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The Phonogram Industry in Zimbabwe

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Traditionally, the people of Zimbabwe have been devoted to song and dance and this has been carried into the Age of Industrialisation, industrialising music production as well, mainly through recorded music. Phonograms spread music to a larger audience, even to a certain degree outside Zimbabwe.¹ This essay attempts to give an overview over the music industry in Zimbabwe. It will follow the outline of Roger Wallis and Krister Malm's study *Big Sounds from Small People — The Music Industry in Small Countries* (Wallis and Malm 1984) and its continuations (Wallis and Malm 1990, 1992). The basis for these works are the views held by, among others, Unesco and the International Music Council that "cultural activities related to one's own heritage play a vital role in enriching the quality of life for individuals, groups or nations as a whole" (Wallis and Malm 1984: 19).

Wallis and Malm consider the international music industry to consist of three levels: the international, the national and the local level (Wallis and Malm 1984: 20). They investigate the flow of both music and money between these levels, and have shown how both music flows from smaller countries in the world into centres such as the USA, the United Kingdom, Germany and France, generating profits in those same centres. I am interested to see if this applies to Zimbabwe as well.

In Zimbabwe, there is no such thing as a local record company. That is not to say that it is no regional difference or interaction. Ethnic variations between Shonas and Ndebeles can also be heard in music, and different regions have different musical traditions and preferences. This essay, however, focuses

on the national and international levels, proposing regional differences as a field for further study.

To cover the whole flow of music and money created from music in a society, Wallis and Malm (1984, 1992) found different activities to be important: the origin of music in "performance activities", the spread of music through "non-performance activities" such as records and the important role of broadcasting, and the flow of "secondary incomes" through national and international copyright associations. I have followed these in the outline of this essay. While concentrating on recorded music, I have included brief sections about live music activities in Zimbabwe and the money-collecting agencies.

The research was carried out in Harare in April 1995. Most of the information stems from interviews with 13 different informants who were chosen to try to cover the whole process of record making, from the musician, through the various functions of the record company, to the retailers and the agencies collecting copyright royalties. Some interviews were taped, while at the request of the informants, others were not.

Live Music Activity

No one can really know how many bands there are in Zimbabwe, but the usual guess is around 300. The Zimbabwe Music Rights Association (ZIMRA) numbers 439 composers (although a handful of them are Zambians and Mozambicans) (Interview with a ZIMRA representative, Harare April 1995). There are, therefore, large differences in income, ability and organisation. One of my sources who works as a musician puts it this way:

There is a big class difference of the musicians in this country. You have the top class with about five people - Simon Chimbetu, Leonard Zhakata, Thomas Mapfumo, Oliver Mutukudzi, Leonard Dembo. These people sell more than 7 000 of each album. Then you have no middle class. Then you have all the rest who has got to have a side job and never can expect to earn a living as a musician (Interview, Harare April 1995).

Playing live is the main income for musicians in Zimbabwe. According to a former representative from the Zimbabwe Union of Musicians, a fairly successful recording artist would get about 10% of his income from record

sales, 5% from radio airplay, and the rest from live playing (Interview, Harare April 1995). Musicians play every Friday and Saturday night — for popular acts also every Thursday — and it is not unusual to play three or four hours without a break. Even musicians who are selling enough records to make a living, like Thomas Mapfumo, can be heard live three times a week in the Harare area.

This way of work has obvious negative effects on the music. The musicians get tired and playing becomes routine and less creative. There is no time for practice or creative experimenting with the music. As one of my informants points out, Zimbabwe is one of the few places in the world where you can buy two concert tickets for the price of an album (Interview, Harare April 1995). Why spend Z\$50 on a cassette with eight songs when you can hear the same musician live for several hours for half the price every week?

Record sales and royalty rates are, however, so small that they do not create sufficient income for the musicians. The income is often eroded through the hands of "middlemen". Modern band instruments are not manufactured in Zimbabwe and there is not a single store selling them in the whole country. To import instruments is so expensive that most musicians have to rent instruments for a percentage of each concert fee. Concert promoters, band leaders and agents are also noted for taking the lion's share of the money. There appears to be a great deal of distrust and hostility in the concert business and few people walk clear of accusations. Only about ten acts have a proper manager who actually look after their careers.

For several years there has been talk about forming a proper musician's union (Zindi 1985, Howard 1992). It is still a fact, though, that the existing Zimbabwe Union of Musicians (ZUM) is not functioning properly. According to a former representative from ZUM, all the leaders of the union have been more occupied with holding onto their positions than doing anything to help the musicians. In April 1995, the Harare branch of ZUM had not held a single meeting in more than a year. The result is that musicians do not believe that the union ever will be able to help with their problems of low wages, instrument owners exploiting them, long work hours and shows being cancelled with a few hours notice without any compensation (Interviews, Harare April 1995).

Recorded Music Activity

Ownership

Zimbabwe's music industry is unique in an international context. For the last twenty years there has been a steady movement towards concentration of the major record companies in the world into five large international conglomerates (SONY/CBS, Polygram, EMI, Time-Warner WEA, BMG/RCA). These companies control the bulk of the world's output, both in terms of number of records and in terms of sales (Burnett 1988, Wallis and Malm 1984, 1992). Although these companies have local branches in many countries, recording and promoting local artists for local markets, most of the revenue comes from the sales of international megastars. Michael Jackson is known everywhere and, though stunningly expensive to produce, his records are an important income for the whole of Sony Corporation due to enormous sales on the international market.

