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ERASMUS THEMATIC NETWORK FOR MUSIC

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Working paper: Literature research overview on Recent and Ongoing Changes in the Music Profession

Profession Working Group

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I. Introduction/Approach

“Music is an awkward subject; it does not easily present itself for study. It often leads us astray; it tempts us into the overly–abstract, the axiom, or the generalisation. It is my position that small–scale empirical research projects are now required in order for us to unmask the secrets of the illusory triangulated relationship between music, technology, and the individual agent — a relationship that is veiled by ‘naturalization’ and ‘normalisation’, it is, in other words, embedded in everyday life. These studies need not bow to traditional research practices; in fact it is important that music is used to challenge traditional notions of empiricism. The qualitative interview is important in the construction of the details of music in everyday life, yet it should not be a solitary focal point. It has its limitations. Instead it should be combined with ethnographies (virtual or actual), thick–descriptions, recorded–observations, emailed questionnaires, chat room conversations, topographies, and aesthetic accounts of music technologies and its packaging, or, in short, further case studies ...” (Beer, 2005).

An attempt to describe the current and future music profession as a whole inevitably leads to the conclusion that relevant subjects involve significant scientific crossover. The term ‘profession’ is defined by the Merriam-Webster Online Dictionary¹ as “**a** : a calling requiring specialized knowledge and often long and intensive academic preparation **b** : a principal calling, vocation, or employment **c** : the whole body of persons engaged in a calling.” The profession thus embraces educational, psychological, technological, sociological, economical and legal areas as well as non-pecuniary and pecuniary values.

Without pretending to be exhaustive, this paper aims to give an overview of the broad range of the music profession through a brief literature research review. It shall provide insight into some basic ideas, theories and findings by focusing on

¹ <http://www.m-w.com/cgi-bin/dictionary?book=Dictionary&va=profession>

economical, socio-musicological, technical and some legal aspects of the profession as it is embedded in society today.

II. The Key Question

The following question was formulated as a starting point for this literature research following preliminary discussion and a brainstorming session of the Polifonia Profession working group experts in Lisbon in June 2005:

- Are there any changes or shifts currently taking place in the music profession that could have a substantial impact on the professional musician?

By researching only a fraction of the broad variety of existing studies, literature and articles on the topic, a preliminary indicative answer to this question will be provided in the conclusions.

III. Mediamorphosis of the Music Profession

What is mediamorphosis?

The main and overwhelming novelty over the last 15 years has been the creation of the Internet and the availability of this new medium of communication for the broader public. New electronic devices are constantly being developed to increase the speed and the amount of data being processed. More powerful computers, storage for larger data bases, computer programmes and interconnecting technologies from the cable to wireless devices are fast emerging. Each new development leads to reductions in cost relative to previous technological innovations. The resulting digitisation and globalisation of modern reality have led to major changes in all realms of society.

As the gramophone or the 'Schellag' did in past centuries, electronic innovations have had and are still having a major impact on the music profession. The term 'mediamorphosis'² can be used to describe substantial changes in cultural production introduced by technical innovation. In the early 1980's Blaukopf stated: "Changes in patterns of musical behaviour are not only due to modernisation and/or westernisation, but also to 'mediamorphosis', i.e. the electronic mutation of musical communication. The concept of mediamorphosis may serve as a tool in the attempt to analyse the impact of the electronic media upon the creation of music and upon the technical and economic mechanisms governing the dissemination of music." (Blaukopf, 1994, p. 337). In this text, Blaukopf is referring to the changes wrought in the mid-twentieth century music profession by broadcasting and new music recording devices: "The role of the technical media in communicating music has been intensified by recording and broadcasting. The *electronic media* opened new channels for the passing on of musical information. While in the pre-electronic era music could only be communicated by live performance or else by graphic means, electronic technologies permit the use of phonographic devices and the dissemination of recorded music by broadcasts. This has opened up a *second way of musical communication* unknown to pre-electronic epochs, which has gradually gained in importance (Breh 1982, p. 170 cited by Blaukopf, 1994, p.340). The sheer

