

Middle Eight

Apolitical Blues: Report on the IASPM 12th Biennial Conference, McGill University, Montreal, 3–7 July 2003

Jason Toynbee

IASPM conferences are always enjoyable. There is plenty of enthusiasm for music, as well as much skilful delineation of its form and cultural context. IASPM conferences also have a pretty flat structure and, although there is never enough, a relatively high degree of interaction between people from different countries, ethnicities, disciplines, sexualities. Certainly, the academic star system is in evidence, but its worst manifestations are suppressed because most people want their conference to be democratic, to represent an alternative kind of academic culture.

All this I am wholeheartedly for. I am also for the conviviality of after-hours conference life. My experience in Montreal was the best yet in this respect – a combination of intense socialising and rational communication that is hard to beat. Much of what I learned, and remember most vividly, from Montreal was transacted in extra-mural sessions.

And yet . . . The problem, I think, has to do with the field, and in particular the fact that popular music studies (PMS) has finally *arrived*. In the beginning, twenty or more years ago, PMS was a subculture. Most of all it found its identity in opposition; to musicology which treated only the classical canon, and in a formalist fashion at that, but also to barren social science which repudiated music altogether. Something else. PMS tied its colours to the ‘popular’ masthead in a more categorical way than other nascent academic fields which addressed popular culture like film, television or cultural studies.

Jump forward again twenty years. Now the field is pretty well established. True, there are still some problems with musicology and the hostility of some of its older practitioners toward PMS, especially in the United States. But by and large those of us working in the area are being accepted, we are embarking on doctorates, setting up courses, and publishing in greater and greater quantities. In short, PMS is on the verge of becoming professionalised. There are strong parallels here with the phase that cultural studies went through ten years ago. Let us call it the growing-up stage of emergent academic fields.

Yet it would be a mistake to leave the critique at that. For if this historical cycle is, as it now turns out, predictable, it is also deeply troubling. After all, what lay behind the original emergence of PMS was neither simple enthusiasm for the music, nor a self-serving drive to create a new kind of academic capital. No, the key thrust was political. And this was just as true of Frithian pragmatism (‘let us follow through the implications of treating music as both industrial *and* of the people’) as it was of Shepherd’s Marxisant perspective (‘we need to find out how music is implicated in class-stratified societies across the grand sweep of history’).

It is the contrast between the political urgency of this beginning phase, and a relatively de-politicised contemporary approach that informs what I am going to say now. First, it is worth pointing out that Montreal was the biggest IASPM conference ever with four sessions running in parallel most of the time. This is another sign that PMS is entering a mature phase. Lots of people want to do it. Very good.

One result, however, is that a single person can only hear a small proportion of the papers. I should own up straightaway to the fact that I missed the Queering plenary in memory of Phillip Brett, led by Karen Pegley. Several people have told me that this encapsulated precisely the kind of political engagement which was lacking elsewhere. I do have reservations about a politics, like that of queer theory, which is built around identity. We need political economy too, because rich and poor cannot, *must* not, ever become identities – they need to be swept away. But having said that, the important point to make is that, in practice, queer theory has both a collective ethos and a firm grasp of dialectics, two qualities not evident in some parts of PMS.

Sure enough, the 'Queered Agenda' session late on Monday morning turned up trumps. The analysis by Nicholas Greco of Morrissey's 'Boy Racer' video was deft, and the application of the notion of a fourth gender highly illuminating. Morrissey was being probed, even assaulted by the camera, so that what we were left with in the end was a profoundly ambivalent sense of both gender *and* nationality: a vulnerable, British boy/girl trapped in a Thatcherite netherland circa 1990. This was a powerful reminder of how radical Morrissey used to be, a figure who, notwithstanding his embrace of the Union Jack (or weirdly enough perhaps this helped too), constantly upset nascent conservative norms of woman, man, country. Greco's paper made the case eloquently and economically. Earlier in the session, Katrina Rudmin had already suggested that Rob Halford of Judas Priest in effect femmed himself up through the performance of masculinity. Nothing could be more queer than dressing up in leather like a man. By way of contrast, David Owen Montgomery read Bowie's gender games of the 1970s in a decidedly non-queer way. Bowie, we were told, drew on a long tradition of transsexual performance in the entertainment industry. Far from challenging gender roles or performing new ones, this was 'plasticity', or good old-fashioned drag.

These papers all addressed questions of gender and sexuality by moving out from the pop text to life itself. They combined a political ethic with sophisticated analysis: nothing reductive about any of this stuff. The limit to the work was its almost exclusively visual orientation, evidence that people trained in film, television or literary studies are by and large still not prepared to engage with the Sound of Music. Philip Auslander did though. Drawing on anthropologist Victor Turner's distinction between 'indicative' and 'subjunctive' performance in, respectively, ceremony and ritual, Auslander showed that while the former, with its invocation of a normative reality, predominates in much rock, Roy Wood's work typifies the subjunctive, 'if it were so' mode. The key means of subjunction are the Wood voices, which constantly move within the frame of one song – for example, from the sound of the Beach Boys to Neil Sedaka . . . and then back again. Nowhere do we hear a base-line voice which might establish a real Wood. In fact Roy does nothing but shift and yearn; he's constantly in someone else's vocal cords. This was terrific stuff. Quite apart from its local application it suggested an important new way into the popular music text more generally. Still, the question I now want to ask Auslander is, 'Why does it matter?' Is the subjunctive mode just another aesthetic strategy for making us go 'ooh'? Or is

there a queer agenda – in other words, does Wood upset repressive norms *beyond* the record text?

Apart from queering, the other politicised zones that seemed to be emerging at Montreal were around policy and ethnicity. A problem with policy studies is that their ambition may be curbed by official prescription, or worse, that researchers may internalise policy makers' priorities. No danger of that happening with Martin Cloonan and John Williamson (see their Middle Eight contribution in the present issue). They told how their project with Simon Frith on the music industry in Scotland was constantly being scotched by the people who had commissioned it. The notion that research might be independent or, even better, dependent on reality, was simply not part of their paymasters' thinking. This was a sobering, but instructive story: if you do get commissioned by anyone with an angle and in a field where strong institutional interests are at stake, then expect flak. Marion Leonard's account of recent British initiatives to promote music exports to the United States had something of the same flavour. Leonard's point was that policy for the support of popular musicians from the UK was profoundly contradictory, taking quite different forms according to which arm of the British state was involved. The survey of live music in Sydney done by Bruce Johnson and Shane Homan was actually completed without too much censorship or interference. Still, whether its recommendations will be implemented is another matter. Johnson and Homan's insight was an important one, that a live music scene is dependent on an extraordinary variety of interlocking factors, from noise levels to the availability of public transport. Good music policy is therefore a matter of thinking across spheres. (I'm tempted to remark that this is what socialism is like – you keep on making links until you reach the totality.)

Turning to ethnicity, one issue that came up in several papers was the meaning of diaspora. Klive Walker's discussion of reggae in Canada was interesting on this subject. He pointed out how many musicians came from islands in the Caribbean other than Jamaica, and that there were franco- as well as anglo-phone forms. Reggae was thus a signifying system as much as an authentic and homogenous tradition. What is more, competition between reggae's different diasporic sites – for example Toronto, New York, London – suggested that it was a dynamic, and not entirely united, cultural front. The picture that emerged was of the *complexity* of reggae as a diasporic form. Tracy Nichols then used Gates' notion of 'signifying' to approach Bob Marley's 'liberation' of the spiritual 'Go Down Moses' in his own song writing. Here too diasporic movement was at stake, from Christian allegory about slavery in the nineteenth century US to Rastafarian songs of freedom in Jamaica more than a hundred years later. This was useful, although I would have liked a little more historical context: How did Marley get hold of 'Go Down Moses'? When did he first hear it and what did he know of spirituals more generally?

Perhaps the most striking paper on black music was by Kyra D. Gaunt. Calling on her own ethnographic research – including auto-ethnography – into black American girls' song-play on the street and in school yards, Gaunt recounted what was for me a startling narrative concerning the 'social construction of a "popular"'. Not only have black girls' songs and chants been incorporated into hip-hop (so it is really girls' music), but girls have then clawed back motifs and telling phrases from the genre into their own practice. This analysis of a hidden cycle of musical appropriation revealed something big, I thought, namely the persistence of a connection between everyday and commercialised forms of music-making in African America.

The significance of this was underlined by Gaunt's telling use of the indefinite article before 'popular' in her title.

