



BRITISH
COUNCIL

SCOPING THE EAST AFRICAN MUSIC SECTOR



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PREFACE

In early 2014 the British Council commissioned three short pieces of research to help us gain greater insight to the arts sectors across East Africa. The research was to guide the British Council in the development of its arts programme across the region over the next 3+ years and was not commissioned with public publication in mind. However, the resulting reports were extremely interesting and as such we have decided to make an edited version of them available for wider consumption.

The research brief was focused around the objectives of the British Council and potential engagement with the UK. The resulting report published here is therefore not a definitive guide to the arts in East Africa but is more of a snapshot to help stimulate engagement.

The ties between the UK and East Africa are long standing, and

deep-rooted cultural exchange is readily evident in the relationship between our countries. But like any relationship it must be continually developed so that it remains current and relevant. The British Council's renewed approach to our arts work in East Africa will have a particular focus on 'young' and 'digital' audiences as a reflection of what is happening in the region. The programme will offer opportunities for collaboration, skills and career development, and wider engagement in the arts for young people across East Africa.

We hope that you find the report as stimulating and useful as we did and that it will inspire people from the UK and across the region to connect, collaborate, or simply just find out more about each other.

Lisa Phasha

Director Arts, Sub-Saharan Africa

EXECUTIVE SUMMARY

This report was commissioned by the British Council to scope the music sector in Kenya, Uganda, Ethiopia and Tanzania to inform the development of its programme in the region. The international cultural profile of East Africa has been much lower than West and Southern Africa but this is rapidly changing, with much more international attention focusing on the arts from the region as the economies of these countries begin to grow.

Universally the infrastructure for music across the region is underdeveloped at all stages of the supply / demand chain, from creation through to consumption. There are serious issues for musicians in terms of making an income: there are limited opportunities to play live; piracy is rife; little is done to enforce copyright and collect royalties; returns from selling music are low and only a few stars are able to secure investment from

brands or corporate sponsors. Generally people are not working internationally or across the region and indeed many are only working at a local level within each country.

The picture is not universally bleak however and there are many positive signs. There is a new generation of entrepreneurs and arts activists who are keen to build successful music enterprises. There is a growing live music scene across the region, particularly in the major cities, supported by a growing audience, and this is offering more opportunities for musicians to play. There is increasing confidence among artists and industry and a desire to develop internationally.

Across the region there is a great pool of musical talent and a growing interest around incorporating traditional music and culture into more contemporary forms of expression, bringing these from

folklore to a more commercial realm. There is also an interesting debate about how regional and tribal identity is filtered to create a national culture and consciousness – and this is particularly true in Kenya. Much of this traditional music remains relatively ‘undiscovered’ by global audiences so there may be opportunities for UK or international companies, working with local partners, to bring this to international markets.

The region offers incredible opportunities to create exciting new work and musicians would benefit hugely from collaborating with international artists. Bands like Extra Golden and Owiny Sigoma have proved that brilliant collaborative work can be created that appeals to audiences abroad. The region also offers business opportunities that are likely to grow as their economies grow and as the industry and audiences develop. However for this

to happen the music sector needs to mature and the issues surrounding piracy and the non-collection and non-payment of royalties need to be addressed. There is a need for:

- **Training**
- **Networking & sharing of experience**
- **Developing markets and appetites**
- **Building support for change**
- **Developing technical ability, musical and recording / producing**
- **Developing of musical arrangement and structure**
- **Access to other markets**



INTRODUCTION

East Africa has considerable diversity and an abundance of different musical traditions. Yet despite this diversity, many of the countries face similar issues, from the effects of urbanisation to the threats of piracy, the lack of Intellectual Property enforcement and a lack of sector development.

The international cultural profile of East Africa has been much lower compared to West and Southern Africa, but this is changing. There is a growing identity to the region, especially around the East African Community (EAC) encompassing Kenya, Tanzania, Uganda, Rwanda and Burundi. Slightly outside of this is Ethiopia, which although part of the COMESA (the Southern and East African common market) is not part of the EAC.

Across the region popular musicians from the early years of independence

were less inspired by American music than their West African counterparts. Influences were taken from closer to home, including Arabic sounds from the coast, South African rhythms adopted in Tanzania and Kenya, and the predominance of Congolese Rumba. The exception to this is Ethiopia, which (aside from its love of reggae) has maintained its own unique repertoire and a traditional feel to its music. This musical distinctness as well as the existence of a professional group of musicians to play it, has led to a stronger international profile.

More recently urban genres have dominated the youth market. Initially these styles were heavily influenced by American R&B and hip-hop, but increasingly they have a more home-grown character, often sung in local languages. The dominance of the American sound has waned in favour of a stronger African influence and lately it has been Nigerian music

that has dominated youth markets, alongside music from South Africa and Ghana. This African ascendancy offers inspiration for many musicians and Kenya has begun to export its music to neighbouring countries and key African music markets with some success.

Despite these successes few of the participants in this research were optimistic that their popular music was likely to conquer markets in the rest of Africa, recognising that their own industries are less developed, and citing the view that 'playing catch-up with others' would be unlikely.

Traditional rural popular music often shares the same means of production as this pop and urban music (cheap digital studios without much live instrumentation and recording). In some cases this can give a unique and contemporary flare to the music, however it often results

in low production standards and limited appeal to the local areas it comes from.

Diaspora communities are vital to the development of new economic powers such as India and Nigeria, but until now they have not played a major role in East Africa. They are important in providing an 'international' audience, but perhaps more importantly they are also the conduit for feeding ideas, innovation and 'style' back to their parent countries. Across the East this is beginning to change as those educated overseas return. They stimulate an audience with broader tastes and often form a pool of experienced cultural activists and entrepreneurs who want to change their own cultural landscape by bringing skills and developing the infrastructure.

THE EAST AFRICAN REGION

East Africa is a fast developing region. However, compared to other African territories it is comparatively poor with annual incomes for the countries surveyed in this report averaging just below the median African average. Kenya is by far ahead of the others with an average GDP per capita of over \$860 whereas the Ethiopian average GDP per capita is \$470.

According to the Mo Ibrahim Foundation Index, the more established countries in the region are Rwanda, Tanzania and Uganda, followed by Kenya and then some way behind Ethiopia and Burundi. The ranking is calculated by four factors: safety and rule of law, participation and human rights, sustainable economic opportunity and human development. The instability of Somalia has a big impact on the overall stability of the region.

The relative size of Kenya's economy makes it a centre of gravity for the region. Nairobi and Addis Ababa are the regions' biggest cities and both are significant bases for companies and NGOs and therefore expat communities.