None of these big internationals have branches in Zimbabwe. Their music is sold by a licensing agreement with two local companies, Zimbabwe Music Corporation (ZMC) and Gramma records. These two companies are both owned by Zimbabweans, as are the two other record companies, Record & Tapes Promotion (RTP) and Vibrant records. Warner tried to establish a local branch in Zimbabwe in 1989, but the effort failed, and after six months they pulled out. So, in 1995, Zimbabwe is in the rare position in the world of having a locally owned duopoly on the record scene. However, according to Tony Hagelthorn and Dave Smith, who provided me with background information, this is a recent development (Interviews with T. Hagelthorn and D. Smith, Harare April 1995).

During the Rhodesian regime, two South African record companies set up local branches in Rhodesia: Gallo Records, which has branches all over Africa, and Teal Record Company Central Africa, owned by the big conglomerate Lonhro. Each of the companies had obtained exclusive licences from some of the international labels. All of the internationals were represented, some by Gallo and some by Teal. After independence, Teal produced records under the label Gramma to secure a double allocation of foreign exchange in the days of strict currency regulations (*Horizon*, February 1994: 43). Gallo figured that a more patriotic name might be good for business in the new,

independent country, so they changed the name of their Zimbabwean company to Zimbabwe Music Corporation.

In the mid 1980s, Gallo disinvested in Zimbabwe, and the local executive Tony Hagelthorn bought ZMC together with some partners. Gramma and ZMC merged their production facilities in 1988 in order to minimize production costs as both factories were only running at 20% of capacity. ZMC closed down their plant in Bulawayo and sold the equipment to Gramma with what Tony Hagelthorn calls "a very favourable deal" on production as a return (Interview with T. Hagelthorn, Harare April 1995). This "very favourable deal" was in fact greatly criticized in the music industry of Zimbabwe. The two record companies were acting like a duopoly in many people's opinion. Musicians complained of low royalties and difficulties for new bands in entering the record market. Retailers complained about their being little understanding of their needs. The record companies were accused of being interested only in money as, for instance, they did not spend anything on record promotion.

When ZMC's producer Mike Ralph decided to set up a new record company, RTP, in 1989, he found a great deal of support. Dave Smith is the owner of Music Express, Zimbabwe's largest music retailer. He described the situation as follows:

Using our strong retail base, ... we gave Mike Ralph the confidence to leave there and set up his own record company We gave them point-of-sale preference, we gave them privileges on promoting the product in store, we allowed a lot of leeway to our buyers to buy the RTP product. We did a lot of radio promotion, co-sponsorships. Where they paid minimum amounts, we paid maximum amounts and we managed to make this thing happen (Interview with D. Smith, Harare April 1995).

Mike Ralph brought along important artists such as Oliver Mutukudzi and the Chimbutu brothers from ZMC, offering them better contracts with the new company. These artists already had a big following among the record-buying public, and RTP managed to capture a considerable share of the market. RTP started out as a new independent record company, but after a while it also became clear that their freedom was quite limited. They do not have their own studios or record plants. There are independent recording facilities in Harare, but for record manufacture, RTP has to rely on Gramma.

After a few years, Ralph set up his own cassette duplication plant, but his company still co-operates closely with ZMC and Gramma out of mutual interests. Andrew Moyses described this as RTP being “held ransom”, and “forced into line” by the two others (Interview with A. Moyses, Harare April 1995). RTP has become much more like the two others in their way of operating. Most observers still describe the record industry as a monopoly situation. That has also been the development for the last few years.

In 1992, Gramma records was bought by Zimbabweans. The takeover involved several people, and was conducted secretly (Interview with T. Hagelthorn, Harare April 1995). Two of Gramma’s Zimbabwean executives, Julian Howard and Dennis Kung, became the new owners.

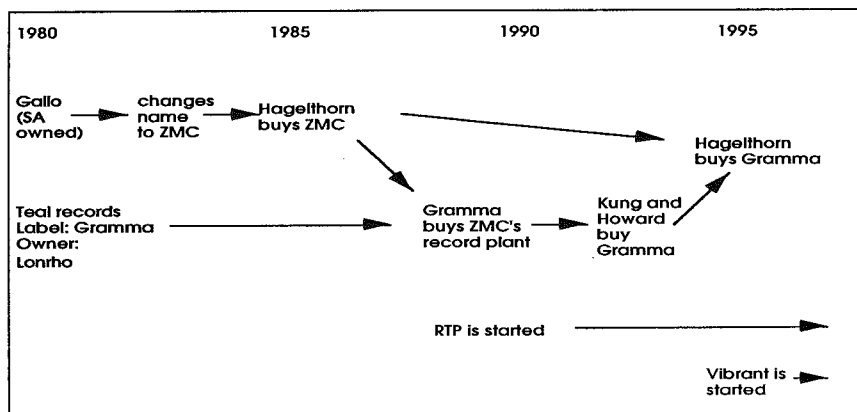


Fig. 1: Timeline – Major changes in record companies in Zimbabwe 1980-1995

However, Gramma soon found itself in trouble, losing a lot of money after some bad tactical moves in the shrinking market. To protect his “very favourable deal”, Hagelthorn bought Gramma together with another secret group of shareholders. Dennis Kung was bought out in the takeover, but it is generally believed that Julian Howard still is one of the owners of Gramma. Tony Hagelthorn now holds 30% of the shares in both Gramma and ZMC.

Hagelthorn is both owner and head of the two companies, which share the same buildings and production facilities, but each have their own departments of A&R (Artists and Repertoire), sales and production. The two

companies claim to be competing, but to most people, they function as one (*Horizon*, February 1994: 43). They merely maintain an illusion of competition to satisfy the international labels they licence. The international big four certainly are not interested in being kept together to maximize Hagelthorn’s profits as they want to compete. This is why Tony Hagelthorn is eager to keep up the image of two different companies. In his own words:

[Gramma] now has got its own [sales] reps, it’s got its own administration, it’s got its own accounting, and shortly it will have its own managing director. Totally separate! We don’t want them together. We need the competition. The big labels need to see that they are in competition with other labels (Interview with T. Hagelthorn, Harare April 1995).