Wham! We are back with the problematic which kick-started the whole PMS project: POPULAR in all its awkward and contradictory meanings. As I suggested earlier, the 'popular' flag got tied firmly to the mast in the days of The Fathers. Now, though, it seems the epithet trips off our tongues emptied of significance, at most a kind of honorific. Effectively, 'popular' dignifies whatever it is we do without in any sense specifying it, without giving point or urgency to it. Meanwhile, of course, the 'people' get hung. Gaunt's use ('*a* popular') hints at a way forward: the term may only apply when we can delineate a people, and probably a people who are screwed over. However, there are dangers with this if, like me, you are a universalist. What you want is *the* people, that is, people everywhere. The trouble is getting back to such a notion will require class analysis, political economy and, just as important, the commitment to integrating these approaches with cultural and formal analysis of music. There was not much sign of this at Montreal.

Of course there is another way. Just pull down the flag and forget 'popular'. After all, we are probably only a decade away from being able to take over 'music' pure and simple in the academy. Everything will be much simpler then, and we will be able to consider Britney Spears and Cecilia Bartoli together, where they have always belonged.

Rethinking creative genius

Michael Pickering and Keith Negus

We pick up a newspaper in September 2003, and read a review of Christopher Ricks's book on Bob Dylan (Ricks 2003). The reviewer is Andrew Motion, the English poet laureate. As he gets into the stride of his discussion of the book, he makes the only slightly hesitant assertion: 'These days no one would think – would they? – that it's doubtfully transgressive or suspiciously cool to call Dylan a genius' (Motion 2003, p. 10).

This is an interesting statement for several reasons. For a start, it acknowledges from a present standpoint that it *was* once doubtful to claim that as a poet or songwriter Dylan possesses the qualities of greatness conventionally extolled in highbrow aesthetics. Motion suggests that previously anyone who had proclaimed Dylan's genius would have been regarded with suspicion. They would have been considered as affecting a pose (being provocative or pretentious rather than conventionally straight about questions of artistic greatness). This is no longer the case. In referring to past controversies, Motion now accepts that a significant change of judgement has occurred, though he does remain rather cautious in his recognition of this. The question that is sandwiched in the middle of Motion's aesthetically loaded sentence could be taken as either rhetorical or expressive of genuine uncertainty that the days of doubt are past – perhaps we are still in a transitional phase. But Motion goes on in his review to dispel any further doubt. He writes that what is exciting about Ricks's book is its air of vindication, for in the past Ricks has, in the face of both highbrow antagonism and disbelief, long championed Dylan as an artist of genius – albeit one he recognises mainly through his lyrics rather than these in combination with the expressive flights of Dylan's idiosyncratic, word-transforming vocal ability,

and his continual risk-taking in reinventing his songs in their musical and vocal delivery.

We need hardly labour the irony of a reverse shift in literary and cultural theory over the past quarter century. Questions of genius are now regarded as hopelessly out of touch with the approaches adopted by contemporary cultural theorists and sociologists. They are denounced as naïve, as inherently mystifying and elitist. Genius is now almost a taboo category, and not least because it is seen as epitomising bourgeois individualism and masking the collective relations of cultural production and consumption. The critical opposition to ideas of greatness or genius is now orthodox. Popular music studies has fallen into line with this orthodoxy. If you look through the index of any academic book on popular music over the past twenty years, you'll find a broad range of issues covered, but it will prove very difficult to locate any discussion of genius, at least beyond that of suspicion and critical dismissal. Search through past issues of this journal – the category remains elusive. Its general absence in popular music studies as in cultural studies is because it is seen as riddled with reactionary values, with illusion, misconception and myth. To discuss the category of genius with any seriousness is now regarded as a highly dubious business.

In a book we have recently completed, we found ourselves continually returning to this issue and arriving, towards the end of the book, with a strong sense of the need to challenge this orthodoxy (Negus and Pickering 2004). The book deals with the question of creativity. In pursuing this question across various arts and cultural media, we have found that many of the key moments in our discussion have direct bearings on our more specialist work in popular music studies. This is especially the case with the category of genius. In the book as a whole, we consider how certain types of creativity are recognised and rewarded by the cultural industries, how creative artists operate in relation to convention and tradition, and how they have been constrained or oppressed by divisions of class, gender and race. Yet as we moved from these considerations, we found ourselves having to confront the fact that many singers, songwriters and musicians – as with many painters, novelists and dramatists – are esteemed for their creative exceptionalism, or at least for the exceptionalism of some of what they produce. The special character of these cases of creative exceptionalism led us on to the category of genius, the category that has been abandoned by cultural theory.

Having spent most of our academic careers to date working on various areas of popular culture, we neither broach the issue of exceptionalism solely in relation to high culture, nor support a conception of high culture constructed in polar opposition to popular culture or the popular arts. We share in and endorse the movement away from exclusive conceptions of creative practice towards a more inclusive consideration of creativity in its more pervasive forms. But such movement does not mean that we can forget about creative exceptionalism, not least because exceptionalism continues to figure in most people's everyday judgement and appreciation of what they take to be creative. It is not only poet laureates who talk of exceptionalism, transcendence, genius and the like. To echo, but also to extend a point made by Simon Frith in *Performing Rites* (1996), in practice all sorts of people – including cultural theorists, at least when they are away from the lectern or seminar room – operate in some way with an aesthetic value of exceptionalism, in popular music as much as anywhere else. In everyday conversations about popular music, there is often mention of key moments of genre emergence and development, significant shifts of musical pattern and possibility, landmark albums, outstanding artists. If these judgements about any

particular musical genre, tradition or artist have always to be given careful critical consideration, does this not apply also to more general questions of musical migrations and transgressive value? Is it not the case that the general question of exceptionality is central to how music is valued, how music changes, and how musical history is conceived? If we refuse to tackle the dilemma of dealing with both creative exceptionality and the ordinariness of culture, we may be left critically bereft in the face of those instances which produce major shifts in the way a musical genre, idiom or style is conceived, leading to a radical transformation in the artistic possibilities open to it. We may also simply vacate an important critical space and leave the stage open for yet another rehearsal of naïve, mystical, elitist or hyper-individualistic explanations.

We discuss various examples of what have been accepted as instances of creative exceptionality in the book, and not only in relation to music and musical history. The cultural analysis of such instances is never easy, and certainly does not benefit from abrupt and simplified summary in short pieces like this. Our point here is a more general one. It bears on the way in which cultural analysis today fights shy of the question of creative exceptionality. It is as if it does not exist, or cannot be recognised as anything other than an ideological chimera. This considerably reduces the explanatory power of such analysis. It is of course the case that a great deal of creative development within a cultural form or practice is gradual, cumulative and closely entwined within the broader pattern in which it participates. Examples of creative exceptionality which arise out of and are given immediate significance within this pattern may be relatively scarce, and how they become publicly recognised is conditioned by a whole range of variable historical factors and contingencies. Whether and to what degree such examples in any particular case are innovative is also a complex matter that cannot be easily decided, which is one reason we go to considerable lengths in the book to distinguish between the different shades of meaning that exist in the semantics of newness. But such cases do occur and cannot be ignored.

The problem of the neglect of issues concerning exceptionality or genius seems in some ways to have arisen because of a continual elision of the activity of creating and judgements about that activity. There is no denying that judgements of genius have often been ideologically loaded, carrying various unhelpful assumptions about gender, ethnicity and social class that have been and continue to be oppressive. But these judgements should not be simply or entirely run together with the activity and practice involved in path-breaking moments of innovation, or in what are taken by artists as well as by fans to be exceptional cases of music production or performance above and beyond other examples within the same genre or tradition. If we try to keep the activity and judgement distinct, at least for analytical purposes, we may begin to avoid associating cases of exceptionality with the tendency to view genius only through the lens of exclusivity.