	KENYA	UGANDA	TANZANIA	RWANDA	ETHIOPIA
POPULATION	43.2 million	36.3 million	47.8 million	11.5 million	91.7 million
LAND AREA	580,000 km ²	241,000 km ²	945,000 km ²	26,000 km ²	1,110,400 km ²
GDP	\$37.2 billion	\$19.9 billion	\$28.2 billion	\$7.1 billion	\$43.1 billion
GDP PER CAPITA	\$862.2	\$547	\$608.9	\$619.9	\$470.2
LIFE EXPECTANCY	57	54	58	55	59
NET ODA PER CAPITA	\$59.1	\$45	\$52.5	\$113.3	\$39.5
HEAD OF STATE	Uhuru Muigai Kenyatta since 2013	Yoweri Museveni since 1986	Jakaya Kikwete since 2005	Paul Kagame since 2000	Mulatu Teshome since 2013
REC MEMBERSHIP	CEN-SAD, COMESA, EAC, IGAD	COMESA, EAC, IGAD	EAC, SADC	COMESA, EAC	COMESA, IGAD
IIAG RATING/100	53.6	56	56.9	57.8	47.6
INCOME LEVEL	Low	Low	Low	Low	Low

All currencies in US dollars

Source: <http://www.moibrahimfoundation.org/interact/>

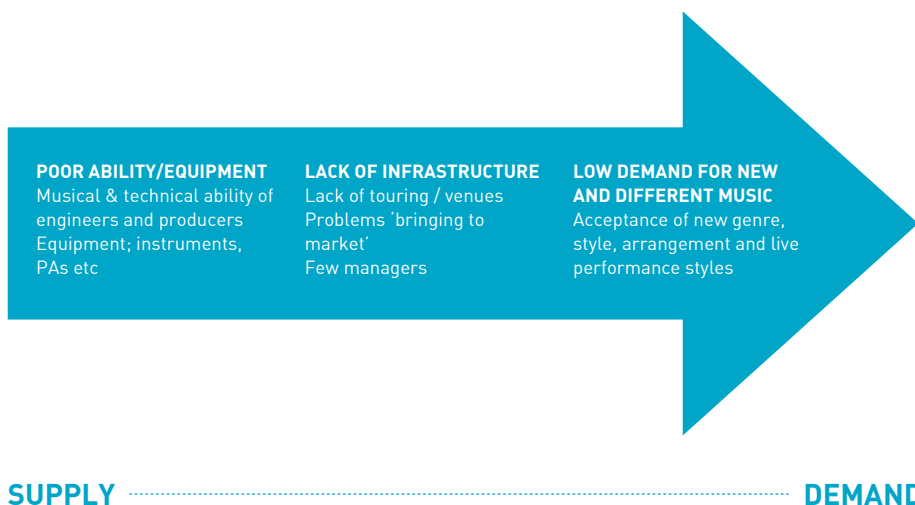
THE EAST AFRICAN MUSIC INDUSTRY & REGIONAL ISSUES

The music industries in East Africa are universally underdeveloped and the effect of this on the supply / demand chain is dramatic.

The industry is not completely dysfunctional, but it faces severe challenges at all stages along the

supply and demand chain, beginning with the production of new material right through to developing new audiences.

The effects are examined more specifically in the following country-specific chapters but the issues can be summarised in the chart below:



The modern production process means that few musicians are involved in writing and recording. One 'producer' composes and arranges the music around a song and then plays all the 'instrumental' parts on a cheap keyboard or using MIDI instruments from a computer. This has two effects: musicians cannot develop their skills as they are not playing and the recorded product is often of low quality. On the rare occasion where live musicians are used, instruments are often poorly tuned and badly mic-ed. Backing vocals are hardly ever used because extra musicians cost both time and money.

Whilst this general picture is true it is by no means universal. There are great producers in East Africa who are also very good musicians. Using cheap keyboards or MIDI instruments does not necessarily mean bad music. But even if great

music is made using this process it does have repercussions. As this music is usually created alone in the studio it suffers when performed live due to a lack of necessary resources to translate this music for a live band and into an electrifying show.

Good managers are a rare breed and their inexperience coupled with the challenges they face working in a difficult industry means they struggle to bring their artists' product to market. They are rarely able to strategically develop their artists' careers and so musicians have limited opportunities to tour, generally only operating in their own countries or even smaller sub-regions.

Collection of royalties is poor and often unenforced. Music distribution is changing rapidly and ownership of archives and recordings are sometimes disputed. The impact of digitisation on both

music-making and distribution is not fully understood nor is it encompassed by statutory law, with most regulations having been passed before the digital revolution. Internationally, downloads are a relatively inexpensive and well-established, yet the income from sales is largely invisible to artists in East Africa. Whilst these sales remain inadequately governed by legislation, little income will filter back to writers and performers.

Audiences do not usually have the inclination or the disposable income required to support the development of new music. Those that do are polarised into urbanised cliques and mass markets for rural, more ethnically-focused music.

Despite these challenges there are positive signs because the region is becoming more porous and there are increasing opportunities to play in different countries within East

Africa. The African Music Festival Network for example provides new opportunities for audiences to hear music from other countries. The cultural diversity and brilliance of musicians in the region is an amazing resource which simply needs facilitating better at home and abroad to have a good future. European world music markets are turning increasingly to East Africa. So little has been heard about the region for so long the industry and audiences are becoming curious.

IDENTITY AND TRADITION

All of the countries surveyed, except Ethiopia, are engaging a very lively, ongoing debate about the identity of their music and their culture more broadly. These deliberations centre round the usage and interpretation of 'traditional' and 'local' and the integration of diversity into 'national' cultures. As the region becomes more visible to the rest

of the world, East Africans are positioning themselves: measuring up against how they expect to be seen and heard in the world, rather than tailoring themselves to local markets. It's an exciting debate to witness, as people consider how they go about expressing themselves in an increasingly globalised culture; and how they might be able to operate and compete in globalised markets. The debate attests to a growing confidence in each nation and in their own national and local cultures.

Nevertheless when they consider themselves against their international musical competitors, such as Nigeria or South Africa, it is obvious to them that the industry around them is underdeveloped. People hear and see African artists developing successful international careers and it was commonly held that this was because they worked with better producers; had access to

better studios and equipment, and were generally better-resourced. This was once held up as the secret to their success and habitually led to frustration because other musicians felt they were unable to emulate them. However there is beginning to be a realisation amongst East African musicians and music professionals that rather than attempting to imitate, their musical differences and discrete culture actually allows them to sound distinct from their international competitors. Their difference rather than being a hindrance is beginning to be seen as an asset that could be key in enabling them to compete and develop an international profile.

VENUES AND FESTIVALS ACROSS THE REGION

There are a wide variety of venues and promoters across the region and music is an important social and leisure activity common to all the



East African countries. Small clubs and bars form the mainstay of the live circuit, typically with capacities of 100 to 300; many hold residencies for certain artists and concentrate on particular genres of music. Additionally there are a number of freelance promoters and festivals operating in the major cities.

