beginning of 1993, they travelled to Paris to take part in a Rap/Reggae festival at the Bataclan, invited by Disco Mixte Club and Radio France Internationale. PBS were stars of Dakar's first music festival in 1993. Mamadou Konté, was instrumental in promoting the band all over the African continent. Half-Malian, half-Senegalese, Mamadou was the creator of Africa Fête, a major event in World music on the Parisian scene (which took place in Paris). In 1994 Maal used PBS on his *Firin' in Fouta* album, this led them directly to a signing for Mango, a subdivision of Island Records. Signing with this label catapulted them directly to the front of the World Music scene.

¹⁹ Sterns history is interwoven with the emergence of world music. See <http://www.sternsmusic.com/> (about us)

The music production system

MPS: The concept

The aim of this section is to provide an analysis of the production of music in Senegal. We use the notion of the music production system (MPS) to structure the analysis. The MPS is a version of the cultural industries production system, or production chain that underpins the UNESCO (1998) concept of the cultural industries. In essence the model is simple, it follows 6 notional steps in the production of music from the initial idea, through writing (called content origination), to making a recording (production), Reproduction (distribution), consumption (retail, or live performance), and includes archiving and education and training. These last two elements provide visibility for the cross-cutting and feedback elements that characterise the model. In many senses such a characterisation is very similar to notions of innovation systems. The investigation of these steps in the production process also serve to alert us to the necessary social and economic, public and private, formal and informal, material and non-material institutions that enable the transition from step to step, and comprise the processes of learning and innovation within each step.

Content Origination

This step concerns the initial idea of a piece of music, and it also concerns the position of the artist; necessarily it implies training and education as well. This task requires time and resources. In the Senegalese case there has been a tradition, after the notion of the griot, of a singer-songwriter-composer. This combined with erratic interpretation and application of IPR rules has created tensions between those that specialise in just one of these tasks. There has been a struggle, for example, to get recognition of the role of songwriters; this is often manifest in the decision to print the writer/composers name on the cassette sleeve²⁰. The situation of musicians is also problematic. A very small proportion are employed by the state in the National Orchestra, for the vast majority they are self-employed, engaged in multiple job holding, or engaged on contract for bands, or bars, restaurants and hotels. This erratic nature of employment is the norm the world over; it is a major stumbling block if music is envisaged to be a tool of economic regeneration.

The AMS is a local organisation formed to pursue the rights of musicians; however, as yet there is no collective agreement on contracts or wages (as in other countries who have Musicians' Unions). The remuneration of musicians still remains low. Niang, manager of Maal's band, Dande Lenol, discussed monthly rates of between 100,000-200,000 CFA, pay in bands such as Diamano range between 150,00-250,000 CFA according to Ndoye, their manager. Clearly, if a band has a regular engagement in a club or restaurant then a note of stability may be introduced to their employment; however, a higher risk strategy involves touring internationally. This requires investment, and the possibility of erratic rewards. Likewise the same system can apply to recording, musicians commonly being paid on a one-off basis rather than contacting for a proportion of royalties.

Other bands adopt different systems, notably just being employed for the touring period. It was reported to us that Ismael Lo's band were paid on this basis where for a string of 20 concerts musicians might receive between 800,000-1,000,000 CFA. With headline acts such as those noted above the front person is likely to have a preferable deal, as well as being in receipt of an IPR income. The precarious nature of employment has prompted AMS to campaign for a form of social insurance for musicians.

There is very little infrastructure required for this stage of production aside from access to basic materials, and possibly a quiet place to practice. These facilities can be found relatively easily.

²⁰ In this case the writer is unable to assert their moral right to their work, and to protect their IPRs.

Production

This stage involves making a master tape of the song that will later be reproduced; it includes recording and mixing the music. The main issue here is access to a recording studio. It is significant that recording studios have been constructed in Senegal (Dakar) in recent years. Prior to this there was no option but to travel abroad. In the late 1970s the recording hub of West Africa was Abidjan, Ivory Coast (see Eyre 2000:91); otherwise it was Europe: Brussels, but usually Paris²¹ or London (see Stapleton 1998). A few early recordings did take place in nightclubs using rudimentary mixing desks. The first local studios appeared in the late 1970s, however the norm was either the use of broadcasting studios or nightclubs²². There are two international quality studios in Dakar, Studio 2000 (PERCENTS, Cultural pyramid of Senegal) and Xippi (Jololi/ Youssou N'Dour). Both studios have a variety of studio sizes and digital recording and mixing facilities (48 track desks). Costs to hire these facilities vary by studio size: but range from 40,000 to 100,000 CFA per day.

In addition new technologies allow small scale, home, studios; as in Europe and elsewhere it is possible to make reasonable recordings this way; however, they are not a serious option to a full studio and its mixing facilities. It is not know how many 'home studios' exist.

The role of the producer is to be the impresario, or organiser; sometimes also to be the engineer. Producers seldom have this as their only employment; commonly they will produce one or two cassettes. An Association of Producers has recently been formed. Producers are usually the ones to advance money for the studio time so that musicians can make a recording and mass produce their tapes. Either musicians receive a flat, once and for all fee, or they share a future income stream. The former case is most common.

The other key element is the recording engineer's expertise; we commonly heard the complaint that whilst there were basic technicians, there was a critical lack of recording engineers. This lead to foreign engineers being brought to Senegal, or recording taking place abroad²³. Further still, a basic recording will be done in Senegal and other elements added, and mixed, abroad. There is a question of trust that still has to be developed between major record companies, local studios and engineers in order to guarantee quality product.

There appears to be no market in 'singles' and only albums are produced. In practice, this means that local recordings aimed at cassette distribution have 6-8 tracks. An international norm would be 12 tracks or more.

Reproduction (distribution)

The stage of reproduction is three fold. First, it alerts us to the mass production of songs from a master tape and their transformation into cassettes, records or CD (the sound carrier). Second, the technical equipment and musical instruments, as well as the machinery to make the sound carriers and production technology, as well as the domestic playback machines. Third, it is concerned with the channels of distribution (radio, TV and the internet; as well as physical goods)

²¹ Here again the role of the French cultural ministry was crucial in supporting touring African artists. For example Africa Fete was sponsored. Arguably Paris has gained enormously from this relationship boosting its music industry (see Stapleton 1998).

²² Ibra Kasset's club Miami in Dakar, or Moussa Daiallo's Songomar in Thies.

²³ A number of notable, world class, producers that specialise in Senegalese and African bands more generally are located abroad. For example, the Paris-based Senegalese producer Ibrahima Sylla.

Mass production

Practically all domestic recordings are distributed on cassette. It seems that there have never been any domestic vinyl pressing plants; and, as yet, there are not facilities for commercial production of CDs. We identified three cassette duplication 'factories'; two associated with the two studios noted above, and a third, instigated in 2002, Keur Serigne Been (KSF), operated by Talla Diagne. The start up cost of such a utility is in the region of 250 million CFA. The unit cost of reproduction is in the region of 450 CFA. These facilities are able to produce 10,000 cassettes a day. Separate, but related is the production of the artwork and packaging for the cassettes. The unit cost of these is between 15-30 CFA; promotional posters are also produced, often from the same artwork, at a common unit cost of 350 CFA.

