Networks in Montreal's independent music industry

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ABSTRACT

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Cultural industries have risen to prominence in the economy of Montreal and other cities in the developed world. An important component of Montreal's cultural economy is its independent music scene, which has produced successful bands and receives international media attention. Members of the independent music scene are at least semi-autonomous of the four major record labels and associated production and distribution channels.

By drawing on 42 semi-structured interviews with musicians and other key actors in Montreal's independent scene, this case study engages with debates on the social foundations of creativity by analyzing music industry networks and the place-based attributes of Montreal affecting those networks. Findings suggest that Montreal's music scene had its roots in the 1980s when musicians migrated to the city due to its low cost of living. The do-it-yourself attitude of the scene's founders coupled with a reduced major label presence has fostered a spirit of independence and solidarity among actors in Montreal's music industry, which makes the city a suitable incubator for emerging acts.

Today, networking and diversification are the two principal survival strategies used by music professionals to cope with the challenges of the industry. Francophone networks are concentrated in Quebec and France while Anglophone networks are more international. Language-based cleavages within Montreal also considerably affect professional networks. Finally, music professionals in Montreal benefit from a number of institutions that facilitate networking and provide funding, expertise, and exposure.

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For my brother Charles

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Introduction

Since the late 1970s, the manufacturing sector in developed countries has experienced a general decline as a result of economic processes favouring internationalized and flexible production (Dicken, 2004). Consequently, other sectors, and the cultural sector in particular, have become more prominent in the urban economies of the developed world (Scott, 1997). Montreal has followed this trend, since its manufacturing sector has declined (Picard, 1986; Tremblay et. al, 2002) and its cultural industries are now seen as vital drivers of economic growth (Stolarick & Florida, 2006).

An important component of Montreal's cultural economy is its independent music scene, which has gained global recognition due to the success of English-language bands such as Arcade Fire, Islands, and Wolf Parade. Montreal, as the cultural hub of French-speaking Quebec, also has a vibrant Francophone music scene. Many of the biggest bands to come out of Montreal are called 'independent' because they operate at least semi-independently from the four major record labels,[1] which dominate the North American and global music markets. The concentration of independents in Montreal has become well known, and the city has been mentioned as a centre for independent music in Spin Magazine (Perez, 2006) and the New York Times (2005).

This thesis is an exploratory study of Montreal's independent music scene, where the goal is to provide a basis for future studies on the cultural economy or cultural industries in Montreal. Two main themes are explored in the thesis: (1) the characteristics of professional networks in Montreal's independent music industry, and (2) the place-

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[1] For instance, many Montreal bands are produced independently but are distributed by the major labels, making them semi-independent.

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based attributes of Montreal that affect these networks. The first theme includes an analysis of horizontal and vertical network linkages using a framework informed by the geographical and sociological networks literature. The term 'horizontal linkages' refers to the connections between actors on the same level of the supply chain (e.g. connections between musicians), and 'vertical linkages' refers to connections between actors on different levels of the supply chain (e.g. connections between musicians and label owners). The second theme, on the place-based attributes of Montreal, broadly covers issues such as Montreal's geographical location and its size, languages, history, and institutions.

To meet the research goals, 46 musicians and key actors in Montreal's independent music scene were interviewed in 2008. The interviews were supplemented with data garnered from other sources, such as organizations' annual reports, official statistics, and regular participant observation as a performer alongside professional musicians.

The research showed that music professionals engage in two strategies in order to mitigate the risks of low-paying and unstable employment: networking and diversification. Diversification can be horizontal (i.e. working on multiple similar projects) or vertical (i.e. occupying more than one function in the supply chain). Networking, meanwhile, is a tool used to achieve functional diversification and to transfer information. It primarily occurs through face-to-face contact and attendance at live performances, which leads to clustering of most actors and functions. In Montreal,

music industry clustering primarily occurs in three neighbourhoods: downtown, the Plateau, and Mile End.

Professional networks in Montreal's independent music industry are significantly affected by the place-based attributes of the city. For one, the city has a low cost of living, which has been instrumental in attracting and retaining artists since the 1980s. Secondly, Montreal's bilingualism serves to fragment the already small scene into tight, language-based networks. Tight networks impose limits to growth but also support professionals early in their careers and generate feelings of solidarity. This cohesion has led to the creation of a music infrastructure and a set of grassroots organizations that make the city an incubator for emerging talent. Grassroots organizations provide professionals with networking opportunities, information, and exposure. Meanwhile, top-down provincial and federal policies funnel millions of dollars into Montreal's music industry annually to bolster intermediary organizations and support production, promotion, and distribution of music.

The thesis begins with a review of the academic literature. Here, pertinent themes in economic geography are discussed, including cultural industries, cultural policy, clustering, and face-to-face contact. A more specific discussion of the music industry follows once these general topics are laid out. After the literature review comes a short section on methodology. Most of the rest of the thesis is then devoted to examining the results of the research in-depth. The results section begins with the findings that describe the functioning of the music industry in general and ends with those which are more

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specific to Montreal. Finally, the conclusion offers suggestions for further research and for policies to bolster the music industry.

Chapter I

Literature review

Part I – Cultural industries

As part of an exploratory study of musicians' networks in Montreal, this literature review draws primarily upon a broad set of works concerning the cultural economy and networks in cultural industries, but also refers to more specific research on the music industry. To begin, the important terms used in the study are defined. Next, the significance of cultural industries in the urban economies of the developed world is highlighted, along with the policies used to promote them. A description of networks in cultural industries follows, accompanied by a discussion of the clustering that cultural firms (e.g. music production companies) tend to exhibit. Special attention is paid to the roles of 'buzz,' face-to-face contact, and different types of linkages within creative industry clusters.

After laying out the theoretical framework, I turn to a more specific discussion of the music industry. Both the top-down and bottom-up dynamics of the music industry are dealt with, and a focus of this section is the division between major and independent record labels. A brief history of independent music is also laid out, highlighting the challenges that independent artists and labels face. Finally, a section on the music industry in Canada and Quebec concludes the literature review.

Cultural industries in the urban economies of the developed world

The study of music in geography is still an emerging field, but much work has been done on cultural products in general. Cultural products are goods that serve an aesthetic or expressive function and are directed at a public of consumers (Hirsch, 1972). Examples of cultural products include paintings, movies, jewelry, and music. The cultural economy is the portion of the economy that is involved in the production, distribution, marketing, and retail of cultural products (Scott, 1997).

The cultural economy has become increasingly significant in cities of the developed world because of declines in manufacturing and industry, in turn due to shifts towards an increasingly competitive and globalized economy (Dicken, 2004). New information and telecommunications technologies driving globalization have also allowed signs, symbols, and culture in general to assume major new roles in consumption (Lash & Urry, 1993). Indeed, according to Scott (1997, p. 323), capitalism "is moving into a phase in which [...] human culture as a whole is increasingly subject to commodification." Meanwhile, academic interest in the cultural economy has increased with the general recognition that culture contributes to the generation of new ideas and innovation (e.g. Saxenian, 1994; Putnam, 2000). The set of changes described above has prompted policies supporting the cultural economy (Brown et al., 2000). One popular but controversial argument for such policies is that a vibrant cultural sector attracts those with high levels of human capital, who generate regional economic growth (Florida, 2002). Although the long-term viability of cultural industries is still in question, many

cities are embracing the cultural economy as a pillar for job creation and economic growth (Peck, 2005a).

Urban cultural policy

Cultural industries have been explicitly linked to economic development policies in many cities that have experienced de-industrialization, including Manchester, Detroit, and Berlin. The cultural sector is seen both as a tool to generate employment directly, and as a lure for human capital and investment in other sectors (Brown et al., 2000; Peck, 2005a). Urban policy-makers have by-and-large accepted that they are competing against each other on 'the global stage' to attract investment and human capital, and have used cultural industries to engage in public relations campaigns which highlight cultural capital and minimize the manufacturing past. In cases where cultural infrastructure did not already exist, it has been invested in. Within cities, de-industrialized zones have been particularly targeted with cultural investment (Brown et al., 2000). An example of such investment was the construction of the Sage Gateshead building near Newcastle-upon-Tyne, United Kingdom, which was built on post-industrial land with significant public support and contains several music halls.

Alongside arguments that it attracts inward investment and human capital, public investment in cultural industries is justified as a means of defending local cultures and traditions. This argument is particularly salient for the music industry, which is globally dominated by four multinational corporations. Nevertheless, cultural policies designed to protect local scenes do not necessarily seek to shut out globalizing forces, as the case has

been made that globalization fosters mutually beneficial linkages between local producers and global systems of production and distribution (Brown et al., 2000, p. 438; Scott, 2004). Sometimes, and notably in the case of music, there can be resistance to urban cultural policies. According to Straw (2000, p. 177), "policies intended to professionalize popular music culture, however well intended, will always run up against the conviction that, in doing so, they are interfering in processes that are best left untouched." Similar feelings exist in other artistic industries, where some participants contest the very conceptualization of their craft as 'an industry' and view policies predicated on this assumption with suspicion.

Public sector support for cultural industries takes a variety of forms, but often involves backing for festivals and investment in cultural infrastructure such as art galleries and music venues (Peck, 2005a). Many cities have also targeted existing clusters or 'cultural quarters' for support in the hopes that self-sustaining concentrations of creative activity will be created (Brown et al., 2000l; Mommaas, 2004). These initiatives have been criticized as 'quick-fixes' for more serious structural problems afflicting de-industrialized urban economies. Furthermore, it has been argued that many cultural policies are elitist and do nothing to support vital local cultural institutions (Peck, 2005a) such as libraries, schools, and community centres.

Networks in cultural industries

As interest in cultural industries as part of an urban economic strategy has increased, academics and policy-makers have focused on studying their organization.

More specifically, some geographers have begun examining the networks that comprise the cultural economy. This new interest is connected to the rise of economic sociology, which examines the broader roles of social networks in economic interaction (Peck, 2005b). Becker (1982) was one of the first to look at networks in cultural industries in his seminal work *Art Worlds*. Becker calls the patterns of collective activity surrounding a work of art an 'art world.' He notes that all art requires collective action to be produced; art is not simply the work of the artist. This is similar to Bourdieu's (1996) influential idea of the 'field' – the set of horizontal and vertical power relations -- in which art is created. For example, a painting requires not only the work of the painter, but also the work of those who produce canvases, paintbrushes, and paints (vertical relations), and other painters to provide inspiration (horizontal relations). With a little thought, one could extend the art world (or the field) around a painting almost indefinitely, to include, for instance, those responsible for the transportation of paint supplies, or people in charge of law enforcement, who allow the painting to be completed in peace. Becker realizes that the boundaries of art worlds are difficult to define, but his most important contribution is the observation that art is not produced in a vacuum, but is the result of networked interaction between individuals.

Another significant idea from *Art Worlds* is that of conflicting interests. When one considers the example of the art world around a painting, it becomes obvious that the motivations of different actors contributing to the final product are not necessarily aligned. While the painter may be concerned with producing a masterpiece, the art

vendor may want a piece that, while unoriginal, is likely to sell. In other words, the division of labour within art worlds may create conflicts of interest (Becker, 1982).

Paul Hirsch is a prominent economic sociologist who essentially applies the ideas proposed by Becker to contemporary cultural industries. Rather than looking at networks of individuals, he makes use of an industry-systems framework, which emphasizes the connections and interdependencies between different roles that are necessary for the completion of a final product. Through this lens, cultural industries are seen as a network of profit-seeking organizations, encompassing creators (e.g. artists, musicians, writers), brokers (e.g. agents), producers (e.g. publishers, studios), distributors (e.g. wholesalers, theaters), and media outlets (Hirsch, 2000, p. 356).

A cultural industry-system has input and output boundaries which can be thought of as delineating the art world. On the input boundary and along the production chain, products and ideas appear on the market and are processed by organizations that weed out unsatisfactory candidates and modify those seen as having potential. As a result of this process, consumers are given a set of pre-selected cultural products. New material is constantly being searched out due to high rates of turnover (Hirsch, 1972).

Figure 1 – A simplified diagram of the music industry-system
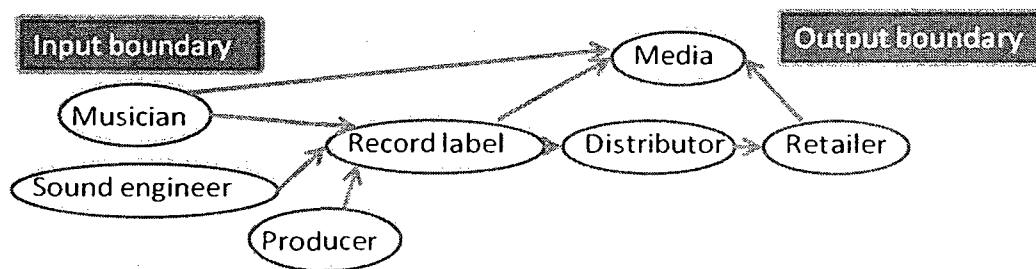
Those on the output boundary of cultural industry-systems are concerned with creating linkages to retail outlets and 'surrogate consumers' in the mass media, with the end goal of marketing and selling the cultural product. The necessity for these output boundary linkages derives from the sheer number of unique cultural products, which prevents the firm from adequately marketing each one. Thus, a substantial amount of the responsibility for promotion rests with other organizations, such as radio stations or websites, which may either block or facilitate the diffusion of cultural products. When a certain style is embraced by the media, it is generally imitated by cultural firms until the 'fad' is no longer popular (Hirsch, 1972).

Beyond marketing, the distribution of cultural goods is carried out by specialized firms and multinational corporations (Scott, 1997). The cost of producing many cultural products has decreased, making distribution and retail more vital segments of the cultural economy. Perhaps as a result of these relative costs, mega-mergers have recently concentrated power over the distribution and retail of cultural products in the hands of fewer firms (Hirsch, 2000).

The distribution and retail components of cultural industry-systems exist to deliver cultural products to consumers. Demand for these goods and services is notoriously uncertain due to changes in consumer and media tastes, and so cultural products are over-produced to allow firms to 'hedge their bets.' Cultural products require low capital investments and the more products released, the better the chance of one of them being commercially successful, which generates an overall profit. This means the chance for commercial success of any individual cultural product is quite low (Hirsch,

1972). Uncertain demand also causes cultural industries to remain vertically disintegrated (Scott, 1996). This is especially true for the entertainment industry, which is characterized by outsourcing of production, marketing, and distribution (Hirsch, 2000).

Clustering of cultural firms and monopoly of place

In addition to over-producing goods and remaining vertically disintegrated, cultural firms also tend to cluster spatially. Industrial clusters have horizontal and vertical dimensions: firms offering similar products or services compete horizontally, while complementary firms are linked vertically. Both internal and external knowledge inputs contribute to the growth of clusters (Bathelt et al., 2004; van Heur, 2007). For a cultural cluster to be viable, it requires a strong network of institutions (e.g. local universities supplying skilled labour, supportive local government or trade associations) to provide inputs and to fulfill needs for governance. The creation or presence of such institutions is also linked to the appearance of clusters (Scott, 1997).

One reason cultural firms tend to cluster is that they are highly dependent on external economies of scale, and so they tend to co-locate in appropriate environments. For example, recording studios may cluster in a suitable area already containing venues and music shops. The close proximity of industry actors within a cluster also facilitates communication, reduces transaction costs, and creates localized pools of workers with specialized skills, which benefits cultural firms with high turnover rates (Hirsch, 1972; Scott, 1996; Scott, 1997). From the perspective of workers, clustering minimizes the risk of long-term unemployment because other jobs are available within the cluster if lay-offs

occur (Storper & Venables, 2004). Artistic workers in particular rely on face-to-face networking to minimize the risks associated with unstable employment (Pilati & Tremblay, 2007), leading them to cluster.

Cultural industry clusters are typically composed of interdependent small- or medium-sized businesses. These firms require flexible workers with a variety of skills and often complement human labour with computer technology (Scott, 1997, p. 333). Flexible, small-batch production is the norm in cultural industries due to uncertain demand. Flexible production has been understood both as a driver of and a response to "the emergence of increasingly differentiated and fragmented consumer cultures" (Scott, 1997, p. 326) such as the international Goth, punk, and hippy subcultures (Scott, 1997; Hirsch, 2000).

While popular culture is consumed across the globe, most is produced in a few clusters located in world cities such as Los Angeles and London, which, over time, have become identified with the culture they produce. As cultural industry clusters gain recognition for their products and the processes involved in their creation, they gain a competitive advantage, which Scott (1997) refers to as 'monopoly of place.' To use one of Scott's examples, the film industry of Los Angeles gains an advantage from the fact that Los Angeles is known for its film industry. Films produced there are seen as distinctive from films made elsewhere, and they create images of the city that are assimilated into its urban character. The new character makes Los Angeles even more fitting for shooting films.