The ideological coupling of genius and exclusivity has been present in the European tradition of high art since the late eighteenth century, and the category of genius has contributed to the legitimation of various types of social divisions, particularly those associated with issues of race, class and gender. The exclusivist attributions of genius are legion, in both obvious and not so obvious ways. But this raises the important question as to whether such attributions render exceptionality null and void as aesthetic quality. Current models of the creative process in cultural theory remain either silent or shifty about this sort of question. Jason Toynebee's (2000) radius model of creativity, for example, seems entirely appropriate for relatively small shifts

sideways within a musical genre or form, but cannot handle those moments of creative exceptionality, leading to huge steps forwards, which a broad public remain happy to refer to by the critically unhappy epithet 'genius'. The purpose of Toynbee's model lies in its attempt to demystify exceptional forms of creativity in the same way in which Bourdieu sought to demystify the Kantian notion of a disinterested aesthetic by always placing artistic production within its particular field of interest. Toynbee's model has closely followed the prevailing attention in cultural sociology to the structural determinants of social reproduction, in ways strongly influenced by Bourdieu. While this is always a necessary attention, its shadow side is a compulsive anxiety about individualism and Romanticism, as if cultural theory has to keep up its guard by insistently disavowing them. At the same time, they are simply used as boo-words that conceal a lack of attention to their legacy in our ideas about subjectivity, selfhood and self-expression. It is then often difficult to find where the individual has disappeared to or why the power of creative expression goes virtually unacknowledged. Both are lost to the ideological 'construction' of selfhood, exceptional or otherwise. They glimmer only faintly amid the mechanics of the 'radius' or 'the field'.

So is genius really just an ideological construct, as Tia De Nora (1997) argues in her study of the political, economic and social context within which Beethoven's work was recognised and his reputation 'constructed'? Or is this again the consequence of seeing the acts and attributions of genius as one and the same, and so irremediably steeped in suspect values and interests? In the case of De Nora, the methodological strategy is quite explicit: aesthetic value (the sound of Beethoven's music) is fused with, collapsed into and reduced to socio-political value (the attribution of various beliefs concerning Beethoven's greatness and the use of these within various discourses of privilege and exclusivity).

The praise and celebration of genius may have served dominant values and interests in the past, and may continue to do so, but this does not necessarily mean that exceptional or highly innovative creative acts are simply equivalent to them. As Peter Kivy has argued in a rare attempt to retain a notion of genius in the study of music, to say that genius is nothing other than a social and political construct makes it an empty concept – there are no geniuses, only the politics of genius. DeNora, following Bourdieu, deconstructs genius and the appreciation of genius not by contesting value, but by contesting motive, as if musical appreciation is only and entirely a matter of self-interest – or in Kivy's lampooning take on this: 'Scratch a music lover and you will, inevitably, find a status seeker or social climber beneath' (2001, p. 208). This reduces all musical aesthetics, including the aesthetics of popular music, to acts of bad faith. Yet it is surely crucial to distinguish between artistic and cultural production on the one hand, and its critical acceptance and celebration on the other. They cannot simply be conflated. In Beethoven's case, this is an impoverishment of the historical imagination. It fails to address the question as to why his *music* endures beyond the time and place in which he lived, or how it connects with huge numbers of people. Is this only due to a social and political construction of belief in his genius which serves elites, and nothing to do with the *popular* appeal of the music?

The category of genius may carry a lot of baggage, but it is not reducible to that baggage. Thinking critically about genius does not mean we shall inevitably succumb to cultural snobbery or hero worship. We can be anti-elitist and still recognise and discuss cases of creative exceptionality in popular music or any other sphere of cultural production and performance. We can critically engage with the difficulties the concept of genius raises for feminist theory while also acknowledging female

geniuses. Surely it is in the interests of such theory to do so? And surely it is in everyone's interests not to see what is valued in creative exceptionalism flattened out into mere variation and insignificance?

In our extended engagement with these issues, we argue against an absolute conception of genius, of genius as ontology – treating the entire person/subject as genius – and move instead towards an understanding of genius as involving an interflow of artist and theme that produces *moments* of innovation or instances of exceptional production over time that change a cultural tradition through the lasting value and significance they come to have. How such value and significance is assessed is always a difficult question – and sometimes such judgements are clouded by naïve biological determinism, patriarchalism and racism – but it always involves moving beyond existing limits, and achieving communicative value in an interaction of play and convention. This clearly occurs in relation to a social and historical context without being confined to it. The value of what is communicated is such that it finds a resonance as it is re-created, re-lived, re-embedded into different lives by others in other contrasting contexts across both space and time. This is, for instance, why Handel's *Messiah* can still move and be intensely enjoyed by present-day atheists in ways which have nothing immediately to do with cultural stratifications, any more indeed than it did when the Larks of Dean – Lancashire handloom weavers – delighted in such music in the period of the late eighteenth and early nineteenth century (Elbourne 1980).

It is through such considerations that we argue for a reconceptualisation of creativity as at once ordinary *and* exceptional, involving the links people make between an everyday conception of creative acts and an apprehension of exceptional creative acts. Genius may often be narrated in terms of exceptional moments of musical insight or breakthrough, but these are always firmly embedded in an extended process of arduous toil and preparation before a musician is able to become at one with their art and synthesise from a range of existing cultural elements. In popular music as in other fields of culture, the ordinary is not so much at odds with the exceptional as continually open to the possibility of *becoming* exceptional. Across the route to such possibility are lapses, mistakes, moments of failure and mediocrity, or mere repetitions of what is aesthetically commonplace. As the music hall performer Dan Leno is reported to have once said: 'Only mediocrity can be trusted to be always at its best. Genius must always have lapses proportionate to its triumphs'. Against the idea of genius as natural endowment or individualist uniqueness, of genius as a rarefied and reified state of being, we need to conceive of creativity as embracing both the ordinary and exceptional in terms of their productive tension. From this tension, genius may be realised.

In the same edition of the newspaper we referred to at the outset, we find in the reviews section Steven Poole referring to J.S. Bach as 'one of those apparently trans-historical, godlike figures (Shakespeare was another) whom it seems hard to believe was ever a real human being at all' (*Guardian Review*, 27 September 2003, p. 31). This is not only a travesty of Bach's actual practice in musical composition. It is also an example of the absolute sense of genius we want to move beyond in trying to rehabilitate the concept within the broad range of creative processes, embracing both the mundane and the marvellous. In proposing this, we argue for an approach to creativity as the communication of experience and the attainment of communicative value that allows us to grasp the dynamic, and often paradoxical – even dialectical – connections that link the ordinariness and exceptionalism of creativity.

It is because of this relation that forms of popular music move between specifically local contexts of production and recognition to broader patterns of reception and assimilation. This is where song or music come to have enduring value, however fraught the critical assessments associated with this may be. Such value is not necessarily the imposition of power or privilege even if it may come to bear their imprint. It is also about the movements which bring connections between different bodies of experience, which allow some form of sharing – although not simply of meaning – and the value of song and music to be continually appreciated as they move across time and space. To understand creative exceptionality in popular music in this way means that we cannot separate the exceptional from ordinary social and cultural life since such life constitutes the set of circumstances from which it takes its bearing. To see it as separated (as psychological quiddity, mystical visitation, moment of divine inspiration, madness or drug-induced insight) is to see only monumental greatness, ethereally abstracted from its contingent temporal and spatial settings. Creative exceptionality has never been part of our understanding of the ‘popular’ in popular music studies. It is high time this changed, for in neglecting it we are missing some very significant issues in musical analysis and history.

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Copyright and popular musicology

Sheila Whiteley

It is now six years since my letter to Middle Eight was published (‘The Sound of Silence: academic freedom and copyright’, *Popular Music*, 16/2, May 1997, pp. 220–2) and, sadly, rather than matters improving, they have only got worse. My last book, *Too Much Too Young. Popular Music, Age and Identity* was due for publication in July 2003, I had already received my advance copies, and was anticipating it being on the shelves in time for IASPM’s biennial conference in Montreal. Suddenly, a telephone call from my editor informed me that they had recalled the books, copyright permissions had not been received. While this was due to a misunderstanding over fair usage, the fact remains that song lyrics are not considered comparable to poetry or prose, and transcriptions (while interpretative) are still subject to the whims of the publishing houses.

For the purpose of clarity, I have set out below the guidance offered to authors by my publishers, Routledge. While these relate to poetry and prose, they nevertheless suggest a comparability with extracts from musical texts.

Under a convention known as ‘fair dealing for purposes of criticism and review’, the Society of Authors advises that permission need not be sought for short extracts provided that the content

is quoted in the context of 'criticism or review' and not just to embellish the text. A short prose extract is defined as of not more than 400 words (or a total of 800 words in a series of extracts, none exceeding 300 words); and in poetry not more than 40 lines from a poem, providing that this does not exceed a quarter of the poem.