There is a small import market for CDs, and there is an unknown trade in non-domestic cassettes. CDs and cassettes attract an import duty of 140% of the price. This degree of the cassette trade is difficult to know as it overlaps with pirated recordings. We heard various estimates of the degree of piracy between 60-90% before the introduction of hologram marking in 2002, this may have been halved (as the official number produced – see BSDA data Table 2 -have doubled). The Association of Producers suspects that much pirated material emanate from outside of Senegal: informants suggested alleged that Guinea, Tanzania, Togo, Sierra Leone and Nigeria were most likely to blame²⁴. However, informants suggested to us that it does seem evident that some small-scale duplication (up to 200 a day) originates within Senegal.

Equipment

Traditional instruments are manufactured in Senegal; we have no data on this industry or its output. However, we estimate it to be at the level of craft production. When one is considering the contemporary music business the concern is with modern electrical instruments, recording and playback equipment. It is clear that all of this equipment is imported; musical instruments, a category which includes recording equipment, attracts an import taxation of 70%²⁵. Some data is available on the value of imports by various categories, although it is not especially useful for our task; however, an approximate total of such goods were 600 million CFA in 2002. The data in the table (below) shows the import value by weight, as another measure of volume.

| Year | KG |
|------|---------|
| 1996 | 169 969 |
| 1997 | 180 813 |
| 1998 | 220 036 |
| 1999 | 200 074 |
| 2000 | 190 459 |
| 2001 | 308 333 |
| 2002 | 303 564 |

Table 1: Imports of electronic materials (Kg) Source: Government

²⁴ We did not receive any concrete evidence to establish this. Interestingly, Eyre (2000: 199), discusses the issue of piracy in Mali. He claims that a major source was Sierra Leone. Initially the pirate had been based in Liberia (importing cassettes from Asia). Elsewhere Eyre discusses how artists are in constant battle with the pirates, even resorting to releasing their albums in the rainy season when pirates will be held up by poor transport.

²⁵ This is an issue of great concern to musicians. For example Thione Seck (2004) claims that President Wade has promised to relax these taxes, but has failed to. Traditionally, the band leader has owned many of the instruments (see Stapleton 1998)

Distribution/Dissemination

Once duplicated cassettes are distributed wholesale to retailers. This is normally carried out on a 'deposit' account. The wholesale price for cassettes per unit ranges between 700-900 CFA depending upon popularity of the artist. It is estimate that as much as 50% of the national market is accounted for by KSF (although products sometimes appear under a different label). Modern music is but one part of the music market, something approaching 30% of sales are of religious music, and another proportion of traditional or folk music.

| Station | 2001 | 2002 |
|------------------|------------|------------|
| RTS | 25 000 000 | 25 000 000 |
| AFRICA N°1 | 2 200 000 | - |
| SUD FM | 7 615 838 | 3 616 338 |
| OXY-JEUNES FM | 350 000 | 500 000 |
| RADIO DUNYA | 3 065 625 | 6 130 650 |
| SOXNA FM | - | 2 362 500 |
| 7 FM | 2 144 300 | - |
| NOSTALGIE | 1 500 000 | 6 600 000 |
| WALF FADJRI | 4 000 000 | - |
| B.B.C. | 1 323 990 | - |
| TERANGA FM | - | 399 600 |
| TOTAL | 235 | 239 |
| | 512 670 | 676 619 |

Table 2: Annual copyright, broadcast receipt, paid by radio stations (CFA): Source BSDA

It is notable that there is very little consumption of non-Senegalese, non-Western, music. On one hand the import taxation would dissuade buyers, however, on the other hand one might have expected distributors or producers to license foreign music. Those to whom we spoke suggested that there was little knowledge or interest in the products of musicians in other West African states; knowledge of western pop forms comes from radio play. However, radio stations too seem not to be interested in other music from the region. This fact seems strange to those viewing the picture from a European perspective where 'world music' is often marketed on a regional basis (West Africa), and interest is in the music of West African states, notably Mali and Senegal. There seems to be both a missed opportunity for external marketing, and one of the developments of the musical form through cross-fertilisation²⁶.

Some Senegalese distributors do export cassettes KSF said that their distribution (10,000 annually) 10% went to Gambia, 15% to Europe (of which half went to France). KSF and Studio 2000 estimate that 1.5 million cassettes are legally produced per annum in Senegal.

An important area of promotion of artists and music is via radio and TV. Music videos have become very important in this respect. A music video can cost 500,000-750,000CFA; there is little data on output or use of this means of promotion. It seems clear that this part of the industry is at an early stage of development. Music videos are important as TV stations are prepared to play them, and as such provide another outlet for music. In a more traditional mode there are a number of radio stations broadcasting in Senegal. But, as Senegal is not a signatory of the Rome convention the payment of

²⁶ Another reason might be the interventionist role of the state in the Malian music business contrasted to the market orientation of the Senegalese business.

royalties is idiosyncratic. Data from BSDA illustrates this (see Table 3). Contributions are not made in direct reference to radio play, but appears to be negotiated through one-off settlements. Once again, the radio programmes have a limited range and either play Western music, or Senegalese music. Surprisingly, there is little programming of showcasing music from other West African, or Africa more generally.

Whilst this deals with access to audiences within Senegal it is notable that a major means by which Senegalese music has found an North American and European market is through radio play. Specialist programmes and awards with mainly public broadcasters have led the way (BBC in the UK, Rfi in France, and NPR in North America). Likewise small independent, European based, music distributors have also played a significant role in audience development (for example, World Circuit and Sterns in London). Finally, as noted above, the role of concert and festival promoters in initially bringing artists to Europe to gain initial exposure; for many this is the essential step to gaining a recording contract.

Consumption

Retail

This stage of the MPS concerns how cassettes, and music eventually finds its audience. Commonly, this is via a retail outlet, or via a live performance. It was from 1990 onwards that the cassette made its presence felt in the Senegalese market place and dynamised the music industry. The retail environment is based upon market sales; there is only one dedicated 'record shop' in Dakar, Senegal. The vast majority of sales take place formally and informally in the Sandaga market. The retail price point is between 1,000-1,500 CFA per cassette. Sales are from market stalls and itinerant sellers. There is little if any market information aside from the recommendation of the merchant and the cassette cover.