² Mediamorphosis meaning changing of the media from Latin medium = middle and Greek morph = form, morphein = changing of a form

quantity of music communicated in this new manner has resulted in a mutation of music life that for some time went unnoticed. Popular music of the Western type, for instance, is predominantly passed on to listeners by electronic means rather than by live performance. Potential performers of this kind of popular music are becoming familiar with this repertoire not through notated music ('sheet music') but obtain their information from recordings to which they gain access either directly or through broadcasts. It is in this field, especially, that the role of notated music is losing weight" (Blaukopf, 1994, p. 340).

This example shows how a technological event of the past, the emergence of radio broadcasting and the development of the phonographic industry, lead to electronic mediamorphosis, resulting in cheaper and broader dissemination of music recordings. Prior to this 'revolution,' notated music was the main vehicle used to pass on and exchange music. Clearly, technical innovations can lead to a cultural change within a particular environment, in this case the music profession.

Today, the music profession is challenged again, this time by digitalisation. The invention of the CD can be seen both as the beginning of a new era and a paradigmatic change (Tschmuck, 2003, p.302) in the music business. This change became visible when a new technology called MP3³, which allows the compressing of large quantities of data, was developed, thereby making it possible to use the Internet as a fast, cheap and easy channel of communication for music.

According to Tschmuck, mediamorphosis is characterised by modified processes in production, distribution and reception and is accompanied by a paradigmatic change or structural break that can be seen not only as a technological change but also as an extensive cultural one (Tschmuck, 2003, p. 277).

During major cultural shifts in the past, the former power brokers in the music profession typically went through 4 phases of collective behaviour (Tschmuck, 2003, p. 278):

- Phase 1: Ignorance of the innovation
- Phase 2: Downplay of the relevance of the innovation for the own economic activity
- Phase 3: Fight against the innovation and its protagonists
- Phase 4: Acceptance of the innovation

Is a mediamorphosis happening at the moment?

Based on these assumptions, Tschmuck concludes that the music industry, under the control of the major music labels for the past 50 years, is in fact undergoing changes which bear all the signs of mediamorphosis. Production (e.g. home studios), distribution (e.g. via the internet) and reception (e.g. via the internet) of music are changing significantly and the old power brokers are desperately battling music file exchanges on the Internet by all available legal means (see for example the

³ MP3 is a method to compress data, developed by the Fraunhofer Institute in Germany.

NAPSTER case 2000⁴). Tschmuck states that if his assumption that a digital mediamorphosis is actually taking place is correct, it is foreseeable that soon music will no longer be exchanged via records but only via music files over the Internet. As it is already increasingly the case, music can be produced by the musician him/herself in a home studio and distributed over the Internet without the help of a record label. The artist mainly needs assistance in getting noticed by his/her potential customer. As for the consumer, it is difficult for him to find relevant information on the Internet. Therefore it is also foreseeable that new gatekeepers will arise, creating new paths through the Internet jungle as well as new concentrations of power.

Does mediamorphosis have an impact on the musician?

In a recent study by the Mediacult Institute in Vienna (2004), changes occurring through digital mediamorphosis in the Austrian electronic music and rock music business were researched. 33 qualitative interviews with experts from the Austrian musical scene led to the following conclusions:

