The art of being different: exploring diversity in the cultural industries
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MULTIPLE AND SHIFTING GEOGRAPHIES
OF WORLD MUSIC PRODUCTION

(Submitted for review. Co-authored by Karin Pfeffer)
6.1 INTRODUCTION

This paper is concerned with mapping the transnational flows and spatial concentration in world music production, offering an insight into processes of cultural globalisation and their relation to place. The increasing circulation and diffusion of cultural goods and symbols is seen as an expression of the globalization of culture (Crane et al., 2002). However, while cultural content may transcend fixity, cultural production in general tends to combine a global circulation of outputs with the spatial concentration of creative and productive activities, (Scott, 2000, Hall, 1998).

The study of music production has a propensity to explore links between place and sounds and the exploration of music ‘scenes’ (Connell and Gibson, 2003, Kloosterman, 2005, Cohen, 1991). In the more specific case of world music, a separation in time and space between the origination of music and its loci of consumption is noted (Feld, 1994). However, to understand world music simply in a dichotomous way is reductive: a more helpful approach is to understand ‘its place within the complex and constantly changing dynamics of a world which is historically, socially and spatially interconnected’ (Guilbault, 2001).

Our paper departs from this point and takes world music as a case in point of the trans-local dynamics of cultural production and valorisation, interrogating the genre’s special relation to place. Utilising European world music charts since 1991 as a surrogate measure of the salience of global economic and geographical linkages in world music production, we offer an in-depth analysis into the clustered and transnational dimensions of world music production. Our research substantiates the claim that the valorisation of commodified musical content has traditionally been removed from its place of origin and centred on metropolitan areas in Western Europe and the USA, and goes beyond that to reveal the clustered nature of world music production. However, the paper suggests a growing diversification in the geography of production, with the emergence of secondary centres with an international and national orientation. This invites us to explore both the global interdependencies and the local specificities of cultural production, and in a more general perspective, the multifarious and interrelated scales cultural creativity and production networks.

We first turn our attention to world music as a unique case in the study of the relation between music and place. Next, we present our data, methodology and mapping. Adopting the perspective of the European world music charts, our analysis subsequently offers insights into and visual representations of the degree, direction and diversity of world music production over the last two decades. Finally, our study concludes with a discussion of the relation between music and place against the backdrop of globalisation and intimates directions for further research.

6.2 (WORLD) MUSIC AND PLACE

Hesmondhalgh, 1996, Negus, 1997, Scott, 1999, Power and Hallencreutz, 2002). This is associated to the more general tendency of cultural industries to concentrate spatially (Scott, 2000, Currid, 2007b, Markusen, 2004), but also to the connection of music to ‘scenes’ (Cohen, 1991, Kloosterman, 2005). While such clustering reflects the more general idiosyncrasy of a networked production system in the creative industries (Caves, 2000), it also results in a global system of critical nodes and sounding boards, articulating the reproduction of musical creativity beyond the boundary of the cluster itself. Major city-regions such as New York, Los Angeles, London, Berlin and Paris constitute sites of both cultural production and consumption, thriving on social agglomeration, proximity and density of social networks (Hall, 1998, Florida, 2002, Scott, 2000, Zukin, 1995, Lloyd, 2006, Currid, 2007b, Currid and Williams, 2010) and a critical infrastructure of actors shaping cultural production and consumption (Zukin, 1991). Besides being the loci of creativity, scenes are also the conflation of taste and genre makers and communities sharing particular musical preferences (Currid, 2007a, Florida and Jackson, 2009).

