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SITUATIONAL ANALYSIS OF THE ZIMBABWEAN MUSIC SECTOR

FINAL REPORT



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1 INTRODUCTION

This analysis is carried out under the framework of the EU/UNESCO Expert Facility for the Governance of Culture in Developing Countries and is part of the Zimbabwe project “**Strategy for the sustainable development of Cultural and Creative Industries (CCIs) in Zimbabwe – focus on the Music sector**” piloted by the National Arts Council of Zimbabwe. The situational analysis undertakes a rapid diagnostic of the current situation of the music sector to identify existing strengths, weaknesses, opportunities and threats. It is intended to feed the development of a future evidence-based national strategy for the music sector.

Data for the analysis comes from interviews and observation carried out by two UNESCO technical experts mainly during a mission in Zimbabwe from 8 – 15 March 2020, an online survey deployed on methods of music consumption in November 2020, additional data collected by National Arts Council staff in focus groups with sector players in November 2020, as well as additional desk research. A draft version of the situational analysis was circulated to industry players, including members of the National Team for the EU/UNESCO Zimbabwe project, for feedback during January and February. The authors extend their thanks to those who took the time to give additional information and make suggestions.

2 MARKET AND PLAYERS

2.1 Zimbabwe Music Market Overview

With a relatively small population of 15 million and a per capita income of US\$1,400, Zimbabwe has a music sector that bats out of its league. Compared with other countries of similar population and revenue, Zimbabwe has a relatively high number of internationally recognized musicians and individual song titles garnering more than 5 million views on YouTube¹. Zimbabwe’s music today reaches unexpected audiences: local press were delighted to report the airplay of a hit Zimbabwean song on Russian television in 2019². Home-grown Zimbabwean and diaspora Zimbabwean music professionals have been nominated or won pan-African and international awards in recent years, including the prestigious Grammy Awards³. In the context of a rapidly growing African music market⁴, the Zimbabwean music sector thus has the potential to grab new opportunities, provided a sufficiently enabling environment is in place.

While statistics on the size of the Zimbabwean music market are scarce, industry players generally concur that there has been strong growth in the number of musicians, both male and female, in the

¹ Senegal, with its population of 15 million and per capita income of about US\$1,200 is one of the few other countries sharing these characteristics, with a music sector with significant international presence

² <https://www.hmetro.co.zw/russia-endorses-dzamutsana/>

³ Brian Soko, won a 2014 Grammy Award for Best Song, Tinashe “Bantu” Sibanda a 2019 Grammy nomination for Music for Visual Media, Nutty O collaborated on a 2019 Grammy-nominated album, and Isaac Kalumbu aka King Isaac a 2010 Grammy nomination for Best Album.

⁴ On the prospects of the African music sector, see Eamonn Forde. 2019. “Africa’s Perfect Storm for the Music Business is Coming”. Synchtank blog. <https://www.synchtank.com/blog/africas-perfect-storm-for-the-music-business-is-coming/>

past decades. Technology has made music production very affordable, and a wider pool of talent now accesses the music market. Some industry players however also point out that it is more difficult to make money as a musician today than it was a couple of decades ago when large Zimbabwean and international record labels still operated in the country. Others feel that freed from record labels, artists have greater leeway to manage their careers lucratively. In recent years, there has been particularly strong growth in music varieties linked to urban youth, such as Zim Dancehall music. Traditional music and choir music are also popular.

Industry players strongly underscore that the unique sounds of the various genres of music Zimbabwe produces, thanks to its cultural diversity, are a key asset. The 2020 Creative ZM Unlocked study found that 84% of artists see originality and authenticity as Zimbabwean music's greatest strength⁵.

2.2 Music Consumption Patterns

An online survey launched in November 2020 as part of this situational analysis (see full results in the appendix) revealed that 34% of Zimbabweans today consume music primarily through streaming, and another 23% primarily through WhatsApp transfers. In other words, the main mode of consumption of music for almost 60% of Zimbabweans has become digital. Radio and television remain the main mode of music consumption for 11% and 2% of Zimbabweans respectively. 9% of Zimbabweans consume music primarily at live performances. Finally, CDs remain the main mode of consumption for only 6% of Zimbabweans. (86% of survey respondents were from towns, therefore the above figures may be less representative of rural areas, where CDs as the main mode of music consumption may be higher, and online modes of consumption less frequent).

Most online consumers of music are consuming music freely, with only 27% of Zimbabweans reporting having a paid subscription to a streaming platform. YouTube is by far the most popular platform for Zimbabwean music consumers: 78% use the platform at least once a week. The second most popular platform is Facebook Live, used regularly by 37% of consumers. Only 8% of respondents say they do not use any streaming platform regularly. Zimbabwean platform Buddie Beatz is only used regularly by 2% of respondents.

The Covid pandemic has pushed music consumption even further online, including watching streamed live performances. Zimbabwean consumers have responded favourably enough to paid streaming of live performances to have incentivized investments and innovation in this realm by music promoters and digital platforms. Thus, for example, Gateway Stream, a subsidiary of a hospitality group, developed a pay-per-view concert platform and events promoter Kayse Connect organized a concert with two very popular artists initially scheduled for the end of December 2020. A spokesperson for the promoter reported having sold more than 2000 online tickets, at US\$ 2

⁵ British Council/Connected Sahara. 2020. *Creatives ZW Unlocked: Unlocking the Zimbabwean Creative Scene*

each⁶. An earlier gospel concert had garnered 400 pay-per-viewers⁷. Thus despite, the digital divide and relatively high cost of data, limiting factors that cannot be ignored, there is potential to garner a critical mass of consumers willing to stream concerts.

Recent figures on internet access in Zimbabwe, indicate that 40% of Zimbabweans have digital access, and this rises to 60% amongst the youth population.⁸

2.3 Revenue Generation

Internationally, music revenues from digital sales outstripped those from physical sales in 2015 according to the International Federation of the Phonographic Industry (IFPI) data. In 2019, global music sector revenues were composed of respectively: 49% from streaming and downloads; 26% from physical sales (CDs, DVDs, etc.) and 23% from live performances⁹. Consultations with industry players in Zimbabwe suggest that the Zimbabwean sector currently relies more on revenue from live performances than any other income stream. Piracy has dwindled the physical sale of music almost completely. CDs are pirated within 24 hours and many producers or labels have stopped releasing CDs at all. When they are still being released, they are mostly given away as promotional material to drum up the popularity of an artist to grow live concert audiences.

The potential to replace lost physical sales with digital sales for the moment is only timidly realized. 68% of musicians questioned in November 2020 declared having made no revenue whatsoever from streaming in the past year, and only 2% reported having made more than US\$5000 from streaming revenue in a year. Monetizing digital presence is being hampered by a lack of digital skills, as well as logistical hurdles linked to currency fluctuations and exchangeability. Payment from some international platforms is not accessible to Zimbabweans without passing through an intermediary based in Western countries. While the digital music market across Africa is set to see rapid growth over the next few years¹⁰, the industry will have to remain wary of piracy. Experience elsewhere shows that as consumption shifted to streaming, so did piracy with stream-ripping services, which allow users to create permanent offline copies of audio or video streams from platforms¹¹. Therefore, just like for physical sales, copyright enforcement will be key for ensuring the viability of this revenue stream.