“The decreasing costs for production and distribution increasingly transform the musician into a home studio operator needing primarily skills in producing and arranging. This implies that the musician is increasingly becoming a technician and a craftsman. At the same time, the musician is also becoming a ‘*cultural entrepreneur*’ who, beyond his/her original creative activity as a musician, has to deal with other fields related to communication, organisation and commercialisation. Computers, Internet, and the organisational and commercial activities now inherent to a musician’s life lead to an increase in the individual musician’s autonomy. While he thus gains independence from market intermediaries like record labels, at the same time this same situation can lead to discrepancies between those ancillary activities and the musician’s original profession. Therefore professional managers and producers are, at least in part, still needed. ... The digital mediamorphosis offers new opportunities, especially for small and medium-sized musical and manufacturing enterprises, because digital production technologies are becoming affordable and the new communication channels are opening new marketing and distribution channels which had earlier been exclusively occupied by traditional sale and trade. A present difficulty is that dealing with both channels is often necessary. This means that the traditional retail market still has to be supplied, as does the online market, thereby increasing both time required and costs. The implicit danger is that the musician may disperse himself too much. This danger, by the way, does not arise in the marketing and distribution sectors only, but in production as well. Therefore, staying focused - irrespective the area - becomes increasingly important, as does having a ‘feeling’ for the business as a whole. A certain degree of specialisation becomes indispensable, while on the other hand knowledge of the music market, copyright laws, as well as skills in foreign languages and communication become indispensable.”⁵

The study highlights the increasing need for additional skills when it comes to a typically non salaried sector such as electronic and rock music. The primary conclusion seems to be that information technology (IT) gives the artist more

⁴ The ‘old’ NAPSTER was a music file exchanging system that enabled private persons to exchange music files over the Internet free of charge. The company was sued because of copyright infringement and the original service was shut down by court order.

⁵ The original text is in German, translation by the author.

opportunities to act independently and to make his/her own business decisions. It implies at the same time that the artist is obliged to be well informed about technological innovations and market structures and prepared to offer a great part of his/her energy and time to non-artistic work in order to be able to live from his/her artistic output, if this is at all possible. Several of the musicians interviewed in the Mediacult study are unable to live from their artistic activity alone and would prefer focusing solely on performance were they well enough funded. They have to build up a so-called 'portfolio' career and find ways to fund their creative work through non-artistic but better paying jobs⁶.

If the latest technological innovations lead to portfolio careers, is this a sign of art market failure?

One could conclude that the market is not interested enough in the arts and music to be able to financially support all the artists leading such portfolio careers. Cowen in his theories relative to the economics of the arts sees this as an opportunity for the artist rather than a failure of the market: "many artists cannot make a living from their craft, and require external sources of financial support. ... Art markets sometimes fail to recognize the merits of great creators, but a wealthy economy, taken as a whole, is more robust to that kind of failure in judgement than is a poor economy. A wealthy economy gives artists a greater number of other sources of potential financial support" – such as the family, rich mentors or even the public (Cowen, 2000). He further argues against the so called 'cost disease' theory. This theory was invented by the economists William Baumol and William Bowen, who have analyzed the performing arts. The theory states that if over a certain time period art is not able to produce the amount of income it takes to pay real salaries, its production will decline as it becomes unaffordable. In short, the arts produce very little economic value. Cowen disagrees when he says: "The cost disease argument neglects other beneficial aspects of economic growth. The arts benefit more from technological advances than it may at first appear. Production of a symphonic concert, for instance, involves more than sitting an orchestra in a room and having them play Shostakovich. The players must discover each other's existence, maintain their health and mental composure, arrange transportation for rehearsals and concerts, and receive quality feedback from critics and teachers. In each of these regards the modern world vastly surpasses the productivity of earlier times, largely because of technological advances." This again demonstrates how technology, the market, and the arts interrelate and influence decisions made by individuals.

When speaking about the art and economies, it is important to cite Richard Florida's book "The Rise of the Creative Class". Florida argues that the creative sector in the Western economy is growing: "the wealth generated by the creative sector is astounding. It accounts for nearly half all wage and salary income in the United States, \$1.7 trillion dollars, as much as the manufacturing and service sector combined" (Florida, 2004, p.xiv). When Florida speaks of the 'creative class' he is referring to all sorts of people who are able to add creative value to their jobs, citing highly educated technicians, lawyers, doctors and of course artists. The book emphasizes the kind of environment needed to attract such individuals, typically, a vibrant urban community that leaves enough space for individual development and

⁶ Although most of the jobs chosen are in the music business, as for example producing, managing, and building websites for bands and similar activities.

expression, is tolerant, offers communication possibilities and is culturally rich. According to Florida, good indicators for detecting a creativity-friendly environment include high rankings on the 'Gay Index' (the relative concentration of gays) and the 'Bohemian Index' (the relative concentration of artists, writers, musicians and other artistic professionals). In other words, creative people bring money to places where they settle down. If a city wants to attract creative workers to ensure economic prosperity it should make sure that tolerance and openness are part of its politics and that the cultural life is a rich one.