Andrew Moyses sees this as a “smoke screen” and believes that, with ZMC and Gramma co-operating, it will be even more difficult for the smaller record companies to compete.

Vibrant records was formed in early 1994. David Smith and Music Express were in at the start, but, according to him, they were pressured to pull out. Without the direct support of Music Express, Vibrant has had a hard time. According to Smith, they simply do not have any very good artists. Although they provide the artists with better royalties than any other company, and while that is admirable, this does not make it easier to make a profit on their operation. In April 1995, they were experiencing serious difficulties. While they were looking into alternative means of operation at this time, they were not producing new records (Interview with D. Smith, Harare April 1995).

Another company worthy of notice is one more of David Smith’s operations, Africa Sounds. This is a small-scale operation solely selling cassettes to tourists. Their catalogue contains 24 titles, sold at hotels, art galleries, curio shops and the like. Africa Sounds does not regularly record music itself, but relies on buying masters from other companies. On their rack, tourists will find special compilations of music from popular artists and pure recordings of “traditional” music, made by ethnomusicologists.

The last mentioned component is very interesting. All record companies sell popular contemporary styles like Sungura, Jit, Chimurenga or Rhumba, but only Africa Sounds are taking care of Zimbabwe’s unique traditional musical heritage — to cater for tourists! Tourists are not interested in the popular contemporary Shona music, they want the “ethnic” sound of rural

folk music, which is not recorded or sold by the other four companies. Ironically, in this way, the tourist industry is actually both working to save Zimbabwe's cultural heritage and to make it available.

The most recent development in Zimbabwe's phonogram industry is that the Zimbabwe Broadcasting Corporation (ZBC) plans to open a record company (Interviews with D. Smith and T. Hagelthorn, Harare April 1995). ZBC have many studio facilities and are now planning to utilise them to produce records. They have contacted ZMC/Gramma to stike a deal on manufacturing and distribution, but the established companies deliberately set the price high so as to force ZBC to drop their plans. Instead ZBC has looked for alternative ways of manufacture and, in the meantime, it has actually recorded a few bands.

According to several of my sources, this has led to some concern in the music industry in Zimbabwe (Interviews, Harare April 1995). Firstly, ZBC will have free access to radio and TV which are the main promotion channels for new records. The record companies are obviously concerned about the competition. Secondly, the market for records in Zimbabwe is quite stable in terms of revenue, as we will see in the next section. The amount of money people spend on music is decided by their personal economies, not by the quality or availability of records. So, if ZBC introduces many new records into the market, record sales as a whole will not increase, but each record will sell fewer copies. Therefore, the entry of ZBC into the record market might be harmful to many of the artists if care is not taken. Most records are only just making a profit and if record sales drop, the companies will not be so inclined to take risks.

On the other hand, many observers think it would be a good thing if the duopoly were to be broken and a new distribution company formed. ZBC is a parastatal and can probably afford to keep a record company running with losses for a while. That might be what is needed to secure a share of the market, or it might just sustain the operation for enough time to spoil the market for less popular acts, in the way described, before ZBC decides to pull out. David Smith claims that it is in order to avoid damage to the market that he has offered to set up a distribution company and a consultancy service for the new ZBC record company. As of April 1995, ZBC has not responded to the offer (Interview with D. Smith, Harare April 1995).

A few records are produced independently each year. Musician John Christou was the first to do this in 1991. When he had showed the way, a few others followed. The most important was that the highly successful Thomas Mapfumo decided to go independent because of dissatisfaction with the established companies. To produce records independently is problematic, though. To manufacture records, the independents either have to form an agreement with Gramma, or have the records and tapes manufactured abroad, mainly in South Africa, thus adding to costs.

Making records

Most of the bands in Zimbabwe trying to catch the attention of record companies in order to sign a record deal. Even if most recording artists do not make that much money on records, it is possible to earn a lot if you have a hit. Leonard Zhakata earned Z\$50 000 in royalties in the first three months after his record-selling hit *Mugove* was released (*Parade*, March 1995: 26).

In the 'northern world', bands in search of a recording contract bombard record companies with demo-tapes. This is not the case in Zimbabwe. There are few recording facilities, and the prices, about \$250 per hour, are too high for bands to pay. The studios are also situated in Harare, so bands from out of town have to pay for transport as well. Gramma receives a few tapes each year, but the technical quality is usually very poor (Interview with a Gramma representative, Harare April 1995). The advent of cheap, small studio equipment like DAT players has helped the situation somewhat. A few musicians have obtained such equipment and are helping other bands to produce cheap demos.

Instead of listening to demo-tapes, the record companies in Zimbabwe invite artists to auditions a couple of times a year, using studio downtime, and thus providing both a studio and proper equipment for the artists. For many musicians, this is the only time they get to play on good instruments. Subsequently, the acts which are believed to have commercial potential are signed. To be signed, the act must be ready to record. They must have at least 6-8 songs that are good enough to release, and the band must be well rehearsed. If one group member is found to be inferior, then the act will not be signed, or they may be told to come back and try again with a better band. The record companies do not try to build artists, change the members of groups, create new groups or find good substitute musicians. A musician I interviewed

put it this way: "Never has a young artist suddenly made it in Zimbabwe. That happens all the time in the rest of the world but here — no way!" (Interview, Harare April 1995).