Revenue from a live performance is generated both from concerts in Zimbabwe, as well as performances abroad. For some genres of music such as Zim Dancehall, performances outside Zimbabwe target mainly diaspora populations, while other genres reach out to more diversified

⁶ The December show, for logistical reasons was cancelled and rescheduled for 2 January 2021. It is not clear how many of the originally sold tickets had to be reimbursed. <https://www.herald.co.zw/zero-audience-for-jah-prayzah-winky-d-show/>

⁷ <https://nehandaradio.com/2020/12/20/mystery-over-jah-prayzah-winky-d-show-cancellation/>

⁸ British Council/Connected Sahara. 2020. *Creatives ZW Unlocked: Unlocking the Zimbabwean Creative Scene*

⁹ IFPI data reported in European Commission. 2019. *Music Moves Europe – A European Music Export Strategy*

¹⁰ See Eamonn Forde. 2019. “Africa’s Perfect Storm for the Music Industry is Coming”. In addition to the international platforms (YouTube, Spotify, Apple), new platforms such as Chinese but Lagos-based Boomplay and uduX are entering the African market.

¹¹ Tim Ingham. 2020. “Stat of the Week: Music Piracy hasn’t gone away – it’s just changed shape”. *Music Business Worldwide.com* <https://www.musicbusinessworldwide.com/stat-of-the-week-music-piracy-hasnt-gone-away-its-just-changed-shape/>

foreign audiences. Live performance revenue streams however are extremely vulnerable to shocks such as the Covid pandemic. While Zimbabwean players were relatively quick to adjust and propose online monetized concerts, the potential revenue from online performances is a fraction of what can be made from physical live performance. A study in neighbouring South Africa reports that few artists or hosting venues are earning much from streaming performances. When extensive marketing of an online show is undertaken, earnings max out at 30%, and often much less, of what ticket sales for live audiences would fetch¹².

Revenues from royalties are often not significant for individual artists. In the past, non-payment of rights by national broadcasters to the collection society, ZIMURA, has resulted in artists being paid royalties several years after they were due, which in an inflationary context can cancel out the bulk of earnings. (Also see the section ‘Enabling Environment’ for more on copyright issues).

Given the relatively small size of the local market, exports are key for reaching sustainable revenue levels for the Zimbabwean music sector. While figures specific to the music sector are not available, the 2020 study Creatives Unlocked¹³ found that 44% of creatives reported regularly exporting their work beyond Zimbabwe in 2020. The bulk of creative exports went to South Africa (46%), followed by 20% to the rest of Africa, 16% to the UK and 10% to Europe. A large Zimbabwean diaspora population is an obvious opportunity to generate export revenues, both through streaming and live performances.

2.4 The Music Value Chain today

Creation

The creation link of the music value chain in Zimbabwe is relatively robust, although there is room for improvement. As in mature art markets, there is an oversupply of artistes. Industry players concur that within that ever-growing pool there is abundant raw talent. The high number of artistes in the sector creates frustration as the market cannot support all, and only a small minority of artistes make significant income, while the majority struggle. This skew in earnings towards a few superstars is characteristic of music markets across the world. Nonetheless, within the current Zimbabwean market, there is still more that can be done to nurture talents to widen the pool of high-quality superstars and generate more regular employment opportunities for others (instrumentalists, backup singers, sound engineers, etc.).

Music videos today being an essential part of creating music, there may also be an opportunity to increase music video production skills locally. While top Zimbabwean artistes have world-class videos, industry players point out that often South African production companies are used rather than Zimbabwean companies, and the costs can be prohibitive for smaller artistes, many of whom do not have videos on any streaming platform.

In terms of musical heritage, there is growing international interest in mbira instruments, with mbiras (or kalimbas) being commercialized in many countries across the world. One shop in

¹² Gwen Ansell. 2020. Are lockdown live stream working for South Africa’s Musicians. The Conversation <https://theconversation.com/are-lockdown-live-streams-working-for-south-africas-musicians-144946>

¹³British Council/Connected Sahara. 2020. Creatives ZW Unlocked: Unlocking the Zimbabwean Creative Scene

Turkey reported selling up to 500 mbiras a day during the Covid lockdown as Turks developed a taste for playing the small portable instrument at home¹⁴. The mbiras sold across the world are not always made in Zimbabwe or neighbouring countries. The recent formation of the Mbira Guild of Zimbabwe is a positive stride towards ensuring that Zimbabwean instrument-makers do not lose this opportunity to both develop their markets and maintain or sharpen their craftsmanship. An action could also be taken to develop and protect intellectual property around mbira – by creating official labels for example.

Production

The production part of the music value chain covers the activities of what in the music business is referred to as “production”, that is recording and sound-engineering music, as well as the packaging of music into physical formats (CDs, digital album artwork, etc) or derived products (music videos, merchandising), and the marketing of music and artists, a vital step in ensuring that products find distribution outlets.

This part of the value chain has seen great disruptions in the past decade mainly linked to the disappearance of large Zimbabwean record labels. Record labels in the value chain acted as gatekeepers, identified and nurtured talent, provided the infrastructure for quality recording, and in most cases, were also active in organizing marketing and distribution campaigns. Music piracy made it impossible for the large historic Zimbabwean record labels to continue operations: Gamma Records for instance folded in 2016. Since then, the lack of gatekeepers is not allowing for fruitful filtering of talent. The physical act of recording music (music production) has become highly accessible; commercial music producers who need to survive will record anyone willing to pay; those who can pay and also invest in their marketing are not always the most talented. At the same time, several true talents, never find the necessary support, notably in terms of marketing to reach a sustainable level in their careers. The absence of gatekeepers capable of undertaking quality control is underscored by many industry players as a key weakness of the industry today, leading to too many substandard products on the market. The other key weakness is the absence of mechanisms to nurture and showcase new talents, leading to an even greater skewing of revenues towards a few superstars (see distribution below).

There has been an explosion in the number of recording studios, sometimes called “bedside” studios, in recent years. One music producer estimated that in 2018 there were a total of 1000 studios, with some low-income neighbourhoods (ghettos) in Harare hosting up to 200 bedside studios. The skills and equipment capacities of studios vary widely, and industry players point out that many producers and sound engineers are self-taught, and not always capable of producing sound to international standards. The shift of industry revenues to live performances, in some cases leaves recording studios with fewer revenue streams to reinvest in state-of-the-art technology. However, some recording studios riding on the success of Zim Dancehall have recently expanded into the business of record labels. One such entity interviewed in March 2020, maintains a hybrid structure, whereby the bulk of musicians pay the company to record them, and the company’s label chooses only a small number of talents that they will nurture. Nonetheless the next few years may see the return of the missing record label function.

¹⁴ <https://www.dailysabah.com/arts/music/turks-interest-in-african-thumb-piano-rises-during-stay-at-home-measures>

Furthermore, with the growing interest of international labels in the African music market, there may also be greater availability of nurturing functions outside of Zimbabwe for Zimbabwean musicians. Majors like Universal Music and Sony Music have recently expanded their operations in Africa: both have a regional or African office based in neighbouring South Africa (and other offices commonly in Lagos). One can also note the presence of the Zimbabwean diaspora in some key strategic international positions: for instance, in October 2020, Taponiswa Mavunga was appointed head of Africa in Sony Music UK.