Does the market size influence the nature of artistic outcomes?

Coming back to other art economic theories, Cowen and Tabarrok further argue that "reproducibility is closely tied to market size" (Cowen & Tabarrok, 2000, p.240). In this they refer to the mass-market 'temptations' by saying "when an art work is reproducible it may be easier to increase profit by increasing the number of consumers most willing to pay. Appealing to large numbers of consumers usually requires an appeal to mass tastes. ... When reproducibility is impossible or very costly, artists attempt to find the individual consumers willing to pay the greatest possible price. ... If the costs of reproduction are low many markets can form that would otherwise not exist. ... If the size of the art market does not change, then lower costs of reproduction will always increase quantity and quality" (Cowen & Tabarrok, 2000, p.241). This means that if the market for a piece of art increases it is probable that the artist (or the art/music industry) tends to produce products for the enlarging market. It includes the assumption that the artist is willing to trade part of his non-pecuniary satisfaction to pecuniary values that enable him/her to live from his art. If there is no such possibility because the market is not big enough, then the artist will tend to increase his non-pecuniary satisfaction and produce art that suits him/herself and appeals less to the broad market taste. According to Cowen and Tabarrok, another phenomenon occurs when the pecuniary satisfaction has reached its possible peak. The artists then tend to "take some of their wage increase in the form of higher aesthetic satisfaction." They further explain that "an increase of the market creates a dilemma for newly discovered artists. ... If the local market is small, the incentives to choose a high 's' [*non pecuniary satisfaction/ self satisfaction*] are large. The local market might even mean [*only*] the artist himself, in which case the artist loses nothing by catering solely to his own tastes. When the artist finds an opportunity to sell in the world market there are significant incentives to suppress the artist's own tastes in order to reach a mass audience" (Cowen & Tabarrok, 2000, p.242).

If one follows this theory and assumes that the Internet enlarges the market, especially for niche products in music, changes in the character of art may occur through the newest technical innovations.

Are there additional changes taking place in the music business?

Dr. Peter Hanser-Strecker, chairman of the Schott Musik International Executive Board, describes the changes in the music business occurring through the Internet as characterised by two factors: their nature and amplitude, and the speed with which the changes occur (Hanser-Strecker, 2005). He suggests that the digital age is confronting the music business with the possibility of achieving perfect reproduction of every kind of intellectual performance in music, because of the ease with which it can be copied and manipulated and due to the possibility of communicating music

globally without substantial investments in time and money. As in the classical music sector, the main profits made presently are with recordings and performances of a limited number of compositions, performed by a defined number of world famous orchestras or ensembles. Hanser-Strecker argues that the copying possibilities may pose a threat to the income of classical music orchestras. On the other hand, as will be reported in the section about audiences, Hanser-Strecker also thinks classical orchestras can benefit from these new technical possibilities.

Besides technological and economic factors, sociological ones can have an impact on the shape of the music profession. Garofalo, an analyst of popular music, argues that 4 major factors influence progressive cultural changes in the music business: artists, record labels, the audience and the music itself. These factors in turn are influenced by the surrounding society (Garofalo, 1994, p. 3). Inasmuch as it reflects the different segments of the audience, he suggests that marketing strategies used by major labels segment the market into target groups according to class, racial, ethnic or age affiliation. Further remarks will be made relative to this argument in the next chapter dealing with audiences.