World music poses interesting questions about the relation between place and music. Within this genre, ‘local’ music is being transmitted and received far beyond the local, regional and national boundaries (Connell and Gibson, 2003), earning the genre the equivalence to ‘sonic tourism’ (Taylor, 1997). World music is by nature ‘transnational’ and ‘translational’ (Guilbault, 1993), implying a sense of border and physical distance, as well as a form of decodification and symbolic diversity. The spatial distance between the loci of creativity and its consumption is a crucial component of the vision of ‘authenticity’ of the world music product, and part of its added value, allowing for the illusion of a still preserved otherness (Connell and Gibson, 2004, Connell and Gibson, 2003). Yet this authenticity generally hides processes of intermediation and commodification in the ‘West’, converting distant sounds into a familiar and intelligible, consumable item for a wider consumption (Taylor, 1997, p.31) and taking consumers across any boundaries of taste they may have (Haynes, 2005). However, the translation of music has been associated with its transmutation of music to suit wider, ‘Western’, audiences. The paradox that emerges is that Third World performers could effectively gain better access to audiences in the West when they conform to Euro-American based intonation and rhythms (Guilbault, 1993, Connell and Gibson, 2003). This genre thus provides an illuminating example of how geographical scales and distanced actors are intrinsically combined in networks of cultural production, valorisation and consumption.

The mediated nature of the genre is evident in a brief overview of the evolution of the term world music itself. World music broadcaster and magazine editor Ian Anderson gives an account of the ‘fateful meeting’ in June 1987 when several label managers, journalists and festival promoters got together with the aim of broadening the appeal of their repertoire and adopting ‘world music’ as a ‘campaign/media title’ (Anderson, 2000). This helped create a consumer base for world music which extended beyond the (ethno)musicology experts, while also reconfiguring the way music was recorded, curated and promoted (Feld, 1994).
The displacement of processes of cultural valorisation of world music away from the place of origin of music reveals a complex spatial boundedness of world music. On the one hand, it reflects growing processes of cultural globalisation, with the circulation of cultural goods outside their national boundaries. On the other hand, the co-location of actors specialized in researching, reviewing, producing, staging and consuming world music creates trans-local nexuses of mediation and diffusion, as explored in the study of the Paris world music cluster (Brandellero and Halbert, Under review). The interaction of the two defines a ‘cultural world system’ (de Swaan, 1995 cited in, Janssen et al., 2008 p.720), whereby certain places become central in setting standards for and granting recognition to cultural products.

6.3 METHODOLOGY AND MAPPING

To understand better the relational nature and geography of world music production, our paper uses a surrogate measure of the economic linkages in the realization of musical outputs within this genre, notably the World Music Charts Europe (hereafter WMCE). The WMCE have been coordinated by the European Broadcasting Union since 1991, and are based on monthly nominations by a panel of world music DJs from across Europe. The monthly nominations are collated and a yearly chart is produced, ranking entries according to the number and relative positioning of nominations throughout the twelve months. The nominating panel is constituted by DJs working for a specialized world music programme or radio, and its membership currently stands at 45, having started with 11. The monthly top five is also presented on the WOMEX website, an indication of its recognition by the world music industry itself. The WMCE charts offer a large longitudinal dataset (N=13,970), which contains information on ranking, album title, author, country of origin and label on which the album was released. We checked all entries for accuracy, filling any informational gaps, and we enhanced the dataset by adding the location of the label (city and country) and removed entries for which the label and/or label location were untraceable. Label locations that fell either within the outer ring of the larger cities such as Paris, London, Johannesburg, Los Angeles and New York, or that were considerably close to the centre (less than 10 km) of smaller or medium-sized cities were considered part of the same urban area. Santa Monica and Hermosa Beach were assigned to LA since these locations are enclosed by LA metro region. All nominations were geo-coded by country of origin of the artists and the location of the label associated to the albums, and the data was analysed using Geographical Information Systems (GIS).