Music managers that can also play a key role in nurturing talent, and above all in developing a marketing and career strategy for artistes, are present in the Zimbabwean value chain. In 2020, managers created a collective association, the Music Managers Forum Zimbabwe, to increase the level of professionalism¹⁵. Managers note that there is a need to improve the skills of managers in marketing, contract negotiation, financial management and entrepreneurship, as well as their understanding of digital distribution. They also note a need for a clearer division of roles between them and music promoters, the latter sometimes tending to encroach on a manager's function.¹⁶

Not all artistes however can afford managers. Therefore, artistes today often find themselves saddled with multiple functions not just of the creation link, but also undertaking their product packaging and marketing. The result for many artists is weak brand image and marketing, and subsequently low distribution.

Distribution

As can be expected from the earlier discussion on music consumption, the physical distribution of CDs has mostly disappeared in the value chain. The key players in distribution are now constituted by music promoters, DJs, radio and television stations, international and national streaming/download platforms, and download pirates (selling music on flash drives, for example). The marketing function, essential in the production link of the value chain, is also very important in the distribution link, this time to ensure that products reach the end consumers.

Music promoters organize live performances, which is where – Covid crisis notwithstanding – artistes make the bulk of their income, as well as online distribution (for instance running channels on YouTube and other streaming platforms). Promoters sometimes come from non-music sectors (the hospitality industry for instance) and tend to operate on a strongly commercial model, seeking clear profits. This drives them to focus on booking events with already established big-name musicians. Industry players complain that the current mode of operation does not afford enough space for emerging talents to get exposure and experience, and some voice specific concern of space afforded to non-Harare-based musicians in particular. Corporate events or sponsorships are also a non-negligible source of revenue for some musicians who have succeeded in building their brand image. Observers note a rise in the number of cultural festivals in recent years. These create new distribution opportunities, especially for emerging talents. However, few festivals have attained financial sustainability and most rely heavily on donor funding. The synergies between live performance and tourism could be enhanced.

¹⁵ <http://newsofthesouth.com/zim-musicians-managers-form-union/>

¹⁶ Additional observations from focus groups organized by the National Arts Council of Zimbabwe staff are available in “Report on the Additional SWOT Analysis Exercise of the Music Sector”, November 2020.

Revenue distribution and contractual arrangements (when these are in place) between promoters, managers, and musicians vary widely and can be a frequent source of contentions between players. Music promoters focusing on distributing artistes on streaming platforms do not always have clear or equitable agreements with artistes concerning royalties, and for the new emerging realm of live-streamed concerts, no guidelines are in place.

In addition to classic television and radio stations, there are online stations specialized in music (for example Nash TV and AfroZimRadio), which can easily reach diaspora populations. There have also been private initiatives to launch local online download/streaming platforms for more than five years now, but there have not yet been any resounding successes¹⁷. Platforms developed by telecoms companies – in particular BuddieBeatz by Econet¹⁸ – appear to be the most solid offering for now. Past initiatives such as Jive and OyOs Music failed in their online sales strategy, due to online payment issues or failure to negotiate a large enough repertory of artistes to attract a critical mass of listeners to the platform. The collective management organization (CMO), ZIMURA, also attempted unsuccessfully to set up an online platform, iTunes. Zim Music Store and Zimall Music Centre continue their online download sales, but the latter platform in January 2021 only had 4 artists in its repertory (Zim Music Store, on the other hand, had more than 2500 titles). The newest entrant is Gateway Stream, backed by a major hospitality group. Their streaming app was launched in December 2020 and they also organized the first major online concert on a pay-per-view model. Online platforms owners also point out that for now, they have not been very successful in attracting advertising revenue to support their business model. Artistes for their part highlight that some of them hesitate to place their works on platforms as the lack of moderation of user comments sometimes results in them receiving online abuse.

While these platforms often make optimistic claims about beating piracy, they will almost certainly be faced with the challenge of piracy through stream-ripping as the major international platforms are. Also, they have the challenge of carving out enough of a market to achieve sustainability faced with the hegemonic market power of the international platforms (YouTube, AppleMusic, Spotify, etc.) who through their audience size attract the major acts, who have lesser incentive to also be on local platforms.

Of the international streaming platforms, Apple Music and Deezer are present in Zimbabwe, meaning that their apps can be downloaded directly and artists in Zimbabwe can sign up directly. Spotify and YouTube Music¹⁹ (a premium service of YouTube) are present in South Africa, but not Zimbabwe: consumers and musicians wanting to use them, have to go through the hurdle of creating a VPN (virtual protected network) to make it seem like they are connecting from South Africa or another country where these platforms are present. Despite this hurdle, in the November 2020 survey, more Zimbabwean musicians reported having their music on Spotify (23%) than on locally-present Deezer (16%) and Apple Music (14%), demonstrating the powerful draw that bigger players have over the other smaller, but still relatively large, platforms.

¹⁷ On past attempts, see for instance <https://www.techzim.co.zw/2014/09/jive-zimbabwe-launches-online-music-platform-will-succeed/> and <https://startupbiz.co.zw/rtg-introduces-online-music-store-and-streaming-service/>

¹⁸ The NetOne network has also developed a music streaming/download apps – OneMusic. Another network for now just offers ringtone downloads - Teletunes by Telecel

¹⁹ A premium subscription service of YouTube available only in select countries. The free YouTube platform, on the other hand, is available in all countries and is by the far the most used platform in Zimbabwe.

Zimbabwe written press and radio/TV media include a variety of specialized papers and shows on showbiz issues, and most major daily newspapers have showbiz correspondents. There are thus functioning avenues in the traditional media for informing the public and generating interest in singles, albums or an artiste in general. Some musicians call for easier access to information on the performance of artistes or song titles on various platforms and the setting up of transparent music chart systems. Educating artists and professionals on existing methods to track online performance may help respond to this concern.

2.5 Gender issues

Industry players note a gender imbalance in the music sector, common to music sectors across Africa as well as other regions of the world²⁰. Women musicians in Zimbabwe still face a significant social stigma that may discourage entry or growth in the music sector²¹. Those that do pursue musical careers are often boxed into the role of backup singers even when they have greater ambitions. In traditional music, there are also customary prohibitions on women playing certain instruments, such as the mbira. However, there have been several prominent women musicians who have broken this proscription garnering some level of acceptance. Women solo artists or bands have difficulty negotiating the same amount of exposure as their male counterparts: they are booked to fewer concerts, and when they are booked, it is often as opening acts; their live performances are also covered less frequently by television media.

This sets in a vicious cycle, as the lower level of exposure, means that generally women musicians get paid less than male counterparts. Making lower income from their music means that women musicians have fewer resources to invest in inputs necessary for high-quality music performances, such as instruments and rehearsal space, and have to engage more in non-music related activities to generate income. The reduced investment in their music ultimately may lead to lower quality performances concerning male counterparts, reinforcing the perception that women musicians should be paid less. Zimbabwean women musicians also have less access to professional managers and therefore more limited opportunities for career growth. Female music managers also complain that they are often disregarded, with music promoters bypassing them more frequently than male managers to speak directly with the musicians they represent.

Women musicians also report facing high levels of sexual harassment, be it from other musicians or gatekeepers such as DJs and concert promoters. In some genres of music, there is also high pressure on women to be sexy and sexually explicit in dances. In response to these pressures, women musicians have set up social media groups to offer each other psychosocial support. Two examples are the WhatsApp groups “United Women in Music” and “Zim Divas”.

²⁰ On challenges women in Africa face in the creative sectors see Yarri Kamara. 2013. “Challenges for African women entrepreneurs in the performing arts and designer fashion sectors” in *Gender Equality, Heritage and Creativity*. UNESCO. https://unesdoc.unesco.org/ark:/48223/pf0000229418_eng

²¹ In addition to interviews, this section relies on Kessia Masona. 2019. “Challenges Faced by Female Musicians in The Music Industry in Harare Central”, Bachelors’ thesis. Women’s University in Africa.