In northern countries, artists are paid an advance when entering a record deal. This advance is "recoupable, but not returnable". If the record fails, the record company has to pay for production and the advance. If the record sells well, the record company takes the artist's royalties until production costs and the advance are recovered (see for instance Chapple and Garofalo 1977). This system assures an income for the artists, and it puts a pressure on the record company to market the records well in order to raise sales. In Zimbabwe, no advance is paid and there are only royalties from sales. These royalties are subject to negotiations and have actually risen considerably since RTP entered the scene. Now, most artists are paid between 8 and 15% of the retail price, (Interview with a Gramma representative, Harare April 1995). According to Tony Hagelthorn, the percentage is often linked to sales. He gave an example of an artist earning 15% royalties on the first 5 000 records, 17% on the next 5 000, and so on, reaching a limit of 20%, "which is more than any international would give" (Interview with T. Hagelthorn, Harare April 1995). This is the opposite situation of the advance system, giving the artist an extra incentive to raise sales. The record companies also have to pay 5% royalties for the holders of so-called "mechanical rights". Mechanical rights are the rights of a song's composer, lyricist and publisher to receive an income when their song is mechanically reproduced, recorded and manufactured.

Musicians in Zimbabwe have always claimed that record companies are cheating with the sales figures and deliberately lowering the numbers in order to pay less royalties to the artists (Interviews, Harare April 1995). Dave Smith of Music Express rejected these rumours. His chain buys all their records from the companies with no return option. Accordingly, they have no interest in lowering sales, since they already have paid their royalty share to the company. Smith says that the actual sales figures in his stores show that the record companies' sales figures probably are reliable:

I have told the musicians to come in and look at my figures. Some of them have actually done it, about seven or so. They sit here a couple of days, and then walk out, humbled. You know, if the record companies are cheating, I would love to get them, but they're not The reason for this is the staff

in the shops. You see, the musician goes into a shop and asks how his record is doing. And the salesperson doesn't want to tell him that what he has made is bad, so he says "it's flying". Then the musician goes to other stores and gets the same answer, and believes he is selling thousands. And then he receives a check for \$27 and says "hey, you're cheating me!" (Interview with D. Smith, Harare April 1995).

It is also the case that musicians, among them Thomas Mapfumo, have travelled abroad and found their records in shops in London and Amsterdam, without ever having signed a contract to give anyone export rights, and without ever receiving any royalties from sales overseas.

When Zimbabwean records are sold abroad, they are mainly sold in South Africa, but also to an extent in the United Kingdom. The Zimbabwean record company enters into a deal with a local company, giving away the master tape for a percentage of the sales' price, usually in the area of 15-20%, according to Hagelthorn. He said that most of the South African record companies are marketing Zimbabwean artists. The percentage that goes back to Zimbabwe is, according to Hagelthorn, split equally between the record company and the act (Interview with T. Hagelthorn, Harare April 1995). Several other informants said that artists almost never get any money from foreign sales. One source put it this way:

The most prolific Zimbabwean musician, who out of frustration has been dimmed, is Jonah Moyo. Jonah Moyo has sold more records than anyone. At last count, 15 of his albums had been released in South Africa. Each album has sold at least 50 000 units. Of course, he's got nothing to show for that. Because that money has not been paid (Interview, Harare April 1995).

In the UK, Zimbabwean records are released on a small label called Serengeti records. The label is owned by Mike Wells, who is African representative for the two multinationals EMI and WEA (Warner). He exports international records (meaning Anglo-American) to Africa, and takes records back to be released in Britain. When European companies reject some of these records, he releases them on his own label, Serengeti. Hagelthorn claims that Mike Wells get the same kind of deals as the South Africans, with royalties that are to be split (Interview with T. Hagelthorn, Harare April 1995). According to Andrew Moyse, Serengeti is doing quite well, but money is not finding its

way back to Zimbabwe (Interview with A. Moyse, Harare April 1995). This problem is felt the other way as well. When ZMC and Gramma produce records with foreign music, in most of the cases they obtain material through the international record companies in South Africa. The South Africans offer a selection of the international catalogue to the Zimbabweans, and the Zimbabweans pick titles from the list. ZMC and Gramma pay royalties to the South African companies (usually about 15-25%), who keep a percentage themselves, and send the rest to their mother companies.

Contracts usually bind the artist to the record company for a period of 3-5 years. Most acts produce one album a year in this period. With a small record market like Zimbabwe, recording costs are kept to a minimum. An album is usually recorded in two days, one day for the band, and the second day for vocals. Even if the more popular acts use more time in the studio, practising in the studio, experimenting and working to find the right sound is not the rule. One of the musicians I talked to, said that some albums had been made in only four hours (Interview, Harare April 1995).

The record companies have their own studios and their own engineers and producers on their payroll. All over the world, it is recognised that the producer has a lot to say when a recording is made. The producer is responsible for shaping the sound, hiring extra studio musicians and often contributes to quite a large extent in arranging the music. He or she also takes care of the record company's interests, making sure that the music will be popular and that it will sell.

In Zimbabwe, a handful of producers make all the records. Gramma, for instance, has two producers taking care of all their recordings. This of course leads to a streamlining of the music, making most of the music sound quite the same. Bands are also expected to copy the style of more popular acts. In April 1994, *Horizon* reported that Gramma had refused to record Franco Hodobo's new album, in spite of having signed him to a contract. Instead, he recorded it with RTP, but he had to negotiate with Gramma for six months before they released him from his contract (*Horizon*, April 1994: 47).