MAKING A LIVING

Musicians generally earn their income from three sources: playing live shows; selling recorded material and other merchandise; and through royalty payments for the use of their music. In East Africa there are issues in all of these areas, particularly the latter because there are issues surrounding the enactment and enforcement of copyright legislation, and limited payment and collection of royalties. Add to this confusion over who 'owns' what; a system largely based around the one-off upfront buy-out;

and incredible levels of music piracy, and it is easy to understand why many musicians struggle to make a decent living.

Artists overwhelmingly rely on income from live shows. Between Kenya, Tanzania, Uganda and Rwanda there is a commercial pop scene. Ethiopia has one too, but it is separate from those of the other EAC countries. At the very top end of this, musicians are able to secure significant commercial sponsorship as companies seek association with the right celebrities to help sell their products.

THE DIGITAL DOMAIN

In all countries the growing middle class are rapidly taking to life online and are developing expected habits. Downloads look certain to become more popular, but currently they only make up the tiniest fraction of the market. As so much music

is pirated there is currently little commercial viability for download businesses as it is widely possible to buy a compilation of 200+ tracks as MP3s on a USB memory stick, for as little as £1 or £2. This is a price that download and other sites can't compete with. These services tend to operate in more developed African markets such as South Africa and Nigeria.

There are increasing efforts to deal with piracy, copyright and collection issues. Whilst the collection of royalties is beginning to happen in some countries, enforcement of copyright across the region is poor or non-existent and this, alongside the ease with which it is possible to pirate material, makes for a significant black market economy. Many people interviewed saw pirates and street hawkers as the major distribution network for music.

WORKING INTERNATIONALLY

Very few musicians make their living from markets outside of their own country or even sub-region. Those who have toured know that their income is quickly swallowed up by the costs of being abroad. Offsetting income against the high expenses of touring is arguably becoming more challenging. In Europe and the UK by and large the fees that established overseas artists command for live shows has halved or quartered in relative terms over the last 5-10 years. This has meant that many younger artists see international markets as less of a priority as the income they can now gain from fame and through corporate endorsement and sponsorship in their own countries is high. It is this money rather than from recorded or live music (which historically was better internationally) which fuels the African music economy.

CONTEMPORARY SCENES / HIP HOP, R&B AND NEO SOUL

With the exception of Ethiopia all East African markets are heavily affected by global trends, styles and stars. However, the influence of Southern African and Nigerian pop music culture is having an increasingly large impact.

Middle classes often want a more 'sophisticated' sound, reflected in the smooth stylings of R&B and neo soul, where there is a large overlap with what is commonly termed 'afrofusion': elements of African music - harmonies, melodies or even guitar lines - combined with heavy doses of generic soul, pop and slick, middle-of-the-road, production. Whilst it is popular with middle class urban African audiences, it has a very derivative sound that would make it hard to popularise outside of the region.

In terms of western notions of contemporary and experimental music, jazz, electronica, alternative and the avant garde there are signs that musicians are interested in playing these kinds of music and that audiences in East Africa are opening up to it too. Ethiopian and Kenyan rock are starting to become more fashionable and it's easy to discern that these musicians are not copycats, aping western styles.

THE EFFECT OF GOSPEL MUSIC

Across the region gospel music has had a profound impact. Unlike the UK and Europe it is not a distinct genre but it is more an expression of Christian faith in popular music. You can find large sections dedicated to music of faith in most CD shops. Christian music could be rumba, ohangla or any other popular music from the region. It is also fair to say that many musicians have faith and produce songs using Christian

themes. There is a discrete audience for this music and some people don't buy anything other than gospel.

There is a complex relationship between religious and secular music in Africa, but where financial and market support is lacking you can often observe a symbiotic relationship developing between musicians and churches. Religious audiences provide a buoyant market and many musicians tread a line to keep themselves 'in' with congregations. Many churches have developed small studios, and in rural areas they are sometimes the only place to record music. Producers in these studios are often able to subsidise themselves with commercial secular work and therefore the studios are assets to both the gospel and wider industry. Occasionally missionaries support studios such as Crystal Klear in Kampala. In this case American missionaries have

assisted their producer with top quality international equipment and technical training making it the most sought-after studio in the city. It is important to remember that the coast of Kenya and Tanzania is mostly Muslim and therefore not necessarily able to draw on similar resources.

VCDS

Most music is released in two formats: standard audio CD and video CD (VCD) and it is common to make videos for all the songs on an album as they are essential for getting music onto TV. The videos often have narrative elements that display the theme of the lyrics and generally feature the singer with dancers in a nice location, and while many of them have a certain charm the production quality is generally low. The content and the style are not in themselves necessarily bad things, and they reflect a major

cultural difference to the West. However they also have an effect on the quality of music as a whole. Not only are the files low resolution, the costs associated with producing and manufacturing the videos mean that artists have less to spend on making the music itself.

MOBILE NETWORK OPERATORS

Mobile Network Operators (MNOs) own the fastest growing distribution channel of music in the region. Competition in their core telecommunication services has cut into their profits and led these companies to look increasingly at alternative revenue streams. Music is now seen as significant part of their business.

Artists are increasingly seeking exposure through MNOs but this often comes at a cost, as most have to deal with them through content aggregators who bundle games,

music and other content together for the MNOs. The deals offered by both the MNOs to the aggregators, and by the aggregator to the artists, are both structured in favour of the contractor - small margins and large volumes - rather than working for musicians. Nevertheless, many are keen to be present on these platforms so accept the terms. Because intellectual property rights are often unenforced, artists may not see any payment filtering back to them. In a region where first steps to tackle basic issues such as physical piracy and counterfeiting are not taken, it's easy to see why the complex challenges of these new industries are avoided by politicians, and why companies such as the MNOs who have no business interest in stronger legislation, enforcement and equitable returns for musicians, make no noise.

SCANDINAVIAN INFLUENCE

Many Scandinavian cultural organisations operate in the region, from NGOs to governmental cultural bodies. These organisations have been working on capacity building over a wide range of issues including musicianship, recording techniques, stagecraft and in copyright. There have traditionally been strong ties between Denmark and Kenya, since the days of Karen Blixen: Danish organisation Culture Connect operates in Nairobi and has brought a variety of training programmes as well as producers to Kenya, including acclaimed dancehall and reggae producer Farfar. The Swedish organisation Selam was established by an Ethiopian who has settled in Stockholm and is now operating in Ethiopia, Uganda, Kenya and Tanzania, delivering long term capacity building projects alongside promoting concerts and shows back in Sweden.

The profile of East African music in Scandinavia is much higher than in the UK: musicians like Makadem and Winyo have toured extensively in Sweden and Denmark. Ties between Europe's largest festival Roskilde in Denmark and Sauti za Busara in Zanzibar are also strong and have been forged over a number of years.



ETHIOPIA

Written by Guy Morley with additional support by Girum Mezmur

INTRODUCTION

Ethiopia is the largest of the three countries visited and in many ways the most distinctive. It has a different geographical axis, a singular history and a distinctive musical culture. In many ways it has more in common with neighbouring Sudan, South Sudan, Djibouti, Somalia and Eritrea than it does with Kenya, Uganda and Tanzania.

