MUSIC INDUSTRIES IN AFRICA

Opportunities, Challenges, Interconnections and Potential Actions

by

Paula Aciego de Mendoza Sagaseta de Ilurdoz

EXECUTIVE SUMMARY

This paper is a preliminary study of the structure of the music industries in Africa. The purpose of this preliminary study is to identify the main structures and status of music industries in Africa, and to investigate, clarify and explain the possible connections between the countries in Africa and their former colonizing countries. The guiding research question was as follows:

"What are the main music industries in Africa, and what are the business relationships between these countries and their former colonizing countries?"

The methodologies that I used for this research were a literature review and exploratory interviews with different music professionals. The data collected from both methods was compared with secondary data from other sources, such as music industry reports and peer-reviewed articles.

This research report includes an introduction to the problem area and a critical literature review, a description of the research methods used, an introduction to the participants, a presentation of the results and analysis of the research, and a discussion of the main findings.

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1. INTRODUCTION

1.1. Background of Problem Area

Every year, the *International Federation of the Phonographic Industry* (IFPI) releases the Global Music Report, an annual report on the state of the recording industry. In the report from 2018, there is barely any mention of Africa. As a matter of fact, the only mention of Africa is a quote from Universal Music Latin America and Iberian Peninsula's Chairman/CEO, Jesús López, who comments, "I am sure Asia Pacific, Africa and other territories will develop fast and gain more and more global traction…"(IFPI, 2018:31) Moreover, when looking at the IFPI's Music Consumer Insight Report of 2018, the only African country mentioned is South Africa. According to author Dave Laing, the reason for the limited coverage of non-Western countries (including most countries in Africa, aside from South Africa) is that the IFPI's performance data are compiled from national recording industry associations that exist only in countries with a conventional recorded music market, regulated by intellectual property regimes and structured around the activities of multinational companies. Elsewhere, IFPI's member companies, which are led by the multinationals, generally have little or no direct presence (Laing, p.16).

These reports lead one to wonder: What is happening in Africa? Why has the continent that is either the source or influence for most, if not all global popular music not mentioned in these reports? The purpose of this preliminary study is to clarify and describe music business structures within Africa and the relationships between African countries and their former

colonizing countries. As the research developed, the scope narrowed to those countries that were home to the most developed music industries, as identified by research participants.

Research was guided by the following questions:

RQ 1: What are the main music industries in Africa?

RQ 2: What are the business relationships between these countries and their former colonizing countries?"

1.2. <u>Critical Literature Review</u>

Several African music organizations, as well as international organizations with regional offices on the continent reveal the structure and status of the various music industries on the continent. These organizations include the African Music Council within the <u>International Music Council</u>, the <u>European Music Council</u>, <u>CISAC</u>, <u>African Music Institute</u>, <u>North Africa Cultural Mobility Map</u>, <u>Music In Africa</u>, and <u>SAMRO</u>. Some of these organizations provided sources that were essential for the preliminary research. They not only served as a starting point but as a source to identify the main players in the industry and potential interview participants

According to author Wale Adedeji in his article "The Nigerian Music Industry (2016)," musical talent and creativity are not lacking in Nigeria or Africa, in general. What is lacking is the support of the government. The author believes that if the music industry is properly managed and regulated through the government's financial intervention, investment and enforcement of copyright law, then the industry has the potential to generate huge revenue for Nigeria and any other African country.

Turning to how people have consumed music, radio remains the most popular medium on the continent. There is a great variety of radio stations because they are relatively inexpensive to operate and can play a major role in promoting local culture and policy (African Music Development Programme, 2018). Moreover, television in Africa, like radio, experienced a boom after numerous national conferences established democratic processes in the media. Concurrently, the rise of pay-to-watch music channels on the continent contributes to the promotion of local music with programming such as talk shows and live television performances. Furthermore, while the development of the Internet has significantly benefited Francophone Africa, it has had less of an impact on Anglophone countries (African Music Development Programme, 2018). According to the data provided by the International Telecommunication Union or ITU, Nigeria alone reported 98.36 million internet users, as of December 2017.[1]

Authors and music professionals seem to agree that the African continent represents a massive potential market for music consumption, especially in the streaming era. This exponential growth seems to go hand-in-hand with the sheer volume of smartphones users and the active role of telecommunication companies. According to Ben Oldfield, "In Africa, telecommunication companies can potentially become the vital funnels for this consumption for a mass market dependent on their supply of data, which can currently only be purchased outside usage bundles for music services locally except for a few models just starting out" (2018:1).