When deciding whether your quotations are covered by 'fair dealing', the following points should be considered: the length and importance of the quotation(s); the amount quoted in relation to your commentary; the extent to which your work competes with or rivals the work quoted; and the extent to which the works quoted are saving you work.

It certainly appears that the citation of short lyric quotes, or indeed transcriptions, that are proportional to the original song, and which are contextualised by criticism or review, is part and parcel of popular musicology. In my own case, the lyric extracts and transcriptions had been counted for each song and fell between four to eight lines/bars with the exception of Jimi Hendrix (ten bars). If these were poetry or prose, they would be within the limits for 'fair dealing' and they were certainly contextualised by analysis and discussion.

All sources should be acknowledged, even if permission is not required.

These instructions are followed by the majority of publishing houses, some of which allow for 'fair dealing' and do not ask permission from the holders of copyright. Looking through my bookshelves, OUP do not even go as far as to acknowledge all sources. For some large publishing houses, however, the fear of litigation is uppermost in their minds, and if copyright permission is sought for the larger quotes (four lines and over), then all texts cited have to undergo the same lengthy procedures – and this includes even a few words of the lyrics.

If the author is a well-known literary figure, you should seek permission as a matter of course. The general rule is: if in doubt, seek permission.

And herein lies the first problem. The artists we discuss are nearly always 'well known'. However, it is not the artist who holds copyright – and in the past, contact with, for example, Janis Joplin's sister, Laura, Tori Amos's father, Dr Edison Amos, Kathleen Hanna (Bikini Kill) has resulted in correspondence that expresses pleasure in the fact that their music is being brought to the attention of researchers and students. Rather, issues surrounding copyright have to be addressed to the publishing houses, many of which have scant regard for academic texts. The Hendrix Experience, LLC Seattle, for example, who describe themselves as a 'Jimi Hendrix family company', have refused copyright permission for two transcriptions and four lines of lyrics. Apparently, they did not like my interpretation. It seems that for his countless fans, writers and critics who valued his psychedelically charged power rock, and his strong, sensitive, sensual performances, such discussions are taboo. A mere two bars of transcription have also been refused by Sony Music Publishing (Bow Wow Wow, 'Go Wild in the Country'). It seems that there is a dispute over ownership and I have been caught in the cross-fire.

I know I am not alone in my concerns over copyright permission. My publishers (Routledge) have now spent three months on the case and are as anxious as I am to get matters resolved. Ashgate share this concern. Copyright permission was refused by Warner Brothers for three short transcriptions of Madonna songs. Attempts to find out why result either in silence, or letters threatening litigation. I am informed by colleagues in Australia and the United States that they are also experiencing similar problems.

Clearly, these issues are stifling both academic freedom and the opportunity for students of popular music to engage in critical discussions of contemporary artists – a big problem when advising our Ph.D. candidates to publish their work, for example. It is also obvious that such censorship will have a significant impact on our research output and, hence, the next RAE where pre-twentieth century musicology will have the upper hand.

Previously published works in which the author owns the copyright are protected throughout his/her lifetime and for 70 years after the end of the year of the author's death . . . US copyright protection, however, has remained at 50 years, but works published before 1978 were protected for 75 years, providing the author renewed the copyright after 28 years.

Add to this the complication that in popular music, copyright is seldom in the hands of one agent – I have copyright permission for Bjork, UK, but not yet for the USA where it is held by a number of parties – and so the problems compound.

It seems, then, that our only course of action is to tackle the Government about the constitution of 'fair dealing' and to attempt to ensure parity for popular musicologists. I am also writing to the European Parliament as the present situation does seem to imply unfair discrimination.

Clearly one voice is not sufficient to evidence the global significance of 'fair dealing' for popular musicologists, and I am joined by Prof. Derek Scott who has encountered these problems both as a writer and as General Editor of the Ashgate Popular and Folk Music Series. He believes that lack of clarity over rights is leading to covert censorship of the circulation of ideas. Discussions with Routledge strongly indicate that they are on our side and that it would also be in their interest to get these problems satisfactorily resolved. I will also contact such headline artists as Paul McCartney (just think how many academic texts focus on the Beatles) and George Martin. Clearly, your support is needed too – and these issues will be raised with IASPM, the British Popular Musicology group, HEFCE, the RMA and other relevant organisations.

Please e-mail me. Derek and I need signatures to make our case and change will only be effected if we can argue that popular musicologists are suffering from unfair discrimination, rather than sharing in 'fair dealing'.

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What is music worth? Some reflections on the Scottish experience

Martin Cloonan, John Williamson and Simon Frith

In July 2002 we were commissioned by Scottish Enterprise (a publicly owned economic development agency) to write a mapping report on the economic value of the music industry in Scotland. (The report, *Mapping the Music Industry in Scotland*, is available online at www.scottishmusicdirectory.com). Our experience of doing this research raises a number of issues for popular music scholars which we discuss here under four headings: methodology, findings, politics, and the policy role of the academic. We begin, though, with some scene setting.

Context: valuing music in Scotland

Recent years have seen a plethora of reports attempting to determine the economic value of the British music industry (see, for example, British Invisibles 1995; Dane *et al.* 1996, 1999; National Music Council 2002; and, from the perspective of small businesses, Wilson *et al.* 2001). Scotland has not escaped such attention: in the 1990s, various attempts were made to assess the contribution of music to the Scottish economy. (One of our ambitions was to describe Scotland's musical economy so definitively that our information could be updated in the future without needing further costly, wasteful replications of our research effort.) Such interest in music as a creative industry obviously reflects political concerns, and our own commission can be seen as an effect of devolution, the re-establishment in 1999 of a Scottish Parliament. Previous Scottish Office powers were then devolved to a Scottish Executive, answerable to Members of the Scottish Parliament (MSPs) answerable, in turn, to the Scottish electorate.

Some crucial policy areas (broadcasting, taxation) remain under the control of the UK government (which has reserved some powers – this is not independence after all) but the Scottish Executive is responsible for arts and cultural policy and, in August 2000, published a cultural strategy document, *Creating Our Future: Minding Our Past* (Scottish Executive 2000). It is generally agreed now (across the political spectrum) that this was a soothing and woefully unambitious statement of policy intent, but here we will simply note that the Executive did not, apparently, expect music to make much of a contribution to our future. Popular music is mentioned but once, with reference to its importance in combating social exclusion.

The Scottish Executive is also responsible for economic development and the country's most important policy drivers here are Local Enterprise Companies (LECs), which operate in the different Scottish regions under the umbrella of the national development agency, Scottish Enterprise (SE). In 2001, SE launched its *Creative Scotland* strategy, a £25 million package aimed at 'the development of Scotland's creative industries to exploit the wealth of talent, skills and expertise in the sector' (www.scottish-enterprise.com/businessdev/industries/creativeind/). Unlike the Executive, Scottish Enterprise regarded music as a significant source of valuable intellectual property rights, and in order to inform its popular music policies it commissioned an initial economic survey of the music sector from a Glasgow-based consultancy, New Media Partners (2001).

At the same time that SE was developing a music industry policy, the key sponsor of artistic activity in Scotland, the Scottish Arts Council (SAC), was re-appraising its own approach to music funding. In March 2001 it launched a new policy initiative, *Contemporary Popular Music* (SAC 2001), which committed the SAC to supporting popular as well as classical, jazz and folk performers and to providing additional resources to the whole music sector, with priority being given to touring, promotion and recording. Research and consultation within the sector were promised as key means of taking the programme forward as was collaboration with SE in supporting small music businesses.

In short, by the summer of 2002, the two state agencies concerned with Scotland's creative industries were paying particular attention to music, and were both interested in having data on the sector that could inform their activities, hence our commission. (There was also a political agenda here that we did not appreciate until we saw what happened to our report. We discuss this further below.)

Methodology

Methodology is, of course, a perennial problem for academics, and everyone trying to measure the value of the music industry has highlighted the methodological difficulties. In 1996, Dane and his colleagues noted 'the general absence of comprehensive official data on the industry' and added that 'there exist few agreed definitions of what constitutes the music sector' (Dane *et al.* 1996, pp. 7, 8). In 2001, Wilson and his colleagues agreed that 'there is no consensus as to precisely what types of businesses are representative of the "music industry"' (Wilson *et al.* 2001, p. 94). From the outset of our research we were aware that even the most basic assertions about economic activity in the music sector are subject to dispute and interpretation.