Addis Ababa is by far the largest city in the country with a population in excess of 3 million people. The Omoro regional centre is Jimma and is of a typical size for significant regional cities at around 200,000. Addis is a vibrant city with a lively music scene that includes a healthy traditional sector, vibrant pop, much jazz and even some avant-garde and alternative music, influenced by the small expatriate community and Ethiopians returning from abroad.

Two of the major ethnic groups in Ethiopia are the Omoro and Amhara from which derive the main languages, but there are over 80 languages spoken in total, giving an indication of the complex ethnic makeup of the country. Ethiopia, despite all this diversity, remains a very integrated country.

The 1970s - 80s saw the Durg communist regime under Mengistu, which faltered as communism collapsed in the Eastern Bloc. Those days were a bad time to be a musician as a nightly curfew stopped most music. The Ethiopian Peoples' Revolutionary Democratic Front (EPRDF) eventually ousted the communist regime and remains in power today. Politics is still occasionally controversial and although Ethiopia is a multi-party democracy there has been international criticism about how the opposition is treated. There were many refugees that left under

the Durg regime; nowadays, along with other diaspora (often foreign educated), they are returning and help form the country's current vibrant scene.

OVERVIEW AND HISTORY

The music of Ethiopia is very diverse, with each of Ethiopia's ethnic groups having developed their own sounds, rhythms and styles. Some forms of traditional music are strongly influenced by folk music from elsewhere in the Horn of Africa. In North Eastern Ethiopia, in Wollo, a Muslim musical form called Manzuma has developed. Sung in Amharic, Manzuma has spread to Harar and Jimma, where it is now sung in the Oromo language.

In the Ethiopian Highlands, traditional music is played by itinerant musicians called Azmaris. In the cities Azmaris are less likely to be itinerant, but their historical

status still gives them a special standing. An analogy would be that of Griots in West Africa, and although status is not inherited through clan and family, in the same way an Azmari's calling is music and they are given respect by others for this in society. Azmari tradition is important. Their music underpins a passionate belief in tradition held by many Ethiopians.

Ethiopian music has a pentatonic scale, and an unusual mode. The instruments are unfamiliar to a western eye and ear: the Krar is a six-stringed lyre; the Masinko, a one-stringed bowed lute and the Washint, a flute. Ethiopian folk music may have borrowed from other countries in the Horn of Africa but there is little influence from the East or the rest of Africa as a whole. Most people consume music because of its lyrics and therefore Swahili or Lingala (Congolese) culture has never touched Ethiopia.

Local music is very distinctive and has its own melodic structure.

Tigre music for example uses fast 10/8 rhythms. Gonda on the other hand has fast 6/8 rhythms and a 13 bar structure and there is a good chance that this music could become popular outside of Ethiopia because it is so distinctive.

Ethiopian audiences consume a lot of music, much of it rooted in ethnic culture. It is popular to go to a traditional restaurant and listen to Azmari music and watch local dance, and this music is regarded as commonplace and a part of everyday life. Even the commercial scene is dominated by musicians who are heavily influenced by tradition, but who also bring in other elements too. Two of the biggest current stars Jano (a Rock band) and Teddy Afro (best known for his reggae fusion) have brought these genres to Ethiopian Music.

There has been much international attention on Ethiopian music and this is largely due to the release and success of Francis Falceto's Ethiopiques series on Buda Music. However it has had a profound impact in Ethiopia as well, revitalising interest in classic popular music of the 1960s and 70s and reinvigorating the Addis Jazz scene.

Many of the country's biggest names live, or have lived, abroad and the diaspora is a very supportive community for Ethiopian music. One of the main names from the Ethiopiques is Mahmoud Ahmed who now lives in the USA. He makes a good living playing almost exclusively to Ethiopian expatriates. Well-paid concerts throughout the diaspora are also available to Ethiopian-based musicians and this has an important role in stimulating, validating and sustaining the scene back home. It creates a pool of talented musicians

and an associated industry because there is income that can sustain people's careers.

Ethiopia's gifted musicians have developed through jam nights and through the Yared music school (where other music is taught alongside classical repertoire). The city also has a small number of good studios, such as Abegasu Shiota's, where music with high production standards is being made.

There are key people in Addis acting as catalysts; Heruy Arefe-Aine for example, a US college promoter who returned to Addis after living in the States. He started the Addis Festival and has brought many international artists to the country to perform. He has also helped others who have made a real difference to the scene to develop their own projects, including Francis Falceto and Terrie Hessels from the Ex who have in turn brought Ethiopian music to a

much wider international audience. Arefe-Aine manages a pragmatic balance in producing his own events, gaining sponsorship and securing partnership with the city. He is able to broker international partnerships including Summer Stage in Central Park in New York.

Outside of teaching and making money from playing live there are very few other ways for musicians to make a living. Royalties and publishing income does not exist. In Ethiopia CDs are almost always pirated and while there is legislation to prevent this it is not enforced.

KENYA

Written by Guy Morley with additional support by Ketebul Music

Kenya was the focus for much of the research for this report and therefore the information in this section is the most in-depth and comprehensive. Much of the information gained is specific to Kenya, but there are many instances of commonality with the other countries. It is interesting to note that during the research visit Kenya was celebrating 50 years of independence from British colonial rule and this celebration seemed to be colouring much of the collective thinking encountered.

OVERVIEW AND HISTORY

An ethnic divide splits Kenya and because music and song is very much an expression of language, tradition and cultural identity this affects their music industry, with inter-ethnic tensions often playing themselves out within the success and fortune and popularity of music. Currently this means the

Luo and Luhya are stereotypically pitted against the Kikuyu and Kalenjin. Whilst largely managed and channelled these tensions do occasionally spill over. Most Kenyan's rise above these issues but it would be fair to say that there is occasionally mistrust along ethnic lines about those in leadership roles.

Kenya had the largest and most developed music industry in East Africa. In the 1970s the major record labels all had outposts in Nairobi. Along with these labels came an infrastructure that supported a burgeoning scene of promoters, A&Rs, managers and publishers. The scope of the industry would have been familiar to those working in international markets from more developed countries. However in the late 1970s and 80s this infrastructure began to crumble. One-by-one the major labels withdrew and Kenya began producing its own music on a DIY basis, using the old pressing

plants left behind by the majors. The centre for the scene was called River Road where many studios and music shops were located, alongside the public bus stands, which brought a ready supply of people keen to buy 7" singles and later cassettes and CDs.

The predominant Kenyan sound was Benga which influenced music across the whole African continent. Benga whilst being the most well-known and influential is not the only Kenyan style, there are many others that were perhaps more regionally/ethnically popular across the country, including M'chungwa, Mugithi, Isikuti. It is important to note that Benga has had a profound impact in nearly all Kenya's ethnic groups including Kalenjin, Kamba, Kikuyu, Luhya as well as the Luo, who were its originators.