This phenomenon has not only attracted investments by companies within the continent; foreign companies also see opportunity for exponential growth. One of these companies,

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[1] For a full list of selected countries in Africa go to Appendix 1.

Transsion Holdings, the Chinese-owned maker of phone brands including Itel, Infinix and Tecno, has become the leading smartphone seller in Africa. As its devices have become ubiquitous among African users, the Shenzen-based company has also been building out Boomplay, a joint music streaming venture between Transsion and NetEase, a Chinese Internet company. According to the *New York Times*, Transsion's strategy of pre-installing Boomplay on its phones since the launch of the service in 2015 has already helped to build a base of 31 million users, 17 million of whom are active monthly users in Africa. Those numbers would make Boomplay one of the biggest music streaming services globally (Quartz, 2018). While that figure sounds impressive, we have to keep in mind that we are talking about the world's second most populous continent, with a population of 1,311,823,158 as of Tuesday, April 2, 2019.[2]

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[2] Source: Worldometers (April 2, 2019). "Africa Population." Worldometers. Retrieved from:
http://www.worldometers.info/world-population/africa-population/

2. RESEARCH DESIGN DETAILS

2.1. Methods

Primary data collection process

Primary data were collected through structured interviews with diverse music professionals, in order to explore the status of the music industries in Africa and the challenges and opportunities these industries currently face. We also discussed business relationships with former colonizing countries and the mobility of local artists within the continent and internationally. All interviewees additionally agreed that Africa's music industries are still in early developmental stages. Therefore, our discussions also addressed potential actions to encourage growth and development.

Secondary data collection process

Interview data were compared with a literature review of various industry reports, including the IFPI annual reports, CISAC annual report, and the Cultural Industries Growth Strategy report by the Department of the Ministry of Arts, Culture, Science and Technology in South Africa. The interviews further guided the range of other secondary resources explored: I limited my review to papers and articles that mention the main music industries and some of the challenges and opportunities that the interviewees identified. These included news articles, peer-reviewed journal articles, books, and papers recommended by the music professionals interviewed or found through an organic search.

2.2. Participants

I had the incredible opportunity to talk with several renowned music professionals, ranging from The Orchard's VP of France, Benelux and West Africa to musician and producer Blick Bassy, a native of Cameroon but has lived in France for the past eleven years. Below is a alphabetical list of all research participants:

- *Max Alphonse Gapher* – Content creator of AfroVibes Media Group, an online platform that informs, entertains, and unites in celebrating culture. Gapher takes a deep interest in the areas of music, finance, agriculture, technology and marketing.. Gapher is also an entrepreneur and believes that entrepreneurship is the path to follow if Africa wants to see a better version of herself in the future.

- *Blick Bassy* – A native of Cameroon and well-known musician, writer and producer for his BB Prod label, founded in 2004. Bassy has lived in France for eleven years. Through the diversification of his activities, he continues to forge links between his two spaces of life and work, France and Africa. All of his projects, artistic and otherwise, promote local involvement: For example, the CAB project (Caribbean, Africa, Brazil) was a series of 18 workshops he facilitated at the end of 2014, during a tour of 28 African countries. These workshops addressed copyright, music publishing, career management, and relevant strategies in music and new technology communities. This initiative was supported by the Society of Authors, Composers and Publishers of Music (SACEM) and the Institut Français. Bassy has launched several actions and projects for young artists to learn about the realities of artistic environment.

- *Nothando Migogo* – Chief Executive Officer of the Southern African Music Rights Organization (SAMRO). Migogo is an Intellectual Property expert in the arts broadly, and

music specifically, specializing in royalties management and licensing arrangements. She previously served as the Managing Director of Dramatic, Artistic and Literary Rights Organisation (DALRO), a SAMRO subsidiary. A lawyer by training, Migogo has previously worked in educational publishing and as a tax consultant. During her time with DALRO, she was named by the Mail & Guardian one of the Top 200 Young South Africans to watch.

- *Ben Oldfield* – Vice President of The Orchard's France, Benelux and West Africa territories. The Orchard is a leading music distribution company with operations in 35 global territories. It develops marketing possibilities with labels and digital music platforms around the world to simultaneously grow business and artists' careers. He has been working in the music industry in France since the last century, in order to develop the international careers of artists like Cesaria Evora or Lucky Dube. His growing focus on musical monetization on the African continent stems both from his personal history with popular music being rhythmically attached to those roots and the permanent rediscovery of the amazing talent and drive that people in Africa have in great abundance to create a powerful potential homegrown source of wealth in the making.