Our own research can be described straightforwardly: we carried out a literature review, we built up a database, we wrote case studies, and we conducted interviews with key stakeholders (a list of these was agreed in advance with Scottish Enterprise). The most important part of our research was desk-based. We collated existing information by reviewing previous surveys and material held by Scottish organisations such as the Scottish Music Information Centre (SMIC) and the Scottish Arts Council. We consulted UK industry sources: Companies House, Mechanical Copyright Protection Society (MCPS) and Performing Right Society (PRS) reports, the Musicians' Union's *National Directory of Members* (MU 2001), the *Music Week Directory* (Scott 2002), the BPI's *Music Education Directory* (BPI 2002) and the *IMF Handbook* (IMF 2000). And then, in the most interesting and challenging part of the research, we attempted to fill the gaps, using our own local industry contacts and email questionnaires and a snowballing technique, getting information from companies about other companies they worked with. We tracked down the smallest and most unpublic music business operators by relentless phone-calls!

On the basis of all this information we divided the music industry in Scotland into eight sections: Artists and Composers; Live Music; Recording Industry; Media; Other Creative Activity; Ancillary; Education; and Retail. We assessed turnover, earnings, and employment figures for each sector, while realising that the demarcation lines between sectors are hard to draw. As Wilson *et al.* put it, 'in reality, music businesses are very often multi-function enterprises, occupied in a range of different activities' (Wilson *et al.* 2001, p. 19). Moreover, in the increasingly complex world of the cultural industries, economic demarcations between industry sectors (between the music and games business, for example) are not easy to draw either, and individuals and companies may make their living by working across different creative industries. Within each of our categories, decisions had to be made about what to include and exclude as economic consequences of a *music* business. At what level does a record company become economically significant (as opposed to being, economically, a vanity project)? How much money is generated at pub gigs by the *music* as opposed to the sale of alcohol or the attractiveness of bar staff? What *added* economic value did the music bring? Supermarket chains may be key record retail outlets in Scotland as elsewhere, but are their CD counters really part of the Scottish *music* industry? (Our answer was no, although we did try and calculate the worth of this sector).

Whatever the problems of definition, double counting, etc., we believe we did identify the most economically important sectors of the music industry in Scotland, although our assessment of importance here was not simply economic. While Scottish Enterprise's remit is economic development (with arts policy the remit of the SAC),

we decided that any understanding of the Scottish music industry and its problems had to be cultural, had to appreciate the values and beliefs of the people who work in it, hence the importance of our case studies and stakeholder interviews. Our report concerned not simply what the Scottish music industry is, but also what it could and maybe should be. We wanted to provide some measure of the cultural as well as economic value added by musical activity, to suggest (using comments from our conversations) that money-making is not the only or even most important motivating factor for many entrepreneurs in this sector. (Note that we were investigating all economically significant music-making activities in Scotland, whatever the kinds of music involved – in economic terms. As a matter of state subsidy, for example, classical music and jazz are just as significant as rock and pop.)

Findings

The headline findings of the report were as follows.

- Scotland generates in the region of £106 million annually in sales of music and services, although this can fluctuate greatly.
- The public sector contributes around £18.8 million to the music economy in Scotland.
- The industry is made up of approximately 2,040 full-time employees and 2,003 part-time workers, with hundreds of seasonal workers at festivals, etc.
- Within Scotland there are personnel working in all the major sectors of the music industry, although several areas (notably distribution and management) are severely under-represented.
- While investment by the major record labels in Scottish artists has declined, investment by international companies in the Scottish live music scene has increased, showing the relative health of that sector.
- The retail sector is also buoyant with Scottish consumers spending in the region of £330.9 million a year on musical instruments and live and recorded music, a figure proportionate to the UK expenditure.

And we identified (as briefed) a number of obstacles to economic development.

- The lack of music provision in schools. (This has now been addressed by the Executive following a report on musical provision in Scotland – see Broad *et al.* 2002. Every child in Scotland is now entitled to a year's free instrumental tuition. How this policy will work – the fund is being administered by the SAC and local educational authorities – and with what effects, remains to be seen.)
- A perceived under-investment in Scottish-based artists by both the major record labels and the public sector.
- A general lack of Scottish media support for domestically based music.
- A lack of clarity and understanding about the role of the public sector, particularly in relation to the mechanics of funding.
- A lack of business service providers within the industry, such as managers, agents and publicists.
- A perceived lack of entrepreneurial skills amongst both Scottish artists and intermediaries.

- A tension between the public sector's concern for the Scottish national interest and the private sector's international perspective, between the public sector's tendency to concentrate funding on new entrants to the industry and the private sector's need for funding support for the sustenance or growth of successful enterprises.
- The lack of a Scottish music industry trade and lobbying association (although whether such a body is feasible is open to question).

Details of these findings can be found in our report. The points we want to draw attention to here are the ones that were harder to headline, harder to turn into policy initiatives, because they raise questions about the very concepts of 'the music industry in Scotland' and 'Scottish music business policy'. Consider the following.

First, the single most transforming development for music businesses in Scotland would be a globally successful Scottish-domiciled act. (The most commercially successful act from Scotland at the time of our research, Travis, could not be counted as part of the Scottish music industry as they are London-based. And anyway Travis are not really global superstars.) How could such an act be produced by state policy, particularly when the Scottish executive has no power to provide tax breaks, to impose content quotas on broadcasters, or to influence the distribution of rights income, policies used in small countries that have had global musical success, such as Sweden and Ireland)?

Second, the live sector in Scotland may be flourishing but it is dominated by two promoters (one Irish owned) and is now a site for the increasing economic interest of such global players as Clear Channel. It is hugely difficult for smaller operators to establish themselves and, in general, live musical events and venues in Scotland rely heavily on the support of a brewing company, Tennents (sponsor of T in the Park, among many other things). If Tennents were to change its marketing policy, the Scottish live music scene would not be nearly as buoyant as it now seems. How, in policy terms, should Tennents be treated as part of the music industry? Should the complete take-over of the Scottish live music scene by global companies be regarded as a good or bad thing for Scottish music business?

Third, there is no escaping the fact that whatever the abundance of musical talent in Scotland, there is locally a very small market. Even the most successful independent record companies such as Chemikal Underground, Lismor, and Soma remain comparatively small scale and, more to the point, have to operate in the context of small-scale cultural industries generally. There are few specialist media through which to break new acts; allied trades such as film and TV production companies, advertising agencies, Internet providers, games companies, etc., have remained small; in the ancillary sector we found comparatively few music publishers, specialist lawyers and accountants, agents or full-time managers. Scotland's only major CD manufacturer, Grampian, went into liquidation soon after our report was finished. A number of points follow from this situation. First, the most fruitful economic policy might not be to develop existing businesses into something much grander but to ensure that they can sustain themselves as SMEs in the long term given the inevitable medium-term vicissitudes of music markets. Second, a successful Scottish music business (or music act) has to operate in a UK-wide and international context. In economic terms, the exact nature of its Scottishness can be hard to figure. (The most successful Scottish music enterprise we examined, for example, the retailer, Fopp, is successful precisely as a UK-wide chain. It may have started as a market stall in Glasgow but it is in effect nowadays a UK

rather than a Scottish company.) Third, the most secure music industry jobs in Scotland, those which remain self-consciously Scottish oriented, tend to be those in the state sector, in music-related quangos, and in the Scottish offices of such industry bodies as the Performing Rights Society. We will come back to the political implications of this in the next section.

Many of the questions raised here are, of course, not specific to Scotland. The issues facing the music industry in Scotland are those facing the music industry everywhere or those facing the music industry in every small country, even if exacerbated in this case by the fact that Scotland is only partially a state. Overall, our findings did suggest that, compared to the UK generally, the Scottish music industry performs less well in most areas than might be expected from a simple demographic comparison (in terms, say, of music earnings per head). But then this tells us less about the obstacles to the industry's growth in Scotland than about the obstacles facing any local music industry in a global context of media centralisation. The problem for would-be musical entrepreneurs in Scotland is not to replicate the metropolitan industry north of the border, but to devise strategies to make a living from doing what they want to do by responding to market opportunities both locally and globally and ensuring that their local and global dealings can sustain each other. The policy implications of this are not easy to spell out in terms of 'the Scottish economy'. And, as we were to find, they are not easy to explore given the present state of Scottish music politics.

Politics

Once the Scottish Parliament was established, so were a number of cross-party groups, means by which MSPs (and select members of the public) can pursue a particular hobby-horse. The groups have no legislative or policy-making powers, but can act as a lobbying force, with good access to Ministers and the media.