IV. Audience

Neil Postman, a media scientist and critic of new media, expressed his observations of the media society strikingly in the foreword to one of his books: "We were keeping our eye on 1984. When the year came and the prophecy didn't, thoughtful Americans sang softly in praise of themselves. The roots of liberal democracy had held. Wherever else the terror had happened, we, at least, had not been visited by Orwellian nightmares. But we had forgotten that alongside Orwell's dark vision, there was another - slightly older, slightly less well known, equally chilling: Aldous Huxley's *Brave New World*. Contrary to common belief even among the educated, Huxley and Orwell did not prophesy the same thing. Orwell warns that we will be overcome by an externally imposed oppression. But in Huxley's vision, no Big Brother is required to deprive people of their autonomy, maturity and history. As he saw it, people will come to love their oppression, to adore the technologies that unravel their capacities to think.

"What Orwell feared were those who would ban books. What Huxley feared was that there would be no reason to ban a book, for there would be nobody wanting to read one. Orwell feared those who would deprive us of information. Huxley feared those who would give us so much that we would be reduced to passivity and egoism. Orwell feared that the truth would be concealed from us. Huxley feared the truth would be drowned in a sea of irrelevance. Orwell feared we would become a captive culture. Huxley feared we would become a trivial culture, preoccupied with some equivalent of the feelies, the orgy porgy, and the centrifugal bumblepuppy. As Huxley remarked in *Brave New World Revisited*, the civil libertarians and rationalists who are ever on the alert to oppose tyranny "failed to take into account man's almost infinite appetite for distractions". In 1984, Huxley added, inflicting pain controls people. In *Brave New World*, inflicting pleasure controls them. In short, Orwell feared that what we hate will ruin us. Huxley feared that what we love will ruin us. This book is about the possibility that Huxley, not Orwell, was right" (Postman, 1986, foreword).

Postman adopts a very pessimistic view concerning the evolution of consumers in an information society influenced by the media, mainly TV, which increases passive

reception and trains the consumer to await outside stimuli (the media) to make him/her happy. Others are less pessimistic but still recognise that too much information can lead to confusion and hinder clear perception. The great amount of information available seems to lead to a loss of orientation (Hanser-Strecker, 2005 and Sperlich, 2004). Some artists, on the other hand, have the impression that there is more interest in music in general and that in an increasingly digitised environment live performance seems to revive the feeling of being truly alive (Sperlich, 2004, p. 71 and Hanser-Strecker, 2005).

The Internet gives the individual the possibility to customise his/her music consumption and to influence offerings and prices. If the full range of offers at any given time is but a 'mouse-click' away, consumers will get used to immediate satisfaction. Moreover, as on the Internet different kinds of information can be interconnected and then presented via different mediums (video, sound, picture, text etc.), the audience is therefore conditioned to a rich and varied style of presentation. Audiences are thus accustomed to enhanced value when they consume music, and expect live music presentations to include multimedia as well (Hanser-Strecker, 2005). Hanser-Strecker demonstrates with two examples how this could benefit orchestras by providing added value to an orchestra concert via the instant CD (now one could imagine an instant DVD) and the simultaneous broadcasting of live concert via internet or (telephone) cable. The instant CD or DVD can be produced immediately following a concert offering the concert audience the possibility of purchasing a copy on the same evening as they leave the concert hall. The simultaneous broadcasting of a concert on the Internet or via a cable system seems to offer possibilities for concerts that cannot find space on a traditional radio or television programme because the orchestra playing or the music itself is less known or appreciated by audience. It offers the orchestra the possibility of disseminating a less known repertoire by being independent of labels or broadcasting companies that seek well-known music likely to sell well.

For Garofalo, the consumer plays an active role in the changing landscape of (pop) music. According to this theory, the listener develops an affective bond between himself and the music, which then can lead to an affective binding between the audience and the performing musician. This is happening especially in popular music where the audience identifies very strongly with the artist. Even if major labels try to grab successful new appearances on the music market and to force the artist to produce for the broadest audience possible, the primary audience is not always following this path. The Internet can provide musicians with opportunities to share their music with a small audience that wishes to support this particular kind of music. An excerpt from the biography of the rock band 'Marillion' illustrates this.