Kalin Pashaliev - Editor-in-chief of [Music In Africa](). Before joining *Music In Africa* in early 2017, he worked for various publications in South Africa as a journalist and publisher and was a correspondent for Bulgarian National Television in Johannesburg. He has a degree in journalism from the University of Johannesburg.

3. RESULTS AND ANALYSIS

3.1. Music industry structures in African countries

The music industry is a complex agglomeration of different industries that produce a variety of musical products. According to the Department for Arts Culture Science and Technology of South Africa, in the simplest scenario, the music industry includes:

- Creators, including musicians and composers who are the basis of the industry

- Agents, who represent musicians (e.g., booking agents; promoters)

- Record companies, which are responsible for sound recording and production, and the promotion of recording artists

- Publishers, which their essential purpose is to administer, exploit, and collect royalties for its copyright properties.

- Manufacturers, which include both phone manufacturers, since many users access to music through their phones, and manufacturers of music products

- Broadcast, retail, and entertainment sectors, through which the products of the music industry reach the market

- Streaming services (e.g., Spotify, YouTube)

This structure is further complicated by the nature of music and by the singularities of each territory. As Kalin Pashaliev, editor-in-chief of *Music In Africa* said, "It is always difficult to talk about Africa as a whole. As they say, Africa is not a country, the music industry in Africa can be classified according to regions, colonial languages and socio-economic successes. In general, Africa can be divided into North Africa (Maghreb), West Africa, East Africa and Southern Africa as well as Francophone and Anglophone Africa."

All the interviewees tend to agree that there is a great contrast between African countries, and that it is very important to acknowledge and seek to understand the different socio-cultural, socio-economic, and socio-political realities of each country. As Kalin Pashaliev mentioned, we have to take note of the many countries that have been shaped by extreme conflict: In Mali, South Sudan, Chad, and others, conflict impacts all industries, including the music industry. Pashaliev explains, "For instance, a curfew [which are usually established during war periods] can have a major impact on the nightlife business of a city, and by extension, the live music industry. Religious regions/states, particularly Islamic ones, also make it difficult to forge viable music industries for obvious reasons." Therefore, highly developed music industries in countries such as South Africa and Nigeria co-exist with many countries that "are very much in their infancy [stage] when it comes to a viable music business structure." Moreover, as musician Blick Bassy said, "many countries do not have real distribution, production, or publishing structures" in place.

According to the musical professionals interviewed for this research, between five and six countries and regions boast a music business structure and system for the monetization of music that has been economically prosperous. Ben Oldfield, VP of France, Benelux and West Africa for The Orchard, identifies the following countries and regions: "South Africa, Nigeria, Kenya, North Africa region, and some of the French-speaking countries to a lesser extent." To this enumeration of "music hubs," Oldfield adds, "We have to keep in mind that not in every country is music available in a monetized fashion. For instance, iTunes is just available in about 10 countries, and YouTube is available in about 10 to 15. Telecommunication companies play a very important role here offering bundle services." This last statement supports an argument for the importance of

telecommunication companies, when it comes not only to the music business structure, but also to music accessibility for consumers.

Piracy has traditionally been the "solution" to the lack of music access in a monetized fashion. In addition to accessibility challenges, most people do not have disposable income or not even a regular income that would enable the legal purchase of a ten-dollar album, considered to be a luxury item in most African countries. While piracy has played a similar role in other countries, including the United States, one particularity of the African country worth mentioning is outlined by Pashaliev: "What is interesting is that upcoming artists themselves push their own pirated works to get people to gigs. So CDs, and even tapes (cassettes), are often regarded as promotional flyers rather than musical products." In other words, what Pashaliev is saying here is that some artists see the promotional potential of pirates and use them to their advantage. Oldfield says that piracy "will persist but become less and less a habit as the need to own music declines as the offer becomes progressively more attractive, flexible and affordable." Oldfield and many other music professionals believe that streaming has cured Africa of the need for piracy, or at least provided an alternative, as consumers move from an ownership model to a service/access model. All the professionals interviewed for this research agree that the growth potential of streaming is immense, given the huge demand, and rising number of people with access to smartphones. The success of streaming will depend upon how streaming services adapt to the different realities of each country, particularly when it comes to subscription models—an argument confirmed by Oldfield. Moreover, telecommunication companies are going to play a key role. According to Oldfield, "as the sale of data packages is currently a standalone source of revenue for telcos, they might be slower to come to the understanding that a music streaming

service needs bundled data in the plan to make it attractive to a wide audience." Of course, this is Oldfield's personal analysis. It remains to be seen how effectively the telecommunication companies will react and adapt to this new streaming reality.