Of particular importance to our story is the Cross Party Group on the Scottish Contemporary Music Industry. This Group is made up of MSPs, individual managers and musicians, assorted industry representatives, and some educationalists. It is essentially a talking shop (see Symon and Cloonan 2002), but it does give some focus to music industry discussions in Scotland and some scrutiny of policy developments. Its approach, though, is, to say the least, erratic. The politicians in the group have no clear agenda except a vaguely populist belief that popular music should be taken as seriously by the executive as other kinds of music and media. The industry people who attend regularly have little in common except a sense of self-importance, a belief that they are the people who know best how the industry works and what it needs. Either way, members of the Group were exercised about Scottish Enterprise's Cultural Industries Strategy, by its apparent tendency to fund music initiatives without consulting the experts (i.e. themselves). SE's music team leaders were summoned to explain their music support plans in public. Two stormy meetings followed and led to Scottish Enterprise attempting to placate its critics (this was in the context of wider political and media attacks on SE's efficiency and transparency). Hence the immediate reason that SE funded the mapping exercise and chose an academic team to do it. It wanted credibility for its policies by signalling its commitment to a better understanding of the sector and by gathering independent evidence of the economic value of its approach.

In some respects this strategy was successful. The report was well received by people in the industry who'd previously regarded Scottish Enterprise with suspicion (this was clear at a public meeting we organised to debate our results). But in other respects it was not. On the one hand, our findings did not always support SE's music industry strategy; on the other hand, the vested interests already dismissive of SE's music industry expertise were even more dismissive of the SE's use of academic expertise.

The first problem emerged in the discussions of how best to disseminate our findings. We delivered the report in December 2002 and it was welcomed effusively. But there was then a month of haggling over the content of an Executive Summary (the way that the information would be fed to the media). SE made no attempt to alter the report, but they did want to ensure that in any summary our findings were spun so as support SE's existing policy initiatives. Arguments about this – how could the summary of a report make arguments not found in the report? – delayed publication for two months.

The second problem was more insidious. Almost as soon as the report was published there began to be whispers that it was full of mistakes, that it revealed a basic ignorance of the industry. The Scottish Music Information Centre (SMIC, a publicly funded body) which had been chosen by Scottish Enterprise to be the report's host on the Web, removed it following complaints from its advisory board (several of whose members are also regulars at Cross-Party Group meetings). Such complaints were not made directly to us either privately or at our public meeting. (The only such denunciation to be published, in *Scottish Music News*, neither substantiated the accusation of inaccuracy nor gave any indication that the writer – a composer member of the SMIC board – understood the research process; see Fowler 2003.) This attempt to undermine the report has not affected our belief in it, nor our determination to contribute to music policy debate, but it has been instructive in showing how expertise in a policy area is created institutionally (rather than on the basis of demonstrable knowledge) and how determinedly established experts will fight off any rival claims to understanding. One complaint we heard repeatedly in our research when questions turned to state support for music enterprise was that 'the state' actually meant a small number of people, not so much an elite as a coterie, whose power was based on politicians' or civil servants' belief they were the people who knew the industry best and who should therefore be consulted on every policy initiative. They were the experts now because they always had been. The world view of such quangocrats is inevitably conservative. (It has been suggested to us that if we had had an advisory board of the usual suspects to approve the report before it was published we would not have had this flak. Our sense, though, is that this would have just faced us with the problem earlier in the process.)

The policy role of the academic

We were commissioned to write the mapping report because we made effective play of our expertise as academics, as detached observers. Of course, we knew people in the music industry. One of us (Williamson) has worked in it in a number of capacities; another (Frith) has been a consultant to a number of industry projects such as the Mercury Music Prize and, in Scotland, the music and media event, Musicworks. But the nub of our pitch to Scottish Enterprise was that we had no policy agenda. We

would be tempted neither to exaggerate the success of the Scottish music industry (in an attempt to make ourselves seem more important) nor to underestimate it (in an attempt to get more state funding). Our argument was that if the music industry in Scotland was to be researched, then those within the industry were perhaps, after all, *not* best placed to do it.

In retrospect, though we did not talk to each other about this explicitly, we clearly saw our role here as providing the sort of public knowledge for which Keith Negus has called (see Negus 1998). To use his terms (drawn from Bauman) we were, in effect, combining the roles of legislator, interpreter and knowledge provider. In our legislative role we were being publicly funded to provide information for an economic development agency to whom popular music was of interest primarily as an economic force. We duly made policy suggestions (though Scottish Enterprise itself seems to have paid them little attention). Our interpretative role was to broaden the remit to understand music as a cultural force too. We gave voice to people working in the industry; we described the cultural conditions in which music is produced and consumed, musical goods exchanged, music value added. We interpreted the music industry through a framework drawn from an established scholarly tradition. We were – deliberately now – trying to bring the knowledge accumulated by popular music studies into the public sphere. For us, then, the political row in which we found ourselves embroiled became primarily a struggle about public knowledge, about who knows what and how other people get to learn from them. In addition to the report we produced a Directory of the Scottish Music Industry, a freely available and exhaustive list of companies and contact information, organised to allow interactivity and updating. We were committed to the widest possible dissemination and discussion. Some others in the industry were not. This response continues to puzzle us. If the Directory has gaps and errors, which is likely, then why are they not pointed out to us so that we can change them? What seems to be in dispute here are not the facts of the matter, nor even the interpretation of those facts, but our right to make them public in the first place.

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The current status of world music in the UK

Neal Hattersley

In June 2003, Swedish music historian Jan Ling wrote an article suggesting that 'World music is the classical music of our time' (*Popular music*, 22/2), drawing parallels with the circumstances in which Viennese Classical Music had swept Northern Europe in the seventeenth century. Jan identified a group of well-educated, well-travelled, twenty something people who might form the vanguard of this international movement. Intrigued, and drawing on my background as a journalist, I made enquiries as to the state of the *World music* category in the UK in 2003. My review attempts to identify the nature of the *World music* sector in the UK and the way that record companies and the media promote, reflect and nurture it. I hope to both stimulate thoughts and add knowledge in an area currently regarded as peripheral by the major record labels. Recorded *World music* is more significant in France than in the UK, but the UK music market is undoubtedly more buoyant overall and it remains significant for performers.

The UK remains the world's third biggest market for recorded music and, as Jan pointed out, it was twenty-five, primarily UK, independent labels that coined the term *World music* in 1987. They did so to secure racking space in record retail outlets for a very mixed bag of 'product'. The first UK peak for *World rock*-influenced music was the fashion for Zimbabwean guitar music in the mid-1980s. The UK is an intensely fashion-conscious, volatile market place for music, making the prospect of a prosperous, stable, genre-loving sub-group attractive to the record industry. However, official indicators are that the *World music* market in the UK has flattened out and that it remains extremely diverse. There is little evidence of it being the new classical music of today, although an 'intellectual, progressive middle class, interested in innovation' (Ling 2003) clearly exists in the UK. I would still suggest, however, that it is 'new advertising, and music sold to new economic laws' (*ibid.*) that will create a social movement in the near future that leads to *World* being a much more commercially relevant category. The prospects are better than ever now for minority repertoires.

Hardcore

A visit to the summer WOMAD (World of Music, Art and Dance) Festival presents a delightful 'vibe'. WOMAD caters for the whole family, although teenagers are less in evidence, and the impression is of an audience of predominantly white British people, listening to acts of predominantly non-UK origin. Most stall holders and campers are regulars and the ambience is of a summer festival, although it is clear that the record marquee also does great business. This three-day event is attended by over 35,000 people, each paying around £70 for the privilege. Its organisers have expanded WOMAD to other UK locations and other countries of late.