There have also been instances of women musicians self-sponsoring all-female concerts to correct the imbalance of exposure for women musicians.

3 ENABLING ENVIRONMENT

3.1 Training

Harare-based Zimbabwe College of Music (a private trust) provides the fullest range of professional music courses, covering instruments, voice, sound engineering, and music entrepreneurship. Learners have the option of a one-year course leading to a National Certificate in Music or a two-year course leading to an Advanced Certificate in Music. Finally, students can also opt for a Bachelors in Ethnomusicology offered in partnership with Africa University and the University of Zimbabwe. Students in the full-time course must study a range of Western instruments as well as African instruments, such mbira and marimba, take classes in music entrepreneurship and are encouraged to set up bands to gain practical experience. The school also runs its band which has toured internationally in the past. Part-time course offerings include sound engineering, DJing and performance studies. There is also an offering of amateur classes for school children.

In 2020, the College reported having 220 full-time students. The average age at entry is 16. With tuition at roughly ZWL7500²² Zimbabwe dollars per year, several students face difficulties paying school fees, and the College only has limited resources to cater to scholarships for low-income talents. The College is not residential so students from outside Harare face additional hurdles.

Another strong professional training facility in Harare is Music Crossroads, a private music academy that developed out of a 1996 youth empowerment project. The academy has offered professional courses for musicians since 2013. It offers a one-year Professional Certificate in Music and a six-month sound engineering course (to be extended to one year). Its self-accredited courses are designed in collaboration with the Global Music Academy in Berlin, Germany. In 2020, the academy reported having 120 enrolled students in its various courses. In 2019 the academy introduced digital training courses for musicians and creatives, better-equipping musicians on placing and monetizing their music on international digital music platforms such as Spotify.

Music professionals seem to have a good appreciation of the quality and relevance of the offering of these two Harare-based institutions. Mid-career artistes often seek training at either one of these to learn to read and write music, a skill essential for international collaborations. The main constraint for both schools seems to be the scale of students they can take in: both have relatively small premises for their current student intake, and there are potential students left to wayside for issues of affordability or space.

There are also universities offering degree programs that provide a good theoretical grounding in music. Mutare-based Africa University, a private university, works in collaboration with the earlier

²² The ZWL (Zimbabwe dollar) currently exchanges at the rate of US\$1 = ZWL 82.

cited Zimbabwe College of Music to offer a Bachelor of Arts in Music. In 2018, 40% of the 116-person graduating class were women²³. Two public universities, Midlands State University (Gweru and Harare) and Great Zimbabwe University (Masvingo) offer respectively a Bachelor of Sciences in Music Business, Musicology and Technology and degree programs in music from the bachelor to doctorate level.

Outside Harare, and the university system, professional music training options are more limited. While Bulawayo hosts the Zimbabwe Academy of Music (a private trust), this school's offering is seen as less relevant for Bulawayo artists, because of its focus on traditional Western instruments and low incorporation of professional courses such as sound engineering. Nonetheless, it should be noted that the academy's infrastructure (professional auditorium, rehearsal space) offer the potential that could be better exploited by music professionals. Unlike its Harare counterparts, the Bulawayo academy has a very low student intake and no full-time offerings.

Musicians in Bulawayo and elsewhere outside Harare, mostly acquire their professional music education through informal apprenticeships with other musicians, or *ad hoc* training programs organized by cultural centres. Arts education, either in the general school curriculum or as an extra-curricular school activity, is often a first stepping stone for professional musicians, with several reporting having started performing during their school days through music or drama groups and competitions. Music training is incorporated in teacher's training colleges for arts teachers. Industry players point out that if the training may be adequate on theoretical issues, creativity and innovation are weakly integrated. Church choirs are also often a fertile training ground for musicians.

The existence of the Mbira Centre in Harare should also be noted. This private centre specialized in the manufacture of high quality traditional and chromatic mbiras, has also in the past initiated mbira teaching programs in schools through its Mbira in Schools project. Given the recent recognition by UNESCO of the mbira/sansi instrument on the World Intangible Heritage list, this centre is an asset for promoting Zimbabwe mbira music.

In terms of business skills and understanding the industry, there is a growing body of industry professionals writing short articles or books guiding success in the industry. Wider dissemination of these can help with continuing education for artistes and music professionals. Industry players notably point out a lack of branding and communication skills of most artists (developing electronic press kits, quality social media profiles, etc.) as well as those in support functions. There are some university courses on intellectual property issues and copyright law, notably a master's programme run by the Africa Regional Intellectual Property Office (ARIPO) and Africa University. Short-term training for artistes and practitioners on IP issues however would benefit the sector.

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<http://africau.edu/news/Africa%20University%20and%20the%20Zimbabwe%20College%20of%20Music%20Graduate%20116%20Music%20Professionals.html>

3.2 Distribution infrastructure

The rapid growth in the supply of music has outstripped the existing concert venue infrastructure in Zimbabwe. Industry players notably point out the challenge of finding venues for 500+ place concerts, and also the ageing and dilapidated state of many venues. There is also an issue of pricing of venues managed by municipalities, with some players complaining that they are too expensive. There may also be reluctance on the part of venue managers to hire out venues for some concerts, as there have been incidences of damage to property in the past, pointing to the need for consultations and clear operating guidelines.

In section 2.4 we saw that there are several home-grown initiatives for digital distribution. The potential success of these is constrained by the cost and speed of internet connections, which currently limits their users to mostly an urban elite and diaspora populations. The online payment infrastructure is also a constraint that has tripped up many initiatives. It is no coincidence that telecom company Econet's Buddiebeatz has seen the most extended "success", given that the telecoms operator has its payment platform. For international platforms, the inoperability of online payment systems like Pay Pal in Zimbabwe, as well as currency inconvertibility issues create hurdles for artists to receive their royalties.

Livestreaming of concerts only started being significantly experimented on in Zimbabwe during the 2020 Covid pandemic. There have been some teething difficulties in terms of regulations governing the organization of Livestream concerts. As this model of distribution is likely to continue post-Covid, the government and private sector must consult and come up with clear guidelines that are supportive of promoters and artistes and protect the consumer rights of concert attendees. For the latter for instance, payment systems could be set up that only debit payment from attendees once the concert starts, thus reassuring consumers that they are protected in case of cancellation. Internet connection speed is a particularly crucial aspect for quality streaming of concerts.

3.3 Copyright collection

ZIMURA (Zimbabwe Music Rights Association) is the only collection society for music royalties. In 2020, it reported 3,200 members. While it performs favourably compared to other collection societies in the East and Southern Africa region²⁴, excluding South Africa, there are many challenges in ensuring the artistes receive their due royalties. Traditionally, a significant portion of royalties have come from broadcasters, but there have been issues of non-payment of royalties due by the national broadcaster to ZIMURA in the past years. This has resulted in a situation whereby artistes in 2019 were getting broadcasting royalties due in 2013 paid to them, in a context of highly fluctuation currency value. ZIMURA has also faced similar difficulties collecting dues from commercial radio stations²⁵. While broadcasting rights should be the biggest source of revenue for

²⁴ Africa Regional Intellectual Property Organization's (ARIPO) regional survey on Collective Management Organizations finds that in 2013, Zimbabwe had the highest level of royalty collections with respect to GDP of 10 African countries collecting royalties. <https://www.aripo.org/wp-content/uploads/2018/12/ARIPO-CMO-Survey-Mag-1.pdf>

²⁵ <https://www.chronicle.co.zw/zimura-to-charge-online-platforms-as-commercial-radio-stations-fail-to-pay-artistes/>

ZIMURA, currently the bulk of its collection comes from public performance (that is blanket fees that public places – bars, restaurants, discos, hotels – pay for playing recorded music in their premises). ZIMURA has also recently branched out into collecting from local online platforms, as well as collecting mechanical rights, that is rights for reproductions of music (globally streaming services pay mechanical rights and may also pay performance rights).