Buzz, face-to-face contact, and linkages

Related to monopoly of place is the more general idea of 'buzz.' According to Bathelt et al. (2004, p. 38), based on work by Storper and Venables,

> buzz refers to the information and communication ecology created by face-to-face contacts, co-presence and co-location of people and firms within the same industry and place or region. This buzz consists of specific information and continuous updates of this information, intended and unanticipated learning processes in organized and accidental meetings, the application of the same interpretative schemes and mutual understanding of new knowledge and technologies, as well as shared cultural traditions and habits within a particular technology field, which stimulate the establishment of conventions and other institutional arrangements.

Buzz, then, is tied to clustering and the face-to-face contact associated with it. It is beneficial because it facilitates networking and allows innovations to spread throughout the cluster. In creative industries, the role of face-to-face contact in generating buzz is particularly important, as the constant exchange of tacit knowledge (that which is difficult to codify) is vital (Bathelt et al., 2004). The music industry provides a simple example of this: band-mates practice together to convey to each other exactly how they want music to be played, beyond what may be written on the musical score. This information is difficult to transfer through non-face-to-face interaction, and so the necessity of this type of face-to-face contact leads to clustering in the music industry.

Aside from facilitating the transfer of tacit knowledge, it has also been argued that face-to-face contact (1) is an efficient means of communication, (2) allows actors to coordinate their separate commitments and thereby reduces incentive problems, (3) permits screening of people or products, and (4) motivates effort. The significance of face-to-face contact in clusters is suggested by the fact that advances in transportation and communication technologies have not deterred clustering, and that the number of face-to-face contacts do not change in response to transportation costs (Storper and Venables, 2004, p. 353).

When face-to-face contact between two actors occurs, one can say that a linkage has been created (to say nothing of the strength of the linkage). In this sense, clusters can be thought of as collections of linkages with temporal and spatial dimensions. Using the terminology of van Heur (2007), industrial clusters include two types of linkages: clustered linkages are between actors inside the cluster, while networked linkages extend from within the cluster to outside it. There is an ongoing debate about which type of linkage is more important to the vitality of the cluster, but one opinion is that a balance of both types is ideal (Bathelt et al., 2004). Interestingly, van Heur (2007) contradicts an assumption of cluster theory (that vertical linkages should mostly occur within the cluster) by arguing that independent electronic music labels forge vertical linkages with artists based on the genre they specialize in, be they local or non-local.

Both clustered and networked linkages may be vertical or horizontal. Strong vertical linkages facilitate production, while strong horizontal linkages generate competition and diffuse innovations. A strong set of both types of linkages encourages

entrepreneurialism in the cluster and aids policy initiatives designed to support intra-cluster relations (van Heur, 2007).

Part II - The music industry

The music industry-system

The music industry possesses many of the same characteristics as cultural industries in general. Record labels over-produce music, cope with uncertain demand, and cluster spatially (Hirsch, 1972). Face-to-face contact and buzz drive local scenes, which are comprised of complex sets of clustered and networked linkages (van Heur, 2007).

The major centres of the American music industry are New York, Los Angeles, and to a lesser extent, Nashville (Scott, 1999; Wiseman, 2003). It could be argued that a 'monopoly of place' accrues to these locations, generating advantages for local labels and artists. The labels in these and other centres require a host of other functions to operate, which encourages clustering. Scott (1999, p. 1968), for instance, discusses the industry-system surrounding record labels:

> The recording company [...] operates basically as a central A&R (artist and repertoire) recruitment organization and as the publisher of finished recordings. Around this core lies a constellation of distinctive economic and culture-producing functions ranging from song writing and the provision of musical instruments on one side, to manufacturing and promotion-distribution on the other.

Similarly, van Heur (2007, p. 2), writing on the music industry, notes:

> Organizationally, music networks are differentiated into a number of functions:
> venues (clubs, galleries); record labels; event organizers; publications; booking
> and promotion agencies; radio stations; record stores; and distributors. These
> functional nodes are interconnected with one another through a large variety of
> informal networks.

In addition to the roles mentioned in the preceding quotes, organizations (e.g. universities and trade organizations) and the broader cultural milieu are also vital components of music industry clusters (Scott, 1999). All in all, the complexity of the music industry-system can appear daunting.

Major and independent record labels

Perhaps the simplest way to understand the organization of the music industry is to take record labels and separate them into 'majors' and 'independents,' and then to divide up all the other actors in the music industry according to their affiliations with majors or independents. The major labels are the four companies that dominate the music industry: AOL-Time Warner, Sony-BMG, Universal-Vivendi, and EMI (Fox, 2005). These companies are based in Tokyo, Los Angeles, New York, and London, and account for about 90% of Canadian and American music sales and 80% of global music sales. They also have control in other media and technology sectors (Brown et al., 2000;

Leyshon et al., 2005; LeBlanc, 2006; Sutherland & Straw, 2007).[2] Independents, on the other hand, comprise all other record labels and usually employ only a few people. Due to the over-supply of music, uncertain demand, and low barriers to entry and exit, turnover among independents is quite high (Scott, 1999, p. 1966). Turnover of artists and staff within the majors has also risen recently with the decline of the fortunes of the four majors since the beginning of the new millennium, which followed fifteen years of growth in the sale of recorded music (Leyshon et al., 2005).

Although the categories of major and independent labels will be used in this paper, the distinction is not always clean-cut. Clouding any simple division is the fact that majors often form partnerships with independents, and vice-versa. The majors invest in a large number of subsidiary labels, which possess varying degrees of autonomy (Scott, 1999). For independents, forming a partnership with a major (frequently to secure distribution) can be seen as the only way to achieve large-scale or sustained commercial success (Hesmondhalgh, 1999).

Both major and independent labels face significant challenges when attempting to sell music, the most important being the unpredictability of the industry. Three factors cause demand for music to be uncertain: changes in consumer tastes, disincentives to vertical integration, and the fact that the desires of mass media organizations (e.g. television and radio stations) must also be taken into account (Hirsch, 1972). Demand is

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[2] Other areas of the American music industry are also highly concentrated. Concert ticket sales are dominated by Ticketmaster, Viacom dominates music television, and Clear Channel Communications largely controls music radio stations as well as concert production and promotion (Fox, 2005). The major labels also dominate music distribution (Leblanc, 2006).

also reduced by the availability of free music through Internet downloading and from other sources.

In order to cope with the challenges of the industry, record companies over-produce music, differentially promote artists, and attempt to influence processes at their input and output boundaries (Hirsch, 1972). To illustrate the first point, major labels only break even on between about 3-10% of their records (Leyshon et al., 2005). This small minority of commercial successes must be popular enough to generate a profit for the firm. The second point, dealing with differential promotion, is related to the first, as significant backing is given only to the small number of artists who are expected to succeed. Promotion is done directly to consumers, and indirectly to influential actors within the media. The total amount of promotion that a record receives before its release is a decent predictor of whether or not it will be a hit (Hirsch, 1972).

The third point is manifested by the fact that record labels commit large numbers of personnel to boundary-spanning roles, and is connected to how music is promoted and how new artists are discovered. On the input boundary, boundary-spanning roles relate mainly to the discovery of talent, while on the output boundary they exist to create and exploit connections used to generate indirect promotion with the media. At the input boundary, personnel, such as record producers and A&R people[3] are given a great deal of independence and are evaluated based on the performance of the talent they bring to the table (Hirsch, 1972).

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[3] A&R people are essentially talent scouts.

The input boundary of the music industry-system

Near the input boundary, musicians, composers, arrangers, producers, and sound engineers (among others) provide inputs for the creation of the initial product (Scott, 1999), which may be altered or rejected further down the line. The record label typically owns the recorded music that is produced, whereas the publishers of the music own the rights to the work itself. Live music is used to support the sale of recorded music, which is the principal source of income for a record label. Of course, record companies also try to control other sources of revenue, such as artist-related merchandising (Leyshon et al., 2005).

Musicians are the key actors at the input boundary of the music industry system, and, like other artists, they must contend with intermittent, precarious work that demands flexibility (Pilati & Tremblay, 2007). In the music industry, musicians primarily make money through live performances and royalties on sales of recorded music, both of which provide little long-term stability (Hirsch, 1972). Musicians are increasingly relying on performances for income, due to decreases in record sales. Performances are usually confined to a local or regional scale; for most artists, extensive tours are infrequent. Bands seeking commercial success usually release promotional press kits and try to perform as much as possible to promote their recorded material.[4] The technical skills needed to perform, tour, and accomplish many of the other tasks associated with a career in music are usually acquired through clustered interaction or informally (van Heur, 2007).

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[4] A notable exception is the British rock band Oasis, which initially concentrated on forging connections in the media and only played a small number of exclusive shows (Hesmondhalgh, 1999).

Challenges and transformations in the music industry

As in any social network (or art world), the different actors in the music industry do not always share common goals. An important example of this is how labels rely on the mass media for promotion, which plays music in order to sell advertising, not to sell the music itself (Hirsch, 1972). Another example of competing interests is within the major labels. The labels are branches of multinational conglomerates with investments elsewhere in media and technology. It is a problem for many large companies to unite their internal objectives (Bathelt et al., 2004), and this issue has been cited as a reason behind the predicament of the major labels; while a record label complains about music piracy via the illegal copying of CDs, a different division of the same company is manufacturing CD burners (Leyshon et al., 2005).

Another problem facing the music industry as a whole is a shift in how music is consumed. In the 1950s, time was spent listening to music fairly exclusively (Bennett, 2005), whereas music is now tightly linked with the consumption of other goods and services. For instance, music is often sold with other cultural products (e.g. movie sound tracks), in no small part because the major labels' parent companies expanded into other media sectors. While associating music with other cultural products is an extremely effective method of promotion, it strips music of its intrinsic value and creates conflicts of interest within entertainment firms. Moreover, the sheer number of goods and services people can spend money on has radically increased since the 1950s; people today have more ways than ever to spend their money, and music is only one option (Leyshon et al., 2005; Sutherland & Straw, 2007). Indeed, Walmart, the largest music retailer, sells many

CDs as loss leaders to encourage consumers to purchase other products in its outlets (Fox, 2005) and, more generally, music has been losing retail space to products such as videogames and DVDs (LeBlanc, 2006).

The arrival of new technologies is also rapidly transforming the music industry. Home recording has allowed people from all over the world to cheaply produce high-quality recordings (Leyshon et al., 2005). Additionally, new technologies and other processes are causing segments of the music industry to become more specialized, fostering the appearance of an alternative and independent music industry. Small, underground scenes with global linkages have popularized alternative genres around the world.[5] Metal music scenes, for instance, can be found in numerous cities, despite minimal airplay of the genre in the mainstream media. Many musicians prefer to work in alternative genres because they can be more creative and independent (Bennett, 2005).

Global, underground scenes are often linked electronically through the Internet, which has transformed nearly every sphere of economic interaction in the last two decades. Its ascendance has been particularly noticeable in the music industry, since peer-to-peer file sharing has been blamed for declines in music sales by the major labels and industry groups such as the Recording Industry Association of America (RIAA) and the International Federation of the Phonographic Industry (IFPI). Indeed, approximately one billion music files were available for download from the Internet in 2002 (Leyshon et al., 2005). While revenues from paying music downloads are growing quickly, they are still small compared to those from sales of recorded music (Sutherland & Straw, 2007).

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[5] This connects to the earlier point linking flexible, small-batch production to the emergence of fragmented consumer cultures.

Due to the popularity of downloaded music, many musicians now use the Internet to release material while circumventing the traditional process of dealing with publishers and distributors (Bennett, 2005). A well-known example of a band that used the Internet to distribute music is Radiohead, which released *In Rainbows* online months before the CD was available in music stores. In addition to distribution, the Internet is also used as a networking, support, and promotional apparatus. As such, it has been viewed as a democratizing force counteracting the effects of mergers between large corporations in the entertainment industry, which have concentrated power in fewer hands (Hirsch, 2000).

New technologies are also opening up possibilities for the consumption of music and thereby changing traditional roles within the industry-system. According to Sutherland & Straw (2007, p. 142):

> The recording industry developed largely as a means to sell physical objects – vinyl records, cassettes, and, for the last two decades, compact discs. CDs remain the largest source of revenue from recordings, but other modes of consumption are becoming more prominent. Downloads of cellphone ringtones, subscription-based satellite radio services, and online sales of music tracks all represent new ways of packaging music and selling it to consumers. As these forms of distribution grow in popularity, the boundaries between the recording industry and other kinds of business are shifting and difficult to draw with precision. Key aspects of the music industry, such as talent development and the distribution of recorded music, are being undertaken by the broadcast industry, retailers, and electronics manufacturers, often in novel and surprising ways.

Cultural hearths

Away from the direct influence of the major labels and other corporate entities, the alternative music genres produce innovations, some of which are eventually embraced by mainstream culture. New music genres develop in tandem with underground scenes[6] whose participants attempt to differentiate themselves from the 'mainstream' (Stahl, 2001).

Despite the huge number of music scenes all over the globe, Stump (1998) contends that innovations can only be produced in specific settings called 'hearths.' Hearths consist of venues that provide intimate live shows to specialized countercultural audiences, as well as an immediate locale that is receptive to innovation. At hearth venues, substantial freedom is given to artists to experiment and share ideas with like-minded individuals (i.e. there is a great deal of beneficial buzz). If the innovations generated in the hearths are popular enough, they acquire a cult following and eventually break through to the mainstream. At this point, artists looking for commercial success take their act from hearths to 'stages,' such as larger venues or the mass media, in some cases leading to global acceptance. Within and between cities, different locales are associated with hearths and stages, and only certain places can provide the hearths necessary to generate innovation. For instance, Bebop jazz emerged in the 1940s at a set of venues in Harlem, New York that encouraged experimentation, informality and counterculture, but the genre gained a platform for commercial success on Broadway and elsewhere in the city (Stump, 1998).

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[6] According to Straw (2002, p. 6), the word 'scene' circumscribes local clusters of activity and/or similar practices and affinities dispersed throughout the world. This definition will be used here.

Stump's discussion of hearths emphasizes the importance of place in the creation of local styles. Local music shapes people's identities and provides narratives for life in the area. Conversely, globally popular forms of music are also transformed in specific contexts to deal with local issues (Bennett, 2005).

Independent music

Artists maximize their freedom to innovate when they are outside of the mainstream in the alternative genres. It is independent labels that are most intimately involved with the alternative genres (Leyshon, 2005), although the majors have been developing specialized subdivisions (and acquiring independents) to access musical niches (Bell, 1998). A label is usually considered independent when it is not one of the four majors or a direct subsidiary of a major. Unsigned artists and those affiliated with independent labels are also considered independent. Somewhat confusingly, the word 'independent' is frequently shortened to 'Indie,' which can simply mean 'independent' as just described, can refer to a genre of music, or may mean both at the same time. The reason for the complexity of the term is that the genre of Indie music grew out of group of British labels and artists who were functionally independent of the majors (Hesmondhalgh, 1999). In this study, the word 'independent' will mean a level of independence from the major labels, while the word 'Indie' will refer to the genre of music.

According to Hesmondhalgh (1999), Indie music grew out of the British punk rock scene in the 1980s. The goal of many early Indie labels was to secure commercial

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success while maintaining artistic autonomy for musicians, which meant independence from the majors in production, distribution, and promotion. Aesthetically, the Indie genre has been characterized by an informal concert setting where musical proficiency is not highly valued, as well as carefully designed record packaging, often produced with the aid of visual artists. The Indie sound is distinguished by 'jangly' guitars, an emphasis on clever or sensitive lyrics, and minimal focus on the rhythm track (Hesmondhalgh, 1999, p. 38).

Indie music appeared in Britain partly in response to new technologies that increased the accessibility of musical production, and partly as a set of counter-cultural political ideals associated with punk. The originators of the movement advocated independent production and distribution in order to democratize the music industry and created international networks that still exist today. By the late 1980s, the term 'Indie' had come to mean a narrow set of sounds within the genre of pop or rock, and by the 1990s, Indie music had become popular enough to be considered 'mainstream.' The independence of the founding artists and labels that had survived was disputed around this time, as some were affiliated with majors (Hesmondhalgh, 1999).

The experience of working in the independent music industry was and still is difficult, as many responsibilities must be juggled simultaneously. As Hesmondhalgh (1999, p. 42) writes:

> The music industry is a high-pressure business, but there are few opportunities
> for a professional training, which might provide assistance in coping with this
> pressure. In both major and independent companies there is a stressful continuum

between leisure time and work. Evenings are often spent attending live concerts in order to stay aware of new developments and to maintain contacts. In independent record companies there are additional burdens. The people working together are often friends, and relationships are put under great strain by new and unexpected roles. Another problem is that of negotiating between the constant threat of bankruptcy and a strong resistance to 'selling-out' to majors, or even to 'straight' companies (those supposedly motivated neither by love of music, nor by politics).

Thus, turnover in the independent music industry cannot be attributed solely to factors such as unstable demand; on a personal level, the nature of the industry produces tremendous challenges.

Owing to a lack of resources, the pressure for independents to make deals with majors is quite high. For a small company, music is expensive to develop, market, and distribute, but has a low marginal cost of production. This situation accords advantages to firms that can market and distribute their products internationally to reach large audiences and take advantage of economies of scale (Hesmondhalgh, 1999, p. 47). Independents are unable to tap into such economies due to their small size, and so they form partnerships with majors. These partnerships have important consequences for independents: when independent labels coordinate with majors, they typically must deliver a product that is suitable for the global market (Hesmondhalgh, 1999), which limits creative freedom.