3.2.   Main music industries in the continent

As mentioned in the previous section, the dominant music industries on the continent are located in South Africa, Nigeria, Kenya, the North Africa region, and a few other French-speaking countries. Kalin Pashaliev mentions Mali and Senegal as two of the countries responsible for birthing major international artists, such as Ali Farka Touré, Oumou Sangaré, or Youssou N'Dour. Max Alphonse Gapher, content creator of AfroVibes Media Group, also praises the Democratic Republic of the Congo and Ghana for producing exemplary artists, but agrees with his peers that aside from South Africa, the most developed music industry on the continent is Nigeria. In his own words, "the largest entertainment industry in Africa is Nigeria […] If you are referring to digital purchases on iTunes, Spotify, etc., then South Africa (is leading). However, by sheer volume of artists, releases, and airplay across the continent, Nigeria dominates by a large margin. When you visit at least 10 African countries (including South Africa), you will be pleasantly surprised to hear Nigerian music playing on almost all radio stations."[3]

In terms of the business sectors within the music industry, Bassy believes that "the most important industry now and for future years is the download sale due to telephone companies that offer direct download. Then YouTube streaming because the subscription system on the

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[3] This is the perception of music professionals when it comes to the volume of artists, releases and airplay of Nigerian artists versus South African artists. According to *Statistica*, entertainment and media revenue in South Africa reached 9.1 billion U.S. dollars in 2017, while the revenue in Nigeria was 3.76 billion U.S. dollars. See Appendix 2 for additional performance information.

streaming platforms is still difficult to implement due in particular to the cost of the mega and the slow bandwidth Internet." Once again, despite the immense growth of streaming in most countries, streaming success across the continent seems to be determined by the construction of telecommunication infrastructures.

In recent years, some independent labels have been created, such as Mavin Records and Hypertek Digital. According to Bassy, "the democratization of new technologies has also accelerated self-production and allowed several artists in different countries to have their labels proposed. Since the dynamic comes from the independent producers and the initiatives of the artists themselves and things are not standardized because of a lack of training structure, each one does its own thing."

Not only have independent labels been established, but some of the majors have recently established offices on the continent, beyond the existing regional offices in South Africa. Universal Music Group has established new strategic divisions in Nigeria this year to cover neighbouring English-speaking markets within Western Africa, including Ghana and the Gambia (UMG, July 2018), as well as in the Ivory Coast, covering Benin, Burkina Faso, Burundi, Cape Verde, Cameroon, the Central African Republic, Chad, Comoros, Congo (Brazzaville), Congo (Kinshasa), Djibouti, Equatorial Guinea, Gabon, Guinea, Guinea-Bissau, Madagascar, Mali, Niger, Sao Tome and Principe, Senegal, Seychelles and Togo (*Music Business Worldwide*, July 2018). Through the strategic division in the Ivory Coast, Universal is also expanding to most of the French-speaking African markets. According to *Music Business Worldwide*, this new division will work in partnership with existing UMG operations, including those of the North African territories and key markets across English-speaking Africa. Sony Music has offices in Nigeria and South

Africa, while Warner Music Group is present in South Africa and has recently made a partnership deal with one of the Nigeria's leading labels, Chocolate City Entertainment. According to *Quartz Africa*, the deal will see Warner investing in Chocolate City's talent development and handling the Lagos-based label's international distribution (Adegoke, 2019). According to CEO of SAMRO, Nothando Migogo, while the recording sector is the most established, "publishing is growing slowly, but growing. [This growth] has a direct relation with the existence of and the functioning of Collective Management Organizations."

3.3. <u>Opportunities and Challenges</u>

One of the questions posed to interviewees was what opportunities and challenges they have identified in the African music industries. All interviewees reiterated that different countries pose different challenges. As Migogo reminded, "Africa is not a homogenous space." Despite this diversity, interviewees were able to generalize to some extent and to identify the following opportunities and challenges:

<u>Opportunities</u>

- *Multinational recording companies will become more involved in the domestic market* – As illustrated by the previous section, there is growing interest in this territory by the major record labels, which expanded strategic divisions to many countries. According to *Music Business Worldwide*, the focus of Universal Music Group's expansion within the French-speaking Africa markets is to discover and support local artists. During the past few months, UMG has organized a pan-African tour for French urban legend Niska, and French tours for African artists, including Tenor (*Music Business Worldwide*, July 2018).