As noted above there is a perception of a significant amount of piracy; attempts to fight this have been spearheaded by BSDA (the Senegalese collecting society) the use of a hologram on every cassette to demonstrate its legitimacy. The production of holograms now is an indicator of sales. The hologram itself has to be purchased by the wholesaler at 30 CFA. For each cassette the BSDA takes 8% (average 80 CFA); 65% of this sum goes to authors, 50% to the composer of the lyrics, 50% the music. Data from the BSDA indicate a healthy expansion of music sales. Something in the region of 110 new albums are released each year, sales have run from 467,000 in 1997 to 622,000 in 2000, the value of receipts in 1997 was 291 million CFA (equating to sales of 10 times this amount.)

| Years | Broadcast receipt | Mechanical receipt | Total |
|-------|-------------------|--------------------|-------------|
| 1992 | 101 569 641 | 14 009 010 | 115 939 553 |
| 1993 | 102 890 820 | 11 528 900 | 115 312 124 |
| 1994 | 146 900 321 | 19 630 126 | 166 692 777 |
| 1995 | 171 226 812 | 18 630 00 | 190 118 412 |
| 1996 | 182 456 422 | 28 792 100 | 212 054 604 |
| 1997 | 249 643 317 | 41 793 800 | 291 673 897 |
| 1998 | 220 451 648 | 42 839 150 | 264 149 478 |
| 1999 | 219 588 857 | 40 629 620 | 260 458 457 |
| 2000 | 216 232 053 | 61 965 100 | 278 453 178 |
| 2001 | 235 512 670 | 53 407 700 | 289 108 170 |
| 2002 | 240 024 619 | 102 055 670 | 342 320 889 |
| T | 2 086 | 435 | 2 526 |
| OTAL | 497 160 | 254 176 | 281 536 |

Table 3: Royalties (CFA) (excluding those from dramatic performance) Source: BSDA

The BSDA has had a difficult time. Some of our informants suggested poor management. Seck (1994) claims that the present incumbent entered the post only to find 50 000 CFA in the account. However, new management and the introduction of the hologram system have boosted royalty receipts significantly, and inevitably added to the administrative burden of BSDA.

It is difficult to generalise, as with all music industry distribution the majority of cassettes are doomed to failure; some only last 1 month in the market place, others 6 months or more. A popular cassette may register sales of 50-80,000 units. The short life of a cassette, 3-4 months, compares to 12-18months in North America. This simply means that Senegalese musicians are exploiting themselves.

It is notable that with such a hazy grasp of music sales in total, there is very little concrete information on sales by artist or album. There are some problems with the quality of data collection by BSDA, and with their re-distribution of royalties to composers. The result is that there is no feedback between popularity and sales. The mechanism of the collation of charts that signal weekly sales and in the North act as a means of sales promotion and concentration of demand, do not exist in Senegal. Until there is more data collected on retail sales, or on royalties paid, this cannot happen.

Live performance

Another means of access to market is via live performance. As has already been noted, Senegalese music has grown out of a nightclub culture, nightclubs have played a role on employing musicians, and especially where there are a 'house band' of generating stars. The nightclub is a vital space in that it offers musicians instant feedback on their performance. The level of national taxation on live performance can be as high as 40%, although it is difficult to say as it is a sliding scale comprised of multiple components.

The majority of venues for live performance are located in Dakar, although some are to be found in the regional capitals²⁷. There is no audit (official or unofficial) of the number of nightclubs²⁸, or

²⁷ In the larger regional cities there are 2 or 3 venues on average.

their capacities, or the ranges of music that they promote. At its pinnacle is the Theatre Daniel Sorano²⁸, which has a capacity of between 1-1,200; a greater capacity venue, though only occasionally used for the purpose is the Demba Diop Stadium which has a capacity of 15,000. There are an estimated 30 clubs, plus a number of piano bars and hotel lobbies that act as performance spaces for bands or individual singers. There are 4-5 larger clubs with a capacity of between 500-700 (for example Thioassane³⁰, Kilimanjaro and The Barracks). These venues are rented out to promoters for 250,000 CFA on average (the Sorano theatre for 540,000 CFA, and the stadium for a similar amount. Common entry prices for nightclubs range between 2,500-5,000 CFA.

The other means of organising live performance is for bands to tour the country. Many nightclubs have their own basic sound systems, and bands are able to tour from club to club. However, it is common for bands in other countries to take their sound system with them to guarantee the quality of sound, and appropriate availability. When we spoke to Mamadou Konté the only tour promoter in Senegal, he noted that there were only three sound systems in Senegal, and only one capable of being used at the stadium. He spoke of the problem of touring within Senegal, and even more touring regionally, and internationally. Internally, one of the obstacles noted was the poor quality of local infrastructure to support large and heavy vehicles.

²⁸ It is notable that nobody has innovated with a listings guide; a guide of who is performing where and when, and also some assessment of what is considered best at any moment in time.

²⁹ We have no information about the quality of these facilities; though we did note concerns regarding the potential future need for refurbishment of the Sorano Theatre.

³⁰ Owned by Youssou N'Dour's holding company

Music 'policy'

Whilst there is general cultural policy in Senegal, and various incentives for musical production and promotion, there is no explicit co-ordinated policy for music in Senegal. In part this is because, unlike most art forms, contemporary music exists almost exclusively in the private sector. The tradition of public policy making has been a grant giving culture, a music policy if it existed would have to have more of an industrial character. This section discusses the Senegalese collecting society for royalties, le Bureau Sénégalais du Droit d'Auteur (BSDA) the tax and copyright system, the public support of music and training issues.

Collecting Societies and IPR/regulatory environment

The legal status of the protection of copyright in Senegal is clear. Senegal has signed up to the Berne convention which allows rights holders to assert their moral rights regarding properties; however, it has not signed up to the Rome convention which concerns secondary rights associated with radio play and performances of music in public places. In practice, legal agreements are one thing, implementation is quite another. Here the role of the collecting society plays a central role. Even with this partial legal structure, as many other developing and developed countries find, day-to-day regulation is another challenge. Here, the front-line battle is fought by the collecting agency.

Collecting societies are vital the functioning of a private music industry. Musicians may gain income either from live performance, or through the collection of money associated with the rights to use their music in the form of the music and words, radio play, or of a tax on the cassette (a private right to replay). The BSDA was created in 1972 to take an overview of the collection of royalties and regulation of copyright issues. It is run by a board composed of authors, composers and the Ministry of Culture. It collects taxes at the rate of 35% for mechanical reproduction rights, 7% for radio replay rights, and 35% for public places. The BSDA is charged with the protection of intellectual property rights, though, it has been argued that its remit is not as precise as it might be in how this task is pursued. Several commentators argued that the BSDA had until the recent past not been as effective an agency as it might ideally have been (see, for example, Seck 2004)³¹. With its new director significant changes have been made, notably by the introduction of hologram system of stickers on cassettes to reduce piracy. Official stickers are applied to legal cassettes and consumers are encouraged to choose legal over illegal cassettes. The system would seem to have been successful, with registered sales data increasing by 50% overnight (see Table 3 above). However, for a hard-pressed agency as BSDA this is a mixed blessing; it has posed a major administrative burden on them

BSDA recognizes that its records are far from complete as regards IPR producers³², and that many are not registered. In part this is an education failure; it is an issue that BSDA and the musicians body AMS are still trying to counteract. Moreover, there is an ongoing dispute with radio and TV stations regarding their payment of the tax to BSDA (see Table 2, and discussion above). In recent years the precise payment has not been made, instead an informal agreement has been reached on a 'lump sum' basis. As with all collecting societies, there is the problem of distribution of monies to each and

³¹ See also <http://www.lesoleil.sn/legislatives2001/actualites/archives04/papeetchekh.htm>

³² Unfortunately, these declarations are themselves open to fraud, mis-representation and omission. Thus, declarations need to be checked and regulated.

every artist according to the use of their music. Again, as with all agencies, smaller producers tend receive the poorest deal as the sums involved are so small and costly to redistribute³³.