"By 1997, Marillion had realised that the Internet provided an ideal opportunity to nurture a closer contact with the fans, and a fan instigated whip round on their e-mailing list produced enough funds to allow the band to tour the USA. The release of the album 'Marillion.com' in 1999 flagged their newly launched web-site and record label but it was the revolutionary concept of asking their fans to pre-order and pay for the recording costs an album some 12 months in advance of its release that hit the headlines in 2001. Astonishingly, over 12,000 of their fans pre-ordered and an additional deal was struck with EMI to

*market the resulting 'Anoraknophobia' album. A similar campaign was also launched to fund the band's latest release, 'Marbles' but this time all the money raised is going into a campaign fund to promote the album. In terms of fan loyalty, it can be said that Marillion have an international underground following to rival the mainstream."*⁷

This example illustrates several of the ideas already suggested, namely that although the audience paid for the record in advance, a deal with a major label still was needed to market the final product. This shows that musicians, or in other cases small/independent labels, provide the A&R (Artists and Repertoire) for the major labels (Garofalo, 1994, p.9 and Tschmuck, 2003, p. 310). It further shows that promotion and marketing still are a cost intensive part of commercialising a music product even in the Internet era.

Finally the feelings listeners develop for a particular music can even expand to the pure material of a record. If the material changes, the relation to the record can change as well. Kasaras describes this phenomenon: "Similar to the change that music fans experienced when compact discs replaced vinyl, MP3 has changed concepts of ownership and even the idea of the musical piece of art as a whole. Consumers once upon a time had a sensation of 'physically' owning music after every purchase, owning a container in which they valued features of the physical container like an album cover and its artwork [*the CD or LP*]. These experiences are changing with MP3, and are characterised possibly by a more direct relationship with the sound experience than ever before. One could claim that the notion of originality has been replaced by the need for affluence with digital music" (Kasaras, 2001).

V. Copyright Issues

Kasaras confirms the issues mentioned above when discussing copyright issues related to music and the Internet. Possible shifts in the music business can also have an effect on copyright issues, as copyright law has been developed for protecting intellectual property from unauthorised reproduction and dissemination. Reproduction and dissemination is typically bound to a material device. When copyright laws were developed, a sheet of music was the main trading product in music business and a live performance could barely be recorded. The development of the phonograph, the LP, the radio and music cassette had an impact on the copyright law similar to the one information technology is having now. Several authors wonder if copyright as it was originally designed (bound to a material copy of a work and defining ownership of a creation) is threatened by MP3 technology and other means of copying and if it should be adjusted to the new circumstances. "Copyrights are a means of establishing the boundaries between who is allowed to use a particular good and under which conditions, and who is not allowed to use it. Copyrights on information goods exchanged on the Internet exclude potential consumers from getting unconditional access to a product. Developments in ICT seem to take away the grounds for these boundaries. Burke (1996) has shown how technological developments in the past gave rise to changes in copyright. Now, similar discussions are under way. ... Incremental changes to save the present system of copyrights -

⁷ www.marillion.com

and thereby avoid fundamental changes to the structure of the music industry - may no longer do" (Dolfsma, 2000). "The economics of the Internet are pressing with irresistible force not just against business models that treat music as intellectual property but against the legal structure of intellectual property itself. The big question is not whether Napster will win or lose on appeal. It is whether the current legal structure regarding copyright will hold" (Shirky, 2001, p. 147 cited by Kasaras, 2001).

Kretschmer investigates further the benefits copyright offers to the musician. He wonders if evidence exists of a breakdown of the barrier between creator and user regarding the current situation in the music profession, especially in the popular music sector. "The answer is an unambiguous 'Yes' — but much creative reworking takes place despite copyright barriers. Rights owners' terms remain very onerous, hindering engagement with contemporary cultural materials" (Kretschmer, 2005).