- *Growth in community radio broadcasting* –Africa exhibits great variety in radio stations, because they are relatively inexpensive to operate and can play a major role in promoting local culture and policy (*Music In Africa*, January 2018).

- *Growth of smartphone ownership and Internet access* – Artist Blick Bassy highlighted this point. In his words, "we then have a youth that does not expect anything and creates, consumes thanks to the arrival of middle class, but also due to access to the Internet and the smartphone that are the main consumption tools with the arrival of mobile banking."

- *Cooperation among local musicians and between local and international musicians* –Bassy has observed growth in cooperation among local players: "Artists and producers are in their phases of structuring, and countries are creating more and more bridges, facilitating mobility and dissemination at the same time, which is a major asset for the continent." Recent high-profile international collaborations, include Kanye West's signing of D'Banj to his label G.O.O.D. Music, as well as Akon's signing on WizKid to Convict Records, through E.M.E in Lagos. Additionally, through the current generation of artists, the "Nigerian urban sound," now dubbed "Afro hip-hop," has penetrated international markets and garnered positive reviews and accolades (Adedeji, 2016:268).

- *Exposure of the local music industry* – Pashaliev believes that there are various opportunities for local music exposure. Most of those opportunities, however, exist abroad and exclusively for jazz and world music artists. During our interview he mentioned, "popular [African] artists find their opportunities by appealing to very mainstream elements (i.e. young listeners through proven-to-work genres like Afropop, Afrobeats, bongo flava, hip hop, etc.)."

- *Talented pool of musicians on the continent* – Authors and music professionals all agree that musical talent and creativity are abundant in the continent.

- *Governments are starting to see the potential of the music industry* –Max Alphonse Gapher mentioned as an example the Arts Council created in Ghana to support the arts. He believes that "there is [finally] the recognition of creative arts with the creation of that ministry."

- *High demand for music and African cultural goods, in particular* – The Orchard's representative Ben Oldfield commented, "there is pressure from the consumers. People want music and they are going to get it. Look at South Africa. They have experienced an incredible growth. The demand is there." Therefore, the problem is not a lack of demand but a lack of infrastructure to serve the many music consumers across the continent.

- *Growing demand for African cultural goods within the continent and internationally* – There is a global appetite for the creative output of African cultures – even fictitious ones. The Hollywood blockbuster *Black Panther*, which showcased African actors, music, and design influence, is now the highest grossing superhero film of all time, bringing in over $1.2 billion at the box office globally (Hruby, 2018:3).

<u>Challenges</u>

- *Lack of intellectual property protection and piracy* – Every music professional interviewed agreed that this is one of the biggest challenges. In the article "The Nigerian Music Industry," Adedeji states that the issues of piracy and copyright and intellectual property abuse are all intertwined and deeply rooted in the present distribution system. This

distribution system favours electronic markets that sell illegal copies, leading the artists and other entertainment industry professionals to keep losing money: "The way artists are losing money from physical piracy is the same way they lose revenue from media houses, telecom companies and public places that use music in Nigeria (and most countries in Africa) without proper licensing" (Adedeji, 2016:266). The prevalence of movie and music piracy in Africa is exemplified by the Nigerian Copyright Commission (NCC), which estimates that the country loses over USD $1 billion annually to piracy (Hruby, 2018:11).

- *Limited investment and promotion of local artists* – According to Khaleque ,cited by Adedeji, "it is imperative for the government to have an attitudinal change in terms of policy and investment in the music sector as it is apparent that no industry can survive without government sponsorship (Khaleque, 2003:45)[4], less the music industry" (Adedeji, 2016:268). This challenge was also mentioned by CEO Nothando Migogo, who added, "a big challenge across the board is social security. Having a structure that support the arts enough to have creators to make art and avoid exploitation."

- *Lack of coordinated strategy* – According to Gapher, there is a lack of unity between the players in the music industry, as well as a clear framework to protect the industry and encourage its growth.

- *Lack of official government policy and enforcement* – This is needed to protect the industry and incentivize creators and potential investors. According to Oldfield, the

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[4] Source: Khaleque, Abdul. 2003. "The Role and Contribution of Folk Song in Bangladesh Music Industry." *UNCTAD Youth Forum Music Industry Workshop*. New York and Geneva: United Nations: 41-47.

intellectual property laws are not robust enough and are not being enforced by individual governments. He argues that "money is waiting on the legal, and legal is waiting on the financial." Furthermore, according to Adedeji, the lack of official government policy and enforcement might be a reflection of the government's lack of awareness of the viability of the music and entertainment industry as a sustainable sector for revenue generation.