Kenya has taken in influences from a variety of other cultures: from the Coast where the Arabic/Taarab

sound is popular from Mombasa to Dar es Salaam; southern influences from South Africa are also strong with Kenya being more predisposed to the South than to Western influences – be that from black American culture or from West Africa. Along with much of East Africa, Kenya was also heavily influenced by Congolese Rumba. Many of these influences still play out in Kenyan musical culture today: South African beats and bass-lines still have big impact in contemporary music, both secular and gospel; Benga is still the most popular form of music consumed in rural areas and in the working class areas of the cities.

GEOGRAPHY, ETHNICITY, CLASS AND MUSIC

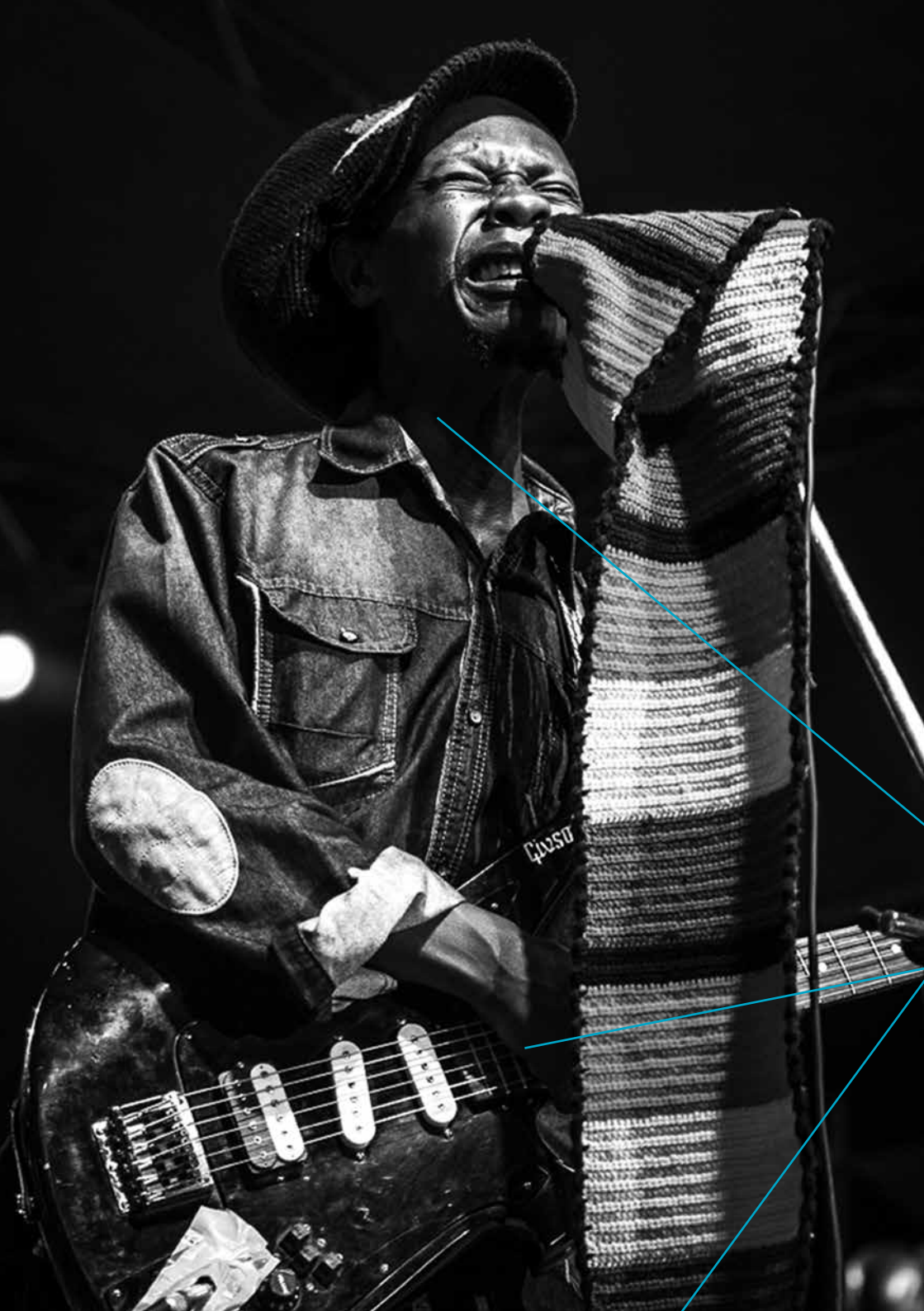
The middle classes music taste tends towards Neo Soul, hip-hop, Pop and youth culture. They have transnational tastes but ones that

can occasionally be middle-of-the road and they make up a small but higher yield (ticket-paying) market. The upper classes are even more international in their tastes and have access to money so are able to access the music they wish (and also stand a better chance of being successful in the industry infrastructure). Both of these are largely urban – where mainstream international pop flourishes alongside local music aimed at specific ethnic tastes. Rural and working class markets have stronger traditional and regional tastes; reggae and hip-hop are also popular with these groups.

Nairobi remains the most important cultural centre in Kenya, most media is based there and there is a very active nightlife. Mombasa is also important but its music scene tends to cater for a visiting tourist crowd more than a local one. As many of those tourists who go to the coast

are Kenyans, Mombasa music tends to provide a microcosm of the rest of the country: a musician from a western region like Nyanza who is popular can easily find an audience in Mombasa.

Kisumu is Kenya's third largest city and is on the shores of Lake Victoria. Historically its musical significance belies its size, as it is the centre of the Luo and some Luhya communities. The Luo have arguably had the largest impact on Kenyan music as both Benga and more recent styles like Ohangla have originated with them. Other important areas include Kakamega, which is more Luhya, Machakos which is more Kamba and Kericho, which is more Kalenjin. It's interesting to note that old style Benga is no longer played much by the Luo, who have adopted much more of a rumba sound in Benga International and Ohangla. Benga is alive and well and very popular



with the Kamba and Kalenjin communities. Ken Wa Maria is Kamba and a good testament to how popular Kenya's own sound still is.

The generational divide is significant as many older Kenyans prefer and consume music with a strong Kenyan identity; either their own ethnic identity or popular musical heritage, which is the East African version of Congolese Rumba. For Kikuyu it would be Mugithi, a Kikuyu style very similar to country music and played by people like Salim Junior or John DeMathew.

Each ethnic group has its own cultural hallmarks including language, rhythm and harmony that can make up distinct ethnic genres. When it comes to genres that transcend ethnic divides such as Benga and Ohangla, the music is distinguished by language and by the harmony.

Until relatively recently much of this traditional music has been ignored or even rejected wholesale by a younger urban generation. There are two factors that have changed this trend: urban, youth, rebel music has aged and become middle class and commercial -therefore it has lost much of its credibility; secondly the current confidence and debate about Kenyan identity has meant that people are looking for something distinctive in their music and popular culture.