Due to the dynamics of the music industry, independents often feel they are faced with a choice: affiliate with a major or go bankrupt. Since the 1990s the trend has been

for independent labels to form partnerships with majors. Major firms often profit greatly from bands signed indirectly through 'independent' labels, and hold the balance of power in the relationship (Hesmondhalgh, 1999). In fact, independent labels are sometimes seen merely as 'research and development' departments for majors, because they better span the input boundary of the industry (Leyshon et al., 2005) and tend to specialize in a small number of genres.

Although the major labels dominate the music industry, independent music can still be found in niche markets, and some cities or regions are known for their independent music scenes. In Canada, the major labels are highly influential, but there are pockets of independence, particularly in Quebec, where cultural and linguistic barriers have allowed an alternative industry-system to mature. The following section briefly compares the music industry in Quebec to that of Canada as a whole.

The music industry in Canada and Quebec

The $800-million Canadian music market is highly integrated with the global market and is dominated by the major labels. The majors concentrate on marketing international repertoire and undertake little artist development in Canada, allowing independent labels to access Canadian talent (LeBlanc, 2006; Sutherland & Straw, 2007). The Canadian music industry as a whole is going through difficulties; between 2000 and 2003 there was a decrease in both the number of music companies and their profit margins (Department of Canadian Heritage, 2006). Physical recording sales are falling,

but digital sales are increasing, although they represent only 1% of the Canadian distribution market (LeBlanc, 2006).

In total, there are 33 600 musicians and singers in Canada.[7] They are an impoverished group compared to the workforce in general, with median annual earnings of only $9 400. Their income has also plummeted; when inflation is taken into account, musicians and singers earn 24% less on average than they did in 1991. 53% of Canadian musicians and singers are self-employed and 52% are female. On average, female musicians and singers earn 25% less than men (Hill Strategies Research Inc., 2009a).

In the province of Quebec, there are 30 200 artists, of whom 6 600 are musicians and singers. Quebec's musicians and singers have a median annual income of $14 800, similar to other artists and much lower than the labour force in general. Nevertheless, the number of artists in Quebec increased by 17% between 1991 and 2001, and by 9% between 2001 and 2006 (Hill Strategies Research Inc., 2009b). Bellavance (2004) argues that the increase occurred because of the baby boom, feminization in the arts, and the acceptance and institutionalization of a diversity of art forms.

The Quebec music industry is tightly integrated compared to the music industry in English Canada. In large part, the distribution system in Quebec is locally owned and there is less reliance on multinational firms (Straw, 2000): for instance, 75 independent Quebec production firms record 90% of domestic artists in the province (LeBlanc, 2006). The ascendance of an independent Quebec music industry has occurred over the past 30

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[7] This number is based on 2006 national census data, where the respondent's occupation is determined by the capacity in which he or she worked the most hours during the census reference week (Hill Strategies Research Inc., 2009a). This also applies for data cited as Hill Strategies Research Inc., 2009b.

years (Stahl, 2001) and today independents control 48% of the Quebec market (interview, ADISQ representative). The most prominent example of concentration in the Quebec music industry is Quebecor, a conglomerate controlling *Groupe Archambault* (the largest retailer of books and music in Quebec), *Distribution Select* (the largest independent record distributor in Canada), a record label, TVA (the most popular television station in Quebec), as well as many newspapers (Sutherland & Straw, 2007). Perhaps thanks to the high level of integration, there are complaints that the Quebec music industry is homogenous and dominated by an ageing establishment (Straw, 2000).

Montreal is the cultural metropolis of Quebec and the centre of the province's music industry. As one of the principal hubs independent music in North America, it is an ideal location to study networks in the independent music industry. Furthermore, the city's bilingualism, size, history, relationship to other centres, cultural milieu, political climate, and institutional environment provide a fascinating set of variables that can be used to better understand networks in the music industry. Let us now turn to the methodology used for this study of independent music in Montreal before examining the city's music industry in greater detail.

Chapter II

Methodology

This thesis is a case study of independent musicians' networks in Montreal. According to Yin (1994), the case study research design is useful for answering 'how' or 'why' questions dealing with contemporary real-life phenomena in a specific context. Case studies make use of a range of data sources, which yield information that is then triangulated to converge on the final results.

The main methodological tool used here is the semi-structured interview. In a semi-structured interview, the researcher draws upon an interview guide and usually asks all of the questions contained within it, which are predominantly open-ended (Bryman & Teevan, 2005). Semi-structured interviews are a fitting method for a descriptive and exploratory study such as this one, as the interviewee is given flexibility on how to respond to questions. This flexibility allows subjects to describe events and processes that they consider important rather than being limited to preconceived options developed by the researcher. The aim here is that subjects' responses generate new hypotheses about the music industry in a time of upheaval, when old understandings of the industry may be losing validity.

In addition to flexibility, there are numerous advantages to using semi-structured interviews. Schoenberger (1991) writes that interviews in general are useful for understanding the rationale guiding people's choices while taking into account context-specific information. Compared to surveys, interviews can also provide a better

understanding of the causality behind subjects' actions. For example, while a survey could reveal that young musicians prefer to play at certain clubs, an interview could easily pinpoint the reasons for this preference. Another advantage of interviews is that the researcher can be sure that subjects have understood the questions by taking cues from their responses. The interviewees are also likely to be intellectually engaged by a face-to-face interview and provide quality responses because, over the course of the interview, they gain an understanding of what issues the researcher is interested in. Additionally, interviews can reveal social relationships and struggles – vital for any understanding of social networks -- that would be missed by surveys.

Like all research methods, semi-structured interviews are imperfect. There is a risk of 'leading the witness' (i.e. eliciting the expected answer from the subject) by asking poorly formulated questions or even with body language. However, open-ended questions reduce this risk. The researcher may also distort responses by over-emphasizing sections of the interview, and misunderstandings or differences in interpretation are possible (Schoenberger, 1991). Finally, the time involved in the interview process and transcription necessitates a relatively small sample size compared to surveys.[8]

To select the sample, I chose knowledgeable members of Montreal's independent music industry who could contribute to the study, rather than using a statistical technique. The sample consisted of independent musicians and key members of the local independent music industry such as promoters, festival organizers, and media personnel. Only professionals (i.e. those who make a significant portion of their income from music)

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[8] In this thesis, I have tried to overcome some of these limits by cross-checking the interview data with other sources of information as discussed later on in this section.

who work in the greater Montreal area were interviewed. This sample provided an industry-wide perspective on the dynamics and the nature of relations that characterize the local scene.

The sampling technique was snowball sampling, meaning I used initial contacts to refer me to others in the music industry, and those new contacts to refer me to still more people. At times, new contacts were also obtained through friends or by chance meetings, which allowed me to tap into different networks. Throughout the sampling process, I attempted to interview a variety of individuals (in terms of age, experience in the music industry, occupation, background etc.) to explore the music industry from different angles.

Semi-structured interviews and snowball sampling are suitable techniques for this study because face-to-face contact and trust are highly valued in the music industry, where reputations can make or break careers and where exploitation is common. As an amateur musician, I began the study with useful contacts, ranging from participants in little-known projects to members of globally recognized bands.

Between January and October 2008, I conducted 42 interviews with actors in Montreal's music scene. In three cases I interviewed more than one person at once, so a total of 46 people participated in the research. Most of the interviews lasted approximately one hour; the shortest lasted half an hour and the longest two hours. I digitally recorded and transcribed all of the interviews. Eleven interviews were conducted in French because the subject(s) felt more comfortable in that language. I translated these interviews into English as I transcribed them. Prior to each interview, I did an Internet

search on the respondents and their projects for background information. This information was used to tailor the interviews to correspond with the respondents' areas of expertise.

A fairly consistent interview guide was used with all of the musicians who participated in the study, although the questions did change slightly as I learned more about the functioning of the industry. In addition to my research questions, the musicians I interviewed were asked questions on talent attraction and retention in Canadian cities on behalf of my supervisor, Dr. Norma Rantisi, for a study by the Innovation Systems Research Network (ISRN). Non-musician respondents[9] (e.g. label owners, promoters, journalists) were not asked the ISRN questions. I devised individualized interview guides for these respondents based on their areas of expertise.

The interview guide used for musicians (excluding the ISRN questions) was divided into three sections: 'personal and employment background,' 'characteristics of Montreal and its music industry,' and 'additional questions'.[10] The first section, 'personal and employment background,' included questions on age, family status, educational, vocational, and employment history, and the subject's musical projects. Following that section, 'characteristics of Montreal and its music industry' focused on the interviewee's perceptions of Montreal as a city in which to pursue a career in music. Here, I asked subjects to discuss the advantages and disadvantages of working in the industry in Montreal, and to compare different neighbourhoods of Montreal and Montreal to other

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[9] Actors in the music industry tend to be functionally diversified. For example, a label owner, although interviewed as a non-musician, could also play in a band and be involved in promotion. This will be explored further in the results section.

[10] This interview guide is available in the appendix.

cities. As well, a vital set of questions in this section dealt with the other actors in the industry that subjects interact with, their roles, and the nature of their relationships with them. Concluding the interview were 'additional questions.' These concentrated on how subjects promote themselves and their projects, the influences Montreal's linguistic landscape has on networks and chances of success, and the role of the Internet in networking and promotion. Furthermore, I asked about the significance of Montreal's music festivals for the independent scene, and whether subjects had received any governmental support. At the very end of the interview I asked subjects to refer me to other people they felt I should speak to and who would be willing to be interviewed. Although I followed the preceding question order most of the time, I attempted to make the conversation flow smoothly during the interviews; I changed the ordering of the questions when I felt it appropriate.

Non-musician respondents were asked most of the questions from the 'characteristics of Montreal and its music industry' and 'additional questions' sections, and a small number of questions on their backgrounds. They were also specifically asked about their areas of expertise. For instance, label owners were asked about the functioning of their label and respondents who had worked in Montreal's music industry over many decades were asked what had changed over the years.

Overall, half of the respondents were interviewed as musicians and half under other capacities. The following table breaks down the respondents according to what capacity they were interviewed under:

Table 1 – Number of interviewees according to primary capacity

Capacity	Number of interviewees
Musician	23
Media personnel (print and online)	5
Record label employee	4
Organization employee (at ADISQ, CALQ, CAM, & FACTOR)	4
Festival organizer (for Pop Montreal)	4
Promoter	3
Merchandise company employee	2
Manager	1
Total	46

For musicians, the maximum and minimum ages were 60 and 21 respectively, and the median age was 32. Of all respondents, only eight were women, and only two of the musicians interviewed were women. The female portion of the sample roughly corresponds with my observations of the sex ratio in Montreal's independent music industry. However, according to 2006 census data, roughly half of Canadian musicians and singers are female (Hill Strategies Research Inc., 2009a), and women probably represent a similar portion of Montreal musicians and singers. Perhaps the discrepancy between my observations and the census data arises from a higher representation of women in orchestras and other more formal music roles that were not covered by this study.

While semi-structured interviews were the primary research method, I also consulted official statistics, policy documents, organizations' annual reports, and media sources, particularly from the Internet (e.g. networking websites such as MySpace and Facebook) and music magazines (e.g. *Hour, Voir*). Additionally, I attended an

information seminar organized by the Society of Composers, Authors and Music Publishers of Canada (SOCAN) for independent musicians on October 25th, 2008, as well as many performances by independent musicians. Finally, I did a certain amount of participant observation, mainly by playing Sundays at the bluegrass jam at Barfly (a bar at 4062 boulevard Saint-Laurent) and Tuesdays at the old-time country nights at Griffintown (a restaurant at 1378 rue Notre-Dame W.). While I cannot say that research was my primary motivation for participation in these performances, they did introduce me to a number of musicians and gave me a greater understanding of their networks and the functioning of the music industry. The information from these performances and other supplementary sources served to triangulate (i.e. verify, perform comparisons with) interview responses and to paint a comprehensive picture of Montreal's independent music industry, including perspectives on its history, bilingualism, size, and supportive structures. Furthermore, a great deal of information was gathered that pertains to the North American music industry in general and the technological changes which have transformed it. These data will now be summarized in the results section.

Results

Chapter III

Today's music industry

This first chapter of the results section[11] begins with a table describing selected functions in the music industry to familiarize the reader with the meaning of occupation titles. Following the table, technologies which have transformed the music industry are discussed to set the stage for a section on the operation of the music industry today that focuses on key activities and intermediaries. The chapter ends with an overview of strategies deployed by actors to contend with the challenges they face.

The next two chapters of the results section look more specifically at the case of Montreal and examine the city's place-based attributes that influence actors' coping strategies. Three themes are given particular precedence in chapter IV: Montreal's history, languages, and size. Finally, Montreal's organizational support structure and festivals, as they influence networks, are discussed in chapter V.

Note: in the results section, 'professional' refers to someone who earns money in the music industry, and 'musician' refers to someone who primarily makes money in the music industry from live performance and/or studio work.

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[11] In the results section, interviews are occasionally referenced with the occupation title of the interviewee (e.g. interview, label owner). However, given the diversity of tasks that individuals commonly undertake in the music industry, these occupation titles can only give an impression of what the interviewee is primarily involved in. For example, a 'label owner' may also play in a band and be involved in promotion and management. In some cases, individual respondents are cited using different occupation titles at various points in the text. While this variable labeling has been avoided whenever possible, it is meant to highlight that the respondent has expertise pertaining to the issue being discussed. Since all interviews took place in 2008, the year has been omitted from in-text citations.

Table 2 - Selected functions in the music industry

Arranger	Orchestrates music, often has a formal musical education background.
Attorney	Negotiates contracts, litigates, e.g. over copyright infringement.
Booking agent	Finds work for musicians. Usually specialized in television, film, or live performances. Operates over a set geographical area. Deals closely with promoters.
Club booker	Responsible for finding musicians to perform at a club.
Manager	Negotiates on behalf of musicians and manages their careers. Musicians sometimes have separate managers for different geographic areas (e.g. a North American manager, a European manager).
Musician	May perform in clubs, weddings, churches, private homes, parties, conferences, etc. May also teach privately, play in studios, etc.
Producer	Involved in the production of music. May concentrate on the music selection, arrangement, or the engineering of the recording. Finds musicians and signs them to record deals. Can work independently or for a label.
Promoter	Sets up concerts, arranges light & sound, contacts local media to publicize the concert, etc. Concentrates on a city or a set geographical area. Close relationships with booking agents.
Publicist	Responsible for creating the artist's image for the public to consume. Contacts media where musicians are touring or releasing an album. Works for record labels or for musicians directly.
Record label	Brings together musicians, producers, sound engineers, etc., to create albums. Often involved in promotion and marketing.
Road crew	Provides tour support for bands (e.g. sets up and dismantles the set, sells merchandise)
Songwriter/composer	Writes original music to be published, often has a formal musical education background.
Sound engineer	Responsible for the technical aspects of producing recorded music.

Table based on original research, Wiseman (2003), and Wolff (2004).

Part I - New technology

Technological change has been central to the evolution of the music industry. For example, until the invention of the printing press, music was commercialized entirely through live performance. The printing press added a second revenue stream: the sale of sheet music. A third revenue stream, the sale of recorded music, appeared after the invention of the phonograph in 1877 (Wiseman, 2003).

Since the arrival of recorded music, considerable technological leaps in production and distribution have occurred[12] which have been key in shaping power relations in the music industry. Indeed, much of the success of the major labels in the 1940s can be attributed to their use of new technologies that allowed them to out-compete or acquire smaller labels and distribution companies (Wiseman, 2003). Ironically, the future of the major labels is now uncertain thanks to the emergence of technologies, particularly Internet file-sharing, that have allowed small companies and individuals to bypass the majors for distribution.

Just as new technologies have permitted actors to self-distribute music, technological advances in production have enabled musicians to create professional-quality albums themselves. An early example of a democratizing music production technology was the four-track tape recorder, which gained popularity in the 1960s. Advances in home recording continued over the following decades: in the mid-1980s digital tape recorders appeared and by the 1990s recording onto computer hard disks

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[12] A notable advancement in music production technology that occurred in Montreal was Victor's 1925 innovation of using electric microphones for recording. Prior to that time, music was mechanically recorded onto wax, an arduous process (Gilmore, 1988).

became possible (Wiseman, 2003). Today, home computing technology is essential for professionals, not only for the production of music but also its promotion and distribution.

Taken as a whole, new technology has democratized the music industry (interview, manager), redistributing control of production, promotion, and distribution away from the major labels and into the hands of independent musicians and companies. According to a festival organizer, it has allowed musicians to become more multi-functional, for example by doing their own graphic design and video production, but it has also raised the bar in terms of what other roles are expected of the artist (interview). Concomitantly, it is easier than ever for amateurs to make decent-sounding music with the aid of home recording, pitch-correction, synthesizing, and sampling technology. This has meant lower salaries and less work for highly trained musicians in studios, and in film and television. Studios themselves are also doing poorly as home recording has become common (two interviews).