The UK-based *World music* magazines (*Songlines* and *fRoots*) clearly view the WOMAD audience as a major source of subscribers. The publisher of *Songlines* describes its average buyer as 'a 25–45 year old *Guardian* (Daily) newspaper reader, 75% of them male, attending concerts and festivals on a monthly basis and travelling overseas at least three times a year' (Geoghegan 2003). However, the total readership remains below 25,000 in the UK. *fRoots* Magazine, founded in 1979, describes itself as the first world music, roots and folk monthly magazine, covering 'Anglo trad to

Zanzibar pop, via the great mixing desk in the sky' (Anderson 2003). It appears to have a more traditional readership that is older and consists of those who are more likely to regard themselves as musicians (45%). Its UK circulation is around 10,000, 75% of whom are in occupational socio-demographic groups A, B or C,¹ the majority in the 30–50 age group. Its readership numbers are around the same as *Songlines* but *fRoots* readership survey indicates that for the majority, *fRoots* is their only music magazine. Forty-two percent of the *fRoots* readership crossover with *The Guardian* and 22% with *The (Sunday) Observer*. (These newspapers both share common ownership and a liberal editorial standpoint. *The Guardian*, with a circulation of 320,000 and a readership of 1.35 million, has a slightly larger circulation, but *The Observer* is a closer match to the specialist magazines' profiles.) In music media, the biggest crossover with *fRoots* is 24% with *Mojo* (a monthly glossy music magazine), 22% with *Living Tradition* (a folk-orientated publication), 19% with *Songlines*, and less than 10% with any other folk, world music, blues, country or jazz magazines worldwide. As with *Songlines*, the *fRoots* readers take foreign holidays (60%) and 80% have Internet access (which is much higher than the UK average in 2003). For both titles, readers tend to keep back issues for reference and they also collect records, *fRoots* readers claiming to buy over fifty CDs per year.

What does this torrent of statistics tell us? It seems to indicate that the current 'core' audience for *World* music in the UK is indeed represented and reflected by these media, hence their stable success. Therefore, in total there are around 75,000 active *World* music enthusiasts, and if we assume a normal distribution for their sphere of influence and activity, we can perhaps expand it to 150,000. In a population of 60 million, with around 9 million degree educated and 54% ABC1, this core seems very small and unlikely to influence society at large. Whilst matching the general category described by Ling, it does not seem to be 'elitist and opinion forming' to the degree associated with the Enlightenment or the degree needed to make *World* music a significant movement in the UK. Despite academic opinion to the contrary, there is no evidence of a widespread general *World* music audience.

Hidden potential

In contrast to the specialist magazines, the newspapers referred to – *The Guardian* and *The Observer* – are potentially a channel to mass opinion formers. *The Observer* combines being a far more elitist journal than the specialist magazines, with also having a much more balanced gender profile in its readership. *The Observer* launched a monthly music magazine as part of its package in September 2003. The launch issue had a significant, but not loudly heralded, degree of *World* content, particularly in its review and alternative media sections. With 50% of *The Observer* readership being graduate members of social classes ABC1 compared with a UK average of 14%, the potential audience impact is clear. When this is combined with the fact that 30% of the readership also read another Sunday paper, the potential to create and grow a wider opinion-forming elite group is apparent. This disproportionate coverage given to *World* could have been a big influence on future sector growth if the industry had been able to focus on it. However, subsequent issues of the magazine have been much more mainstream. It would seem that up-market 'broadsheet' papers (and their advertisers) are very reluctant to narrow their editorial focus, rather they seek to emulate each other in a market that is in overall decline. The *Observer Music Magazine* editorial content was not motivated by the trends identified by Ling, but its journalists may

have subliminally noted the specialist magazine readership crossover and felt an affinity with the 'good vibe' aspects of *World* repertoire.

According to the British Phonographic Industries (BPI) trade body, sales of *World* Albums have been stagnating in the UK for the last three years, comprising around 0.4% of the total (Rob Crutchley, BPI Research & Information Department, Personal Communication, September 2003). Their sales analysis of the top 10,000 records in 2002 attempts to define the market. Five *World* artists accounted for 27.4% of all albums sold in the *World* category. They were Bebel Gilberto, 1 Giant Leap, Ladysmith Black Mambazo, Nitin Sawhney and Yann Tiersen. Of the 10,000 top-selling albums across all genres, 156 were classified by the BPI as *World* Music. The top three nations (outside of the UK) in terms of albums sold by 'World music' artists born in that country were Brazil (10.5%), France (8.6%) and India (6.6%). Significantly, compilations accounted for over one third of the total *World* sales in 2002.

Putting aside the huge controversy as to what should be classified as a *World* record, the math is clear. It takes 1.6% of releases to make 0.4% of sales, so the average unit sale of the sector is disproportionately low, especially outside the top 20 artists. This does not appear to be very commercially attractive or to indicate a thriving market. However, the editor of *fRoots* is sceptical about the data:

The industry never tracks anything correctly in any specialist market. For example, in the USA, people in *World* music/folk music labels regularly have said that Soundscan only records about a third of their actual sales. The industry is also useless at categorising; hence, I've also seen (unlikely) figures saying that *World* music sales are as high as 15% of the market. But then Amazon (for example) includes anybody with a foreign-sounding name and anybody who owns an acoustic guitar on their *World* folk pages – e.g. Enrico Iglesias and Eva Cassidy! It is commonly stated that sales of e.g. bhangra records to the UK Asian population often dwarf chart records, but they're not (bar coded or) sold out of shops that do chart returns. (Anderson 2003)

fRoots doesn't even include the likes of Bebel Gilberto, 1 Giant Leap or Yann Tiersen in its pages, and Nitin Sawhney is adamant that he's not a *World* music artist, so BPI statistics are pretty irrelevant to us. (Ian Anderson, Personal Communication, September 2003)

It is certainly clear that a lot of *World* music CD sales are made by online specialists, small (non-chart) shops, at gigs and especially at festivals. 'It's a thriving, independent underground' (*ibid.*). Perhaps surprisingly, the BPI do not disagree: 'I'd say that *fRoots* has made some good points – it is incredibly difficult to get a completely representative sample together and there will always be some areas that aren't picked up' (Rob Crutchley, BPI researcher, Personal Communication, September 2003). The Official Charts.com are also supportive of some of Anderson's comments:

We track sales of over 5,000 retail outlets daily including almost 300 specialist Independent stores and key home delivery outlets such as Amazon.co.uk. This accounts for around 95% of the UK albums market. However, there may well be hundreds of titles, below the top 10,000 threshold, selling consistently and overall significantly, but in too few numbers to make the top 10,000 so it is possible that the market is larger overall. The chart remit doesn't currently count sales from live events such as WOMAD. (Paul Clifford, Personal Communication, September 2003)

Whilst officially the BPI believes that the market is stuck at 900,000 units a year from 160 releases, the specialist magazines get over 2,000 CDs a year to review. Even

putting aside the *fRoots* readers claims to be buying 400,000 albums a year, it seems likely that the UK market is much nearer, 1,750,000 units than 900,000. Small, but potentially a lively launch platform if the right formula for growth could be found. This very long tail of releases selling very small numbers is almost certainly a characteristic of the sector. On the other hand, the Salif Keita release 'Soro', issued in 1987 but digitally recorded and recently acclaimed by *Songlines* as the best *World* recording to date, has only sold 70,000 copies in the UK,² despite (or possibly because) of it being included on many compilations over the years. Such a recording is widely regarded by the enthusiasts as being 'a collection essential', as indeed are many of the top 50 *World* catalogue recordings. There remains a marketing problem for the category despite the successful introduction of *World* racks in major retailers. Individual artists and recordings have become crossover hits in the past (Buena Vista Social Club and Ladysmith Black Mambazo in the UK) and this has disguised the lack of success of the category as a whole.

Why is the *World* market stuck in a rut?

The striking thing about the central London *World* music venues, which are both active and get wide media attention, is that their audiences are not replications of the audiences for WOMAD. The ones I have visited get a more focused crowd. The Royal Festival Hall tends to attract an ethnic audience matching the origin of the artist playing, and this is particularly pronounced for African and Middle Eastern acts. Ethnic interest is similarly reflected in the audience for The Africa Centre (a charitable organisation) whose scheduling and organisation also reflect the nature of that continent. With a new wave of immigration sweeping into London this permanent ethnic audience is now considerable. There are 80,000 Portuguese speakers in London, for example, and increasing numbers of Arab, Persian and Middle Eastern groups. Bhangra is now a thriving domestic repertoire. These trends must strongly influence the *World* market in Greater London, although the new ethnic audience does not fit the degree-educated ABC1 archetype. Despite this media attention and immigrant presence, much of the live circuit is State subsidised. The booking schedules are diverse, but they are borderline commercial and the concerts rarely sell out. In contrast, trendy club Cargo in East London attracts a white urban twenty-something audience to its Fela Kuti, Shrine and Brazilian Jungle Drums club nights, which are essentially commercial operations. This, however, does not indicate any new trend but is simply reflective of the now defunct Bass Clef club of some twenty years ago, where Zimbabwean stars played and which was located in East London.