- *Difficulty of the Collective Management Organizations or CMOs to collect royalties* – According to the CISAC annual report, CISAC member society collections in Africa grew by 9.5% in 2016. However, sustainable growth has been hampered by inadequate copyright legislative frameworks, resistance by users to make royalties payments, and the limited effectiveness of CMOs in licensing, collections and distribution (CISAC, 2018:54).

- *Absence of music industry education* – This is one of the main challenges, according to all of the interviewees. Bassy explains, "the lack of training and standardization structures do not allow a homogeneous functioning of the structures. There is also a lack of understanding of the importance of the cultural and creative industries of some leaders, which makes things sometimes complicated."

3.4. Business Relationship between African Countries and the Former Colonizing Countries

In addition to the influence of the three international record labels currently operating in strategic countries to control the English-speaking and French-speaking markets, the music industry has greatly been influenced by colonization. Gapher provided, as an example, South Africa: "[M]any of their songs are songs of war, freedom, struggle, and pain, mainly because of the apartheid regime." Other participants mentioned the important link between Francophone

Africa (both West and Northern) and France. Editor-in-chief of *Music In Africa*, Kalin Pashaliev, said, "many African artists ply their trade in big French cities where they produce their albums and tour. They are also free to express themselves there." To this statement, he added, "this goes especially for female musicians…but it is often about very talented musicians looking for greener pastures, after seeing little return for their efforts in their home countries."

Bassy sees the relationship between these countries personified through certain networks such as the French Institute, International Organization of the Francophonie, French Development Agency, and Society of Authors, Composers, and Publishers of Music (SACEM). Migogo identified a similar relationship, especially when it comes to Collective Rights Organizations. In her own words, "former colonizing countries set up the CMOs."

A very interesting paradox that Pashaliev mentioned, and that is important to highlight, is the fact that "many of these artists have content that speaks against colonialism, the enforcement of Western culture upon African communities, etc., yet they have no choice but to go to those ex-colonial powers and work according to their systems."

Another point made by Bassy is that foreign businesses need to face the realities of embedded music industries within each African country. In his words, this "requires exchange work; we must avoid applying a model that does not correspond to the realities of these different African countries. It is also necessary to draw on the experience of local professionals to achieve better results in the long term."

3.5.   Former Colonizing Countries Exploiting Local Talent?

Research participants discussed the influence of African music on many global music genres, challenges to fair labour—in comparison with western countries—and local and international exploitation. All agreed on the deep influence of African music in many, if not all, music genres. Oldfield, for example, stated that "we could argue that behind any music genre, you have African rhythms." In terms of labour-related issues and exploitation, Pashaliev mentioned,

> "what African artists have on their side in Europe and the United States is an operational legal system that defends their rights if labour-related issues arise. In many African countries, the legal systems are often ineffective and so artists are exploited by not being paid for concerts, activations, etc. So I believe that there are far more opportunities outside of Africa, where if they work with the right IP lawyers, advisers, labels, etc., there should be no issue of the kind of exploitation we see in Africa."

On this topic, Bassy added,

> "foreign producers, publishers, and majors sign quite a few emerging artists, some for local exploitation, and others for local and international exploitation. For the time being, only a few are able to benefit from an important development because finding the right economic model corresponding to the different local realities remains a challenge. So, they sign them just to make a catalogue" (laughs)."

This last point is critical and warrants further exploration: Are the majors are really present in African countries to promote local talent or to build catalogues to satisfy the increasing demand of music genres such as Afropop or Afrobeat?

3.6.   African Artist Mobility within the Continent and Abroad

As author Dave Laing mentions in his article "World Music and the Global Music Industry," while there is no possibility of direct investment from the international music industry, the widespread international popularity of world music has prompted a growing awareness of African music's potential to contribute to economic growth in Africa among intergovernmental

agencies and some national governments (Laing, 2014:30). According to Laing, some governments have enabled artists to perform at showcase events at the WOMEX Trade Fair, while the Agence Intergouvernmentale de la Francophonie has assisted African and Caribbean record companies to promote themselves and supported tours in Europe. In 2004, the agency organized participation in the MIDEM Industry Fair in Cannes by thirty labels from fifteen countries, quoting its earlier successful efforts in promoting Cesaria Evora, Habib Koite and Magic System. In 2006, the seventy-nine nations of the Africa-Caribbean-Pacific group sponsored a showcase festival in the Dominican Republic, featuring artists from all three regions (Laing, 2014:30).