Democratization in the music industry can also be seen as a reconfiguration of the music industry-system, to use the terminology of Hirsch (1972). The processes discussed in the previous paragraph represent reductions in the ability of firms (particularly the major labels and the mass media) to filter cultural products before they reach the output boundary, and also a diversification of roles near the input boundary.

Aside from talk of democratization, the most common discourse on technological change in the music industry frames the arrival of Internet file-sharing as a disaster for the entire industry, as people buy fewer CDs. This view has some truth to it, but the crisis

is hurting mostly the largest companies, who rely on retail sales and have the resources to publicize their predicament. Indeed, one musician said that file sharing is affecting independent professionals to a lesser extent, since many never had access to retailers in the first place and relied on small-batch sales in other forms (interview). Furthermore, the largest companies adapted poorly to the arrival of the Internet compared to musicians and small companies (interview, manager). However, both large and small companies still operate using the traditional model of CD production. According to an ADISQ representative, independent firms require help switching to the digital model, since they lack the expertise, staff, and finances to do so themselves (interview).

Niche markets

In addition to revolutionizing music production, promotion, and distribution, new technologies have also had a role in transforming the consumption of music. Again, a key example is the Internet, which, along with globalization and broad cultural changes, has created a fragmented market for music. In this environment, successful bands exploit specialized niches by appealing to international subcultures (interview, journalist) in an increasingly prevalent strategy that precludes the emergence of 'supergroups' like The Beatles or The Rolling Stones. Instead, niche bands plateau in popularity at a medium size:

> We're past the days of the MTV when everybody listened to the same
> band and the same videos. It's a bit more fragmented: college radio, Internet
> radio, blogs and just word-of-mouth. A lot of the online networking sites like

Facebook and MySpace really make it easier for bands. Instead of playing to twenty people they might play to two-hundred twenty people. [...] I think for the smaller and mid-range shows, the numbers have gone up, quite incredibly so. Let's say between three hundred- and two thousand- capacity seaters, we book those a lot more than before. But consequently there's a lot less acts that can fill up the arenas, and the ones that are filling them up are actually the older acts. [...] Madonna, U2, Bruce Springsteen, the Rolling Stones: none of these are new arena acts. There's a few exceptions, for instance Coldplay, but in general a lot of the arena acts are aging or doing their farewell tour. There's a big question now: are we ever going to have bands that can centralize enough fans to fill an arena of ten thousand people? (interview, promoter)

The same promoter then stated that as large acts disappear, corporate sponsors are now supporting small and medium-sized bands (interview).

Although new technologies are rapidly reshaping the music industry, the traditional system of album production, promotion, marketing, and distribution remains entrenched, at least for the time being. The functioning of this system towards the input boundary will now be examined.

Part II - Key activities and intermediaries

Key activities: Album production

Album production involves a selection and arrangement of music, booking of musicians and studio time, and recording, mixing, and mastering. Production normally occurs through record labels with the help of producers, but technological advances are now allowing musicians to create professional-quality albums themselves. Nevertheless, record labels remain an integral part of the supply chain in the release of most commercially successful recordings.

Musicians who earn a living mainly from album production and recording music for other uses, such as commercials, are called studio musicians. According to a violinist, studio musicians earn approximately $300 per song for album production, although there are a variety of ways to calculate pay (interview). Barriers to entry into studio work are high because established studio musicians want to protect their jobs (interview, musician) and a high skill level is required. Moreover, the number of studio positions has been reduced by the arrival of sampling and synthesizing technology (Wolff, 2004). Studio musicians are often hired by producers, who are also responsible for many other aspects of album production. Producers are either employed by a label or freelancers. Record labels and producers are frequently located in the same city as the bands they sign (interview, label owner).

Independent labels generally operate in a single country and specialize in a niche musical genre. Compared to major labels, they are less corporate, and their small size

allows quick decision-making and innovation, but limits the scale of their investments. Since they lack the resources to distribute music themselves, independents often use the major labels as distributors. One label owner stated that for an independent label to secure distribution through alternative channels, it must have a large catalogue of releases to make the arrangement worthwhile for distributors. In some cases, pressing and distribution (P&D) deals are agreed upon between an independent label and a major, meaning the major label presses and distributes CDs for the independent in exchange for a percentage of gross album sales (Wiseman, 2003).

Independent labels try to make every release profitable, but in fact only about half make money due to the unpredictability of the market. Still, this rate is much higher than the roughly 10% success rate of major label releases. According to a label owner, once a release is successful, an independent label can get roughly half of net royalties, but this varies considerably depending on the size of their investment and the services provided to the artist (interview). For a quality recording at an independent label, production alone can be a four-month process costing $5000 (interview, label owner).

The set of services that independent labels offer to musicians is becoming more diverse, mainly due to the decrease in album sales linked to music downloading. Four label owners said that low album sales are forcing them to access alternative revenue streams such as publishing, promotion, merchandising, management, and booking (interviews). Here again it bears mentioning that technological change is causing diversification towards the input boundary of the industry-system. The tendency towards diversification has a personal dimension as well: for small labels, it is satisfying to work

closely with the artist to develop many aspects of their career. Which revenue streams the label will access is determined on a project-by-project basis (interview, label owner). In some cases the multiple services provided to musicians can cause problems. For instance, a violinist argued that a conflict of interest can be created if a label is both managing and producing an artist, because a manager ought to be able to recommend that the artist leave their label (interview). This example is interesting because, although the division of labour between artists and record labels is creating a conflict of interest, as Becker (1982) or Hirsch (1972) would argue, the problem stems from the fact that multiple functions are being undertaken by individual firms (i.e. there is a more limited division of labour than before).

Unlike independent labels, which specialize in niche markets, major labels focus on the development of international English-language artists so as to reach the largest possible market. Majors are not interested in developing talent in small markets where a successful artist will only sell 20 000 units (Wiseman, 2003); these niches are left to independent labels or subsidiaries.

Many musicians dream of being signed to a major label because of the backing such a large corporation can provide. To be sure, an artist signed to a major label has the chance to receive hundreds of thousands of dollars for album production, promotion and distribution. Unfortunately, it is a standard requirement that the artist repay this money through royalties. Mechanical royalties (on CD sales) for musicians are around 10-14% of the list price, but labels make considerable deductions on this amount. After all the

deductions are made, the artist may need to sell over 100 000 units to earn a net income (Wolff, 2004).

Of course, few musicians get the chance to sign to a major label, and some choose to avoid that route entirely. The alternatives are to sign with a small- or medium-sized label, or to simply produce, promote, and distribute the album oneself. In these cases, album sales are usually much lower, but the artist can retain a greater share of the income (Wolff, 2004).

Live Performance

As retail album sales decrease, live performance is becoming more vital. Indeed, live performance is *the* way to make money for most musicians (interview, journalist). Not only are musicians paid for performing live, but crucial income is generated from off-the-stage record and merchandise sales. Two respondents also indicated that performance exposes the band to new markets and leads to networking opportunities.

Musicians are paid for performing in two ways: either a guarantee or a percentage of ticket sales (in the form of a cover charge for small shows) (two interviews; Wiseman, 2003). Small bands (in terms of status and bargaining power) customarily make a percentage of cover while larger bands accept guarantees, plus a percentage of ticket sales after a certain number of tickets have been sold (two interviews). According to a manager, the net payment that goes to musicians is often much lower than their gross earnings once all the members of the support team have taken their cut (interview). For

small bands, bartering as a form of payment is also common (such as free drinks or free food for the band in exchange for the performance).

Since pay for performing live can be quite low, other forms of revenue generated from performance are essential to musicians. A bassist noted that off-the-stage album sales are an important source of income (interview), and a FACTOR representative maintained that these are still strong in the face of the crisis in retail album sales (interview). According to one label owner:

> Touring equals sales. There's absolutely no question. The majority of CDs being sold these days by independent artists are sold from stage. They're not being sold at HMV or the record chains. Until, at some point, artists reach a certain critical mass, then all of a sudden retail store sales start really picking up. (interview)

Musicians also pocket a much greater portion of the list price of the CD from off-the-stage sales than they would from mechanical royalties from retail sales (LeBlanc, 2006).

Merchandise (often shortened to 'merch') sales are another critical source of income for musicians that is associated with live performance. Like off-the-stage album sales, merchandise sales often represent an income stream that is minimally siphoned off by the support team (interview, manager; Wiseman, 2003). A merchandise company owner stated that although merchandise income is highly dependent on the particular band, the genre of music, the target audience, and geographical location, an approximate merchandise sales figure for a live performance would be $3-4 per audience member. Online merchandise sales are also a notable revenue stream (interview).

Merchandise, usually in the form of T-shirts, can be handled by the record label, management, specialized companies, or by the band (two interviews). A merchandise company owner noted that close coordination with booking agents is necessary to make sure the appropriate amounts and types of merchandise are available when a band is touring. In some cases various merchandise companies are called upon to supply different portions of a tour (interview).

Touring

In addition to taking advantage of the income generated by live performances, bands go on tour to play at a variety of venues and to access the largest market (interview, promoter). According to a manager, small bands usually lose money touring but try to collaborate with more established acts in the hopes of building an audience. Whoever is in charge of booking will try to get guarantees for tour dates because this facilitates budgeting (interview).

Tours are often organized by booking agents, who specialize in setting up live performances at venues and often operate as part of booking agencies with rosters of about 200 bands. Three respondents indicated that booking agencies are not necessarily located near the bands they represent; instead, they book bands from many places to play in venues over a sizable geographical area (e.g. Canada, North America, Europe). In other words, borrowing from the terminology of van Heur (2007), the vertical

relationships between booking agents and bands are networked[13] and not clustered like most other linkages in the music industry. Another set of networked vertical relations are those between booking agents and promoters; booking agents approach promoters who operate in individual cities and request to have their band play at venues of a certain size within a certain time frame. Promoters then place holds on venues and offer an amount of money for the band, a ticket price, and a budget to the agent, who accepts or refuses the offer (interview, promoter). If the offer is accepted, the booking agent typically makes a commission of 15% (interview, label owner).

A number of factors influence the feasibility of touring. Exchange rates determine the amount the promoter can guarantee a band; for instance, a promoter said that a high Canadian dollar allows her company to lure more international acts to Canada (interview). International touring for small and medium-sized artists is also highly dependent on government funding, as it can be difficult to finance a tour without extra support. One musician lamented that security restrictions, especially at the American border, can also make touring more difficult (interview).

Promotion

Economically, too much music is produced. According to one estimate, over eight million bands and artists have profiles on MySpace (Techradar, 2008). In order to stand out, musicians and any support team they may have must promote effectively.

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[13] I would like to clarify here that 'networked relationships' refer to those extending outside of a cluster, while 'networking' refers to social interactions resulting in linkages being created or maintained.

The level a band has reached usually determines who is responsible for promotion. Small bands normally self-promote, and medium-sized bands hire publicists or have independent labels help with promotion (two interviews). Since the vast majority of acts are either small or medium-sized, musicians are usually at least partly responsible for promotion. The biggest bands, on the other hand, are promoted by the marketing and publicity departments of major labels (interview, journalist). Only the major labels have access to the mainstream radio stations because the cost to get a song on the radio is prohibitive for anyone else: anywhere from $200 000 to over one million dollars. To get their songs on the air and avoid being accused of payola, the majors pay middlemen, called independent promoters, who have links to radio DJs (Wolff, 2004). The effective monopoly the majors have over radio airplay symbolizes a persistent bastion of their power to filter what reaches consumers at the output boundary of the industry-system.

Back at the input boundary, seven musicians stated that any and all means to get the message out are used when promoting (interviews). Normally one starts with free methods (e.g. online, phone calls, face-to-face contact with fans and media) and only spends money once the free methods are no longer reaching new people (interview, promoter). Accordingly, musicians often construct their own websites and make use of social networking websites early in their careers.

MySpace, Facebook, and YouTube are probably the three most important online promotional tools for musicians. Although these websites are multi-functional, they tend to be used in fairly specialized ways. MySpace is used to display the product being offered, in the form of music and video clips, and to network with fans and professionals.

Facebook is more strictly a networking tool where groups of fans can be assembled and shows advertised. Youtube primarily shows videos and can be used to link to other websites (two interviews).

Despite the hype surrounding online social networks, three respondents said that live performance and word-of-mouth are still indispensable promotional tools because they lend credibility and authenticity to the musician, especially in the early stages of a career. Of course, online social networking is a powerful tool that allows information to be quickly and widely disseminated, but the meaning of that information is often diluted. For example, if a musician invites a handful of people face-to-face to see a show, they will be more likely to attend than if he or she invites hundreds of people at once using Facebook, where the invitation can easily be ignored.

Musicians will usually self-promote early in their careers, but there are limits to how much they can accomplish alone. Once bands reach a certain stature, they assemble a promotional support team, perhaps including a manager, a record label, and at least one publicist. Publicists work on a retainer and can be located far from the bands they are representing (three interviews) -- again signifying networked interaction -- since their role is to contact media in the cities where the band is touring or releasing an album. Publicists send out press kits, which generally include a biography of the band, a CV, photos, music, and video clips (two interviews). With the emergence of new technology, the role of the publicist is evolving:

> A publicist traditionally just focused on print and television, print being like
>
> newspapers, magazines, Rolling Stone, the LA Times. However, with technology

over the last ten years, I now hire two publicists. One is the traditional, and one is digital only. They just handle all the blogs. (interview, manager)

When a band or its support team has the right connections, it can be invited to play at tradeshows or showcases. At these events, bands perform in front of booking agents, festival organizers and label owners, in the hopes of securing more work in the future (interview, musician).

Key intermediaries: Promoters

Promoters are the gamblers of the music industry. They pay a budgeted amount of money for each show in advance, and so must maximize ticket sales. According to a promoter, they attempt to maximize ticket sales by announcing the show through publicity (dealing with the media) and marketing (reaching out to the public) (interview). Promoters operate in individual cities and promote shows for local or touring acts (interview, musician). Promoting for a local act symbolizes a clustered linkage, while promoting for a touring act represents a networked linkage.

Some of the major promoters in Montreal are Greenland, Gillette Entertainment Group (GEG), *L'Équipe Spectra*, Blue Skies Turn Black, Fogel-Sabourin Productions, and *Bonsound*. Greenland and GEG are separate companies but operate as partners. Greenland-GEG and *L'Équipe Spectra* concentrate on the largest and medium-sized shows in Montreal, while the other companies do smaller shows. *L'Équipe Spectra* notably produces the *Festival International de Jazz de Montréal* and *Les FrancoFolies de*

Montréal. GEG, meanwhile, has exclusive rights to the Bell Centre, one of Montreal's main venues. With only about 30 employees, the company promotes over 500 shows per year (interview, promoter).

Venues

Musicians perform live at a variety of venues, including concert halls, bars, clubs, parks, and temporary festival stages. Three respondents also noted the importance of churches and cultural centres, particularly in genres where the audience remains reserved during the performance.

According to four respondents, the venues in Montreal are first-class. However, all-age venues are lacking (interview, promoter) and pay-to-play is sometimes practiced (four interviews). One promoter contended that Montreal's economic downturn in the 1970s and '80s played a role in conserving some of the city's finest venues:

> We're incredibly blessed in Montreal with our venues. I'd say our crappiest
> venue in Montreal is better than a lot of the best venues in Toronto, which is
> pretty incredible, considering how we're considered [...] not as affluent as
> Toronto. There's not as much money being made or spent here, but the venues
> are beautiful and I guess you can also tie that back to the fact that, when there
> was a huge boom in the 1970s and '80s, and everybody built and tore down in
> Toronto, there was no money here. So all those theatres just sat there unoccupied,
> and lately some people have redeveloped them. All these beautiful venues, that
> were built in a way that they couldn't be built today, haven't been destroyed to
> make way for condos or whatnot. (interview)

Today, there are more shows going on than ever before in Montreal and the city's venues are usually booked. Many types of music are played in the city, and some neighbourhoods are associated with particular musical genres. For instance, heavier rock music is concentrated in venues around Rue Saint-Denis and Boulevard Saint-Laurent below Rue Sherbrooke. Lighter and more experimental music can be found further north in the Plateau (interview, journalist). Furthermore, the geographic concentration of performances is not static; an ADISQ representative stated that attendance at Francophone shows in Montreal is decreasing and performances are moving to outlying areas such as Terrebonne (interview).

Due to the climate in Montreal, there is a seasonal cycle to live performances. There are usually fewer shows in the winter, when it is dangerous to tour and unpleasant for audiences to make their way to venues. Nevertheless, bands are increasingly embarking on winter tours because they cannot find available venues in the other seasons. Despite this trend, fall remains the peak season for concert promotion, because the student population returns to Montreal and the weather is still good at that time (interview, promoter).

Media

When publicizing shows at venues, promoters use the media as much as possible to get their message out. All but the biggest promoters normally contact small-scale media since mainstream media is expensive or uninterested. Two respondents noted that

promoters sometimes use concert tickets and other prizes to barter with media workers in exchange for coverage of their events.