ZIMURA however cannot monitor mechanical rights due to international platforms such as YouTube. Firstly, they do not have up-to-date software capable of processing data that international platforms make available. Secondly, alone they do not have sufficient negotiating muscle to make claims for royalties from the platforms. They thus collaborate with South African CMO, CAPASSO, who also collect mechanical rights from international platforms for other countries such as Kenya, Zambia and Malawi. ZIMURA does not have the technical capacity to double-check CAPASSO's data.

ZIMURA currently only covers the rights of composers and therefore does not pay out royalties to artistes who are only performers (covered under neighbouring rights). This leads to a lot of misunderstandings with artistes.

For its part, ZIMURA would like to see stronger and more active unions among music professionals helping improve understanding of copyright issues, as well as setting standard rates for payment by broadcasters for instance, which would facilitate ZIMURA's collecting role.

3.4 Supportive policy in place

Zimbabwe's music sector benefits from a variety of policy instruments providing the base for sound strategy pillars. Zimbabwe has a 2019 *National Arts Culture and Heritage Policy*, following a consultative process that revised a 2007 national policy and a *National Cultural and Creative Industries Strategy (2020-2030)*, launched in October 2020. The strategy has the ambition of making Zimbabwe's cultural and creative industries (CCIs) a key contributor to the country attaining upper middle-income status. It also highlights the role of CCI products in building social cohesion and in marketing Zimbabwe's image. The strategy emphasises the need to expand regional and international markets given the limited size of the domestic market, by *inter alia* increasing the visibility of Zimbabwean products on international platforms. Emphasis is also on the crucial need to develop strong legal frameworks that facilitate the full exploitation and commercialisation of intellectual property and protect the rights of practitioners. Generating data for informed policymaking, building professionalism among practitioners and improving access to quality cultural infrastructure are other priorities of the strategy.

The arts and culture sector was, for the first time, accorded consideration in the Zimbabwe government's main development planning processes. In November 2020, the Zimbabwe *National Development Strategy 1* - integrated a section on Arts and Culture – an invitation for responsive sector strategies. Meanwhile, the government's *Education 5.0* policy has incorporated arts education into the national curriculum.

By far, the most influential policy instrument in the view of industry players has been the local content regulation contained in the Broadcast Services Act of 2000, which imposed 75% local content (and an additional 10% regional content) on broadcasters. Many industry players highlight how that was a game-shifter that stimulated the growth of new genres of Zimbabwean music. Despite its utility, the policy can be improved. Industry players point out the need for stricter enforcement of its implementation, and perhaps the need to integrate quality control mechanisms through listening committees, to ensure that good quality local content is played²⁶. Some players have proposed including an obligation to reserve a certain amount of airtime for new and emerging artists, as is reportedly the case in France.

The IP regime has been recently strengthened by the National Intellectual Property Policy and Implementation Strategy 2018-2022. However, the Copyright and Neighbouring Rights Act, last amended in 2004, urgently needs updating for a digital context.

Zimbabwe is a signatory to international protocols such as the SADC Protocol on Arts and Culture and the *UNESCO 2005 Convention on the Protection and Promotion of the Diversity of Cultural Expressions* - a binding international instrument that provides a monitoring framework and potential financing instruments for domesticated strategies. In December 2020, the 15th session of the Intergovernmental Committee for the *Safeguarding of the Intangible Cultural Heritage* inscribed Zimbabwe and Malawi's art of crafting and playing mbira/sansi on the UNESCO List of the Intangible Cultural Heritage of Humanity. A music strategy can provide strategic pathways for riding on the seminal inscription.

Additional supportive policies for Zimbabwe's music sector include, among others: the Freedom of Information Act (2020) which repealed the Access to Information and Protection of Privacy Act, providing citizens and media practitioners with the right to access information and creating legal frameworks and mechanisms for accessing information from public and private bodies. The Zimbabwe Media Commission Bill was published in August 2019 and is currently going through its Committee Stage in the National Assembly. The Broadcasting Services Act, in addition to local content requirements, provides for the functions, powers and duties of the Broadcasting Authority of Zimbabwe such as regulating and protecting broadcasting frequency spectrum and regulating and licensing broadcasting services. The Censorship and Entertainments Control Act regulates and controls the public exhibition of films, the importation, production, dissemination and possession of undesirable or prohibited video and film material, publications, pictures, statues and records and the giving of public entertainments. The Postal and Telecommunications Act provides for The Postal and Telecommunications Regulatory Authority of Zimbabwe (POTRAZ), while the Cyber Security and Data Protection Bill was published in the Zimbabwean Government Gazette of Friday 15 May 2020 and affects everyone who relies on modern information communication technologies. Zimbabwe's International Treaties Bill will establish a uniform procedure for the government's consideration and approval of international treaties and their publication after ratification or, in some cases, before their ratification. The music sector can strategically pivot its operations around these policy frameworks.

²⁶ Some radio DJs are accused of sabotaging the intent of local content policies by playing substandard local content just to meet the quota and focusing quality selection on foreign content.

3.5 Policy gaps

Some instruments and pieces of legislation need to be better aligned if they are to enrich the music sector operating environment. Agency, through awareness and skills strengthening, is urgently required for a music sector value chain that aspires for innovation and global competitiveness – both in terms of content and services. The gap analysis proffered here is not exhaustive.

While Zimbabwe’s National Arts Culture and Heritage Policy was launched in 2020, its formulation started several years prior: some emerging issues in rapidly evolving CCI sectors are therefore not directly addressed. The 2020–2030 National Cultural and Creative Industries Strategy addresses some of these but falls short on specifics in areas such as government funding mechanisms, tax-incentives and policies for enabling new business models, such as online music business content monetisation. While the Postal and Telecommunications Act provides for the Postal and Telecommunications Regulatory Authority of Zimbabwe (POTRAZ), this authority is yet to provide tangible mechanisms to reduce high digital data costs in Zimbabwe (costs are higher in Zimbabwe than in other SADC countries), upgrading of internet speed and incentives for online business start-ups – prerequisites for globally competitive music offerings. Also, the 2004 Copyrights Act needs updating to be able to offer sufficient protection in an environment of digital dissemination, and ICT infrastructure for curbing digital piracy (stream-ripping in particular) urgently needs to be put in place.

The National Arts Council of Zimbabwe Act (1985, 2004) is outdated - superseded by time and technological advancements. It is overdue for revision. While arts organisations registered under the National Arts Council still enjoy duty-free importation of equipment as provided by the Customs and Excise (General) Regulations, 2001 (*Statutory Instrument 154 of 2001*), the rebate is enjoyed by registered arts organisations only - and rebate processes are too cumbersome for most musicians.