Selling records

Several informants emphasised that the market for recorded music in Zimbabwe is not a large one. Reliable numbers are hard to come by, but

according to David Smith, its wholesale value is Z\$30 million, or one and a half million units per year (Interview with D. Smith, Harare April 1995). Tony Hagelthorn estimated it to be Z\$20 million. He claims that his two companies, ZMC and Gramma, together manufacture approximately 750 000 cassettes a year, 220 000 LPs and 180 000 seven inch singles and import 45-50 000 CDs, adding up to a total of 1,2 million units (Interview with T. Hagelthorn, Harare April 1995). If these numbers are correct, the yearly turnover for the two companies must be a lot higher than the \$16-17 million Hagelthorn claimed. RTP is supposed to have some 20-30% of the market, and that should add up to a total of about 1,8 million units. Considering the above in light of recent wholesale prices, the Zimbabwean market must have a value of *at least* Z\$30 million, and a retail value of about 60 million Zimbabwe dollars.

This market is quite stable in terms of money spent. That means that a hit record will not boost the sales in a given period, but rather that it will just prevent other records from selling. People only have a given amount of money to spend on records, and it is this money the record companies compete for. Gramma learned this the hard way in the late 1980s when they started recording many more bands, reaching up to 60 acts a year. The recording costs multiplied, but the total sales stayed the same. The results was that unit sales per artist went down, with many of the records did not breaking even, and Gramma lost money (Interview with Gramma representatives, Harare April 1995).

Record sales have been dropping over the last four to five years. The combined effects of severe droughts in 1992 and 1995 and the economic structural adjustment programme (ESAP) have given people less buying power. In addition, record piracy has increased from almost nothing in 1993, to an estimated 30% of the total market in 1995 (Interview with D. Smith, Harare April 1995). Prices have also risen tremendously. Already in 1990, Julian Howard, then managing director of Gramma, complained about a large rise in production costs (Howard 1992: 31ff). When I met Hagelthorn, he told me that the costs of both vinyl and polysterene for record production had recently increased by 200% (Interview with T. Hagelthorn, Harare April 1995). This is probably due to the fact that vinyl records are becoming obsolete in northern countries and very few are still producing the vinyl needed.

The retail price of phonograms has also risen. According to Andrew Moyse, the price on a cassette has doubled over the last two years from around Z\$20 to Z\$50 in 1995 (Interview with A. Moyse, Harare April 1995). Tony Hagelthorn denies this, claiming that the wholesale prices were increased by 20% in September 1994, and by 15% in 1993. If not a doubling, this still is a 38% increase in two years. "Unit sales as a whole are dropping dramatically. We are only keeping pace with turnover by increasing the prices" (Interview T. Hagelthorn, Harare April 1995). The obvious question in response to this is whether increased prices not will lead to even more decreased sales, as people in Zimbabwe are still struggling with the effects of drought and ESAP.

In Zimbabwe, as in the rest of the world, most phonograms are losing money. Less than one third of the phonograms are profitable, and, of these, most are only just breaking even. According to Hagelthorn, the usual break-even point for a record is 3 000-4 000 units sold (Interview T. Hagelthorn, Harare April 1995). Two other sources, however, estimated the same break even point to about 500 to 1 000 units, depending on whether it is a LP, cassette or single (Interviews, Harare April 1995). In 1990, the managing director of Gramma, Julian Howard claimed in a paper that a single then has to sell 2 000 units to break even (Howard 1992: 36).

This confusion of numbers is typical of Zimbabwe's music industry. It is hard to know who to believe. Howard's estimate is consistent with Hagelthorn's, when one consider the five years of rising costs which separates them. In his article from 1990, Howard also presents many other statistics and this openness makes Howard reliable (Howard 1992: 38). The same type of statistics are a well-kept secret in 1995 (at least to me). One should think, however, that the sales manager of ZMC, Gordon Manyemba and the A&R manager of Gramma, Lazarus Tembo both need to know such numbers. How can Tembo consider which bands to sign if he does not have any idea of how many records they to sell before the record company starts to make money?

A record is considered a hit if it sells 3 000-5 000 copies and a very big hit may be in the region of 50 000 copies. The largest selling record ever in Zimbabwe is Leonard Zhakata's album *Mugove*, which according to *Parade* magazine had sold 100 000 copies prior to March 1995 (*Parade*, March 1995: 26). So, a break-even point of 500 instead of 4 000 means a lot of extra profit for the record companies.

In Zimbabwe, seven cassettes are sold for each LP record. Cassettes dominate the market in spite of a higher cost per single sound carrier and inferior sound quality. Cassette players are cheaper, more reliable and easier to maintain. Cassettes are assumed to live longer, as they do not bend in the sun or become scratched.

By April 1995, singles have become a fading market. This trend has been marked since 1985, but still some executives in the record companies denied the fact in interviews with me. "Singles are still very popular", said two of my informants (Interviews, Harare April 1995). The fact that Music Express had to cut down its single's hitlist in *Horizon* from top ten to top five do not mach these claims, though. According to Dave Smith, "there just aren't ten singles selling in Zimbabwe". In March, the number ten selling single sold a total of three copies in all of the 55 outlets owned by Music Express (Interview with D. Smith, Harare April 1995).

A representative of ZMC claimed that the company might have had low singles sales in the previous year, but the reason was the low number of songs being released. In 1995, ZMC was to release a larger number of songs as a part of their new strategy: this was to release singles from an album when the album began to fade as if to squeeze the last dollars out of the record (Interview, Harare April 1995). This is in fact the technique Sony uses to sell Michael Jackson's reords, and might very well work for ZMC too, but it will not change the trend of fading singles sales, which has been felt for ten years.