POP, NEO SOUL AND THE URBAN MIDDLE CLASS

Hip-hop and R&B has become the mainstay of the commercial pop industry in Kenya, as in much of Africa, finding a base in urban centres and with the middle classes. Until recently it was dominated by American influences but a growing African confidence has taken hold and Nigerian influences now

dominate. Neo soul has a particular hold on popular music and there is a slightly more-middle-of-the-road aspect to mainstream pop. Typical audiences would expect to pay up to 1,500 KES (around £10) for a ticket and this is well out of the reach of the majority of Kenyans (to go and see Ohangla or Rumba entrance could be as low as 100 KES or 70p).

Many middle class Kenyans are interested in other African music and will go to see Ethiopian Jazz or Malian Kora musicians and will expect to pay a reasonable ticket price if they feel it reflects the value of the artist. There are only a few venues in Nairobi who cater for this kind of show, such as Carnivore, Choices and the TreeHouse.

Music and the audience for it in Kenya is demarcated along a number of lines, being overlain with class, age, geographical and ethnic divisions. Promoters of live music

have to be mindful of the make-up of their audience and all of those interviewed were acutely aware of where their audience comes from as well as the relative challenges of their market. Rashid Jibril, Blankets and Wine, and Rift Valley Festival all said that a major barrier to promoting was finding a crowd prepared to pay enough. They all felt they had to balance promoting progressive music, with originality and a distinctive feel, with the less imaginative but more popular tastes of the middle class.

NEW GOVERNMENT – NEW POLICIES

The new Constitution promulgated in 2010 could have a profound effect as cultural impact assessment now needs to be a part of all new policy. The 2013 elections have also brought the recent years of power sharing to an end; there are many issues facing the government and many strategy

and policy announcements have yet to be expounded or implemented. However the new government does seem to put music and culture more at the centre of their thinking than their predecessors.

It places culture as a foundation for nationhood, valuing all forms of cultural heritage from all ethnic groups. It also requires the state to promote culture and the arts as well as demanding legislation to protect intellectual property. Enforcement of legislation has been an issue in the past and therefore the government not only needs to enact primary legislation it also needs to enforce it.

Kenya has also signed up to an extension of the ambitious UN Millennium Development Goals set at the turn of the century, with Vision 2030 establishing a series of development benchmarks to achieve by the year 2030. Therefore some political pressure can be brought

to bear to make sure the elements relating to music and the arts are not forgotten.

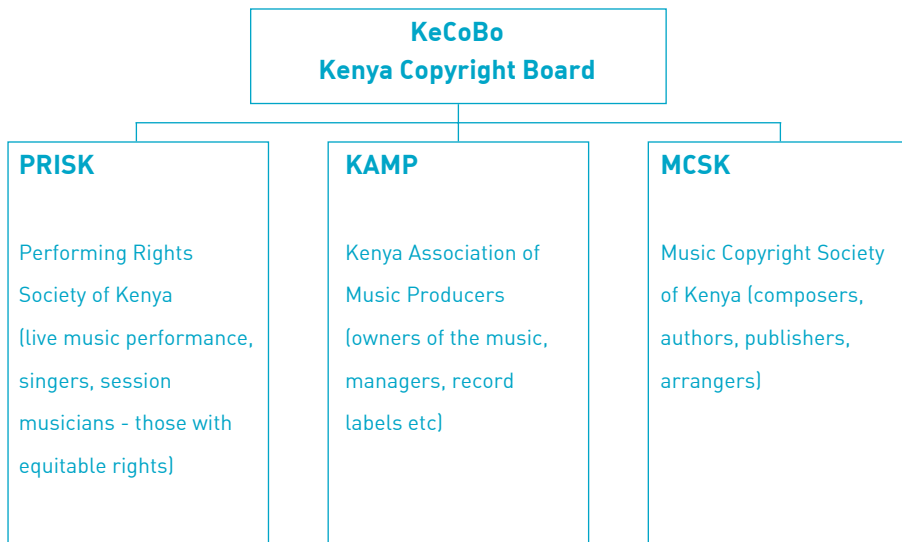
INTERNATIONAL ARTISTS IN KENYA

There are very few promoters who risk bringing international musicians to play in Kenya as costs are high, in terms of fees and international flights. There is also a 4% royalty due to collection society MCSK for foreign artists; VAT of 16% needs to be paid on tickets and all foreign musicians need work permits. Kenyan musicians and audiences need to experience more international artists to broaden tastes and also to acquaint them with the standard that is required to succeed internationally. Generally most Kenyan acts would not be ready to play internationally but there are notable exceptions such as Ayub Ogada.

INTELLECTUAL PROPERTY AND ROYALTY COLLECTION

The Kenya Copyright Board (KeCoBo) has statutory responsibility for the regulation of all intellectual property (IP) including that relating to music. KeCoBo are an important tool to ensure that the music industry meets the objectives in line with Kenya's Vision 2030. KeCoBo currently manages and licenses three organisations:

KAMP does not represent 'producers' as defined by the UK understanding of the term; a Kenyan 'producer' is the person who gets a musician's work to market. In the UK a producer would be the person who is responsible for masterminding a record and is more closely linked to sound production (probably defined as a musician or engineer in Kenya).



RWANDA

The 20th anniversary of the 1994 genocide was commemorated in 2014. Nearly a million people (over 10% of the population) were killed in 100 days of bloody murder in a conflict that deeply affected neighbouring Burundi too. The subsequent victory of the RPF (Rwandan Popular Front) has brought stability to a country that could have been ravaged by on-going conflict. The population numbers rose quickly after the murders, as many Rwandans returned home after years of exile as refugees in neighbouring countries. But the effects on the communities in Rwanda were severe and the demographic impact is startling: 70% of the Rwandan population are under 30 years of age. Thousands of children were orphaned and large numbers of people suffered conditions brought on by the trauma of the violence.

Before the genocide French was the official second language, but since then it has been supplanted

by English. Canada has a major connection to Rwanda, partly because Lieutenant-General Roméo Dallaire was the UN soldier who tried in vain to get the UN to intercede in 1993 and also because Canada has the dual languages of French and English.

The arts, including music, have been used for social change and re-asserting confidence in national culture, and some NGOs have instigated community arts programmes. The manufacture and selling of crafts for example has given employment to many people (especially women) who would have had very little access to income-generating activity.

Many refugees from the genocide (and the decades of build-up which preceded it) are involved in re-establishing arts and culture in the country, and some are becoming key-players in a fast, developing sector. Alongside those who have returned there are others involved

who still live abroad, in the UK, Belgium and Canada.