As in many countries across the world, the Covid 19 crisis has highlighted the fragility of the music sector, with many professionals completely lacking social safety nets. Progress on implementing UNESCO’s 1980 *Recommendation concerning the Status of the Artist* would be welcomed. Other policy gaps around implementing these recommendations can be bridged through connectedness with constitutional entities such as the *Zimbabwe Gender and the Media Commissions* – established to remove barriers to the attainment of full gender equality and media plurality. More protection of fundamental rights, digital environment rights and restrictions to anti-corruption watchdogs would be required. While Zimbabwe ratified the UNESCO 2005 Convention in 2008 and has submitted two *Quadrennial Periodic Reports (QPR)*, implementation mechanisms remain weak, in particular in the field of data collection. There are gaps at local government policy-making levels to realise the potential contribution of culture and the music sector to sustainable-city-making.

Strategic collaborations are needed to enable lobbying and advocacy movements supportive of a vibrant music sector.

4 SWOT

The table below highlights for attention up to five of the most salient strengths, weaknesses, opportunities and threats for the Zimbabwean music sector. Any strategy put in place mustn't undermine existing strengths and ideally should leverage them.

STRENGTHS	WEAKNESSES
<ul style="list-style-type: none"> - Unique Zimbabwe sound that penetrates globally - Good pool of creative talent - Quality and relevant professional music training in place - The large Zimbabwean diaspora presents export opportunities - Local content regulation has created an appetite for local music 	<ul style="list-style-type: none"> - Insufficient mechanisms for quality control and talent nurturing - Low skills to monetize online distribution - Training not sufficient in quantity - Weak CMO and practitioner knowledge and capacity to monitor copyright in the digital realm - Low professional skills in marketing (artistes and managers)
OPPORTUNITIES	THREATS
<ul style="list-style-type: none"> - Can build greater synergies between tourism and music (live events in general) - Mbira on the UNESCO Intangible Cultural Heritage list - Senior executives in major record companies who know the Zimbabwe music scene - African music market growing rapidly 	<ul style="list-style-type: none"> - Digital piracy (stream-ripping) - Market concentration by large international or African digital platforms

5 Appendix 1 : Music Consumption Survey



With funding from the
European Union

SURVEY ON MODES OF MUSIC CONSUMPTION IN ZIMBABWE



November 2020
Yarri Kamara
UNESCO 2005 Convention Expert Facility

This survey was carried out under the framework of the EU/UNESCO Expert Facility for the Governance of Culture in Developing Countries and is part of the Zimbabwe project “**Strategy for the sustainable development of Cultural and Creative Industries (CCIs) in Zimbabwe – focus on the Music sector**” piloted by the National Arts Council of Zimbabwe. Survey results will be integrated into a wider SWOT (Strengths, Weakness, Opportunities and Threats) analysis of Zimbabwe’s music sector which will inform the future Zimbabwe music strategy.

SURVEY METHODOLOGY

The survey on modes of music consumption in Zimbabwe was deployed online using the Survey Monkey platform during October 2020. Information on the running survey was disseminated to audiences through WhatsApp and social media posts, notably through the network of the National Arts Council of Zimbabwe.

A total of 363 responses were registered, of which 357 were valid respondents²⁷. The data on music consumption is quite robust with a margin of error of around 5.2%. The data however may be skewed towards urban dwellers, who made up 86% of the sample. Given the mode of survey administration (online), the results are also skewed towards consumers who are regularly online. The statistics therefore may be less representative of rural audiences, who make up a small part of the sample and are less likely to be online. Furthermore, the data on musicians have a slightly higher margin of error as the sample is smaller.

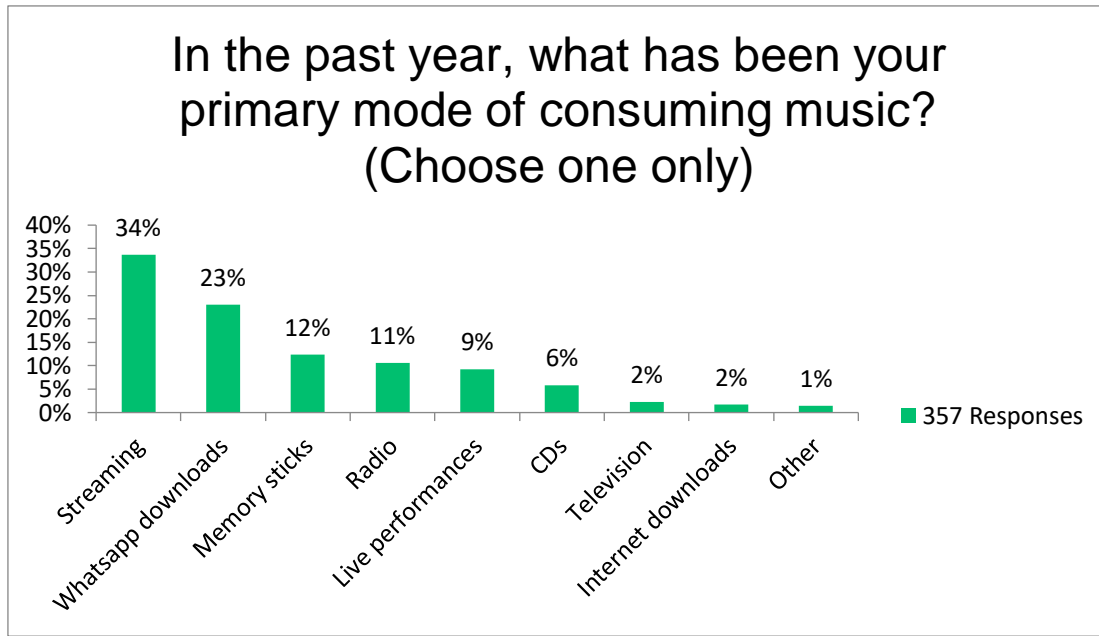
The margins of error reported for each answer are the highest for any given response to the question. Extreme answers—such as 2% or 98%—will have a lower margin of errors, than middle-of-the-road responses—such as 60% or 40%.

SURVEY RESULTS

HIGHLIGHTS

- 34% of Zimbabweans today consume music primarily through streaming. Only 6% are still consuming music primarily through physical CDs.
- Only 8% of consumers do not use any streaming platform regularly (at least once a week). YouTube is by far the most commonly used streaming platform (78% of consumers).
- Consumers are mostly streaming music for free. Only 27% of consumers have a paid subscription to a music streaming service.
- Musicians seem to lag behind consumers in moving online. 15% of Zimbabwean musicians do not have their music available on any streaming platform. Of those who do stream their music, YouTube again is by far the most commonly used platform (77% of musicians).
- 68% of musicians did not make any revenue from streaming over the past year. And only 8% made more than 500 USD equivalent.