In his paper from 1990, Julian Howard shows a steady decline in the 7" single's share of Gramma's sales in the period 1985-1990. Cassettes rates grew in the same period, so the value of the total sales was actually constant (Howard 1992: 38). The figures for monthly stock counts for Music Express, which is the biggest retailer with a 40% market share, indicate the same story in the 1990s. According to Smith, the overall trend shows a rise in the cassette sales, a sudden drop in LPs in 1992 and a steady decline of singles, making cassettes the most popular sound carrier from 1994 onwards (Interview with D. Smith, Harare April 1995).

CDs have just been introduced on the Zimbabwean market, but only imported ones,² and they are very expensive compared to LPs and cassettes. An LP is sold for Z\$40, a cassette about Z\$50, and a CD for Z\$170-200. CDs have to be imported from South Africa or Botswana, since there is no

CD plant in Zimbabwe. Still, people in the music industry believe that there might be a market for CDs in Zimbabwe. Zimbabwe seems to be a very status-conscious society, and if CD players were to be sold at a reasonable price, CD equipment might very well become a status object.

If CDs become the usual sound carrier as in the USA and Europe, this will have severe consequences for Zimbabwe's music industry. CDs have to be manufactured elsewhere, and there is no record studio in Zimbabwe equipped for digital recording. If Zimbabwean music goes digital, it will also become more dependent on foreign technology. A total switch over to CDs is not very likely unless the price of CDs comes down to the level of the other sound carriers. This has not happened in the parts of the world where CD is now the dominant music medium. However, if CDs find a stronghold in the richer strata of Zimbabwean society, there is the possibility that popular local music will exist only in analogue recordings on vinyl and tape, whereas foreign music will be listened to from CDs. This might create a feeling that local music is inferior, and eventually change the strong position of the local artists.

Writing about American record companies, Chapple and Garofalo (1977), observe that:

The purpose of a record company is to make money The basic functions ... are to find artists, record and produce them, and then promote and market their records (Chapple and Garofalo 1977: 173-175).

The two Zimbabwean record companies have the same purpose, but the monopoly/duopoly situation results in their functions being rather different. Having had total control over the market for several years, ZMC/Gramma are used to having it their way. Marketing is cut down to a minimum and there is the assumption that the records will sell anyway. Advertisements in magazines are paid by the retail stores. Furthermore, artists also do a lot of marketing themselves, since Zimbabwean musicians have to give concerts every week to make a living. These concerts give publicity to the artists and, subsequently, to their records. Radio airplay is also an important way of selling records. The record companies give the radio disc jockeys free copies of new records and these records form some of the music output of ZBC's broadcasts. Most artists are very aware of the radio's record selling capacities. In the past few years music videos have also become an important marketing tool. These videos are produced by ZBC, but are paid for by the record companies.

The major international record companies are accustomed to a large return of unsold records from retail stores, but they accept this situation. The system sells records, as stores are more ready to try new artists when they know that there is no risk (Chapple and Garofalo 1977: 200). Record retailers in Zimbabwe have to buy all records wholesale, without any return option. This is a major limitation on the number of new artists being recorded, since the industry is less inclined to take a risk on a new act. The record monopoly does not care about this: it makes its profits on the few that are recorded. This system keeps record stocks low, too. Retailers cannot afford to bind up capital in large stocks of records. In reality, most small stores have only a small number of titles available, and a limited number of copies of these titles. The titles are hits — assumed bestsellers — which leave the shop quickly, giving income to the owner.

The market shares of the three record companies varies from month to month, but over the year the split is about equal, with RTP, Gramma and ZMC catering for one third of the market each. RTP sells only local music, while ZMC and Gramma rely on foreign records for a third of their sales. This means that record purchasers are "patriotic" with 80% of the records sold being local music. Of the dozen sample countries in Wallis and Malm's MISC (Music Industry of Small Countries) study (1984), the only country selling more local than international music was Tunisia, with local music catering for 60% of the sales (Wallis and Malm 1984: 112-117). Zimbabwe is an unique country also in this respect. Ten years ago, the situation was the opposite, with 80% of music sold being foreign. David Smith believes his company, Music Express, has been instrumental in the change, with its 55 outlets, situated in every small town in Zimbabwe:

And that is primarily because we managed to take music out to the people. The local music. Whereas before they never have access to it. Before, the sales were only centred in towns which catered for your up-market and, to bring in racial terms, to the white market. That's why it was this demand for international music (Interview with D. Smith, Harare April 1995)

Spinalong is the second largest retail chain in Zimbabwe. They still adhere to the "up-market" philosophy in their 17 shops which are located in the main cities. Each store has a large selection of international records, and usually has walls covered with CDs. Spinalong advertises in every issue of the magazine

Look and Listen, with a whole page music column carrying news and record reviews. Needless to say, these reviews are always positive, but more important is that the whole advert is exclusively about foreign music.

The record companies do not carry a large catalogue. After only a few years, are retailers offered old records at a reduced price. This is an only chance as unsold records are recycled if they are not sold in this round. In the process of making money, ZMC, Gramma and RTP take no responsibility to preserve a reservoir of old music for Zimbabweans.