Rwandese diaspora artists are impacting on European pop music culture with artists like Barbara Panther or Stromae becoming major acts. Hip-hop artist Shad has also made waves in Canada, with two highly acclaimed albums. The success of these artists is not going unnoticed in Kigali; local festivals like KigaliUp are providing a good platform to develop arts work in the region. Like the other East African Countries, Rwanda has a current trend for hip-hop, R&B and Neo Soul – heavily influenced by Nigerian pop. There is strong influence in music from neighbouring Congo, and Reggae also remains very popular.

Rwandan traditional music and dance are very distinctive and Rwanda has a vibrant traditional culture. However, two decades on from the genocide there is a national debate starting about whether traditional music is being lost

from Rwandan culture and about the challenges it faces from the influence of western music.

Rwanda has a lack of arts spaces but some organisations like Intore Culture and Music Centre have a reputation for engaging in music as well as the visual arts.

There has been an effort to mix the contemporary with the traditional, and Canadian efforts have brought exchanges to the Kigali Arts Festival.

As with the rest of East Africa, Rwanda suffers from a lack of infrastructure and development including:

- **Low levels of entrepreneurship**
- **Lack of touring opportunities**
- **Low sponsorship levels**
- **Lack of venues**
- **Lack of professional musicians**
- **Lack of instruments and equipment.**



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Words and Pictures: A Forum for Visual
Verbal Artists from the Underground

Zanzibar

SESSION
Duo

TANZANIA

Written by Hilda Kiel and
edited by Guy Morley

INTRODUCTION

Tanzania is a large and diverse country, with more than 120 ethnic groups. Dar es Salaam is the main urban centre and the home for most of the music industry activity. Music industry infrastructure is still very much in the development stages, and efforts to control copyright issues or to establish musicians' unions have met with little success. The enforcement of laws is theoretically possible but in practice little is done. Tanzania, unlike other countries in the region, has an Arts Council, Baraza La Sanaa La Taifa (National Arts Council Tanzania) (BASATA), however many artists feel it is hindering not enabling musicians.

The organisation, promotion, sales and income for live musicians in Dar es Salaam are dominated by a few successful entrepreneurs. The city has a plethora of formal and informal creative industry clusters including

music studios, venues, government organizations, NGOs, festivals, promoters, producers etc, as well as the pirates, street peddlers, youth gatherings, bars and dance clubs. The colourful and vibrant musical scene is very loosely organised and few musicians have yet been able to achieve international fame.

TRADITIONAL MUSIC AND CURRENT TRENDS

Across Tanzania, the music scene is dominated by Bongo Flava – Swahili rap and hip-hop that enraptures the young generation and which draws huge audiences at festivals like the annual 'Fiesta'. This festival takes place over three months in all the major cities throughout Tanzania, and its concerts fill entire stadiums. Much has been written about the significance of Swahili rap in relation to social structure, politics and the youth movement. Even Tanzanian politicians have discovered the

power of this music to mobilise the masses. For example, the Kigoma All Stars brought together thousands of people in the Kigoma region in 2012 in order to promote the Chadema political party.

Live music is a central aspect of people's lives, especially in the suburbs and rural areas. As in many parts of Africa, gospel music and R&B remain important. Taarab, ngoma and reggae are countrywide performance styles, which also have very special and localised audiences. Many of these styles exist outside of the mainstream and media coverage, and they are confined to localised areas and special audiences. Their originality attracts attention and one of these groups – Jagwa Music – has achieved international fame, a fact that is changing perceptions among some musicians about what could be commercially viable.

Promotion of music is dominated by radio airplay. Radio is therefore considered a key marketing tool and as such no royalties are paid for airplay. Indeed, radio stations actively promote artists that are under their own management and charge hefty fees for others. Clouds Fm and sister company Prime Time Entertainment are the most business-savvy and successful business enterprises in the music sector; they have created something of a monopoly and therefore have provoked much criticism from musicians in recent years. To counteract this monopoly, musicians have come up with creative strategies to market themselves: one such idea is to give a new song to the bajaj drivers (small motorized rickshaws) who then make the song popular in the districts they are operating in by playing it wherever they go.

MUSIC EDUCATION

Supporting enterprises (such as music management, music production, music education and music practice) only exist in rudimentary form. Music has never been part of the school curriculum. Many producers and studios exist, but few excel in production. Churches have filled some of the role that missionary schools had in music education, and the army and police brass band, as well as the boy scouts, also train young musicians. These, together with the madrassas, are the main sources of formal music education and training. Any other music training is acquired through self-learning.

There are a number of private initiatives such as the Sauti za Busara Festival, the Umoja Center in Arusha, Dhow Countries Music Academy (DCMA), Music Mayday, Music Crossroads, Maisha Music,

Trinity Promotions and Nafasi Arts Space which are working to help develop aspects of the industry and infrastructure, but this support is neither systematic nor sustained. Though each of these can record considerable success and temporary impact, it remains to be seen how much the overall music economy will be affected. Curiously enough, the Sauti za Busara Festival now attracts an 80% foreign rather than local audience, and Music Crossroads has reduced operations significantly, perhaps due to a reduction in funding. Local initiatives that address and attempt to remedy the situation at hand are few and far between.

UGANDA

Written by Guy Morley with
additional support by Bayimba

INTRODUCTION

The majority of the Ugandan population has a low-income base, with the average income less than \$1.50 a day; however this average hides the fact that it has a developing and articulate middle class and a very young population, with 75% under the age of 35. There are over 80 languages spoken in the country and many different ethnic groups, but none dominate or form an overwhelming power-base. In this respect it has more in common with Tanzania and Ethiopia than it does with Kenya where ethnicity is one of the defining issues.

Ugandans feel they have been making popular music that has strong roots relevant to local culture for some time, and consider that the debate currently taking place in Kenya happened in Uganda years ago. A good example of this would be the prevalence of the Adungu (a

traditional harp-like instrument) or the Nanga (a kind of zither) both of which are commonly heard in contemporary popular music. A one-man guitar style called KadongoKamu is popular in Uganda, although little is known of this music outside of the country.

OVERVIEW AND HISTORY

Compared to Kenya and Tanzania, Uganda has a less developed music infrastructure, in respect to both artists and the industry that supports them. This is due to a complex series of factors, such as the proximity of large African markets as well as the instability that affected the country in the 1970s and the 80s. The music scene of Zaire in the 1960s and 70s had an enormous impact on a generation's tastes, so much so that this music still survives in the rumba of bands like Afrigo, who fuse this with Ugandan Kidandali, creating a music that is still very popular today.

With such a young population it has taken many years for the industry to develop to where it is today. The relatively small size of the country means that many musicians know each other well and there is a current trend to collaborate and work across music genres; this means something of a melting-pot is created and many Kampala-based artists are finding confidence in their abilities. In recent years this confidence and creativity has spilled out and Ugandans have had a significant impact on the music of the region.

TRADITIONAL MUSIC AND CURRENT TRENDS

Traditional music remains popular with rural communities and Uganda has a plethora of distinctive instruments, which can also be heard in contemporary popular music. There is also a very healthy local reggae scene.