He further asks if digital distribution benefited creators financially and concludes that "the evidence here is contradictory. The often-made claim that copyright supports the creative basis of a society is empirically doubtful. There is a suspicion that copyright underpins vastly unequal rewards. Creator and investor interests are not identical. The copyright suits investors (music publishers, labels) as incentives to market and distribute the works over which they have exclusive control. Copyright also suits creators with a track record of hits, because they can extract favourable terms from investors. Copyright does little for new and niche creators who often sign away their bargaining chips cheaply. In the absence of alternative compensation schemes, digitisation so far appears to have brought few financial benefits from disintermediated distribution. Royalties from performing rights administered by collecting societies (which cannot be individually renegotiated to reflect economic bargaining power) appear to form an important and increasing part of artists' earnings. They appear to encourage artists at the margins of full-time work. A more systematic profile of creators' income streams across different sectors and different legal frameworks (jurisdictions) would be highly desirable. Copyright contractual income (involving a transaction of rights); copyright non-contractual income (via collectively negotiated or statutory royalties administered by copyright societies), non-copyright contractual income (such as live performances or teaching) and income from non-artistic sources can be conceptually separated and captured by survey data and collecting society distributions" (Kretschmer, 2005).

The above mentioned reflections are only a few examples of the numerous copyright discussions going on. At the moment it seems that the copyright laws will continue to exist. New protective devices are being designed for recording units like CDs or DVDs and the old power brokers are trying to fight future competition which might undermine their well established and profitable control of markets. In any case, it is not yet clear how these issues will develop further. Law very often adapts to actual changes in society or politics instead of establishing an appropriate framework beforehand. Copyright law is at present shaky enough that several experts doubt it will continue to exist in its originally intended form. This illustrates how thoroughly the Internet and new technologies have affected the music business.

VI. Status of the Musician

To describe the music profession of today is an ambitious task, as stated at the beginning of this overview. After looking into different aspects of theory on the topic, some research results on the status of the musician need to be mentioned to complete the picture. The 1997 report of the International Federation of Musicians (FIM) on the status of the music performer based on a questionnaire answered by 50 national unions worldwide produced the following results, which clearly indicate changes in the status of the musician:

- "Musicians are commonly unable to financially support themselves and therefore have another job in order to maintain a steady income."
- "Signing permanent contracts is the usual practice, even if in a large majority of States, the number of permanent positions is decreasing. There seems to be an increasing number of unstable jobs."
- "The number of freelance musicians employed by permanent orchestras seems to be increasing."
- "It is becoming more and more frequent to see artists who self-produce their performances and more particularly sound recordings. Self-production is more common in countries with a high standard of living than in developing countries or countries with economic problems."
- "The use of sampling techniques has reduced the number of musicians hired for live performances, and in a lesser measure, for recordings. But musicians do not feel that they pose a threat to their jobs."
- "While distribution is mainly controlled by large international groups, the number of small independent producers is increasing."
- "The authorities do not seem to have taken into consideration the extent of the merging of business and its consequences on the field of broadcasting and distribution (dissemination) of culture. Therefore, we have observed that both diffusion and distribution companies are being privatised and that the authorities have given up trying to maintain public service in the field of culture. This is particularly true in relation to Radio or Public TV Orchestras."
- "Several projects to improve direct sales of self-produced recordings - via Internet - are in process. This could be a way of avoiding traditional distribution channels which are inaccessible for such recordings."
- "Home music schooling [private lessons] is increasing."
- "It is quite obvious, that the gap between the number of musicians trained to practice their art professionally and the number of job vacancies is getting wider. This stresses a fundamental question about the functions of higher education institutions. This highlights even more the consequences of the decreasing number of jobs, particularly for musicians of permanent orchestras."
- "Nevertheless, holding down more than one job in the musical field of activity is relatively frequent, including for those employed by permanent orchestras, but for a necessarily limited number of teaching hours."
- "A large majority of musicians mainly live off of live performances (over 80%). However, in the UK where record production is high, 40% of musicians' incomes come from recordings. Rights for secondary use of recordings are still low. Incomes are mainly provided from broadcasting of phonograms. Private copying is not (yet) a significant source of income."
- "Social security is not ensured in all free lance positions."