Montreal is home to a variety of print publications devoted to the arts that are within reach of the average promoter. The most notable are *Hour* and *Voir* (owned by *Communications Voir Inc.*), *The Mirror* and *Ici Montréal* (owned by Quebecor), and *BangBang* (independently owned). Three journalists who work for these publications said that they regularly attend shows and mingle with professionals (interviews). One journalist claimed that a band usually must be playing at one of the major venues downtown or in the Plateau that journalists are familiar with to get media attention in Montreal (interview).

Along with print publications, college and university radio is used for promotion because mainstream radio is inaccessible (two interviews). It is also difficult to get airtime on television, but most television newscasts have an arts section. *Mange ta ville* on ARTV is one television show devoted to covering culture in Montreal that promoters try to contact. Online, blogs and podcasts are important new forms of promotion, particularly for smaller shows, although identifying their audience is tricky. According to a promoter, some important blogs are Midnight Poutine, Brooklyn Vegan, and Chromewave Space (interview). Music enthusiasts write these types of blogs, usually for little or no pay (interview, blogger).

Part III - Challenges and mitigation strategies

Challenges in the music industry

Life in the music industry is hard (interview, manager). Young musicians must triumph over a saturated market, and older musicians struggle to stay competitive while dealing with physical decline (two interviews) and some employers' demands for a youthful image (interview, older musician). All types of musicians must contend with low pay (four interviews). For instance, a band may make $200 for playing one night in a bar, a minimal sum after it has been divided among band members and expenses have been paid (three interviews). Corporate events and weddings sometimes pay around $1000 for the band, but can be artistically unrewarding since there is little creativity involved and the mandate is often to provide background music (three interviews). According to one violinist, informality is also a problem; much of the work is under-the-table, leaving little recourse to musicians in cases of exploitation (interview). Overall, the music industry can be quite harsh for musicians, not least because it is set up so "the musician is the last to get paid" (interview, musician).

Another difficultly for professionals is the lack of continuity in a faddish, project-based industry. One respondent noted that new bands, festivals, and labels are constantly appearing and disappearing. According to the editor-in-chief of *BangBang* magazine, bands now only last two or three years, making it impossible to build a viable industry. The editor-in-chief also contended that successful bands are pressured by their support teams to maintain the same sound and avoid innovation until the 'fad' has run its course

(interview). On a personal level, it can be bewildering for musicians to play for thousands of people one day and then in front of ten people the next (three interviews).

Perhaps the most paradoxical challenge facing the music industry is the over-consumption of music. Recorded music is available everywhere, conspicuously in shopping centres and on personal listening devices, so the value of individual songs and live performances to listeners has decreased. Three respondents said that fewer people go out to see shows than in the past and people often are unaware of what they are listening to. Low demand for live performances and the decreased value of individual songs, in turn, lead to the afore-mentioned difficulties of low pay, poor working conditions, and short-lived fads.

Survival strategies

To cope with the challenges of the music industry, musicians use two related strategies: diversification and networking. Diversification has both functional and aesthetic dimensions. Functionally, professionals take on a variety of roles at the same time to have enough work and to hedge their bets. For example, one musician may play in many different bands, learn different instruments (examples of horizontal diversification), work for a record label and as a manager (examples of vertical diversification), and work part-time outside the music industry all at the same time. In terms of aesthetic diversification, professionals gain expertise in different musical genres (e.g. learning to play different genres on the same instrument, learning to market to new niche audiences) to tap into a larger market.

The second survival strategy, networking, is highly connected to diversification. Functional diversification in particular requires an extensive network. For example, a musician requires a strong set of horizontal relationships to be able to play in four different bands at the same time. Effective networking also mitigates some of the risks associated with low-paying and unstable employment by putting in place the connections to secure work, and provides learning opportunities in an industry where there is often little formal training. Networking is facilitated by clustering and frequent face-to-face contact between actors (interviews; Storper & Venables, 2004). Diversification and networking will now be discussed in greater detail.

Diversification

In the music industry, "versatility is survival" (interview, musician). Income from any one project is irregular or unreliable, prompting professionals to diversify their revenue sources. Many professionals, particularly young musicians, work part-time in music while pursuing an education or another career. Indeed, eleven respondents were not counting on long-term employment prospects in the industry. Even three of the long-time musicians who were interviewed still worked part-time outside of the music industry.

To generate enough income, musicians often perform distinct functions in the supply chain simultaneously, for example by working at a record label or a merchandise company while still playing. Sixteen respondents were applying their vocal or instrumental expertise in a variety of ways, such as at live performances and in the studio

with many different projects, in diverse media such as film, television, and theatre, and in private teaching. Still, living off playing music alone is possible; two musicians had a large enough collection of projects and a sufficient database of contacts to allow them to make a living from only live performance and studio work (interviews). However, this is the exception.

Pay is normally quite low for musicians entering the industry. They lack the resources to hire a support team (including a manager, record label, booking agent, etc.) and so they perform all the tasks necessary to advance their art themselves, including arranging, sound recording, CD pressing, accounting, booking, merchandising, and applying for grants (four interviews). This learning-by-doing not only saves money but educates musicians on the appropriate prices for services in the industry. It also gives them the expertise necessary to occupy roles throughout the supply chain later on in their careers.

Diversity is not only a characteristic of musicians' careers, but of those of employees at independent companies and organizations in the music industry. Based on eleven interviews and other observations, it can be said that these organizations normally only employ a handful of people, and each person must perform a variety of tasks. Again, many of these employees also work as musicians. Indeed, according to one musician:

[In] any creative or artistic venture, everybody will be doing everyone else's job. In plays and in music there's an understanding and an expectation that everybody picks up one another's slack. (interview)

Networking

In order to diversify, professionals must acquire a varied skill set through vertical and horizontal relationships. This is one reason why five respondents noted the need for strong interpersonal skills in the music industry. Careers are advanced through face-to-face contact, being seen during live performances, and word-of-mouth (eleven interviews; Wiseman, 2003). In the following quote, a musician describes how his band built an audience through networking:

Networks were everything for us. That's how we built the band. We would talk with other bands and other artists and with people locally, across the province, across the country, in the States, in New York. What we would do is we would network with people and we would put bands on our shows where people knew us, and we would go play on their shows where people knew them. We would play in front of their crowd of about a thousand people where they're from, and they would play in front of our crowd of a thousand people where we're from, and it would be a win-win. [...] Over time, those original networks [gave] birth to long-lasting friendships. (interview, president of Indica Records and Grimskunk band member)

As another example of the importance of networking, two label owners stated that they normally sign bands that they have seen live or have heard positive reviews about from friends (interviews). According to a musician, such positive reviews are a necessity since it is unseemly for musicians to self-aggrandize, but acceptable for friends and

acquaintances to give rave reviews (interviews). This means a network of friendly contacts is essential for career advancement.

Besides through face-to-face contact and at live performances, networking occurs in a variety of ways, including over the Internet and at conferences and seminars (two interviews). Additionally, two musicians noted that working at music schools or teaching privately permits networking with potential collaborators and audience members (interviews). Finally, professionals will collaborate with intermediaries to gain access to new networks. On one end of the spectrum, the major labels hire 'independent promoters' to ensure their songs get radio airplay (Wolff, 2004). At the other end, independent musicians sign to record labels and hire a support staff in large part to expand their network.

In fact, one of the main reasons musicians hire managers is to exploit their professional connections. Two respondents stated that managers are expected to do anything and everything in the music industry, including long-term career management, booking, promotion, and dealing with other professionals such as lawyers and label owners. This functional diversification means that managers have access to a wide network. Managers typically have a roster of two to five bands (interview, promoter) with whom they have strong personal relationships. According to one manager, it is normal to make a commission of 15-25% of gross revenue from each band (interview).

Amongst musicians, networking results in the formation of bands. Chance meetings or word-of-mouth are usually how bands are formed (e.g. 'You're looking for a bassist? I know this guy...'). Bands often have one member called the leader who is

primarily responsible for the advancement of the project. The convention is for the leader to be paid double the amount that the side musicians are making, unless the pay for the band as a whole falls below a certain level (interview, musician; Wiseman, 2003).

Based on interviews with five musicians and other observations, I would suggest that most serious musicians are involved in multiple concurrent projects. Projects are sometimes interdisciplinary, involving work with other types of artists such as actors, painters, and comedians. Each project is associated with particular networks, places, and timeframes, any of which may overlap with those of other projects (four interviews). They are prioritized according to the income and enjoyment they generate, and the contacts involved. As an example of multiple projects with different geographies and timeframes, a musician could have three bands: one that plays often but only in Montreal, a second that plays less frequently but embarks on intensive European tours when it does, and a third that sits on the backburner to be revived in the future. To elaborate on this example so that it includes overlapping networks, three of the musicians from the first band could also play in the second, which has two other members.

Although projects have different geographies associated with them, local gigs are the bread and butter for many musicians, while extra money is earned through occasional touring. In order to find enough local gigs, a musician needs to amass a strong collection of local contacts, including venue owners, promoters, and fellow musicians in particular. Five musicians stated that the effort needed to establish these connections discourages relocation out of Montreal (interviews).

Chapter IV

Independent music in Montreal

In this chapter, the qualities of place influencing networks in Montreal's independent music industry are examined. Particular attention is paid to the city's history, size, and bilingualism. Additionally, a separate section deals with Montreal's regulatory framework and organizations that provide important outlets for musicians and support for intermediaries, and facilitate networking. It is argued that the unique combination of place-based attributes found in Montreal has played a significant role in shaping the character of independent music in the city and in launching successful bands.

Online and elsewhere, Montreal has received a great deal of international media coverage regarding its independent music scene as a result of the emergence of bands such as Arcade Fire, The Dears, and *Malajube*. This attention culminated in the publication of articles in Spin magazine (Perez, 2006) and the New York Times (2005) identifying the city as a centre for independent music. While some attention has perhaps moved elsewhere (Sutherland & Straw, 2007), the city's music scene remains in the spotlight (e.g. Ottawa Citizen, 2007; Dunlevy, 2007; National Post, 2007). Let us now look in detail at the urban environment from which these bands emerged.

Part I – An overview of music in Montreal

Figure 2 – Central Montreal streets and neighbourhoods
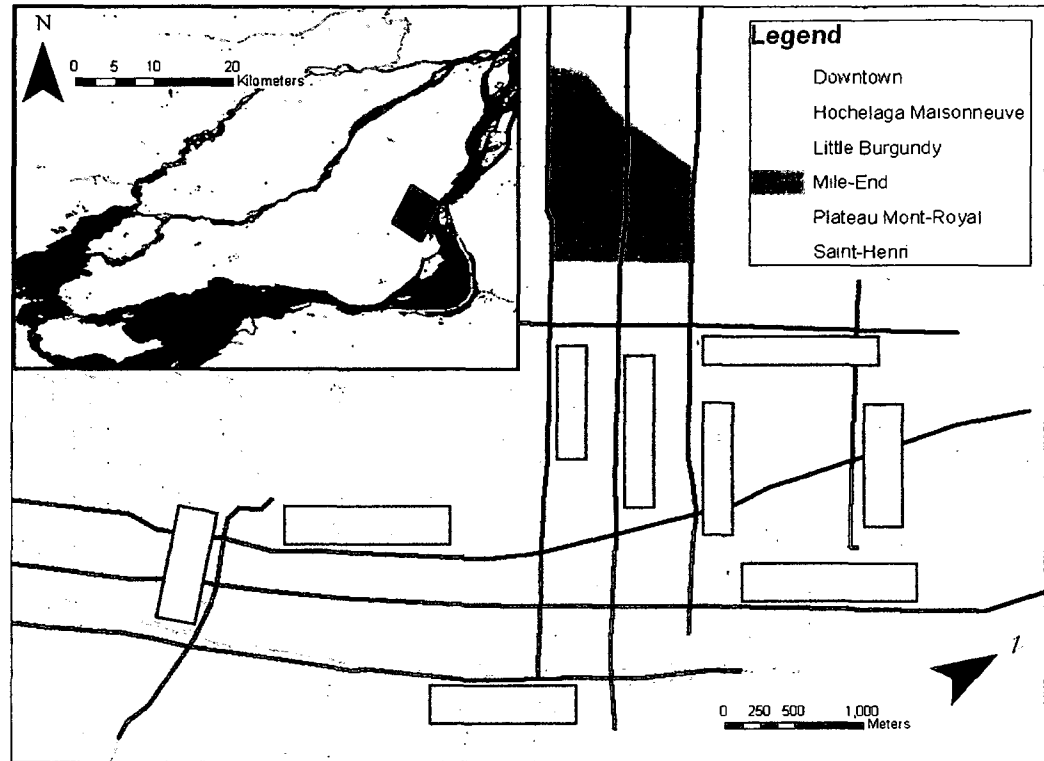
Created using ArcGIS version 9.2, Ville de Montréal AutoCad files (2004)

Using Stump's (1998) terminology, the Plateau and Mile End neighbourhoods are typically viewed as 'hearths' for independent music in Montreal because they contain a set of venues and audiences that are supportive of experimentation (e.g. New York Times, 2005; Boon, 2007; The Gazette, 2007). Located north of the downtown core, these areas contain many music venues, particularly along Boulevard Saint-Laurent and Rue Saint-Denis. There are also many venues in the downtown core (near or on Rue

Sainte-Catherine between Avenue Atwater and Avenue Papineau) and in other dispersed nightlife clusters serving sections of Montreal located away from the city centre.

According to Pilati & Tremblay (2007), artists tend to live in the Plateau, Mile End, and the southwest borough of Montreal (Saint-Henri, Little Burgundy). In fact, using 2001 national census data on the percentage of the population who work primarily as artists, Hill Strategies Inc. (2005) identified the Plateau as the most artistic neighbourhood in Canada. 8% of the population of the area of the Plateau bordered by Avenue des Pins, Avenue Mont-Royal, Avenue du Parc, and Rue Saint-Denis is made up of artists, a figure that is ten times the national average. Nearby areas also have high concentrations: in Mile End, 6% of the population is composed of artists. This type of clustering is predicted by the literature (e.g. Hirsch, 1972; Scott, 1997).

Artists and musicians tend to live near venues where they can broadcast their works and network with peers, an example of co-location due to external economies of scale (Scott, 1996). The prominence of venues, as well as retail and commercial land uses in and around downtown Montreal, reflects the city's transition away from a manufacturing economy (Picard, 1986) towards one relying more heavily on cultural production and consumption (Stolarick & Florida, 2006). Still, the cultural economy of Montreal has a vibrant history; in the mid-twentieth century, Montreal was known as the 'sin city' of Canada and had a pulsing nightlife. Over the decades, this reputation morphed into that of a cultural focal point in North America (Stahl, 2001). Indeed, the city is the hub of French media in North America and plays host to a wide array of festivals, including the *Festival International de Jazz de Montréal, Les FrancoFolies de*

Montréal, and Pop Montreal. These festivals and other cultural endeavors receive significant support from the federal, provincial, and municipal levels of government.

The population of greater Montreal is nearly four million. While most Montrealers are Francophone, the city has a sizeable (and largely transient) Anglophone minority (Stahl, 2001), as well as many non-official language groups. The five major universities[14] located in and around Montreal also attract a passing student population who are noteworthy producers and consumers of culture. Students represent over 4% of the population of Montreal's metropolitan region, the second highest concentration in North America after Boston (Pilati & Tremblay, 2007).

The next section of this chapter will trace the history of music in Montreal, from the city's founding up to the present. Afterwards, the place-based attributes of Montreal that affect the operation of the music industry will be discussed, with a particular emphasis on the size of the city and its bilingualism.

A history of music in Montreal

Montreal was founded in 1642 and much of the early music in the city was associated with the Catholic Church, including after the British conquest of New France in 1760. It was not until 1825 that the first institution devoted exclusively to the performing arts, the *Theatre Royal*, was built. Two other early Montreal venues were the Academy of Music and the *Monument National*. Overall, few buildings were built

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[14] The five universities are *L'Université du Québec à Montréal* (UQAM), *L'Université de Montréal* (UdeM), *L'Université de Sherbrooke* – Longueuil campus, Concordia University, and McGill University

specifically for music in the 19th century, so theatres and hotels served as important venues (Prévost, 1993). The first Montreal Symphony Orchestra was established in 1894, and classical music in the city continued to grow with the founding of the McGill University Conservatorium in 1904 and the *Conservatoire national de musique* in 1905 (Canadian Encyclopedia, 2008a).

In the 1920s, blacks came to Montreal as an extension of the massive African-American migration northward in the United States. Many worked as porters, establishing a close-knit community near the Grand Trunk and Canadian Pacific railways in an area of the city now known as Little Burgundy. Some of the migrants were musicians who brought jazz music to the city. Although Montreal was relatively tolerant, blacks were still barred from playing in the northwest section of downtown Montreal (then called 'Uptown'), through an unwritten agreement between the musicians' union and venue owners. Instead, they were confined to clubs located along rue Saint-Antoine or east of boulevard Saint-Laurent. A vital venue for the jazz scene in Montreal was Rockhead's Paradise, in what is now Little Burgundy. The venue was black-owned and its start-up money was made through bootlegging during the American prohibition (Gilmore, 1988).