Piracy

Illegal records and tapes are a great problem all over Africa. The proliferation of cassette recorders has made it easy to make multiple copies of a recording. In Zimbabwe, however, piracy was close to unknown until two years ago. The strict regulations on foreign currency made it impossible to import records from the large pirate factories abroad or to import blank tapes. In 1995, however, anyone is free to obtain foreign currency and buy blank tapes, and some pirates are even clearing illegal records through customs (Interview with D. Smith, Harare April 1995). These are produced in factories in Zaïre, the United Arab Emirates, Nigeria and East Africa. A pirated cassette sells for between Z\$20 and Z\$40 and can easily be bought at markets in the townships like the Mbare market, or on rural buses. Both local and foreign artists are to be found in pirate versions. Dave Smith estimates the size of the illegal market to be 31-32% of the legal market, and says that his company is losing Z\$4 million every year to pirates. He blames the record companies for not taking the problem seriously:

There are three factors encouraging piracy. One: availability. Two: the quality of recordings and packaging, and three: the price. The record companies are failing on all three (Interview with D. Smith, Harare April 1995)

Since 1993, Smith has been working to draw the attention of the record companies to the piracy problem. Recently, Zimbabwe Music Industry Association (ZIMIA) formed an anti-piracy committee with Smith as chairman. In March 1995, this committee presented a document called *Programme for a policy of action against piracy* in a bid to attract donors, among them the European development organisations like NORAD and SIDA. The committee plans to counteract what they believe are the three

main causes of piracy. These are insufficient law enforcement, inadequate penalties for piracy, and market conditions such as price and availability.

To attack the problems, the Committee plans to lobby Government for better copyright laws. Recent laws in Zimbabwe give protection for phonograms, but have proven to be a little ambiguous when interpreted in court.³ The Committee will also lobby for heavier penalties, and, probably most important, the imposition of a levy on blank tapes to drive the pirate's costs up, and channel money back to the creative people. There are also plans to run information campaigns about copy right in music for police, customs personnel and the public. Plans are also being made to investigate and prosecute pirates to make their activities riskier and drive prices up (Interview with D. Smith, Harare April 1995).

Money Collecting Activities: ZIMRA

Wallis and Malm state that what they term "secondary incomes" are becoming increasingly more important for musicians worldwide. Secondary incomes are incomes not from concerts or record sales, but from mechanical rights and copyright royalties from radio airplay, films and so on (Wallis and Malm 1992: 203). In Zimbabwe, this money flow is governed by the Zimbabwe Music Rights Association.

The Zimbabwe Music Rights Association (ZIMRA) is a non-profit organisation owned by Zimbabwean composers to protect their copyright. In 1995, the Association had 439 members. Members rights are anchored in the Copyright Act, which secures the author (composer) of the rights to reproduce, publish, perform, broadcast, diffuse and adapt his/her work (ZIMRA information leaflet, undated: 2).

According to a ZIMRA representative, the organisation has three employees operating from two small rooms on the sixth floor of a Harare office building. Administration costs are taken from licence fees. Then, 10% is set aside in a trust for musicians. The rest is split between the members according to actual record play, based on playlists from licence holders and the ZBC. ZIMRA thus issues licences to those who play recorded music in public, like discos and night clubs, and to concert promoters. In 1995 the fee is Z\$3 per musical event, an amount agreed upon though negotiations between the Hotel and

Restaurant Association and the Chamber of Commerce. In 1995, ZIMRA has some 800 licence holders. They have tried to request licences from shopping malls playing music, but the store owners threatened to stop playing music, and ZIMRA decided it was better that the music was played as it might help record sales (Interview, Harare April 1995).

My source within ZIMRA further explained that ZBC has a different agreement. In a court decision in an 1989 tribunal, ZBC was made to pay 2,25% of their yearly advertising income to ZIMRA. In 1994 this amounted to Z\$110 000 and the ZBC is by far the biggest contributor of money to ZIMRA. However, ZBC refused to pay any royalties until they were taken to court by ZIMRA in 1987. The broadcaster claimed that they were a national service and that the musician's role was to entertain and help to build the nation by contributing to radio and TV programmes. Music, and to a large extent international music, makes up the most of radio programming and the most popular TV programmes. These are the programmes that attract advertisers (Interview, Harare April 1995).

Although ZBC was making a lot of money on music, it was not honouring this in terms of actual payment. Finances from ZBC usually arrive late, and the playlists from the programmes which form the basis for the distribution of the money does not come in regularly. Many programme makers are not delivering the proper statistics. I picked a sample month, November 1994, and went through the statistics with a representative from ZIMRA. Radio 3, which almost exclusively broadcasts music, had on the 2nd, the 9th and the 27th of November 1994 produced statistics from six programmes, equalling 8 to 10 hours of the day's 19 broadcast hours. These were the three days with the most documentation. On several days only one programme was reported on. This means that the actual amount paid to each member of the association is quite random. The percentage paid overseas is probably fair as the amount of foreign versus national music on the different channels is quite stable. Radio 1 plays mainly foreign music, Radio 2 plays almost exclusively local music, and Radio 3 plays mostly foreign hits, but is obliged to play three local records each hour. Radio 4 plays less music, being an educational channel, but when it does, it plays Zimbabwean music. This leads to a situation where 41% of ZIMRA's royalties are paid overseas, and 59% to Zimbabwean

members. However, the split between the actual musicians is bound to be inaccurate, if not unjust.

This is a phenomenon that is common all over the world. Wallis and Malm cite an official in the English Performing Rights Society (PRS): "It's often much easier for composers' societies to collect money than it is to get rid of it" (Wallis and Malm 1984:170). The Association in Zimbabwe is linked by a contract to the PRS in London with each organisation protecting the other's rights in their area. All foreign works are licenced through PRS and playlists and royalties are sent there. This is an inheritance from Rhodesia as described below:

The PRS spread its activities throughout the British colonies (where British copyright law usually applied). When Britain gave independence to its colonies, the PRS was not so quick to disband its empire (Wallis and Malm 1984: 164)

Zimbabwe Music Rights Association protects the rights of composer, lyricist and publisher for each song. The usual split is one third each, unless otherwise agreed upon, though the maximum share for the publisher is 50% (ZIMRA Information leaflet, undated: 8). Publishing rights are rooted in international agreements and are recognised in Zimbabwe too. This has become just another way of obtaining money for the record companies. The protection of publishing rights was established in Europe at the turn of the century. Music publishing was then a costly business but sheet music was the main way of spreading music. Then, 50% of the income was a reasonable fee for these services:

Now that sheet music publishing is virtually dead, publishing consists mainly of paperwork, registering with a collecting society, signing contracts and occasionally paying out an advance (Wallis and Malm 1984: 167).