Finally, there is the issue of taxation proper. We mention at several places in this report the level of taxation on imported goods: sound carriers and musical equipment and instruments. Potentially, this is a disincentive to import these goods, however, in most cases there is no local substitute; thus, it is a potential barrier to creative development. The level of taxes associated with IPR have been discussed above; but there are also local taxes on the hiring of musical venues, and on ticket sales; as well as on drink sales within clubs. All of these are potential areas for exceptional review to make music performance more attractive.

Public support of musical projects

Whilst there has emerged a national and a West African regional support structure for film production in Senegal, we did not note a similar one in the field of music, nor the arts generally³⁴. Senegal has set up House of Culture, whose remit is delimited by a national consultative committee for the promotion of culture, which has as its objectives the promotion of performance, exhibition of film, concerts and symposia. It receives an annual grant of 20 million CFA; support is also made for a network of (national) regional arts centres. The National Festival of Arts and Culture (FESNAC) circulates bi-annually around the regional capitals³⁵ and it's a stimulus to local initiatives³⁶. This event has been a productive place for the promotion of regional musicians; musicians may receive grants for musical instrument purchase and practice rooms.

In 1982 Senegal creates a National Orchestra³⁷, its mission was to represent Senegalese patrimony, research Senegalese music and to accompany national and international visitors. The Orchestra has four areas of specialism: Jazz, Classical, Variety, and Traditional. The Orchestra also performs a training function (see below). As we have noted already RTS, the national broadcasting organisation established in 1972, has also played a role through its broadcast of music, but also the fact that its studios provided a valuable early basis for bands to make simple recordings. In addition there are a number of cultural events that serve as showcases for music, the Lights of Goree, the Saint Louis Jazz festival³⁸, and the annual midsummer 'National fete de la musique', which provides multiple platforms for musical performance.

Other significant institutional support is available through the Communications Development Assistance Program (PADEC) that was set up in 2000, with an initial 3-year programme, with support of the Canadian government³⁹; the endowment is 600 million CFA.

Radio France International (RFI)⁴⁰ runs a competition 'Discovered in Africa'/ World music award which plays an important role in promoting young musicians; the prize includes an international

³³ There is also an incentive for wholesalers/ producers to 'undercount' cassettes (see Seck 2004). This is a classic problem for the cultural industries that, for example, still besets newspaper sales in the UK, here the issue is over-counting to boost advertising revenues. Generally, there is no substitute for independently audited transactions at the point of sale.

³⁴ For example, there is a Biennial prize of arts and letters, it is not clear whether contemporary music is eligible. Within the West African region the Cote d'Ivoire Market of the Arts and African Spectacle (MASA), whose remit includes music, is commonly cited as an outstanding case. <http://masa.francophonie.org/english/index.htm>

³⁵ http://www.sentoo.sn/fr/culture/suite.php?id=82&art_id=120268&txt_id=118813&sec_id=83

Thies (1997), Dakar (1999), Ziguinchor (2001 and 2004)

³⁶ Local communes do have a legal obligation to promote culture (Item 162 of the national code).

³⁷ Currently supported by an annual endowment of 14 million CFA.

³⁸ There is a Saint Louis museum dedicated to Henri Guillaibert, but there are no facilities for the support of musicians

³⁹ PADEC http://www.infoentrepreneurs.org/english/display2.cfm?Code=8207&coll=QC_INFOQUE

⁴⁰ See RFI world music awards http://www.rfimusic.com/siteEn/concours/concours_fiche_9.asp, the Senegalese performer Wock won this award in 2000.

concert funded by the Cultural and Technical cultural cooperation agency (ACCT) through the intergovernmental agency of the French speaking world (AIF), CIRTEF (Conseil International des Radios-Télévisions d'Expression Française)⁴¹ and the Alliance Française. Whilst such initiatives provide publicity and access to an audience, there is a concern that they also have an unintended consequence of exporting musicians to France, rather than retaining them in Senegal.

The cultural initiatives support programme (Programme de Soutien aux Initiatives Culturelles : PSIC) is financed by the European Union⁴², though managed by the Ministry of Culture. PSIC finances cultural projects in deprived and remote communities; its range of art forms covered includes music. Currently there are 14 projects supported, which corresponds to 65% of the funds available; of this almost one third (22 million CFA) is used in musical projects, the funds are mainly used to aid the production and recording of tapes.

Education and training

In this section we will refer to the public social infrastructure for musicians in Senegal. It is notable that music receives very little explicit support from the state; as we have noted the majority of activity is to some extent self sustaining (all be it at a low level) and operates in the private sector.

The high school curriculum does not include compulsory music education, as far as we could observe there is little extra-curricula teaching of musical appreciation or performance. The Blaise Senghor cultural centre does hold a number of outreach workshops for children in the field of the arts generally. As noted above, the National Orchestra has a wide remit of specialist musical forms. The Music Conservatoire serves as a training school for members of the Orchestra. In turn this provides a vital, though small, trained cadre of musicians, some of which play the role of musical arrangers for popular musicians when they record.

Several of our key informants raised the issue of training in our investigations. The AMS for example, and the BSDA, recognise that there is a deficit in knowledge both of consumers and producers about intellectual property rights, their regulation and control; notably how producers should assert their rights. The AMS also raised the issue of the level of professionalism amongst its current and potential members. It was increasingly recognised that the skills of the management of bands, the recording and touring, and the negotiation of rights amongst band members, and within a recording deal, was a serious issue; and, one that there was a serious deficit. We have already noted that recording studios commented upon the lack of trained recording engineers and producers. This is a particular problem that encourages bands to record in Europe rather than Senegal. However, the problem extends to the management of bands too. The international tour promoter Mamadou Konté had been particularly active in this area; having gained considerable experience abroad he had sought to establish training programmes locally. He has set up a training programme (Tringa) with funding from PADEC, the objective is to get bands organised like small businesses. A 12-day workshop is carried out three times a year for 3 years for 25 managers. The training is a 'hands on' experience. The basis of the training programme is a process of diffusion, to 'train the trainers'. Trainees are grouped with other nationals within the region.

⁴¹ CIRTEF <http://www.cirtef.org/>

⁴² European Development Fund and ACP

Assessment of the Challenges and Opportunities facing the music industry in Senegal, and policy recommendations.