From the early 20th century until the late 1950s, Montreal hosted a vibrant nightclub scene where music was performed with other types of showbiz such as silent films, vaudeville acts, and theatre (Gilmore, 1988). For many years, nightlife in the city was greatly bolstered by the fact that Montreal was one of the few 'wet' cities in North America, since Quebec had been the only Canadian province to vote against prohibition

in an 1898 referendum (Weintraub, 2004) and prohibition legislation was in effect in the United States. Montreal was also the centre of the Canadian music industry until about 1950. The first company in the world to use electronic recording technology was founded in Montreal by the Berliner family. For many years Montreal was the only place to record music in Canada, which attracted more musicians who also performed live (Gilmore, 1988).

The outbreak of World War II did not dampen Montreal's nightlife; instead, the presence of many soldiers provided a boost. By 1948, Montreal was home to fifteen large nightclubs and 25 smaller lounges that hosted live music (Weintraub, 2004). Good times continued in the decade following the war, and Montreal was ranked alongside New York as the best place to see shows in North America. At that time, musicians could play three paying shows and then go jam until the morning every day of the week. Racial integration also began after World War II, allowing black and white musicians to play together and blacks to play in the 'Uptown' nightclubs (Gilmore, 1988).

Montreal's nightlife also had a shady side. From the early twentieth century until the 1960s, organized crime was entrenched in the form of bootlegging, gambling, prostitution, and protection rackets. Deals were made between powerful crime syndicates and nightclub owners, police, politicians, and journalists (Weintraub, 2004). Musicians were told to turn a blind eye to the proceedings of the underworld and were generally treated well. The situation changed in 1954 when Jean Drapeau was elected mayor with the mandate to clean up Montreal. He shut down or constrained nightclubs, which were used as criminal meeting places and were often sites of gang violence. For musicians,

Drapeau's measures meant fewer shows and drastic cuts in their pay. Coffeehouses sprang up as a new type of venue, but they were not as commercially successful as nightclubs (Gilmore, 1988).

Along with Drapeau's measures, other factors were at work against musicians who relied on live performance. Television came to Montreal in 1952, allowing people to be entertained from the comfort of their own homes, at the same time as suburbanization moved audiences away from venues (Weintraub, 2004). Stripping also began replacing other types of showbiz in the late 1950s, shifting the focus of performances away from music and driving away much of the female audience. Another blow was the appearance of tape recorders and sound systems in the 1960s. They permitted club owners to play recorded music instead of hiring a live band (Gilmore, 1988).

As a result of these trends, musicians could no longer find full employment playing in nightclubs. A few musicians survived by diversifying: playing in hotels, touring, learning multiple instruments, or becoming studio musicians. Studio work for television and radio, particularly for the CBC and its orchestras, became an important source of employment for a new generation of musicians, but could only support a fraction of those who had been working before (Gilmore, 1988). Even this would not last; funding was eventually cut from public broadcasters and injected into the private system, which resulted in more job losses and reduced salaries for musicians (interview, musician).

The decline of live music in Montreal occurred alongside the transfer of economic power from Montreal to Toronto. In the 1940s, Montreal had the world's largest inland

port and was Canada's most populous city (Weintraub, 2004). This changed once the Saint Lawrence Seaway was opened in 1959, allowing ships to reach the Great Lakes from the Atlantic Ocean and making the port of Montreal obsolete. Montreal's economic standing relative to Toronto continued to weaken in the following decades with de-industrialization and, at least in the popular conscience, with the rise of Quebec separatism. Toronto eventually succeeded Montreal as Canada's first city (Prévost, 1993) and the centre of the Canadian music industry.

Political change

Between the late 1800s and the 1950s, Montreal's Anglo-Scottish business elite dominated commerce in the city, and at the turn of the 20th century they managed three-quarters of all wealth in Canada (Weintraub, 2004). French Canadians, who had constituted a majority of Montreal's population since the early twentieth century (Prévost, 1993), were largely excluded from commerce and lived in a society that was tightly controlled by the Catholic Church.

A radical change began in 1960, when Jean Lesage was elected premier and the Quiet Revolution began in Quebec. Within a decade, Quebec society was largely secular, French Canadians were in political control, and pride in *Québecois* culture had emerged (Gilmore, 1988; Prévost, 1993). Probably as a consequence, French *Québecois* music exploded in popularity in Quebec in the 1970s, and the province now has its own star system built mostly upon local French acts.

The assertion of French Canadian political power in Quebec continued with the election of the *Parti Québecois* in 1976 and a referendum on the separation of Quebec from Canada in 1980. It is a common perception that these events influenced already nervous businesses, including the major labels, to divest from Montreal, although the deindustrialization occurring in Montreal at the time (Germain & Rose, 2000) almost certainly played a role as well. In 1978, independent music companies in Quebec began organizing to fill the power vacuum left by the majors by creating *l'Association québécoise de l'industrie du disque, du spectacle et de la video* (ADISQ) (interview, ADISQ representative).

Hard times in Montreal and the birth of the Plateau scene

Due to deindustrialization and perhaps partly as a result of the separatist movement, Montreal experienced dire economic times in the mid-1980s. Saint-Laurent Boulevard was boarded up and there were very few venues for bands to play at. Many young people, especially Anglophones, had left the city or were planning to leave for better opportunities elsewhere. The flipside of this situation was that there was a great deal of space available at extremely low rents, which attracted artists from across Canada. The area of the Plateau near Saint-Laurent Boulevard, historically dominated by Jews and eastern European immigrants (Weintraub, 2004), was particularly attractive because it offered suitable commercial loft space and was close to downtown. In the quote below, a bassist explains why many artists chose to move there:

People who want to create [...] have to seek out cheap neighbourhoods [with] less hassle from your traditional neighbours. If you're a sculptor, and you want to be welding and hammering away at three in the morning when you like to create, you can't be doing that in the West Island. You also need a space that's larger to take whatever sculpture you have. You have to live on a street that allows trucks to come down to pick your shit up to go on display. So you end up with artists collecting in enclaves like that. That's what happened on Saint-Laurent here. Because Saint-Laurent used to be an old Jewish neighbourhood. You used to walk down here, twenty years ago, before I came here, and they would still be butchering cows. So it was not a desirable place to live and raise a family. [...] But people who weren't put off by that, or were looking for that because they knew it would give them the freedom in other senses, moved in here. (interview)

Although musicians who relocated to Montreal could live very cheaply in suitable spaces, they also had to do without labels and venues. According to a journalist, musicians were forced to do nearly everything themselves because of the lack of supportive music infrastructure (interview). To perform in the absence of venues, bands would play shows in their lofts as authorities turned a blind eye (three interviews). A promoter describes Montreal's warehouse scene in the mid-1980s:

I remember going to Berlin in 1984, and Berlin was a lot like Montreal. [...] A lot of derelict buildings, a lot of vacancies, boarded-up places. [...] Loft space was dirt-cheap. Anybody who moved here from out of province could get a place, a loft for like five hundred bucks. And then, if you had a loft, you could

have parties, you could have bands playing. And there was a wave of people that actually started, let's say in eighty-five, eighty-six, to move here from other parts of the country and form bands. [...] So all of our first shows were in either community halls or lofts. It was very rare that we had a show in a bar. There were no bars. (interview)

One of the early record labels to be established in Montreal was Cargo Records.[15] It had distribution connections that allowed artists in Montreal to disseminate their works elsewhere. With distribution available and a low cost of living, Montreal became a good place for musicians to be based. Thus, employment in the music industry grew and more companies were founded. By the 1990s, bars, clubs, and other venues were opening, causing the warehouse scene[16] to largely disappear, since it was more convenient to play in a venue with its own sound system and liquor license than in a loft (two interviews). There is still an underground warehouse scene today in areas such as Mile End and Saint-Henri, but, as one underground venue manager noted in an interview, they face problems of increasing rent and limits to growth due to the illegality of their activities.

As Montreal's music industry was growing in the 1990s, new technologies were democratizing functions that had previously been the domain of the major labels. Musicians were self-producing, self-promoting, and self-marketing. In parallel, there was an anti-corporate sentiment in popular culture and do-it-yourself music became accepted (interview, journalist). With fewer labels available than in places like Toronto, some

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[15] Cargo was founded in 1987 and went bankrupt in 1997 (Stahl, 2001).
[16] This term is used to describe a situation where music is played in informal venues, often illegally.

musicians simply founded record labels to sign their friends' bands as well as their own. Rather than beginning with a business plan, they started out fairly informally and gradually became more serious and diversified (three interviews):

> We started the label with two thousand bucks and eight-and-a-half-by-eleven photocopies that we'd hand out at our shows to tell people we had a record label. We didn't have a business plan; we didn't have a media launch; we didn't have anything. It was very, very grassroots. But it was half born out of necessity that we did it, and half out of 'Why the hell not? And why don't we give our friends a hand? And why don't we take control of this aspect of our career as well?' (interview, founder and president of Indica Records)

Similarly, musician-run venues began opening across the city (two interviews).

By the late 1990s, Montreal had become widely known as a music incubator and was home to a variety of genres of music (interview, journalist). The economy was healthy but the cost of living was still low. More young people were coming to the city to study, and they represented both a new audience and a source of talent from which the music industry could draw. The provincial government, through organizations such as *la Société de développement des entreprises culturelles* (SODEC), began supporting the music industry, and, according to a promoter, noticeably expanded the Francophone music industry (interview).

Montreal in the last decade

Since the turn of the millennium, emerging Montreal bands have had an experienced set of peers to learn from and from whom to draw inspiration (two interviews). Significantly, they also have a supportive infrastructure that, to a great extent, consists of former musicians. A remarkable example is the network consisting of the members of Godspeed You! Black Emperor (band), and the founders of Constellation Records, Hotel2Tango (record labels), Blue Skies Turn Black (promotions company/record label), Sala Rossa, and Casa del Popolo (venues). According to three interviewees, this small group of people has been one of the main drivers of the creation of a musician-oriented scene in the Plateau and Mile End and has facilitated the development of countless bands in the past ten or fifteen years. Additionally, other companies such as Alien8 Recordings, Dare to Care Records/*Grosse Boîte* (record labels), and *Bonsound* (management company) have recently set up in Montreal, providing more support to emerging artists. Furthermore, the *Société pour la promotion de la relève musicale de l'espace francophone* (SOPREF) was founded in 1998, professionalizing many emerging musicians and training them to access funding programs (interview, former SOPREF representative). All in all, the supportive structure has been put in place to launch successful bands (interview, journalist).

Photograph 1 – Casa del Popolo (taken by author)

Indeed, many prominent bands were launched, most notably the Indie Rock bands Arcade Fire and Wolf Parade in English and *Malajube* in French. Since these and other (mostly English) internationally successful bands played Indie Rock, Montreal became known for English Indie Rock (five interviews). A blogger contended that the bands that followed in the wake of this publicity have had to deal with comparisons to their forbears and pressure to conform to 'the Montreal sound' (interview).

The past decade has also seen significant gentrification of downtown, the Plateau, and Mile End, which has pushed some artists further from their places of work. Three respondents noted that the boroughs have been clamping down on certain venues and events, possibly due to gentrification. Four also maintained that zoning laws are more strictly enforced than in the past, putting pressure on several venues.

Part III – Place-based attributes of Montreal

Montreal: Open, creative, cosmopolitan, and cheap

Two likely reasons for the gentrification of parts of Montreal are its livability and the presence of many cultural amenities. For four musicians, Montreal is a 'small big city' with a cultural infrastructure comparable to that of larger metropolises (interviews). With a 2007 population of 3.7 million in its Census Metropolitan Area (Statistics Canada, 2008), Montreal is a secondary music centre after the major agglomerations of New York, Los Angeles and Nashville. Eight respondents said that the city has a reputation as a cultural centre, and three said there is an unusually large concentration of artists which attracts musicians from Quebec, other parts of Canada, and elsewhere. According to one bassist, some bands are lured by the cachet of being 'from Montreal' (interview).

Interviewees were mostly upbeat about culture and creativity in Montreal. Nine said Montreal is home to a café society and its residents possess a great *joie de vivre*; it is normal for people to go out and spend money on any day of the week to get together and support art[17] (interviews). Nine respondents also called Montreal a cosmopolitan city, and two musicians said it was a cultural bridge between Europe and North America (interviews). Of the 27 who were asked whether Montreal is open to experimentation and creativity, 20 replied positively, six were lukewarm on the subject, and only one replied negatively.

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[17] Like one label owner (interview), I would suggest that this attitude has some of its roots in Montreal's days as a 'sin city.'

Interviewees indicated that within Montreal, openness to experimentation and creativity varies by neighbourhood. Eleven respondents said that openness is concentrated where there is an arts infrastructure (e.g. venues) and an existing population of artists. They mentioned three neighbourhoods in particular: downtown, the Plateau and Mile-End. The geography of creativity in Montreal is also changing over time; three respondents said that artists have been leaving downtown and the Plateau because of a rising cost of living and moving into Mile End, Saint-Henri, and Hochelaga-Maisonneuve.

For 22 interviewees, the low cost of living, primarily in the form of cheap rent,[18] is integral to allowing artists and others with low or irregular incomes to enjoy a high quality of life, which has the effect of attracting and retaining musicians. In a 2007 study, Pilati & Tremblay arrived at similar findings: Montreal offers artists a high quality of life as well as low-cost cultural activities and spaces. Since money is not an overriding concern, many people in Montreal do not work nine-to-five jobs and are free to participate in music as professionals or audience members (two interviews). However, five respondents said that rents are increasing and there is less suitable artistic space than before.

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[18] Cheap rents in Montreal are enforced by a policy of rent control that limits rent increases each year. Rent control in Montreal in can be traced back to 1940 when the federal government froze rents as part of the war effort. This measure was eventually relaxed and in 1951 the provinces assumed jurisdiction over rents. The system of rent control that Quebec now uses was developed in the 1970s and has since evolved (Thibodeau, 2001).

The size of Montreal

Although the population of Montreal's Census Metropolitan Area is nearly four million, the urban core where many artists are concentrated is much smaller. For instance, the population of the Plateau-Mont-Royal borough is about 100 000 (Ville de Montréal, 2009a) and Ville-Marie (including downtown Montreal) has a population of about 80 000 (Ville de Montréal, 2009b). The artistic neighbourhood of Mile End is only a small section of the Plateau-Mont-Royal borough. Due to the small size of Montreal and its linguistic fragmentation, professional networks are tight and there is a sense of community and solidarity (interview, manager). For three respondents, this was particularly true in Mile End, where much of the music business takes place between friends. Unfortunately, tight networks are not always viewed in a positive light. Two musicians said that studio work is dominated by only a handful of musicians (interviews), and commercial success relative to one's peers can be looked down upon as 'selling out' (interview, festival organizer). More neutrally, two musicians noted that small size of Montreal can force musicians to diversify and play different instruments and genres to have enough gigs (interviews).

The loci of Montreal's music networks are found in a compact area comprising the Plateau, Mile End, and downtown Montreal, where many artists and venues are concentrated. Five respondents pointed out that this compactness makes going out to shows easy for both musicians and audience members. Moreover, one musician noted that when he lived in Los Angeles, it was impossible to work more than two jobs per day because it took so long to get across the city, whereas in Montreal he did not have this

constraint (interview). The clustering of artistic functions is not only beneficial in the music industry: in their study of visual artists, Pilati & Tremblay (2007) also mentioned the ease of circulating through Montreal's artistic neighbourhoods as an attractive aspect of the city for their research subjects.

While the small size of Montreal facilitates circulation, it also puts limits to growth on the music industry. Even as the low cost of living and the presence of many potential collaborators make Montreal a good incubator for up-and-coming musicians (six interviews), the support network for talent in Montreal can be lacking (five interviews). For instance, two musicians saw Paris, Toronto, and New York as offering better managers, agents, and connections (interviews). One musician describes the situation by making an analogy between the music industry and a restaurant:

> I find that Montreal is a great kitchen. If you treat music as food, you
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> have amazing chefs, you really can push food out; all different types of food
>
> from all over the world; all these different types of spices. It's an amazing place
>
> to go get food. But when it comes to the service of the restaurants, and the
>
> waiters, and the presentation of the food and some of those things, then it's a
>
> little hard. When you go to New York, it's a five star restaurant all the time. The
>
> presentation is always fantastic; you have enough servers bringing out the food;
>
> you can go to the restaurant all the time. Here, the restaurant is not developed.
>
> (interview)

Once again, this finding reinforces an observation by Pilati & Tremblay (2007): that Montreal is a good place to develop artistically but that the city imposes limits to

growth. It also relates to Stump's (1998) work; Montreal is a good hearth but is perhaps lacking as a stage. In contrast to Montreal, larger urban centres offer more networking opportunities and better cultural infrastructure, but musicians must contend with more competition (two interviews). Due to limits to growth in Montreal, bands are usually not satisfied with playing in the city; they want to get out and tour. This motivation is enhanced because it can be necessary to network and receive publicity outside of Montreal in order to attain success at home (three interviews).