The record companies in Zimbabwe, as a routine, get recording artists to sign their publishing rights to the record company. In this way, composer, lyricist and publisher (record company) receive money for public performance of records. Musicians who do not compose do not. This system is not likely to change. PRS is a large and powerful organisation, and half of their board are publishers (Wallis and Malm 1984: 167).

Concluding Remarks

Internationally, Zimbabwe seems to be a rather unique country in that it has a totally national music industry, producing records for a market which buys 80% national music, a phenomenon which is unparalleled in all the countries studied by Wallis and Malm (1984). However, as this study has shown, this should not be taken to mean that Zimbabwean music is independent of international industry or economic constraints.

The national music industry is concentrated in very few hands. One man personally control two thirds of the recording industry directly, and has a large degree of control over the last third as well. In this respect, on a national level Zimbabwe mirrors what has been the development internationally: concentration horizontally in the formation of a few large companies which control the bulk of the market, and vertically in companies trying to control every part of the assembly line, from musical idea to record sales.

Wallis and Malm (1984) found music to be flowing from smaller countries in the world towards the centres. This is also the case for Zimbabwe. Foreign companies are buying Zimbabwean recordings and selling them on Northern markets. The amount of this flow is contested, and there is a general suspicion in the industry that record companies export more music than they report they do, while keeping profits to themselves. The flow in the other direction, from the centres towards Zimbabwe, is small but important. ZMC and Gramma rely on foreign music for 50% of their sales, and imported music generally gives better profits, as there are no recording costs involved, just reproduction and royalties.

The content of the foreign imported music is mainstream, international pop and country, generated in the international centres. Wallis and Malm (1992) found a trend towards a flow of musical content between localities, avoiding the centre. This phenomenon seems to be of little importance in Zimbabwe, with the possible exception of the influence of Jamaican reggae on Zimbabwean music.⁴

Wallis and Malm (1992) further report that copyright revenue which they call "secondary income" is becoming more and more important in the international music industry. In this respect, Zimbabwe is a less independent country. As opposed to the 20% sales share of foreign records, 41% of

ZIMRA's revenue is paid to London. Further, this flow is unidirectional; the revenue from airplay abroad is not of considerable value. This is due to the programming of ZBC which gives foreign records a larger share of airtime than they have in terms of sales.

Industrialisation has generated profound changes in the music of Zimbabwe, and there is a tendency towards increased dependence on western countries. In the "traditional" Zimbabwean society, music was a participatory phenomenon. There were no audiences in the modern sense and everyone took part in the performance. In a modern city, these forms are not valid to the same extent. Music is performed from a stage to a paying public. The old, rural, participatory musical forms have less meaning in the industrialised world of cassettes. To western tourists, however, recorded african music has become important signs of mythical Africa. This is evident when looking at the situation of Africa Sounds. For Zimbabwe, this has the benefits of documenting a musical heritage that is likely to dwindle if Zimbabwe becomes more and more "western". This is also a phenomenon where music is produced on the local level, sold on the international level, and generates income on the national level.

New performance situations have also brought changes to the music itself, for example to the use of instruments. Even Thomas Mapfumo, who is considered to play "traditional music", utilises electric guitars and bass, synthesiser, trumpet, trombone and saxophone in addition to the indigenous *mbira*.⁵ Even his drums – so central to African music – are foreign: a western-style drum set and a pair of the industrially produced, USA-made version of the Cuban congas. All these instruments, as well as spare parts, strings, drum skins, reeds and amplifiers have to be imported as Zimbabwe has no musical instruments industry. This is a fact which increases dependence on western countries.

The development within the phonogram industry can be described as a process of commercialisation. Music appears to be produced by the record companies first and foremost as a commercial commodity, rather than for its artistic merit. The phonogram industry is profiting by keeping costs as low as possible. This is achieved by rejecting advance royalties, keeping royalties low, and using short studio time. The number of artists is kept down, directly by only hiring a few acts, and issuing a small number of records, and indirectly

by refusing to take records in return from retailers. Musicians cannot expect to make a living on record sales alone. They often have to play several live shows a week to make ends meet. This leads to exhaustion, boredom and routine playing instead of creativity. The system thus sets up several constraints for the creative musician. As a consequence, capitalism is setting the terms of record production, not artistic values.

Notes

1. For the rest of this paper, I have avoided the term "phonogram" (meaning any carrier of recorded sound) most of the time, using the more common term "record" instead. "Record" might also be used meaning "vinyl disc", and in those cases "phonogram" or "recording" is used as the generic term to avoid confusion.
2. RTP actually produced a handful of CDs with local music, but it was no success, presumably partly because of flaws like in one CD that only had 4 songs on it.
3. Smith reports on a case where a man selling illegally duplicated cassettes on the Chivhu bus terminus was taken to court. The man was found not guilty, as the cassette labels did not identify the music (Smith 1995).
4. The obvious influences from other musical styles from the Southern African region, most profoundly from Zaïre and South Africa are not the kind of local to local interaction as Wallis and Malm found. Their interest are between styles that would normally *not* mix, as Finnish and Argentinian tango dialects, originating in two different peripheries.
5. *Mbira* is a traditional Zimbabwean instrument with sound producing metal keys.

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