Despite the success of such programs, most African artists face a different reality: The interviewees agreed unanimously that both local and international mobility is one of the biggest issues in Africa. Oldfield said, "there is more and more mobility, but it is not the rule. Streaming is providing access, and an access to a wider choice of options." In a way, streaming is an alternative solution to the still existing obstacles for artists' mobility. Gapher mentioned, "talent discovery programs are not common on the continent and this makes it difficult to hold events across the globe to nurture talents and skill."

Pashaliev and Bassy both mentioned that the physical mobility of artists remains complicated, due to several factors: One is the fact that the roads that service travel between countries are still in poor condition, or simply do not exist. Furthermore, it is often easier to fly to Europe than to get to another African country: Flights on the continent remain very expensive and underutilized, due to long connections and a lack of direct flights. Another factor is visas, which seem to be a barrier to mobility in some regions and for African artists with international

ambitions beyond the continent. In this regard, Pashaliev said, "being an EU citizen gets you in easier in many African countries than coming from another country on the continent."

4. DISCUSSION OF MAIN FINDINGS

Based upon interviews with each of the music professionals who participated in this research, it is clear that, when it comes to viable and sustainable music industries in Africa, most of the countries are in a developmental stage. They are either in their infancy or simply do not have any structure in place, which is the case of countries for defined by conflict, such as Mali, South Sudan or Chad.

That said, smartphone ownership and growing access to the Internet, together with a great pool of talented local musicians have put this multicultural continent on the agenda of many investors, foreign music organizations, and governments. However, despite the many opportunities identified in this research, there are also many challenges that hinder the development of the music industries.

This section discusses some of the actions that could be undertaken to ensure the future and sustainability of the music industries within the continent. It is important to emphasize that in order for any action to be effective, the different realities of the 54 countries that form Africa must be considered. Below is a compilation of potential actions extracted from the literature review and the interviews with the different music professionals:

- *Financial intervention* – Increasing the investments available for the development of the music industries is essential. As author Adedeji mentions, "No industry can survive without funding and the music industry is not an exception" (Adedeji, 2016:268). Gapher strongly believes that "with proper management and financial boosting, Africa could rule the world when it comes to music."

- *Policy formulation and enforcement* – Official government policy on copyrights and strict enforcement are needed to deter piracy and ensure proper licensing.

- *Piracy awareness and public education* – This can be executed in the form of seminars and workshops.

- *The issue of a proper distribution network* – All labels and artists should be required by proper regulation to subscribe, and an accreditation of distributors through government regulation and policy should be developed (Adedeji, 2016:268).

- *The issue of royalties* – A clear system for collecting artists' royalties should be modelled after developed countries. One of the organizations that is actively working on a strategic plan to improve royalty collections is the CISAC Regional African Committee. This was brought up by Migogo, who said, "they work very well throughout the continent in trying to galvanize and activate collective management of copyright." During one of their recent meetings in Rwanda, 25 African CMOs came together, alongside SACEM, PRS, SPA, WIPO, ARIPO and NORCODE to embark on plans to implement development support activities (CISAC, 2018:54).

- *Educate government officials on the importance of the music industry* – This can be done through training courses, such as the one given by the World Intellectual Property Organization (WIPO). WIPO has organized training courses for government officials and promulgated its own Development Agenda (Laing, 2014:30). Moreover, African governments need to expand and consistently track creative and cultural industry statistics to support policy development and promote private sector investment (Hruby, 2018:30).

- *Support local entrepreneurs* –Bassy believes that, moving forward, the participation of local entrepreneurs and players is essential to guarantee sustainable growth. His reasoning behind this idea is that "they are better acquainted with their environment and with the needs and mentalities inherent in each country or region." Bassy has taken a very active role in this regard by training and providing workshops throughout the continent. His goal with these training sessions is "to encourage artists, promoters, managers and producers to find processes that correspond to their reality and to emancipate themselves from the European model in order to find effective and adequate solutions and to create their own economic model."

- *Education and support for artists* – This action was mentioned by Migogo, who pointed out the importance of informed artists who are able to contract knowingly and understand the industry's business relations.

- *Build a healthy ecosystem* – In addition to economic and policy actions, Pashaliev advocated for building a music industry that cherishes both its traditional music heritage and its modernity, and which does not censor musicians. According to Pashaliev, "there are many places in Africa where musicians are censored harshly for criticizing corrupt political leaders, backward religious practices, and the socio-economic realities in their countries."