In the final Report of a research commissioned for the Social Dialogue Committee by the European Commission (Employment & Social Affairs), and European Entertainment Alliance (FIA, FIM, UNI-EUROPAMEI, PEARLE) in 2001, the following was stated, confirming that the trend towards more free-lance work has not stopped yet. "In fact, except where investment, either public or commercial, had created new facilities or styles of work, much of the sector is in a state of uneasy equilibrium rather than growth across a broad front. Many of the measures discussed in the report tend more to sustain existing jobs, rather than create new ones, or to allow workers in the sector to remain in it. Even where some growth is evident in numbers of individuals employed, this does not necessarily bring an expansion of full time quality work. This is especially true of the increase in micro-enterprises. Although they expand the opportunities for work and can lead to growth and permanence in some cases, many of them offer pay and conditions of work, which are below the industry standard for whatever country they are in. However, it is unrealistic to resist the impetus of this growth. Moreover, such enterprises are often a way of introducing new methods of delivery of the art form; they are sometimes the only way in which young or overlooked innovators can achieve a platform and they can be uniquely creative. Indeed in some countries there would be little artistic activity outside main centres of population without small and energetic companies. There have been attempts in the subsidy systems of some countries to restrict project or development funding only to those who meet their statutory obligations in respect of pay, social deductions and working conditions. This does not prevent projects continuing on whatever resources the participants can muster, thus depressing even further the quality of the employment."

VII. Conclusions

While the sources discussed above are far from exhaustive, the following can be concluded:

1. The music profession is in fact undergoing shifts and certain trends have become visible. But the full extent of these changes is not yet quantifiable, as they appear to be affecting the greater society at large.
2. A mediamorphosis is underway. New technology has been developed over the last 20 years, whose main innovations include the Internet and faster data processing machines. This has had different impacts on society, the market and the individual. In the music profession, it has facilitated the production, promotion and distribution of artistic output. Globalisation via the Internet also opens a gateway to the world market. Niche products or emerging new trends stand to gain the most from this. The disadvantages of the big market are its complexity and the risk of an information overload. Digitalisation also blurs the ownership of music and can raise questions about original creation.
3. While less long term employment jobs in the traditionally secure areas such as orchestras and full-time teaching are available on the market, short time employment and free lancing are on the increase.
4. Due to the decreasing availability of secure jobs and the added weight of the economic aspect of the art sector, over the last fifteen years it has become increasingly important for the artist to be informed about the professional environment in which he/she will evolve. As musicians must be prepared to earn a living either as free-lancers, by combining various jobs, or by specialisation to obtain one of the few available top jobs, a good sense of orientation, key qualifications and transferable competences are gaining in importance. Concretely, musicians need to develop the ability to access and assess information while also establishing professional networks and making the appropriate professional connections⁸. Young professionals need survival skills as well as opportunities to participate in life long learning so as to be able to constantly adapt to changing professional environments.
5. There is a need for further study of copyright issues in music. Digital music makes it possible to work in a completely new way, for example by sampling existing music. These techniques are accessible to a broader and broader range of people. Copying digital music is not always legal. For the average musician it is often difficult to find one's way in the copyright jungle, in part due to lack of education, but also due to the sheer legal complexities involved. The plethora of ongoing changes in the situation means that national copyright laws are often at odds with the perception of the Internet as a global medium. Guidelines to assist professional musicians in avoiding copyright infringement would be most useful.

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⁸ Tendencies of the market as shown above have led to the establishment of several projects in life long learning, career centres and similar institutions seeking to furnish the musician with additional skills needed in professional life. An example of an approach to this phenomenon is a German project that is establishing a network for 'professionalisation' in the arts. Professionalisation is defined as a learning process whose aim is to ensure the artist's economic survival through ongoing personal and professional development. (Pelz and Schnell 2005).

VIII. Literature

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