World music is now clearly established in UK regional arts venues, possibly because it is viewed as a 'good thing'. Booking agents from at least eleven venues, as well as the major new London centre Ocean, attend the annual WOMEX trade show.³ Representatives of the UK Arts Council are also major participants, whilst the UK National specialist music Station BBC Radio 3 also has a major presence, reflecting its past pivotal role in *World* music promotion via its three scheduled shows and its annual *World* Music Awards. Unfortunately, however, Radio 3 reaches only 3.8% of homes (RAJAR 2002).⁴ Of late, Radio 3 schedulers seem to be questioning the popularity of the genre, with *World* Routes scheduled for Saturdays at 15.00–16.00 and the more folk-orientated Andy Kershaw tucked away on Sunday nights at

10.15 p.m. to midnight. The audience is clearly expected to wear slippers and a cardigan.

This media marginalisation is a critical sales inhibitor. As Radio London Live DJ and musicologist Charlie Gillett explains, the audience can take a while to warm to an act.

With many artists the reaction really comes the second time I play it on the show, the audience doesn't necessarily get it as fast as I do. I don't play . . . a track . . . six weeks in a row; it's six times in a period of four months, which is in some ways even more effective. I'm also aware that even though this audience has proved to be remarkably open-minded, each of us can only take in so much unfamiliar material before it all begins to blur. In the 80s when we first got interested, we coincidentally had the benefit of the emergence of Youssou N'Dour and Salif Keita in particular. There were a number of very, very charismatic genre leaders who did actually mean something in the UK. The *World* music scene is missing a newer generation of this type of people. Can people like myself somehow indicate, 'these are the people to go for'? I don't think so. It's a more natural process than that. But until then the people are just left with confusion. There are too many different names. (Gillett, Personal Communication, September 2003)

Realities of the genre

Many of the leading *World* artists produce one record of true quality (in terms of Western accessibility and production standard) every five to ten years, and this often effectively takes the form of a 'greatest hits' compilation. This also makes it difficult for the genre to reach its potential audience and goes some way to explaining the dominance of compilations in the record racks. In the recent *Songlines* Top 50 *World* Albums review, eleven of the top 20 were over five years old. This lasting strength and core credibility of the catalogue does create Classic albums. Good *World* music is timeless; all you have to do is find the audience!

I contend that the initiative of the independent dealers (dedicated enthusiasts and musicologists) has served its purpose. Its focus on *World* music has developed the category since the 1980s, but it is now leading to stagnation. The emphasis put on musicology and geography created interest amongst a particular 'type' of audience, but this has effectively sidetracked the traditional music business essentials of artist and repertoire, or rather 'star quality' and musical accessibility. This has put a ceiling on the development of the *World* market that could be broken if the industry addressed it. The profit potential will only be achieved by reaching the next band of buyers. These will probably buy only one copy of the definitive artist/repertoire combination for their 'collection' but will pay a full price if they are sure it's the exemplar. Most of the Independent labels around at that initial *World* Repertoire meeting in 1987 remain in business, but they have been joined by the innovative theme compilation specialist Union Square, which so far comes closest to achieving this 'definitive compilation' model. The reality is that UK-based '*World*' companies rely on bulk exports and tourist sales for survival, not the home market. EMI's *World* labels, Real World and Hemisphere, whilst producing a positive contribution in the UK, need other markets to make the numbers tally. However, EMI claims to make a financial contribution to UK sales of 5,000 units for its annual *World* double album. Despite their musical attractiveness, *World* recordings are not reaching a big enough audience to influence general society culturally or economically.

The new age of enlightenment

The question remains how can you reach the next tier of consumers and generate a level of interest that will increase the propensity for hit records and spread the influence of *World* to the status of the 'classic music of our time'? I would suggest that, in terms of the British market, *The Observer Magazine* and new media will be crucial in reaching this distinctive, discerning ABC1 group which is willing and enlightened enough to pre-select marketing information and consent to the receipt of customised messages. This audience group is suspicious of a 'hard sell' but once aroused will act as an unknowing, unpaid social virus spreading the message. Members of the group are hard to reach at the best of times, as they are not generally 'anoraks', listening to Radio 3 at obscure times of the day. They are, however, relatively affluent and lifestyle driven.

So how can the thirty-year-old mother of two who reads a review about a *World* hit in *The Observer* be persuaded to buy it? First she has to personalise the artist, then she has to hear their music or *vice versa*. A trip to Amazon might allow a few 20-second sound bites, but a trip to sternmusic.com will allow 55 seconds of every track on the album – if only she knew it existed! And if only she wasn't blinded by choice and left bewildered by the lack of artist information. Perhaps other new media hold the key? According to a May 2003 *Business Week* review of US legitimate, pay-to-play digital music services, they aren't perfect, but they're improving.

When MusicMatch and label-backed PressPlay launched new services in 2001, they were all about what you couldn't do. You couldn't stream or download more than a set number of songs. You couldn't burn music on a CD. You couldn't transfer music to a portable MP3 player. Now they are about freedom.

The services have excellent search engines for recommending similar music, as well as programmed radio stations that help music lovers to discover new artists. It is features like these that distinguish such sites as real services, not just free-for-all music swap shops like the seminal Napster.

MusicMatch MX offers four ways to listen to music. First, it has pre-programmed radio stations covering all the major genres as well as some intriguing choices such as world beat and French hits. Second, you can also programme your own radio station by mixing and matching the stations and indicating how much of each type of music you would like to hear. MusicMatch is a great product at a great price (*ibid.*)

Unlike its competitors, MusicMatch does not offer downloads or burning, and while that can be limiting, it also means that you don't have to pay attention to the complex rules and myriad exceptions that plague more ambitious services, such as PressPlay. That is one reason why MusicMatch is the most popular pay service on the US Web, with 140,000 paying subscribers paying £6 a month during April 2003. Of course, the goal of every digital music service is to make getting music off the Internet 'better than free'. The latest generation of services are a step closer to revolutionising the industry because they allow people to sample prime cuts in their own way.

Conclusion

As far as the UK is concerned, we have to conclude that *World* is not (yet) the Classic music of our time. Ling's identified audience is present in the UK but not in sufficient numbers to influence mass culture. Time after time a record will peak at 5,000 sales,

reliant upon specialist magazines and word of mouth rather than media coverage. *World* music successes have come about through particular combinations of artist and repertoire, rather than through a general social trend. Up until now, top UK-based *World* artists such as Afro Celts have peaked at 65,000 domestic units and have found it hard to repeat their success, despite receiving strong reviews for their live performances. Artists regarded as performance sensations in their home countries, such as the Portuguese Fado star Mariza, have done well in Greater London but have struggled to sell more than 20,000 units of any one recording, and in order to achieve such sales Mariza appeared at WOMAD, on Radio 3, on Charlie Gillett's BBC London live show, and performed a ten-date UK tour over an eighteenth-month period.

This situation has created a *World*-weariness amongst the major record companies because it shows that traditional artist development does not lead to an upward sales graph. Likewise, the traditional approach of the major record companies to catalogue sales is to 'pump up the volume' through a seasonal campaign aimed at offering marketing collateral support and discount pricing to preferred retailers in return for the dealer buying both breadth and depth of stock. The relative unit prosperity of the UK market might appear to endorse this approach. But what if there is an untapped audience out there who would buy *World* if they knew that excellent product existed, who would respond to the promotion of a narrow, focused product range and who can be reached via a relatively narrow (and thus economical) marketing campaign. And no, I don't mean conventional record clubs. There has never been a better time for the record industry to promote *World* music 'stars' who have achieved outstanding success in their home markets to a broad-minded intelligentsia in the UK. The *Observer Magazine* is one vehicle; can the record industry learn enough about segment marketing to grasp the opportunity and broaden the interest in *World*? Whatever the current size of the market actually is, given the strength of the product it could easily be twice as big. To become the Classic music, *World* still needs 'new advertising, and music sold to new economic laws' (Ling 2003).

Endnotes

1. Socio economic groupings based on occupation are widely used in market research and media campaign planning in the UK. They reflect education and social class rather than income.
2. Salif Keita sales data from www.Sternsmusic.com, September 2003
3. WOMEX attendees list 2003 from www.womex.com
4. BBC Radio 3 data from *BBC Annual Report 2003* and RAJAR (Radio Joint Audience Research Limited), www.rajar.co.uk

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