Independence in Montreal

Although Montreal's size imposes limits to growth on the music industry, the city is still the hub of the Francophone North American music industry (two interviews). This industry primarily serves the Quebec market, which is linguistically and culturally distinct from the rest of Canada and the United States. Because the population of Quebec is only 7.5 million (Statistics Canada, 2006), selling 30 000 albums in the province is quite an accomplishment (interview, journalist). This means the major labels, specializing in releases that must sell hundreds of thousands of albums to be profitable, are less interested in Quebec. Consequently, there is a limited major label presence in Montreal, which, according to three respondents, gives more freedom to professionals and fosters independent innovation. Two interviewees said that the lack of linkages with other centres means professionals operate in relative isolation, creating a culture of independence in Montreal's music industry:

The centre of English-speaking music in Canada is Toronto. All the major labels are there, there's a whole thing built up around it. I think because there's a space [in Montreal] where there isn't a predominant American, multinational, corporate music ethos and culture [...] you have the freedom to be more experimental and take chances. To just do your own thing, and not have the pressure to fit within that structure. (interview, creative director of Pop Montreal)

English and French music scenes

The presence of a distinct, Francophone culture in Quebec is one reason for a limited major label presence in Montreal, which leaves room for independent organizations and practices in the city. Furthermore, the linguistic make-up of Montreal, originally brought about by the British conquest of New France, affects networks in the music industry by creating both barriers and opportunities that would not be present in more linguistically homogenous centres.

According to Statistics Canada (2007), roughly 2.4 million people in Montreal speak French most often at home, 600 000 speak English, and 450 000 speak a variety of non-official languages. It is important to note that these numbers refer to Montreal's Census Metropolitan Area; the core of the city is home to smaller linguistic communities and a greater portion of non-French speakers. Boulevard Saint-Laurent is considered the traditional linguistic dividing line in Montreal, with more Anglophones living to the west and more Francophones to the east. However, this has been changing over the past half-century and one can now hear a mix of English, French, and other languages in many

neighbourhoods. Still, Anglophone and Francophone cultural infrastructures, as well as the two music scenes, are fairly separate (Stahl, 2001).

For reasons of convenience, people tend to associate with those who speak the same language, and this is the main reason for the division of Montreal's music industry into Anglophone and Francophone sections. The linguistic divide in the music industry is also geographic to a certain extent: according to a festival organizer, Anglophone musicians are clustered in the West Plateau, Mile End, and Saint-Henri, while Francophone musicians are clustered in the East Plateau, Hochelaga-Maisonneuve, and Mile End (interview). The Anglophone music community in particular is very tight due to its small size and the compactness of the area of the city in which it is clustered (four interviews). This insular community imparts feelings of isolation from the 'mainstream' economy to some of its members (Stahl, 2001). On the other hand, one musician stated that there is a certain amount of intermingling with professionals and audiences regardless of language (interview).

Language-based professional networks in the music industry exist in large part because people tend to collaborate with their friends first, who often speak the same language. Thanks to the limited number of actors in language-based networks in Montreal, it is easy to become complacent and satisfied with dealing with the same people (interview, festival organizer). In some cases, networks can be so distinct that news does not pass between them (Stahl, 2001; two interviews). In the following quote, a Francophone musician recalls recommending fellow Francophone musicians to

Anglophone festival organizers who were largely ignorant of prominent Francophone musicians in Montreal:

I gave them obscure names, things to help them find interesting musicians, but then I realized that they didn't even know the most well-known musicians. It's like two realities. (interview, translated by author from French)

On a related note, three respondents also recalled cases of musicians being trapped in one linguistic section. Gaining access to networks on 'the other side' is definitely possible, but requires effort (interview, musician).

Even though there is a divide between French and English professional networks in Montreal, the two have come together with the convergence of English and French Montreal in general over the past 30 years or so (two interviews). According to eight musicians, bilingual musicians, who can work across the city, are now common (interviews). The necessity of being bilingual is debatable: one musician argued that bilingualism is essential for success in Montreal, but three musicians contended that it is professionalism and musical ability, not language, that ultimately determine whether an individual will be hired (interviews).

Even though English and French Montreal are closer than in the past, two respondents stressed that there are few bars in Montreal with a mixed clientele. This is probably related to the fact that English and French bands rarely play together (two interviews). According to a journalist, Francophones are willing to attend both French and English concerts, but Anglophones only see English shows (interview). In a 'chicken-or-the-egg' scenario, it is effective to promote English artists in the French

media, but not to promote French artists in the English media (interview, promoter). The same relationship applies for booking: Anglophone promoters will rarely approach French bands (they will approach DJs), while Francophone promoters will approach English or French bands (interview, festival organizer). A promoter noted that online promotion, like much of the Internet, tends to be in English. Overall, promotion is difficult in Montreal since there is no dominant culture, which means the market is unpredictable (interview, festival organizer).

Bilingualism and musical genres

Bilingualism and diversity in Montreal not only influence networks and promotional activities, but also shape innovation in musical genres (four interviews). The presence of multiple Anglophone and Francophone cultures means there are more musical genres for musicians to absorb and experiment with. For example, a bassist remarked that African music is particularly prominent in Montreal due to immigration from French-speaking African countries (interview).

Anglophone and Francophone audiences have different musical tastes. Francophone audiences tend to prefer either smooth, 'dreamy' music (interview, musician) or heavy forms of rock (two interviews). Two respondents mentioned that Indie rock, the genre that put Montreal on the map most recently, was originally an Anglophone phenomenon but is now more evenly spread between Anglophones and Francophones. In jazz, Francophones prefer more experimental music with a European influence while Anglophones follow New York influences, due to past and continuing

musical exchanges with New York (interview, jazz musician). Finally, a journalist observed that hip-hop does not do well in Montreal, perhaps due to its heavy reliance on lyrics (interview).

Language is not the only element shaping musical tastes in Montreal; the history of Anglophone and Francophone communities in the city also plays an important role. Since very early in its history, Anglophone Montreal has been closely linked to New York. In 1797, New York was the first city to be connected with Montreal by year-round mail service (Prévost, 1993). Linkages were strengthened by prohibition in the United States, which fostered criminal dealings between Montreal and New York. Because organized criminals were involved in nightlife, a stylistic connection between Montreal and New York was cemented (Weintraub, 2004). Nevertheless, protectionist restrictions imposed by both American and Canadian immigration services were significant obstacles to musicians collaborating and touring between Montreal and the United States (Gilmore, 1988).

Similar to the English Montreal-New York connection, French Montreal has strong connections with France that can be traced back to the city's history as part of the French colony of New France. Even very soon after the English conquest of New France in 1760, formal cultural exchanges with France recommenced (Prévost, 1993). These exchanges continue to this day, notably through Canada's membership in *La Francophonie*, a large French expatriate population in Montreal, and a number of agreements between Quebec and France.

Although English and French are the two prominent languages of Montreal, the influence of people who speak non-official languages on music in the city cannot be ignored. In the past 30 years, immigration from many different countries has contributed to the import or genesis of a multitude of new musical styles in Montreal (interview, label owner).

English and French target markets

French and especially English bands must export themselves because the market in Montreal, Quebec, and even Canada as a whole is too small to survive on. Additionally, the linguistic fragmentation of Montreal exacerbates the problem of small market size, forcing bands to reach out to other markets by touring early in their careers (interview, promoter), thus gaining valuable experience:

> It's absolutely key to get out of the city and to tour. Especially English bands, because [...] you're playing to about seven hundred thousand people in a city that's over three million. So they had to be on the road. And that kind of experience really sharpens up a band. If you're forced to promote yourself nationally, if you're forced to get out on the road, if you're forced to move around, you make wider contacts, you get a greater amount of experience on how to do the business, and that makes you a better band for it. When you've got a lot of bands doing that, it creates a shared information trust that can be quite powerful. (interview, editor-in-chief of *Hour*)

Normally, English bands look to the Canadian and international markets, while French bands concentrate on Quebec, France and other French-speaking countries (six interviews). The potential international market for English music is huge, but acts face stiff competition from around the globe. English bands also face an uphill battle to get on Quebec radio, which has a French content quota of 65% and plays music from international English bands with the remainder. According to a label owner, it is much easier to get a French artist on the radio in Quebec than an English artist because of the quota (interview).

One journalist contended that French music from Montreal has a smaller potential market than English music but faces less competition (interview). When selling French music in Quebec, professionals must vie with the province's well-established star system and cater marketing and promotion to the distinct regions of the province (interview, CAM representative). Moreover, geographic proximity to the audience can be an asset for French labels in Montreal because it allows them to make targeted and informed marketing decisions. Similarly, the staff at French labels can readily interact with local business partners through face-to-face contact. The situation can be more challenging for English labels, which must engage distant markets and forge relationships with partners in other cities (interview, journalist).

Chapter V

Supportive organizations

Quebec's distinct culture has contributed to the growth of an independent music industry in Montreal (interview, musician). Among Francophones, there is a sense of solidarity and a dedication to cultivating local talent (interview, blogger). Likewise, three respondents stated that the small size of Montreal's Anglophone music community contributes to feelings of commonality. These two examples of cohesiveness, although sometimes at odds with each other, contribute to the success of a set of organizations that provide considerable support for the music industry in Montreal. At the same time, organizations unite professionals and create an environment for further collaboration to occur. On the whole, organizations in Montreal help nurture local industry dynamics by providing some of the resources and venues that foster linkages, and consolidate Montreal's status and visibility as a music hub.

This section begins with a table providing a brief description of selected organizations involved in Montreal's music industry. It continues by looking at grassroots organizations and then turns to a discussion of the regulatory framework and formal granting organizations. Finally, Montreal's festivals and the case of Pop Montreal are examined.

Table 3 - Notable organizations involved in Montreal's music industry

Name	est.	Description
Bureau des festivals et des événements culturels	1987	An office of the City of Montreal that provides funding and logistical support for festivals and events in the city.
Conseil des arts de Montréal (CAM)	1956	An office of the City of Montreal that provides funding and other types of support to artists and artistic organizations.
Conseil des arts et des lettres du Québec (CALQ)	1994	A Quebec government corporation with the mandate to promote the development of arts and literature in Quebec by supporting artists and organizations. It uses juries of peers to select who receives funding.
Société de développement des entreprises culturelles (SODEC)	1994	A Quebec government corporation with the mandate to promote the development of cultural enterprises in Quebec.
Canada Council for the Arts	1957	An arm's-length federal funding agency promoting the development of arts and literature in Canada by supporting artists and organizations. It uses juries of peers to select who receives funding.
The Foundation Assisting Canadian Talent on Recordings (FACTOR) / Musicaction	1982/1985	FACTOR supports the English Canadian independent recording industry. It is funded by private radio broadcasters and the federal government. It uses juries of peers to select who receives funding. Musicaction functions in the same way but supports the French Canadian music industry.
Radio Starmaker Fund / Fonds Radiostar	2001/2001	The Radio Starmaker Fund supports marketing and promotion for English Canadian musical projects and is funded by private radio broadcasters. Fonds radiostar is administered by Musicaction and functions in the same way as Radio Starmaker Fund but supports French Canadian projects.
Canadian Radio-television and Telecommunications Commission (CRTC)	1968	A federal commission in charge of regulating Canadian broadcasting and telecommunications services. It requires radio broadcasters to support FACTOR and Musicaction, and enforces Canadian content quotas on radio and television.
Video FACT	1984	Provides assistance for music videos, websites, and electronic presskits. It is funded by private Canadian music television stations MuchMusic, MuchMoreMusic, and Musique Plus.
Société pour la promotion de la relève musicale de l'espace francophone (SOPREF)	1998	A non-profit organization that supports creators of music by assisting them in production, promotion, and distribution. It holds instructional seminars, lobbies government, and is funded by a combination of public and private sources.
l'Association québécoise de l'industrie du disque, du spectacle et de la video (ADISQ)	1978	An industry association for Quebec music companies. It collectively promotes the Quebec music industry, holds instructional seminars, and lobbies government.
Performing rights organizations (e.g. SOCAN, SODRAC, SOPROQ, SPACQ)		These private organizations represent composers, lyricists, songwriters and music publishers, and insure performance royalties are paid to rights holders. They also hold instructional seminars and lobby government.
La guilde des musiciens et musiciennes du Quebec (GMMQ)	1897	This provincial musicians' union promotes the professional and economic considerations of member musicians, focusing on contracts, retirement funds, and lobbying government.

Grassroots organizations

One of the finest examples of an organization rooted in and promoting solidarity among artists is the *Société pour la promotion de la relève musicale et de l'espace francophone* (SOPREF). Founded in 1998, this Montreal-based organization unites emerging, independent artists and offers training (particularly in contracts and funding applications), information sessions, access to a database of contacts, and provides a venue where professionals can network. The database is particularly valuable for networking; available for $75 per year, it is an exhaustive inventory of the music industry in Quebec containing contact information for over 5000 musicians, venues, record labels, festivals, and media. SOPREF is also a lobby group that played a part in convincing Musicaction to create funding streams for emerging artists, new media, and inter-disciplinary arts. Below, a former SOPREF representative discusses how the organization successfully lobbied on behalf of emerging artists:

> It was just power in numbers. We have six hundred members, which represents
> four people per band, so you have a minimum of twenty-five hundred people,
> plus other organizations in Quebec that make requests for artists to get more
> money, more funding, more training. So we really changed the rules of the
> marketplace (interview, translated by author from French).

Like some other non-profit organizations, SOPREF lobbies governments and funding agencies while receiving most of its funding from the federal and provincial governments (interview, former SOPREF representative).

As SOPREF helps emerging artists professionalize, other organizations are instrumental in allowing them to tour and reach a wider audience. One is *Coup de Coeur Francophone*, a network of promoters that supports emerging and established French *Chanson* artists on national tours (a French artist going on a Canadian tour is quite remarkable). Like SOPREF, this 'homeless festival' facilitates networking, this time by connecting musicians with promoters across Canada and assisting access to provincial networks. Similarly, *Coup de Coeur Francophone* also has links to *L'association des réseaux d'événements artistiques* (AREA), an international network of promoters that encourages exchanges between French and *Québécois* artists. According to the general and artistic director of *Coup de Coeur Francophone,* the organization is run by only four people and operates using an equal mix of public, private, and self-generated funding and donated services. It is headquartered in Montreal and has had links with Canadian partners outside of Quebec since 1995 (interview).

Another grassroots festival that also gives local musicians opportunities for exposure and networking but is more locally-oriented is Pop Montreal. It and other festivals will be discussed in greater detail later in this chapter.

A different and more informal set of key organizations is made up of musicians' collectives. These are founded to facilitate collaboration and networking, and simply to share the musical experience with others. One such group in Montreal is the Kalmunity Vibe Collective, which includes musicians and other types of artists. According to three members, Kalmunity organizes performances and seeks to use art to achieve social development goals (interviews). Another informal gathering of musicians is Tam-Tams,

an event that encourages accessible music and conviviality. Occurring on warm Sundays in Parc du Mont-Royal in the Plateau, Tam-tams is a large, spontaneous congregation of musicians (mostly percussion) as well as an eclectic mix of people.

Federal and provincial cultural policies

In Montreal, supportive grassroots organizations often receive public funding thanks to top-down policies that also funnel money directly to musicians and other actors and require Canadian and French-language content in the media. Similar to cultural policies elsewhere (Brown et al., 2000), these policies exist federally and in Quebec to promote local culture and to help it survive against outside influences (those of the United States in Canada, and those of English-language North America in Quebec). For the federal government, the Canadian Radio-Television and Communications Commission (CRTC), which is the national broadcasting and telecommunications regulator, has been a key instrument for this purpose. In the early 1970s, the CRTC first required that a percentage of radio content be Canadian. Today, music radio stations in Canada must play 35% Canadian content during peak listening hours. Additionally, French music radio stations must play 65% French content[19] (CRTC, 1998; CRTC 2002).

Private granting agencies

When the CRTC imposed content quotas, an incentive was created for private radio broadcasters to develop the domestic music industry so that they would have

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[19] Note that a given song may be Canadian and French, contributing to both quotas.

quality Canadian and French-language content to broadcast (FACTOR, 2007). Working with industry representatives, the broadcasters founded granting agencies to help fund the production and exposure of Canadian music so more listeners would tune in. These granting agencies are divided according to the language of the music they support; the Foundation to Assist Canadian Talent on Recordings (FACTOR) and the Radio Starmaker Fund (RSF) fund the English Canadian music industry, and Musicaction and *Fonds Radiostar* fund the French Canadian music industry. Today, private radio broadcasters are required by the CRTC to make annual contributions to these funds and to support them with a percentage of the value of transactions involving a transfer of ownership or control (CRTC, 2001; interview, FACTOR representative).