The aim of this section is to highlight the opportunities, challenges and examples of policy recommendations to assist Senegal to seize the opportunity of making music a tool for development.

Opportunities

It was noted at the start of this report that there is a strong demand for music in the world market, especially in Europe and America. Additionally, there has opened up, in recent years, a niche – World music and Rap– that is itself growing. West African music, and the music of Senegal in particular, has a substantial reputation and presence in both niches. To consider it in traditional business terms, Senegalese music is a brand that the market recognises and likes. A number of questions follow from these observations, perhaps the central one is: is the Senegalese music industry robust and meeting current demand? Beyond this, we might ask: is there capacity to grow the industry further? Finally, we should ask: are the benefits of these music sales finding their way back to the Senegalese economy, and are they being used –in part – to build a sustainable music industry?

The evidence presented so far points to a varied picture of the music industry in Senegal; in this section we will assess the challenges that are currently faced. We will assess these issues from a particular standpoint, namely based upon the assumption that music is an industry, and that we should think of issues of regulation and policy in an industrial fashion, not a cultural one. Finally, some policy solutions will be suggested

Challenges

It is also very apparent that there are two music systems, one inside and one outside Senegal. The barrier between the two is both a high one, and almost impermeable to feedback. One of the major developmental issues is to find ways of traversing this barrier. Effectively, local music sales are sold to Senegalese nationals; who have a limited amount of disposable income. No net income growth is registered for the economy; moreover, as producing music requires the importation of electronic goods, the national economy runs at a loss. International music sales are managed by international companies, not located in Senegal. The only money that returns is via personal income of artists.

To elaborate; the internal music system is where the sound-carrier is a cassette and the product is meant for local consumption, musicians working in this system struggle to make a living from their profession, in no small part because they cannot rely upon the receipt of royalties from their work; thus, they are thrown back on to a treadmill of live performance where they can earn a more regular living. However, once in this system it is very difficult to grow much larger. There are only so many concerts that can be played, and only so many venues; the lack of touring means that audiences grow bored quickly, which then requires new product. Bands sell their rights in order to finance studio time, which in turn will allow them to produce cassettes that will attract market interest in their concerts. Inevitably, the limitation of a finite (usually) Dakar market, and the limitation on the price that can be charged for either concerts or cassettes must limit expansion. Breaking into an international market is seldom possible due to the costs, and risks, of touring.

The external music system operates differently. If we summarise the experience of the successful bands that hail from Senegal in the last 30 years or so we can highlight a number of issues. First, musicians tended to be 'discovered' by Europeans already involved in the music industry. This 'discovery' usually took the form of arranging for the band to appear at a European festival, or tour in Europe. Touring built up a market for the band's music, and then an album is recorded in Europe, for a European/American label. The album, pressed as a CD, is then distributed via the record company (few find their way back to Senegal as a CD). The band may or may not return to Senegal. What is clear is that, despite the huge cultural impact, the limited financial flows back to Senegal are through the personal taxation of individual musicians (if they remain resident in Senegal for tax purposes). There are two variations to this model that have occurred in recent years. First, that some musicians have not only appeared on the festival circuit, but that have also collaborated with western musicians. This activity expands the market for product, as it helps a band break out of the 'world music' niche (which is a small proportion of all music sales). Second, some bands have returned to set up studios and to make them a recording base in Senegal. This has not been entirely successful as engineers and producers often have to be imported too. However, potentially this creates more economic activity locally, crucially, it creates a local resource for other musicians who may be able to make better quality recordings. Nevertheless, we have also noted that most of the recording equipment has to be imported; this is a loss to the national economy. Without diminishing the considerable steps that successful bands have taken, it is possible to see that much of the added value is lost to the national economy. It is true that the situation is better than it was, but it should be possible to gain more control of the music value chain, and hence to ensure that a larger proportion of the earnings from sales in European and American markets find their way back to Senegal.

In essence, it is recommended that the objective of music policy is to change this state of affairs such that there is one system, and that the benefits of sales to richer market places are directed back to Senegal, and that a proportion of these funds are invested in a local music production system. The following section seeks to outline the range of indicative policies that need to be explored if a number of critical weaknesses in the Senegalese music industry are to be addressed. These weaknesses can be identified at almost every stage in the production system. The central point that cannot be stressed too much is that a significant change must occur in intellectual property rights management, and respect for such rights. However, such a change cannot be enforced over night. Effective change will occur only with grass-roots support for such rights, and if the rights system works to distribute monies from consumers to musicians. Allied to this point is a massive job of institution building to make what has been a remarkable entrepreneurial success – local music finding a global market – something that is viable, expandable and sustainable.

Policy recommendations

Content origination

The main issue facing those operating in Content origination activities concern stability of income; these issues are directly linked to issues associated with the management of intellectual property rights. The challenge is to develop a system whereby authors and performers can be sure of receiving an income for their work, and potentially (see below) have expectation that sales could increase. As we noted above, there is a tendency for a negative cycle to develop where there is an uncertainty of income and 'over performance' takes place; this crowds the market place and in the end congests it forcing out innovation and novelty.

Policy proposal 1: Promote property rights management, and resource agencies to promote it

Implement a system of property rights management that is trusted and understood. Essentially, this is an issue of training and education. The AMS and BSDA are already making steps here. They will need help from Government with legal backing to pursue pirates and those who seek to wilfully miss-assign property rights. Clearly, a progression to full intellectual property rights law would help, especially in the case of income streams from media and replay rights (the Rome convention).

More specifically, it does look at present as if the BSDA is under resourced to meet the challenges that it currently faces, let alone those that it will face in the future, in terms of both managing and regulating the music rights system. Given the central role that they might play it would seem vital that they are more adequately resourced.

Policy 2: Professional training and development of musician and managers

One of the key areas of intervention could be in terms of the management of bands. We have already noted how there is a deficiency of basic business skills in management; the efforts of Tringa seem exemplary in this respect. However, we could see these issues extended such that managers became a key point of educating musicians as to their rights and their responsibilities to BSDA. More support should be given to the AMS in their pursuit of these activities, as they already have the trust of musicians.

Policy 3: Educating and training audiences and future musicians

Generally, issues of copyright and intellectual property should play a part of both the music curriculum and the general school curriculum. In the latter case the fact that most musicians do not train as musicians means that they must be accessed at school; second, the understanding of these issues is also vital for audiences so that they do not commit infringements unknowingly, and they develop respect for copyright and musicians. More generally, an audit and expansion of school level music provision should take place. The objective would be to promote a balance of listening, composition and listening skills across western classical, traditional, and modern Senegalese forms.

Policy 4: Protect and value past rights. The National Sound Archive

One of the crucial elements of Senegal's heritage is its aural history, and the 'back catalogue' of its music. Along side the re-evaluation of its ethno-musicological study, there should be a programme of recording and interpretation. One idea might be the establishment of a National Sound Archive. Such an archive would have as its objective the recording and documenting of as much existing live music that does not already have a recording, especially traditional music. One objective will be to either identify a composer, or protect the rights for the state, from exploitation, except under licence. There would be considerable interest in such an archive, and

it could form part of a national music resource and music education programme to stimulate interest in Senegalese music.