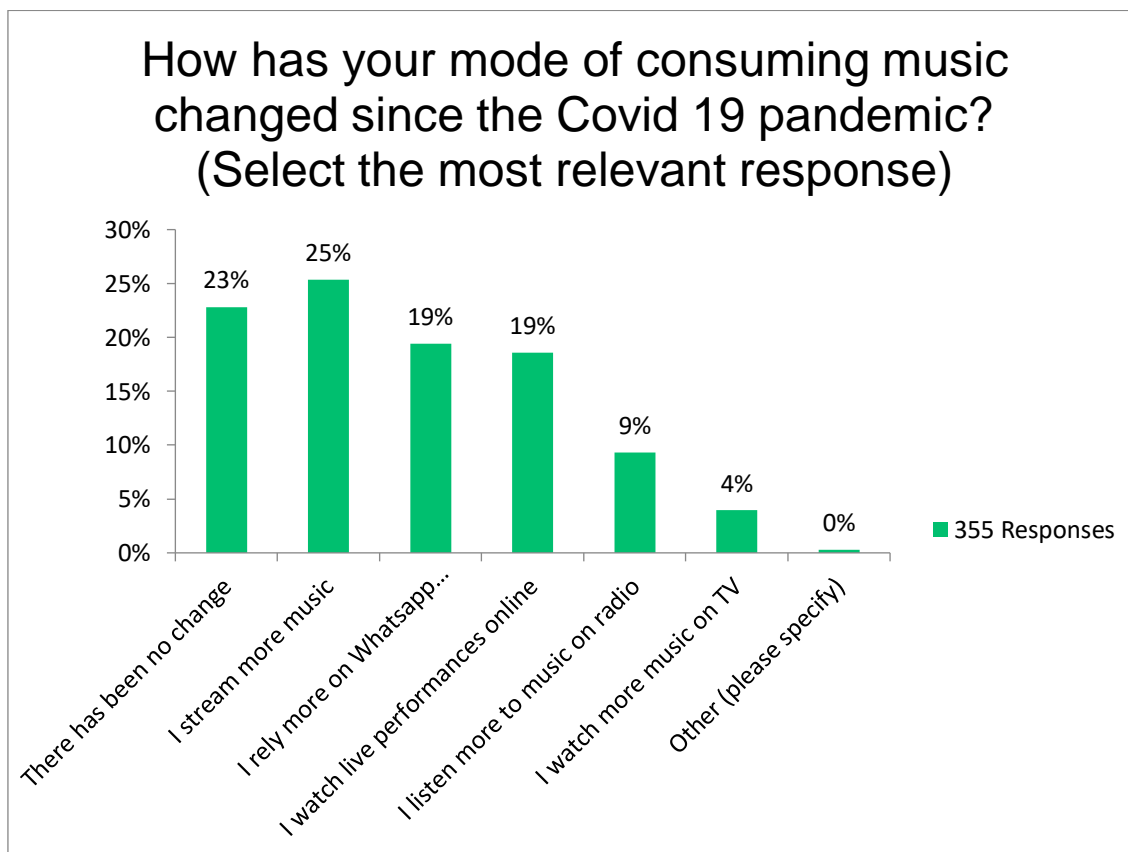
²⁷ Statistically, a minimum sample of 384 respondents is needed for a 5% margin of error for any large or unknown population.



Margin of error at 95% confidence level: 5.2%

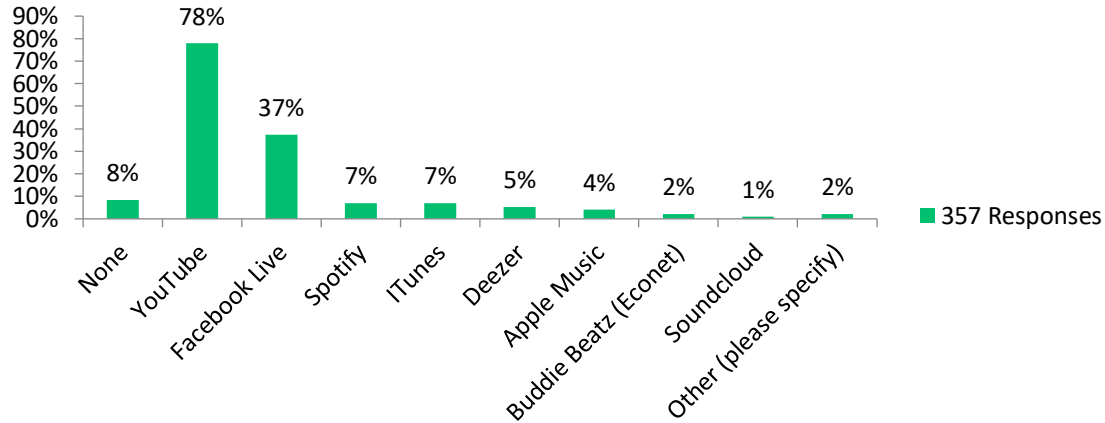
Responses to “Other” include: DJ pool and receiving songs by email directly from artists.

NB: the question asks consumers about their PRIMARY mode of music consumption. For example, 6% for CDs does not mean that only 6% of Zimbabweans listen to CDs, but rather that only 6% of Zimbabweans listen to music *mainly* through CDs.



The margin of error at 95% confidence level: 5.2%

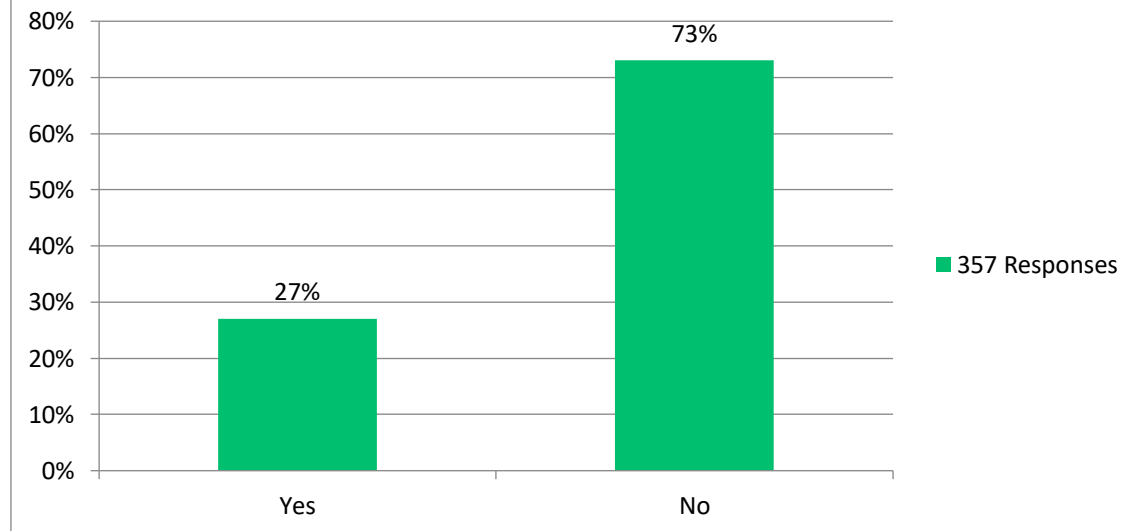
Which streaming platforms do you regularly use, that is at least once a week? (Tick all that apply)