The information on the country of origin of each album author was analysed further to distinguish three categories: individual artists with a single country of origin; individual artists with multiple countries of origin (coded as ‘hybrid’); and multiple artists with multiple countries of origin (coded as either ‘hybrid’ or ‘various’ respectively, depending on whether the album was the outcome of a collaborative effort, or simply a collection of independent works). The location of artists belonging
to the first category was geo-coded at the centre of the stated country of origin. Entries pertaining to the ‘hybrid’ and ‘various’ categories were geo-coded to fictitious locations ‘H’ and ‘V’ respectively, to allow for visualisation of all observations using the ESRI world map. The data on the country of origin of the artists allowed us to specify the direction of international orientation in world music, by considering the representation of specific countries in the charts. Moreover, it enabled us to explore the most frequent links between a country of origin and the label location.

For this paper, we zoomed into the three sample years: 1992, 2000 and 2009, giving us a total of N=2114. We explored the data from four perspectives, using insights from an in-depth study of the Paris world music cluster (see Brandellero and Halbert, under review) to comment further on our findings. Firstly, we examined the extent to which production of world music highlights global flows of music and a concentration of valorisation in larger metropolitan areas in Europe and North America. Secondly, we interrogated the data on the geographical focus of the top world music label locations emerging from the charts, exploring the extent to which we can see the centrality of certain places in the production of world music. Thirdly, we explored the degree of geographical orientation by label location, unpacking the national and international profile of emerging label locations. Finally, we investigated the centrality of sounds originating from specific countries within the world music genre and explored variations in time.

6.4 GEOGRAPHIES OF WORLD MUSIC

Our analysis suggests a changing geography of world music production over the years. The ratio of nominations to number of labels per year displays a 22% increase in the number of labels in 2009 compared to 1992 (eight percent in 2000). The number of countries where labels are based shows a 10% decline in relative terms in 2000, but a 24% rise in 2009 compared to 1992. We also note a decentralisation of label locations, with an increasing number of places appearing in the charts (a 41% increase in label locations in 2009 compared to 1992, 17% in 2000). Further qualitative and longitudinal analysis across all years since 1991 could establish whether we are observing the emergence of new labels in new locations.

We now turn our attention to four further key findings emerging from the data, visually supported by six maps presented in the Annex. Figures 1-3 show the global flows of world music by country of origin of musicians and the spatial concentration of label locations in 1992, 2000 and 2009. Figures 4-6 illustrate the dominant linkages between the countries of origin of artists and label location, additionally displaying the volume of nominations per musicians’ nationality.

Global flows of music to label locations in Western Europe and the USA

The mapping of world music flows (see Figures 1-3), tracing a link from the country of origin of an artist to his or her album’s label location, highlights a distinct movement of music from countries of origin of musicians in the Southern hemisphere to urban
locations in the Northern. While this is by no means a surprising finding (see Taylor 1997), the extent to which music travels outside the country of origin of musicians can now be measured to allow for comparison. While we understand that artists may be influenced by music from a variety of countries, our review of the charts suggests the equivalence between main musical influence and country of origin (unless otherwise coded, e.g. hybrid).

Delving deeper into the analysis, the most obvious feature is the dominance of a top tier of world music producing countries, if we take the number of nominations by label location as a surrogate measure. While 58 countries received nominations in the charts in 2009, compared to 36 in 1992, the profile of countries contributing the most to the production of world music has remained relatively stable. The UK, USA, Germany and France top the charts in all three years. Looking at the geographical spread of label locations, we note a flourishing of places of production across Europe in 2009, reflecting a higher number of nominations associated to labels based in Eastern and Northern Europe. In the USA, we observe a concentration of nominations connected to labels along the East and West coast, but a relative paucity in the rest of the country.

Further analysis is needed to establish whether the changes in technology over the last decades are providing the basis for a shift to new places of production, as anticipated by Leyshon (2001), who analysed the impact of digitalisation on the music industry. Generally speaking however, the entrepreneurs of world music remain located in Europe and North America, with South America, Africa and Asia remaining primarily exporters of musical creativity.