Ideally this archive would be digital and on-line, perhaps a small charge for use could help to finance running costs. If it were on line it might promote international interest as well, as well as ensuring the copyright protection of musical heritage.

Production

Senegal does seem to have managed to build up a reasonable infrastructure for the recording of music. It is difficult to know, but our interviewees suggested that capacity was appropriate in terms of volume and quality at present. However, what was clear was the lack of trained arrangers, producers and sound engineers. It could seem very important to immediately train a number of personnel to fill these roles, and to institute a small training programme run by, or in association with, the studios to ensure a continuing flow of such people. The existence of trained personnel in this case can make the difference as to whether studios are used for external production.

Policy 5: Recording studios as a regional resource

Market the use of studios to international musicians; that is to attract international musicians to record in Senegal. By recording themselves in Senegal local musicians will advertise the fact that this is possible; by attracting international musicians it will draw in foreign earnings and potentially generate more collaboration with Senegalese musicians.

Policy 6: CD pressing plant as a regional centre

We note below the notion of 'migrating' to CD production. At present there is no CD production capacity in Senegal; it is worth considering that Senegal might press its own CDs, and maybe those of the region. Making and pressing CDs, and packaging them might promote more jobs; having control of CD pressing may offer a means of reducing piracy too. The issue of potentially producing domestic CD players would also be on the agenda. Both of these options imply a joint venture with an already existing company producing these products.

Policy 7: Instrument Fair Trade and repair

The issue of musical instruments is a problem. As noted above they are produced mainly abroad, and they attract high import taxation. Consideration might be given either to a selective lowering of import taxation, or to the attempt to develop some indigenous (electrical/modern) instrument making. An alternative might be to consider developing a fair trade relationship with first world instrument second hand-resellers. Potentially, a small instrument repair facility for

second hand instruments may provide a vital flow of instruments for pre-professional musicians. There are many opportunities for the development of joint ventures or partnerships in this area.

Distribution

The question of distribution is a vital one. As we have noted, the internal market does seem to be satisfied with the existing infrastructure of cassette factories. However, at present, whilst there is a small export trade this means that Senegal is separated off from its major markets; quality of recording is too low, and there is very little demand for cassettes. Thus, to penetrate major markets at present the only option seems to be to get a record deal with a European or American company.

Policy 8: Migrate Senegalese music production to the CD format.

As noted above this could generate costs as CD production occurs outside of Senegal. It is only if production were internalised that there might be benefits. International agencies would object to licensing a CD plant if rights management and piracy were not under control.

Another challenge is to generate some home-grown music companies. It is notable that there are no music companies in Senegal, nor even, joint ventures with European or American labels. The main function of a label is to exploit the economies of scale of the control of the production chain, and/or the balance of its portfolio of bands, and its ability to find a 'hit'⁴³. The expertise of a producer with a sense of the (international) market place plus capital to invest is required.

Policy 9: A Senegalese, private sector, locally controlled record company.

A vital step in Senegal's ability to control its musical destiny would be to gain greater control over music production and distribution in an international market. It is most likely that a joint venture would be most likely to work. One possibility would be to use an internationally recognised Senegalese star as a broker, the other would be to broker a 'fair trade' relationship with one of the small specialist and committed independent companies (Real world, World Circuit, Sterns etc.). An objective must be to establish some more favourable distribution deals for the majority of Senegalese artists in the major market places.

The issue of exposure and replay on domestic radio and TV is a stumbling block; this has great potential to boost local consumption, as well as to develop the local market.

⁴³ Youssou N'Dour's company has tried to develop this function (the Jololi label) with limited success thus far ; their first release was a big hit worldwide by artist Cheikh Lo. The first 'showcase tour with N'Dour was a success; however a subsequent one without N'Dour did not do so well. This is however an important starting point that should be developed with competitors.

Policy 10: Joint ventures with North American and European independent distribution companies

Independent distribution companies already play a vital role in developing the market for Senegalese musicians; a joint venture could give both parties reciprocal access to markets.

Policy 11: Mass media and audience development; joint ventures with European radio stations

Radio and TV need to become more aware of their potential role in audience development and critical appreciation of local, and regional music. It is possible that air play quotas might be considered; however, an alternative to simple proportional rules that promote local or regional music is to make the objective one of educated listening. Much of the world music market in the UK and Europe has been built on the basis of radio play of this character. Given this interest, again, the notion of joint ventures and a trade in radio programming might be considered. As we noted above, the development of a West African, or pan-African regional music consciousness might be helpful in gaining access to the international music markets.

Policy 12: Audience and musician development through Regional or Pan-African exchange.

Although North America and European markets are the most valuable, there is much benefit to be gained through trading within West, and in Pan-Africa. Here the issue may not be the value of sales per se, but that of creating artistic interchange and a critical base that will sustain and innovate in style and approach. There might also be possibilities of brokering joint resources such as recording studios, touring expertise, and management skills.

Consumption

Retailing at present is confined to Sandaga market. The mix of formal and informal, legal and illegal sellers in the same setting does not help rooting out the problem of piracy. It makes regulation very difficult. Second, the conditions of sale, and the amount of information and choice, and the ability to compare, or find out about music is limited to the expertise of the seller (who may be a non-expert).

Policy 13: Regulating retail, auditing sales

A system of licensed sellers, or an attempt to create more space for sellers might help. Overall, what is most important is the development of a far greater detail and extent of market information. In most developed economies there are music radio and TV programmes, dedicated music papers, music columns in weekly magazines and general papers. These not only stimulate

demand, but also create a more discerning audience. Another companion element that one finds elsewhere is the production of sales data, charts, which will help to direct consumers to popular (and potentially critically appreciated) items. This would help to slim down an over crowded market place and focus on successful genres and performers; it creates an environment when skills and talents can be compared and contrasted.

Policy 14 Promoting critical listeners

The range of music available for consumption should be the development of 'listing; magazines or newsletters that review live performances and list all bands and their venues for the week. Hand in hand with this development would have to be the training of music journalists who were capable of positive critical discussion of music. This will stimulate audiences to have a more critical engagement with the musical form and act as another means of feedback to musicians seeking to improve their skill and professionalism. Such professionalism might also be encouraged through the development of professional agents who act as intermediaries between managers and venues to create a better circulation of performers across venues.

Policy 15: Support for musicians touring out of the country.

The issue of touring is vital to the expansion of the industry; as we have noted, this is one important way that musicians get their music into the market place, or, at very least into the view of the record companies. Since European and US market places are the objective, some public assistance with underwriting, or simply guaranteeing tours would help; along with the development of management and tour management expertise this would make it possible for Senegalese bands to make their own way into these market places, rather than having to rely upon European or US promoters. Joint ventures could be explored with other regional markets to promote cultural entrepreneurship.