According to author David Laing, in the longer term, the consensus view among national and international agencies is that the potential for music exports can best be achieved through the support of a more effective domestic industry infrastructure. The United Nations development agency UNCTAD, for example, has identified culture in general, and music in particular, as

potential sources of export income for developing countries (Laing, 2014:30). Moreover, and as Aubrey Hruby mentions in "Getting Creative About Development (2018)," African film, music, and fashion are exploding in popularity on the global stage, from Nigeria's Nollywood film industry to the visual arts in South Africa. Creative and cultural industries (CCI) represent a new realm of economic opportunity. From artists to distributors, Africa's creative economies are currently estimated to employ approximately a half-million people, generate $4.2 billion in revenue, and continue to rapidly growing. In order to expand Africa's share of the $2.25 trillion global entertainment market, African governments, businesses, and investors should find innovative ways of supporting, promoting, and investing in CCI (Hruby, 2018:2).

Investing in the domestic industry infrastructure is key and should be the primary focus of both local and international entities, a point reiterated by Migogo, who believes that enabling access to technology should be a priority. That said, this may not the priority for many companies, because it does not result in a quick return on investment. But by doing things right, and right now, substantial and sustainable growth. Otherwise, growth will be limited by existing infrastructure, which is insufficient. Why would companies settle for serving a small customer base that is privileged enough to have Internet access, when they could serve a much larger population by investing in building the necessary infrastructure, including reliable electricity and fibre-optic grids?

I conclude this section with a quote from Migogo, which could be applied to all sectors within the African music industry, in addition to copyright:

"The commitment from African countries, commitment to ourselves, is what we need to strengthen our own frameworks and infrastructure resources to be able to manage our copyright value and copyright wealth." For me this is another example of why it is crucial to act locally while thinking globally to ensure the sustainability and viability of any industry.

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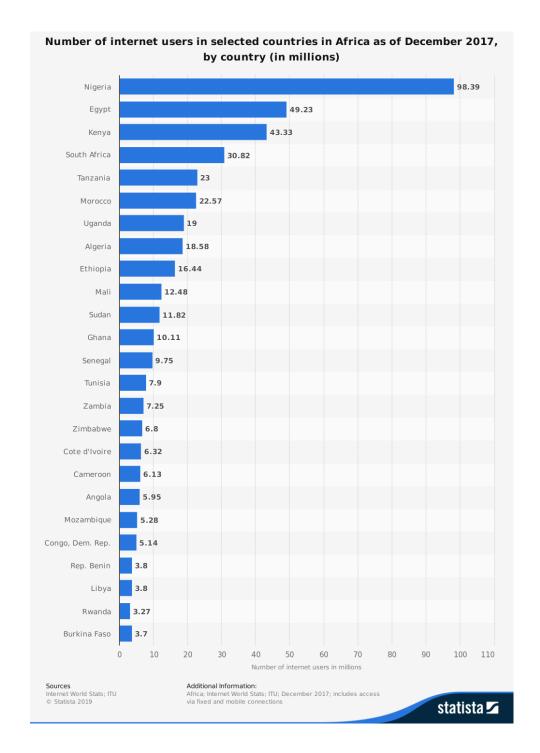
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6. APPENDICES

Appendix 1: Number of internet users in Africa as of December 2017

Number of internet users in selected countries in Africa as of December 2017, by country (in millions)

Country	Internet users (millions)
Nigeria	98.39
Egypt	49.23
Kenya	43.33
South Africa	30.82
Tanzania	23
Morocco	22.57
Uganda	19
Algeria	18.58
Ethiopia	16.44
Mali	12.48
Sudan	11.82
Ghana	10.11
Senegal	9.75
Tunisia	7.9
Zambia	7.25
Zimbabwe	6.8
Cote d'Ivoire	6.32
Cameroon	6.13
Angola	5.95
Mozambique	5.28
Congo, Dem. Rep.	5.14
Rep. Benin	3.8
Libya	3.8
Rwanda	3.27
Burkina Faso	3.7

Number of internet users in millions

Sources
Internet World Stats; ITU
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Additional Information:
Africa; Internet World Stats; ITU; December 2017; includes access
via fixed and mobile connections

statista

Appendix 2: Entertainment and media revenue in South Africa and Nigeria

Entertainment and media revenue in South Africa from 2013 to 2022 (in billion South African rand)

Entertainment and media revenue in Nigeria from 2013 to 2022 (in billion U.S. dollars)