Centrality of places

In general, the labels are located in larger metropolitan areas (see Figures 1-3). Their prominence in the production of world music has been explained through their connection to diasporic networks and migratory flows (Connell and Gibson, 2003), but also their function as places of musical acculturation and the development of affiliations across socioeconomic, religious and ethnic boundaries (Bohlman, 2002). More generally, the finding confirms metropolitan areas in their role of ‘nodes of location-specific interactions and emergent effects in which the stimulus to cultural experimentation and renewal tends to be high’ (Scott, 2000, p.4).

Four metropolitan areas, London, Paris, New York and Munich, are the most frequent label locations in 1992 and 2000, with Berlin taking up Munich’s position in 2009. Over the three years, we note a drop in the number of nominations from the top cities, with the exception of 2000. This translates in the cities’ labels’ aggregate contribution of nominations per year going from 45% in 1992 to 35% in 2009, while reaching 49% in 2000. These metropolitan areas however clearly continue to dominate the nominations and have a higher degree of connectivity to countries of origin of artists.

For example, Paris’s budding local economic development project centred around world music is revealing in this sense: the initiative has its roots in the city’s century-long positioning as coveted performance platform for touring and migrant
musicians, combined on the one hand with dedicated institutions active in preserving and showcasing disparate musical traditions and on the other with a wider, highly networked, economic infrastructure of record labels, promoters, media, venues (Brandellero and Halbert, Under review).

A ‘second tier’ of locations increases over time, including new cities with an international orientation. Here again, we are looking at locations within Europe and North America. In 2009, we see for instance a higher number of cities with ten or more nominations (16 cities), compared to ten cities in 1992 and 2000. All these cities are situated in either Europe or the USA, with the exception of Tokyo, which is only included in this category in the first two years observed. Brussels and Amsterdam consolidate their position, more than tripling their count of nominations between 2000 and 2009.

Three of the top world music producing cities in our analysis are also the locations of the highest concentration of labels. London has the highest number of labels in all three years (44, 49 and 46), followed by Paris (37, 35, 44) and New York (22, 32 and 37). Comparing all locations over the three years, we see that the trend is towards an increase in the number of labels per location. The increase is double or more in Amsterdam, Barcelona, Brussels and Istanbul, but not as steep for German cities overall, with the exception of Berlin.

The hierarchy of production in world music echoes Sturgeon’s work in identifying hierarchies of clusters within specific industrial sectors (Sturgeon, 2003), with a few centres of world music production playing a key standard-setting activity in production and consumption. The role of gateway of certain places reflects not just a position of prominence in the production of world music via the strong presence of record labels, but also corresponds to local nodes of appreciation and consumption, as the case of Paris illustrates (Brandellero and Calenge, 2008, Brandellero and Halbert, Under review). Here, the evolution of a world music cluster currently counting over 700 organizations benefited at different historical moments from the impetus of a variety of actors, some promoting the diversity of the world’s music from the perspective of cultural heritage preservation, to a more recent instrumentalisation of world music to contribute to wider social inclusion goals (Brandellero and Halbert, Under review).

Degree of orientation by label location

Figure 7 below shows a breakdown of nominations associated to the top cities by country of origin of the artists, using a cut-off point of fewer than five nominations per year as a criterion for inclusion in the ‘other’ category, to improve visibility. Interestingly, the data shows the relatively similar international orientation of the top nominations per city, while differences emerge in the degree of orientation towards particular countries. Moreover, for all cities, the highest level of nominations originates from national music.

Berlin and Munich are characterised by a relatively high degree of fragmentation, with higher focus on the hybrid and various category compared to outputs from specific countries, and the prominence of the ‘other’ category in almost all years. London shows strong ties with Brazil, Mali and Senegal in 1992, Cuba in 2000 and Mali once again in
2009, with significant nominations originating from the USA in all three years. Paris displays strong links with DR Congo and Cameroon in 1992, and stronger musical links to Algeria than any other city in all three years. At a first glance, there are fewer exclusive ties (i.e. 100% of albums from one country of origin linked to a single label location) in 2009 compared to 1992.