Policy 16: Music tourism

As North American and European consumers develop an interest in local music there will be a demand for tourism related to music. Tourist strategies should consider such a focus. Music tourism, like that of cultural tourism generally, tends to attract higher spending visitors. Thought should be given to developing a local music tourist infrastructure. As noted above, a listings magazine, as well as on-line music resources would be important; but so would local guides⁴⁴.

⁴⁴ See <http://www.insidenj.com/music/musictourism.html>

Policy and regulation

Finally, there are a number of possible crosscutting initiatives that might be considered; these issues generally find a place in the public sector. Policy proposal 1 is clearly central, but beyond this:

Policy 17: To view the music industry as an industry, to measure its output on a comparable basis

It is an industry that produces employment, income, and export earnings. There is a need to know and to explore the nature of growth of the music industry. There is a clear need for government to satisfy itself of such claims, and to legitimate its support to the public. At present the data availability to either audit or evaluate changes in the scale and operation of the industry are inadequate for the task. This situation must be remedied. In part, it could be solved by more imaginative and concentrated use of existing statistics; however, in large part new data will need to be collected. The barrier on this activity is lack of trust and the role of the informal economy and lack of copyright control. It is apparent that this process will only be effective if it is progressed in a step-wise fashion, rather than all at once. The key will be to have in mind a very clear objective of why the data is being collected and for who, and crucially exactly what variables are being sought (See Appendix 1). The eventual production of a report on the state of the music business in Senegal should be the objective. This report should be made available in the public realm; it ought to act as a rallying point for the music industry within Senegal, and an advertisement of the health of the industry to the world. It should increase confidence in investment as well as providing, if reviewed at regular intervals, a tool to evaluate progress.

Policy 18: Review the tax burden on music related imports.

The government might consider an evaluation of the contribution of the music industry to the economy (on the basis of the above), and in so doing they might re-consider the tax burden placed on the whole music production system. This might be the opportunity to review the possibility of selective favouring of music industry inputs as a way of promoting the industry. Reduction of taxes on import of instruments might be one issue, as might the introduction of some tax refunds associated with training (as noted above).

Policy 19: Create a music champion.

The government might consider making a symbolic as well as practice gesture of creating a 'Music minister' who would champion the cause of the music industry, and act as a roving ambassador for the industry abroad. The minister would be able to use the music status report to support claims. This office should be linked to a new Senegal music web site (linked to the National Sound Archive) that would act as a first point of information for the music public about

the Senegalese music industry, and bands and performance⁴⁵. It could act as an internal information resource for musicians on copyright issues and on professionalisation and training matters. Another related issue that might be considered is the promotion of 'music tourism'; examples of this sort of activity are already organised in the North, Senegal could invest in this as another way of promoting its industry and heritage.

Policy 20: Promote a regular regional music festival.

A means of advertising and promoting the success of the industry might be to seek to act as host of a West African music festival that might be an annual showcase of music from the region, which would promote new bands to the region and the world; it would attract visitors and attention. It is only a matter of time before one West African state does this; maybe Senegal could take the lead. This could work in the same way as the film festival in Burkina Faso; or, the MASA arts festival in the Ivory Coast. An objective of this festival should be to record a regular compilation album that could be used to promote regional music. Again, the possibilities of joint ventures with European independent distributors, and European or North American musicians could be a way of reaching new audiences⁴⁶.

Policy 21: Re-assess the links between the for-profit and not-for-profit music sector

There will be a continuing need for the commercial music industry to have productive and supportive links to the not-for-profit sides of musical activity; profits should in some way provide continued support for informal music making that does not have as its objective commercial production as this will help to develop a more generally positive music culture.

⁴⁵ Another possibility is that this web site could act as a shop window too; it could offer encrypted MP3 samples and pay-per-listen tracks and albums by Senegalese musicians. In this way issues such as distribution and marketing could be by-passed. It is clear that this would never be a volume sale operation; however, its main function would have to be regarded as educational and audience building. The possibility of live web-casting of concerts in Senegal clubs, and of Senegalese bands playing in Europe might also be considered.

⁴⁶ An example is the 'Festival in the Desert' album released in 2003 that has raised the profile of Malian music.

Appendix 1: Data Issues

The aim of this section is to outline some of the data availability issues associated with the cultural industries in general and the music industry in particular. This section pays particular attention to the commercial dimension of music, and its status as an industrial activity.

Concepts

The notion of the cultural industries marks a subtle but significant shift from the dominant concern with 'culture'. The shift is implied in terms of both the focus of cultural policy, and the nature of the evidential base for policy development and evaluation. The dominant thrust of cultural policy making has at its focus issues of the promotion of arts and crafts, and most notably the conservation and promotion of national patrimony; this is commonly expressed through a natural heritage and built environment focus, as well as a concern with associated tourism. Traditionally, the nation state has supported such activities through grant aid. The fact that tourism is traditionally dealt with differently is indicative of its dual nature: partly about cultural values, partly about earning money.

This traditional agenda does not require a substantial evidential base upon which to build policy aside from an audit of key sites and artefacts; the biggest burden is to count visitor numbers. In relation to tourism generally, visitor numbers are collected by national governments via points of entry and points of stay.

The new cultural industries agenda differs from the one described above in a number of significant ways. First, it takes a rather boarder definition of cultural actions to include support activities; generally taking into account the whole cycle of production from idea to audience⁴⁷. The main point here is that the focus on concern of policy makers and census administrators is much broader than the traditional category 'artist'. Second, that the cultural industries are viewed in a more systemic fashion, and from a more strategic perspective. In short, they are considered as businesses (even if they are in the not-for-profit sector); thus, attention is not just given to outputs, but also to processes, investment, training and employment. Third, many of the cultural industries are firmly positioned in the market sector; thus, a loan and tax incentive framework is more appropriate than the 'grant' mode of the public sector. Fourth, there will inevitably exist three-way tension between the needs of patrimony, artistic integrity and the market; however, artists may be positioned simultaneously in all three domains.

This new agenda requires a far more extensive and intensive evidential base. In simple terms it requires information similar to that of most industries. The problem is that many of the cultural industries, and music is no exception, are only partially visible in national accounts and censuses⁴⁸. In order to appreciate exactly why this 'visibility issue' is a problem we briefly discuss industrial taxonomies.

Taxonomies

One of the first questions that needs to be asked is how significant the music industry is in Senegal, how significant its development is in relation to other cultural industries, and industry more generally. Normally, one seeks information from the general census on the nature of employment in an industry. If one consults national censuses one will not find separate categories for music industry production, or, even musicians separated out from other artists. Often they are aggregated into 'catch

⁴⁷ See UNESCO (1998) reports; also Eurostat (2000) and DCMS (2001) reports.