Two international organisations have been working to promote regional and traditional music in Uganda: Singing Wells from the UK who have been specialising in field-recording in rural areas; and Selam, whose initial projects were aimed at helping the localisation of hip-hop, though they have recently been facilitating capacity building work (audio production, copyright knowledge) through the support of Swedish International Development Cooperation Agency (SIDA).

Some UK labels have picked up on obscure but cool local music scenes and some of Uganda's music could fill this niche and find a route to international markets. These styles could include Larakaraka music from Gulu or Bukusu Music from the North East Mbale region. Alongside Kandongo Kamu, another native popular music is Kidandali. In their contemporary forms they are both fused with reggae and ragga and

would mix well with the Nigerian sound.

The term 'world music' often means the same as fusion music in Uganda and some younger artists have had international success in this area, such as Herbert Kinobe who has become famous for playing the West African Kora. He is now adapting his fusion style into something more Ugandan, using thumb pianos and the Adongo (Ugandan lyre). Very influential in this scene is KazKazazi (one of Bayimba's directors) who is a good producer, a great guitarist and an expert on Ugandan music.

THE STATE OF THE INDUSTRY

Most artists have to self-manage and the few management companies that exist, like Bayimba, have to pick and choose very carefully who to take on. There are few live opportunities, so artists are pushed into promoting their own shows.

Where things are moving forward is in working regionally, and festivals like Sauti Za Busara and Sawa Sawa do book Ugandan music. There is a growing scene of venues, festivals and other places to see music and this is helping to support and nourish the industry. There also appears to be a growing demand as others are moving into Kampala to promote, such as Blankets and Wine from Nairobi.

Until very recently most artists used playback (backing tracks sequenced and played from a computer) and many musicians interviewed felt this had created a skills gap: either the musicians are 45+ or they are young and may not have had enough experience to have fully matured. This skills gap is something of an issue when putting live and studio bands together. All the artists interviewed felt that there was very little industry in place to support them and all agreed that live work

was the only way to earn money, with CDs being a means of market promotion not a way to earn income.

There are a good number of studios in Kampala, at least half a dozen able to record musicians and full bands. However, virtually every other aspect of the industry is in need of development and support.

ROYALTIES AND PUBLISHING

The Ugandan Performing Rights Society (UPRS) is the collection society representing artists and composers. They have been operating since 2006 and have had professional advice from the Norwegian Copyright Development Association (NORCODE).

As far as could be determined X Zone is the only publisher operating in Uganda. X Zone has acquired the rights to various back catalogues of work. The company is run from one

of the few surviving record shops in Kampala, but the owner is struggling to run the shop as well as utilise and market the music in the catalogue he manages.



UK CONNECTION TO EAST AFRICA

HISTORY

There has been a long relationship with African work across a wide spectrum of music in the UK. Influences and collaborations have occurred since the first waves of migration brought the Commonwealth to the UK. In jazz music the cross-over started with people like Ginger Johnstone, a Nigerian who settled in the UK after World War II. Johnstone was the sort of musician who had the kudos of playing with Ronnie Scott and many of the musicians who were part of the London scene, blurring the boundaries between rock, jazz and pop in 1960s counter-culture. When he was joined by South African musicians like Chris MacGregor and Abdullah Ibrahim and musicians from the West Indies, it is easy to see why London really was the place to be. During the 1970s African music fitted in with the punk anti-establishment counter

culture and labels like Rough Trade made a serious effort to release and distribute the music through their distribution chain. As punk gave way to post-punk, African music was still there for people who were looking for something different and it caught on with a non-London, non-diaspora audience. The early 80s saw an explosion of African bands touring the UK, many of them Zimbabwean, picking up UK agents and managers and record labels along the way.

The 1990s and 2000s saw a Francophone dominance of African music. At the same time back in Africa music was expanding and experimenting and the growing popularity of African-produced hip-hop and pop meant that there began to be a gap between 'music in Africa' and what a western world music audience expected of 'African music'.

CURRENT CONTEXT

Today that gap is more like a chasm. Afrobeats (a catch-all term for the current popular music led by Nigeria) can be as commercial and facile as pop comes, and it is almost completely at odds with the counter-culture sensibility of the previous world music generation. Equally the afrobeats cohorts would find world music tastes radically at odds with their own and would find the whole thing backward-looking.

The hugely popular music is sweeping Africa and is fuelling a revival of the industry as it generates income (through sponsorship, endorsement, downloads, gig fees and ticket sales). There is a large and growing audience for this music in the UK, especially in cities which have many first and second generation diaspora children. There is interaction between the UK and African scenes, but much of this goes

unnoticed by the UK 'music industry' as it is outside their orbit.

Over the years it has largely been French agents, labels and industry who have become the international facilitators of African artists in European territories and often in the rest of the world. There are some notable exceptions. For example francophone artists like Baaba Maal is signed to UK label Island (Palm Pictures) and has UK industry around him. Other artists from communities with large UK diasporas also have a significant UK base such as Fela Kuti. However it is interesting to note that Fela's youngest son, Seun, opted for a French manager and agent. One might surmise that he (and others) assumes the French are best placed to get him into Europe and international success. The net result of all this francophone support is that it has been far easier for UK promoters and festivals to book African artists from the francophone

regions and therefore it has been these artists who have become widely known.

30 years on from the inception of 'world music', the market is a very different place. African artists' ability to draw large audiences is dramatically reduced and a younger generation, raised on almost universal access to the music of the world and a bamboozling array of choice through the internet, no longer identify with the marketing and marketed notions of 'world music'. In East Africa things have changed as well; there has been much more attention focused on the region from Europe, particularly the UK, than there has been for a long time. The unique evolution and heritage of the East African sound is now gaining focus and attention, not only through the cool compilers of retro African sounds, but also the unusual traditional music of the Krar and Nyatiti. Within pop,

younger East African urban artists have not yet had the impact of the Nigerians, but it's only a matter of time before someone finds a formula and breaks through. UK producers and promoters are starting to visit the region and in the not too distant future East African artists will be appearing on the new Grace Jones and Basement Jaxx albums. Soundway Records are also set to release a second compilation of Kenyan and Tanzanian music.

A leading agent for African artists felt that 'world music' has become something of a 'dirty word', the world has changed and audiences are much harder to come by and so promoters will only be able to offer small fees. There are multiple causes for this but it means that touring East African artists in the UK may not be possible on a commercial basis or if it is then there must be ways to activate an audience beyond the old touring model.

There is only a small diaspora of East Africans in the UK and they are therefore unable to generate the same box office or sales that Nigerians can and so the UK is not likely to act as an engine, driving the growth of the domestic market. If such markets are to develop the current rise in interest in music from the East has to be capitalised on and there is a need to look beyond simple bilateral arrangements between East African countries and the UK. The UK industry could be a vital link, investing in partnerships with artists and organisations in the East African region supporting them to enter and flourish in markets in the rest of Europe and globally.



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