The diversity of music produced in the top label locations partly reflects the diversity of musical influences and artists present in these cities. The analysis of the place of residence of 434 musicians connected to the Paris world music cluster, either through a record label or agent contract, shows that just under half are based in Paris. Interviews with musicians, label and venue managers pointed towards the central role of being present and connected to the city in enhancing the visibility and promotion of artists’ careers. Moreover, the analysis of the combination of countries of origin for the nominations categorised as hybrid shows that in the majority of cases the label’s country location features alongside one or more other country of origin. Moreover, the hybrid category is to a large extent produced in the largest cities. This would appear to point towards the flourishing of collaborations in highly diverse urban environments. Notwithstanding the kaleidoscope of musical traditions and influences found in large metropolitan areas, parallel production chains, with their own economic infrastructure and venues, continue to reflect a separation respectively between traditional “authentic” sounds, more contemporary world rhythms, and musical expressions springing from
local migrant communities bearing strong ties with music scenes in the country of origin (Brandellero and Kloosterman, Under review). Further analysis of all years could further unpack the roots of musical linkages and influences in colonial histories, contemporary migration flows and diaspora ties.

The strongest links between countries of origin of musicians and label locations can be seen in Figures 4-6 below. Our data shows that in 1992 all the strongest connections (above four nominations per year) were between music originating in Africa and South America and labels located in London, Paris and New York. There are two exceptions: Cuban music had strongest links with labels in Havana, and music originating from Western and Northern Europe and North America had connections within their respective (sub)continents. The picture stays mainly unchanged in 2000, with Havana disappearing as a strong link and Sao Paulo displaying a relatively strong link to national music. In 2009, we note the appearance of strong links between national music and labels located in Budapest, Istanbul, Sao Paulo and Warsaw, while music from Africa and South America continues to display outwardly ties to labels in Europe and the USA.

Taking the degree of international orientation as a criterion, we differentiate here two additional categories of cities: second tier cities with a mixed national and international orientation, and cities with an exclusively national orientation (Istanbul, Sao Paulo, Johannesburg, and Luanda by way of example). The latter locations are generally found outside Western Europe and North America. The new label locations are generally situated within countries from which a high number of world musicians originate. While our data does not enable us to explain this, we posit that this is connected to a strengthening of the local production capacity, improved technology, and relatively cheaper costs of production.

Degree of orientation by year analysed

Interestingly, while the term was initially employed to denote a binary relation between the ‘West’ and the ‘rest’, our results show that over time, the USA and the UK have consistently topped the WMCE charts by number of nominations. This had been previously noted by Taylor (Taylor, 1997) in his analysis of the Billboard charts for the early 1990s, where the author suggested music sales generally reflecting ‘fairly unchallenging music’ (Taylor, 1997, p.9). It also shows the prominence of styles such as Celtic and Country and Western music, as a staple part of the world music genre.

The geographical variation in world music output reflected by the charts suggests that the content of the category varies greatly over time, subject to changing trends and tastes (see Figures 4-6). We note a decline in the diversity of countries of origin of artists featuring in the charts (10% relative decline in 2000 and 2009 compared to 1992). In the early 90s, musicians coming from D.R. Congo (formerly Zaire, until 1997) featured prominently in the charts. Promoted mainly by Paris-based labels, the number of albums produced by artists from this country sharply decreases over time, which can probably be explained by the conflict and political instability in the country. Significantly, the ‘Hybrid’ category has a significant presence in the three years studied, particularly among the top 40 entries, possibly an indication of a shift towards a more
dynamic understanding and appreciation of world music. Some countries appear to be more prone to spurring collaborations (UK, USA and France for instance). This might partly be due to the presence of migrant musicians and minority musicians. Further analysis of the hybrid category can help shed light on inter-cultural collaborations as a facet of cultural globalisation.