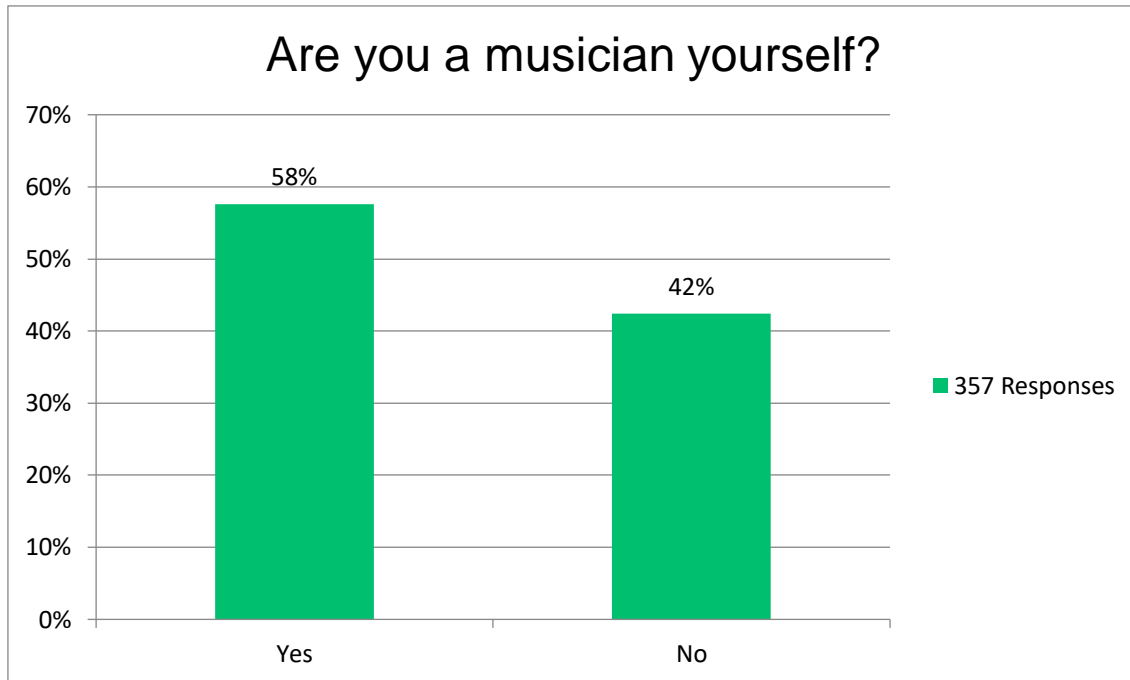
The margin of error at 95% confidence level: 5.2%

Responses to others include: Instagram, Audiomack, and radio streaming

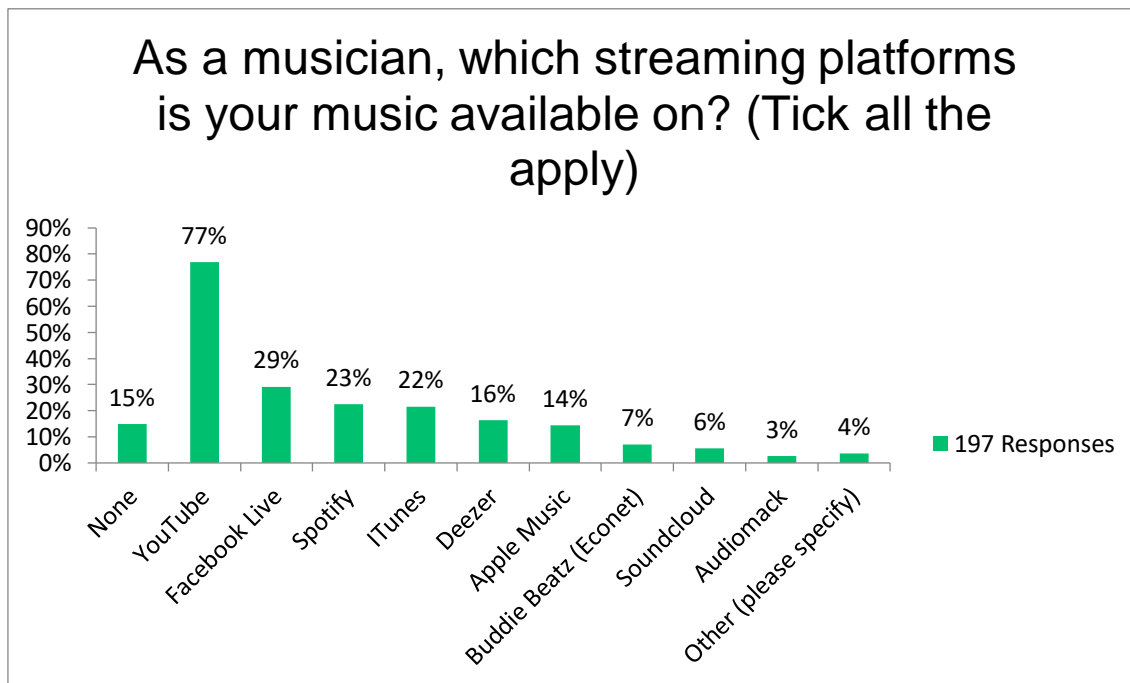
Do you have a paid subscription to a streaming platform?



The margin of error at 95% confidence level: 4.6%

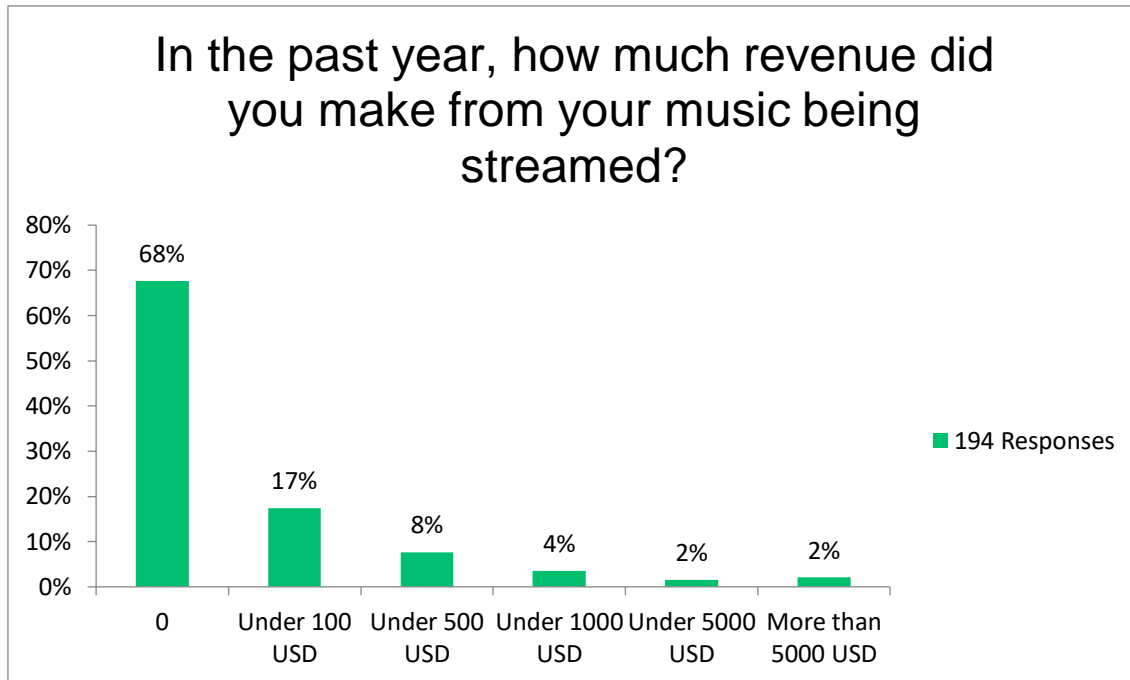


58% of the survey sample were also musicians and proceeded to answer the next two questions concerning the streaming of their music.



The margin of error at 95% confidence level: 6.0%

Responses to “other” include Amazon, Instagram, Reverberation, Oyos Music and “Zimbabwean sites”



The margin of error at 95% confidence level: 6.6%

3 respondents (or 2% of the sample) reported having made over 5000 USD from streaming; one of these respondents is in the Zimbabwean diaspora abroad, one lives in a rural area in Zimbabwe and one in a city in Zimbabwe.

SURVEY SAMPLE CHARACTERISTICS