⁴⁸ This is a problem facing all nation states, and, as international data is built upon national foundations there is a broader issue too.

all' categories, or hidden in other classifications. Either way it is not possible to extract a clear figure. Of course, taxonomies such as the industrial and occupational classifications that form the basis of population, employment and trade census classifications are developed to be stable and long lasting; the music industry is a very new arrival on the industrial scene. However, the problem is a serious one leading to a relative invisibility. In nation states where steps have been taken to work around these issues the cultural industries have often been shown to make a substantial contribution to both employment and trade⁴⁹. Even in developed economies where such steps have been taken, the full dynamics of employment, skill and life cycle are still poorly documented (second job holding, part-time and contract employment); likewise with trade and inter-industry flows of goods, investment and value added.

In developing countries, such as Senegal, there is an added level of difficulty in developing information sources that pose a conundrum: more data might create a higher profile for the industry and attract more investment; however, the data itself is not collected as much of the economic activity that it seeks to record currently exists in the informal sector. Data collection implies, for individuals, the potential of being 'caught', or simply being subject to surveillance, by the state revenue collection agencies. Thus, even at this level there would seem to be a disincentive for individuals employed in the informal economy to 'declare' themselves to such a census, even if it were carried out. The alternative, an independent survey would be extremely resource intensive, and complicated to organise (due to the constraints of sample size, etc).

Recommendations

Turning to other relevant data needs, we also face a set of problems. The most common data one might expect to investigate the music industry would be sales, however, this data is not readily available in part due to the inability of the BSDA to collate the information, and in major part due to the scale of piracy⁵⁰. First, the degree of piracy means that one only has estimates about the total output and the legal output. Again, producers of sound carriers, may be unwilling to reveal the extent of their production in the fear of attraction the interest of revenue collection agencies. First, this means that it is almost impossible to gauge the contribution of the music industry to the economy. Second, as a result of a lack of market signal data there are no indisputable measures of popularity⁵¹, or otherwise, in the market place by which to differentiate product.

Other likely indicators of the vibrancy or otherwise of the music industry might be an audit of the number and scale of live music performance venues. Again, we found that this information does not exist, again, most likely due to concerns about taxation. We failed to identify a 'listings' section of local papers and journals that might at least categorise live and recorded music venues, and classify them by type of music performed. Thus, it is difficult to assess how important employment in live and recorded music venues might be, let alone issues such as turnover. Again, as many musicians work simply as performers it is difficult to identify the numbers of artists that are employed, or the likely revenues earned. On top of this as Senegal is not a signatory of the Rome convention on the collection of live/replay rights on music not data is available on this issue.

These issues, associated by output, number of musicians etc. are recognised by both the copyright bodies (BSDA) and musicians representatives (AMS). They were able to give some general data. However, even though these are collected in good faith, it is very difficult to verify them, or even evaluate them.

⁴⁹ See for example the UK's creative industries mapping document, and more recently, the cultural data framework.

⁵⁰ The International Federation of Phonogram Industries (IFPI) does not collate any data for Africa (less Zimbabwe and South Africa); this is an explicit recognition of the piracy problem

⁵¹ For example, a music sales chart.

There is some government import and export data on musical instruments and musical equipment due to them attracting a special tax. We do know that all modern musical equipment is imported, because it is not manufactured locally. We have identified three major recording studios, and a number of small 'home studios'. Most of these are located in Dakar. We know that there is limited equipment available for hire for large-scale performances and touring. There are three sound systems, and associated transportation, one sufficient for a stadium venue.

Looking at other aspects of the production system, there appear to be no data available on the enrolment of students at music schools, or, the proportion of the curricula devoted to such activities in regular schools.

Finally, setting aside these important data there still a lack of detailed information about how the music industry 'works'; what its institutional and structural characteristic are, and crucially the nature and degree of interaction with the West Africa region, the continent generally, and the rest of the world. We have tried to sketch in some of these details through the interviews reported in this paper; but they must be regarded as a provisional statement.

Methodology

Method of working

The research that this report is based upon has three sources. First, an expert mission visited Dakar in June 2003, a number of interviews took place at this time; second, a local consultant carried out a number of supplementary interviews and secondary data collection in the period July-September 2003. Finally, a full range of secondary reports and data was drawn upon in the collation of the report. The following persons were interviewed:

M SAMB: Director of the National Art School.

Cheickh DIENG, acting Director of the Senegalese office for Royalties (BSDA)

Aziz DIENG, President of the association of music professions AMS, and the chairman of the board of directors of BSDA;

Ousmane SOW Huchard, vice manager of the Youssou NDOUR GROUP;

Alain JOSSE, president of the association of producers;

Mbassou NIANG, *Baba MAAL'S* manager;

Mamadou KONTE, Tringa and music festival promoter;

EL Hadji N'DIAYE of studios 2000;

Assane FALL, cabinet director of the minister of culture and communication;

Papa Massène SENE, technical adviser of the ministry;

Thierno SOW, Koly Tingala group manager;

Alioune BADIANE, director of arts;

Penda MBOW, former minister of culture;

Ngoné NDOUR, director of Xippi studios;

Lamine TOURE, RTS Channel Director.

Alioune NDIAYE, director of programme at Walf fadjri

Diop OUMAI, National director of Employment

Bouya NDOYE, Manager of Ismael Lo

Kalil GAYE, TV and music producer, TV and radio presenter

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RFI world music awards

http://www.rfimusique.com/siteEn/concours/concours_fiche_9.asp

BBC music awards

<http://www.bbc.co.uk/radio3/world/awards2003/>

Music anthologies (see BBC and RFI sites as well)

Frank Bessem's Musique d'Afrique

http://www.geocities.com/MotorCity/Speedway/4939/frames/art_pbs.html

African Music Encyclopaedia <http://africanmusic.org/home.html#S>

http://www.rfimusique.com/siteEn/biographie/biographie_6210.asp

Distributors

Barclay records (part of Universal)

[http://www.universalmusic.fr/servlet/FrontKindServlet?action=anthology&id=271
&page=0&kind=3](http://www.universalmusic.fr/servlet/FrontKindServlet?action=anthology&id=271&page=0&kind=3)

UK Independents

<http://www.realworld.co.uk/webmaster/whatsnew/>

<http://www.womad.org/>

<http://www.worldcircuit.co.uk/flashyes.htm>

<http://www.sternsmusic.com/> (about us)

PADEC

http://www.infoentrepreneurs.org/english/display2.cfm?Code=8207&coll=QC_INFOQUE

CIRTEF <http://www.cirtef.org/>

MASA <http://masa.francophonie.org/english/index.htm>

Observatory of Cultural Policies in Africa

<http://www.imo.hr/ocpa/>

OCPA newsletter

<http://www.imo.hr/ocpa/activities/newsletter/2003/OCPA%20News%20No99%2028%2012%2003.doc>

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Photos:

Top left Cassette retailer in Sandaga market

Top right General view of Sandaga market

Middle left: Main studio mixing desk, Studio Xippi

Middle Right: Tape duplication equipment, Studio Xippi

Bottom: Studio 2000