6.5 CONCLUSIONS

Our study articulates an aggregate picture of world music production and shifting trends over the last two decades. We have discovered important transnational dynamics in world music production, and significant temporal shifts in loci of production and in the genre's musical content. The use of music charts also allowed us to map shifts in the geographical origin of world music, observing changes in tastes and trends and the rise and decrease of popularity of music from different countries.

The analysis of our data suggests that music entering the European world music charts is mainly produced by labels located in Western Europe and the USA, while nominations attached to labels located in South America, Africa and Asia remain sparse. Within these continents, the prominence of key cities is apparent. While this does not imply a paucity of musical production in these continents, it would suggest the continuing relevance of processes of cultural valorisation centred on mediators in the West. The prominence of key production centres combines highly specialised and dense economic infrastructure of actors, attracting renewed flows of hopeful and established artists from diverse backgrounds, as the case of Paris shows. Over the three years studied, we see a diversification of centres of production, with an increase in label locations in Europe and North America. The concentration of cultural industries in large city-regions like London, Paris, New York, Berlin and Munich does not merely result from positive externalities beneficially impacting production activities (as in the cluster approach) but it would appear to reflect the metropolitan areas' ability to draw upon and combine the multiple scales and networks of cultural production.

Within the centres of production, we distinguished between locations with a high degree of international orientation and locations receiving nominations exclusively for national music. The centrality of certain cities in the production of world music originating across the world has been highlighted, pointing towards their continuing relevance in the cultural world system as sites of mediation and cultural valorisation for both national and international cultural content. More qualitative and longitudinal research into the chronology of labels could help establish whether we are indeed witnessing the emergence of new labels in new locations, or whether the output of existing labels is getting increasing recognition in the cultural world system.

The fluctuation in tastes and trends suggests a challenge for highly specialised centres of production, in terms of their adaptation capacity to changing consumption patterns. While this paper provides only an initial analysis of our data, it offers promising research avenues, particularly in relation to the label-level response to shifting trends and the greater voice of hybrid musical forms and inter-cultural collaborations.
REFERENCES


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2 This approach echoes the content analysis of business news put forward by the GAWC group, insofar as it uses a subjective measure (editorial choice) to measure relative business salience.

3 We opted to analyse 1992 as our starting year due to the significantly lower number of nominations in 1991 (100 compared to 632, 665 and 817 for 1992, 2000 and 2009 respectively). This allowed us to maximize the number of observations at the beginning of the WMCE’s history.

4 Research was carried out in 2010, based on a database of world musicians connected to the Paris world music cluster, assembled by the Institute for Contemporary Music (IRMA) in Paris.

5 This is also confirmed by interviews with label managers in Paris (Brandellero 2008).
Geography of world music flows and label locations in 1992

Concentration of music production
- 1 - 5
- 6 - 10
- 11 - 25
- 26 - 111

Link to label location
- origin of artist

Source: WMCE data 1992; ESRI basemaps, modified
Geography of world music flows and label location in 2000

Concentration of music production:
- 1 - 5
- 6 - 10
- 11 - 26
- 27 - 103

Link to label location:
- origin of artist

Source: WMCE data 2000; ESRI basemaps, modified
Geography of world music flows and label location in 2009

Source: WIGCE data 2009, ESRI base maps, modified

Figure 3
Figure 4

Geography of nominations by country of origin of artist 1992

Frequency of nominations
- 0
- 1 - 5
- 6 - 10
- 11 - 25
- 26 - 46

Intensity of linkages
- 1 - 4
- 5 - 9
- 10 - 14
- 15 - 22

Source: WMCE data 1992; ESRI basemaps, modified
Figure 5
Figure 6

Geography of nominations by country of origin of artist 2009

Frequency of nominations
- 0
- 1 - 5
- 6 - 10
- 11 - 25
- 26 - 115

Intensity of linkages
- 1 - 4
- 5 - 9
- 10 - 14
- 15 - 19

Source: WMCE data 2009; ESRI basemaps, modified