Although they were a private initiative, FACTOR and Musicaction receive a majority of their funding from the federal Department of Canadian Heritage (through the Canada Music Fund in particular), with most of the rest coming from private radio broadcasters (FACTOR, 2007; Musicaction, 2008). FACTOR was founded in 1982 (FACTOR, 2007) and offered $1.9 million to Quebec professionals in 2007-2008 (FACTOR, 2008). Musicaction was founded three years later (Musicaction, 2005) and contributed $6.3 million in 2007-2008, mostly within Quebec (Musicaction, 2008). The two organizations focus their support on production, promotion, and collective initiatives (FACTOR, 2008; Musicaction, 2008).

The RSF and *Fonds Radiostar* were both founded in 2001 and are entirely funded by private radio broadcasters. These granting agencies support the marketing and promotion of projects where an initial investment has already been made. In order to

qualify for funding, an artist must have sold a certain number of albums, which varies by genre of music. In 2007-2008, *Fonds Radiostar* granted $2 million, mostly to Quebec projects (Fonds Radiostar, 2008), and the RSF contributed $780 000 in Quebec (RSF, 2008).

Public granting agencies

Taken together, granting agencies contribute approximately $50 million per year to the music industry in Quebec. This money, which is mostly public, supports many different activities, including album production, promotion, marketing, and touring. It also helps pay for professionals to attend trade shows and conferences, and supports artist and industry organizations. Grants are allocated in a variety of ways, but one system used by the Canada Council for the Arts (CCA), the *Conseil des arts et des lettres du Québec* (CALQ), and FACTOR has juries of peers deciding who will be awarded funding from a pool of applicants. To access funding, professionals sometimes employ grant writers with connections to the granting agencies to apply in their names (three interviews). According to one bassist, a grant writer could make somewhere in the order of $200 per grant application plus 2-10% of the grant value (interview).

At the provincial level, feelings of solidarity amongst Francophones and a perceived need to promote culture in Quebec led to the province's first cultural policy in 1992. This policy created two public granting agencies: the CALQ and the *Société de développement des entreprises culturelles* (SODEC) (Gouvernement du Québec, 1992) in 1994. Both provide funding to an array of cultural industries in Quebec, but CALQ

focuses more on artists and artists' organizations while SODEC supports incorporated businesses. In 2007-2008, CALQ gave out $18.6 million in grants to music organizations (a large portion going to organizations in classical music) and $1.7 million to musical artists (CALQ, 2008). The agency also conducts studies of cultural industries, consults with industry representatives and organizations, and advises higher levels of government. SODEC, meanwhile, granted $12 million to applicants in its *musique et variétés* program (SODEC, 2009). It is more active in supporting the promotion and marketing portions of the music industry (interview, CALQ representative).

Funding for the arts also exists at the federal and municipal levels. Federally, the CCA, an arm's-length funding agency created in 1957 (CCA, 2008a), awarded $8.9 million to music artists and organizations in Quebec in 2007-2008 (CCA, 2008b). At the municipal level, the *Conseil des arts de Montréal* (CAM) has been supporting the arts since it was created in 1956 under mayor Jean Drapeau. In 2007 it granted $1.8 million to 57 music organizations (CAM, 2006). The *Bureau des festivals et des événements culturels*, an office of the city of Montreal responsible for facilitating festival production, was also cited by three festival organizers as being quite helpful for logistical support and navigating bureaucracy (interviews).

Issues relating to funding

Grant money makes a huge difference in how Montreal's music industry operates. Record labels are particularly dependent on funding because album sales are no longer reliable (two interviews). Five respondents also mentioned that funding makes touring the

vast distances of Canada and Quebec feasible for bands. Overall, the granting system holds people accountable and requires that money be put into Canadian businesses and talent. Furthermore, grants have allowed many bands to persevere through tough times until they attained success (two interviews):

> Looking at [...] the biggest artists out there today, how many of them are Canadian? There's a reason for that. Some of these young artists, instead of getting frustrated and giving up [...], have some FACTOR or some SODEC or some music support, to keep them going through those difficult months and years, to get to the point when they stuck with it and succeeded. (interview, founder and president of Indica Records)

Despite its strengths, the granting system is not perfect. One problem is that professionals both at home and abroad are aware of the support available for Canadian artists and will expect them to cover extra expenses (interview, musician). A bassist also noted that applying for grants while touring is difficult. Another weakness of the granting system is that it can produce cases where one success leads to years of funding, regardless of the merit of subsequent projects (two interviews). A related problem is that established bands, which may not require assistance, are able to put together stronger applications than emerging artists. To confront the issue, new funding streams that focus on emerging artists have been created (interviews, FACTOR representative, CALQ representative). Likewise, the Music Entrepreneur Component (MEC) program, of the Department of Canadian Heritage, was introduced to fund larger Canadian independent

music companies and free up other funding streams for smaller players (interview, label owner).

Despite the addition of new funding streams, guaranteeing broad accessibility to grant money is an ongoing concern. According to a CALQ representative, musicians in certain communities (e.g. rural areas, aboriginal or other visible minority groups) and musical genres tend not to form music organizations or ask for funding. To deal with this issue, CALQ actively reaches out to these groups (interview).

Additionally, the distribution of funding within the supply chain can be problematic. Three respondents stated that too much money goes into production and not enough into promotion and marketing:

> You see [independent labels] that release albums every month, without advertising, without promotion. Why are you releasing these albums? No one's heard of them. You're releasing them, they'll be in the stores, you'll sell one hundred copies. What's the point? To have people working there, you have to pay them. [...] You conclude, without actually seeing the books, that the company survives largely thanks to our [tax] money. (interview, founder and editor-in-chief of *BangBang*, translated by author from French)

On the other hand, a CALQ representative said that this disparity was indeed a problem in the past but that the organization had made changes to address it, such as injecting more money into programs supporting promotion and marketing (interview).

A few respondents felt the granting system had deeper, systemic problems. The first, and perhaps most scathing, critique came from a journalist: the availability of public

funding is making Quebec's music industry complacent and stifling innovation (interview). Second, applicants must obey the rules of granting organizations to receive funding, which reduces artistic freedom (two interviews):

> If you're working in a style that isn't categorized [...], the government doesn't
> know if it's good or bad. They're afraid to mess up. [...] You really have to make
> a lot of applications over a long period of time before you get anything.
> (interview, musician, translated by author from French)

A third issue that was brought up by a musician in an interview is that funding for artists is project-based, meaning that musicians must start at square one after each project is completed. Finally, a journalist argued that grant money primarily supports the music infrastructure and not artists. For example, musicians are given production grants to record albums, but this money goes to labels and producers (interview).

Other organizations

Besides granting agencies, there are many other organizations that play important roles in Montreal's independent music industry. Educational institutions are particularly visible; there are five major universities located in and around Montreal, and the city is also home to other college-level and private institutions offering music programs and specialized training in fields such as sound engineering and artist management. The presence of these schools draws many students to Montreal, who represent both an audience of young people and a pool of talent for the music (three interviews). Anglophones in particular are attracted to Montreal to pursue an education

and often form their initial networks within the city at school (Stahl, 2001). For one interviewee, teachers served as vital early contacts when he entered the industry.

Professional organizations such as the *Guilde des musiciens et musiciennes du Quebec* (GMMQ) (the musicians' union) and the Quebec music industry trade association, ADISQ, are also fairly influential. Although the union has little direct power over the working conditions of independent musicians, it does provide information on musicians' rights (two interviews) and job postings, and is involved in lobbying. Meanwhile, music companies in Quebec are represented by ADISQ. With seventeen employees, it lobbies government for funding and the CRTC for favourable regulations (e.g. maintaining content quotas), and holds training seminars for member firms' personnel. In addition, it coordinates visits by member delegations to MIDEM, a major music industry trade show in Cannes, France (interview, ADISQ representative).

Several organizations, including ADISQ, organize showcases and awards ceremonies that promote Montreal musicians and to introduce them to wider networking opportunities. The annual *Gala de l'ADISQ* is perhaps the most important showcasing opportunity for Quebec bands, but other significant events include the *Gala de l'Alternative Musicale Indépendante du Québec* (GAMIQ), M for Montreal, and the Montreal International Music Initiative (MIMI).

Lastly, music professionals and organizations in Montreal interact with a set of organizations operating at national and international scales, including the Canadian Recording Industry Association (CRIA), the American Federation of Musicians (AFM), the Recording Industry Association of America (RIAA), and the International Federation

of the Phonographic Industry (IFPI). These organizations are often involved in lobbying and provide governance structures and information to local Montreal organizations.

Festivals

Over the past 30 years, Montreal's music festivals have grown in prominence and are perhaps the main reason the city is known as a cultural centre today. Since the financially unpleasant experience of hosting the 1978 Summer Olympics (CBC News, 2006), the city has since taken a 'hands-off' approach to events promotion, supporting private promoters as they organize cultural events and take more of the associated risks. The result has been that private promoters have gained expertise in setting up events and dealing with bureaucracy, and have amassed valuable databases of contacts (interview, festival organizer). *L'Équipe Spectra* has been a particularly influential private promotions company in Quebec. Founded in 1977, *L'Équipe Spectra* now produces film and television as well as major events in Montreal, including the *Festival International de Jazz de Montréal, Les FrancoFolies de Montréal,* and the Montreal High Lights Festival (L'Équipe Spectra, 2008).

The largest music festivals in Montreal today were born in the 1980s. The non-profit *Festival International de Jazz de Montréal* was first successfully launched in 1980 by Alain Simard, a partner in *L'Équipe Spectra*. Starting from an initial attendance of 12 000, it has since grown to be 'the world's largest musical event,' attracting approximately two million visitors each year. At this eleven-day summer festival, visitors

take in about 500 concerts, most of which are free (Festival International de Jazz de Montréal, 2008).

Two other major festivals in Montreal are the *Festival International Nuits d'Afrique*, founded in 1987, and *Les FrancoFolies de Montréal*, founded in 1989. *Nuits d'Afrique* focuses on African music and lasts eleven summer days (Festival International Nuits d'Afrique, 2008). *Les FrancoFolies* also lasts eleven days and is devoted exclusively to French-language music. The festival was founded as a collaborative effort between Jean–Louis Foulquier, Alain Simard, and Guy Latraverse, who is also a founder of ADISQ (Canadian Encyclopedia, 2008b). 5 000 people attended the first edition of the festival; today attendance is nearly one million. *Les FrancoFolies* offers about 250 mostly free shows (Les FrancoFolies de Montréal, 2008).

As a result of these examples of growth and more, Montreal has become internationally renowned for its festivals. At present, the city hosts over 60 festivals including the Just For Laughs Festival, the Montreal Baroque Festival, Osheaga, and the Montreal Fringe Festival. Even though these events promote and employ local musicians to a certain extent (ten interviews), two musicians complained that they flood the city with free music and do not necessarily hire local musicians (interviews). Moreover, a festival organizer argued that public support for the festivals is uneven; the vast majority of funding goes to Montreal's largest festivals such as the Just for Laughs Festival and the *Festival International de Jazz de Montréal* while the rest of the festivals compete for the small remainder (interview).

The case of Pop Montreal

A fascinating example of one of the small festivals competing for limited government funding is Pop Montreal, a non-profit bilingual grassroots festival focused on music but also welcoming different art forms such as film and fashion design. The case of Pop Montreal illustrates how the community-based and anti-corporate ethos of many independent professionals in Montreal contrasts with mainstream assumptions, value judgments, and policies that envision music as a cultural industry.[20]

Pop Montreal was founded in 2002. Since then, the festival has quickly grown and is now internationally recognized. It has five year-round employees, and about 80 employees and 300 volunteers at its peak in early October (interview, producer of Pop Montreal). Below, the creative director of Pop Montreal comments on why he co-founded the festival:

> I think part of the idea of starting the festival was going to different events and festivals and being unsatisfied from an artistic perspective, from the band's perspective. Feeling like they were too industry-oriented, more about commodifying the experience of live music and not about the actual experience itself and putting on a good show. [...] I think that at the beginning we always wanted to reverse that role of the festival as a showcase for industry and make it about the artist. (interview)

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[20] While music in Montreal is analyzed as a cultural industry in this paper, I would invite the reader to remain open to other analytical frameworks.

As the preceding quote indicates, the character of Pop Montreal is decidedly counter-hegemonic; four festival organizers interviewed emphasized a de-commercialization of art and grassroots involvement. As such, Pop Montreal both feeds off and reinforces feelings of independence and solidarity among Montreal musicians.

For three Pop Montreal organizers, growth and major change for the festival are not goals due to an aversion to commercialization. Instead, the aim is to become more of a year-round presence and to make sure all the shows are well-attended (interview, producer of Pop Montreal). This runs counter to what could be called a mainstream prescription written by Richard Florida in a newspaper article on how to improve the city of Montreal:

> Montreal should follow the lead of Austin, Tex., home of the famed South by Southwest music and media festival, and transform Pop Montreal into a magnet for the most innovative music acts, blogs and talent scouting. That would extend the region's reputation as a creative centre, virally and organically. This is just an example of the general principle; many other organizations, festivals and events can be marshalled in similar fashion. (The Gazette, 2008)

Remaining consistent with a plan that is predicated on community involvement and not on continuous growth, the festival organizers try to book shows in alternative or under-used spaces rather than lobbying for new space to be created. For instance, two Pop Montreal organizers mentioned that the festival holds events on vacant urban space and collaborates with Portuguese and Ukrainian organizations in the Plateau and Mile End to promote shows in their community centres (interviews).

The organizers' advocacy of drawing upon and reinventing existing urban spaces stands in contrast to Montreal's *Quartier des spectacles* development, which was initiated by a former president of ADISQ. The goal of this project is to redevelop an area of downtown containing a substantial concentration of venues to create a 'Broadway' section of Montreal (interview, ADISQ representative). It involves 23 area stakeholders and has $120 million dollars in support from the three levels of government (Partenariat du Quartier des spectacles, 2009; Ville de Montréal, 2009c). For three Pop Montreal organizers, this is an unnecessary investment when there is already ample unused cultural space, and an unwelcome attempt to try to centralize cultural events in Montreal's downtown core (interviews):

> [The city has] been putting a lot of pressure on the small venues that actually are the thing that make Montreal vibrant and awesome. Cracking down on liquor licensing, not allowing permits for *salles de spectacles*, even though they're very viable venues, and I think are actually anchors in the community and make areas interesting and have other circles opening around them. They just seem to be super out of touch with what makes the scene great and why people actually want to come here to check out what's happening in Montreal. It's because of those things, not because of million dollar investment schemes for building these giant structures. [...] They try to force community to happen from the outside, rather than just let it spring up and support it where it is. (interview, symposium producer for Pop Montreal)

Despite the opposition of its organizers to certain government policies, Pop Montreal relies on public funds for about a quarter of its revenue, and, according to its producer, draws from roughly equal portions of sponsorships, ticket sales, and donations for the rest (interview). The nature of Pop Montreal as a diverse and non-commercial festival can make applying for public funding difficult, as it does not neatly fit into any funding category:

> We can't get SODEC funding for the film segment of the festival because you have to be registered to get SODEC funding. [...] The film festival itself has to go out and incur the expenses of registering as an independent entity. In order to sustain a music festival that's also multi-arts, it creates a bit of a redundancy of bureaucracy, so we can only fund the music segment. (interview, producer of special events & content at Pop Montreal)

While the information written in this section is specific to Pop Montreal, it contains three general insights. First, some musicians and professionals disagree with a vision of music as a cultural industry, and certain policies designed to professionalize it, as Straw (2000) has indicated. Second, top-down planning and major developments are difficult to harmonize with an independent music scene rooted in community. Third, bureaucratic funding organizations categorize applicants for support, which excludes a certain number of them.

Conclusion

This thesis is a case study of Montreal's independent music industry undertaken to describe (1) the characteristics of professional networks in Montreal, and (2) the place-based attributes of Montreal affecting these networks. To meet the research goals, 42 semi-structured interviews were conducted with 46 musicians and other key actors in Montreal's independent music industry in 2008. These interviews yielded many fascinating findings, and together served to paint a comprehensive portrait of the history, structure, and functioning of the independent music industry in Montreal.

Before reiterating the results of this thesis work, it is pertinent to discuss the limitations of the study. To begin, the sample was imperfect; professionals in the classical and electronic genres were underrepresented and professionals in certain functions, such as sound engineering, booking, and distribution, were not interviewed at all. On a related note, the use of semi-structured interviews as the primary research method imposed a limit on the number of participants. However, an effort was made to interview a variety of individuals, and the fact that many respondents agreed with each other suggests that an acceptable level of saturation was reached.

Another systemic issue was the use of a case study research design when one of the goals of the research was to identify place-based attributes of Montreal affecting professional networks. The risk here was that the place-based attributes of Montreal were over-emphasized. Indeed, many respondents stated that Montreal is far from the only

place with a vibrant music scene. What's more, one label owner made a point that critiques a theoretical foundation of this study, the notion of 'a Montreal music industry:'

> You can't point too explicitly towards geographical places. Especially the way [...] bands are connecting with fans. It's all over the world on the Internet. Where do you really draw the boundary in terms of where that scene begins, where it ends? It doesn't really. I wouldn't say it has a geographical centre. (interview)

Perhaps the best way forward is, as Yin (1994) suggests, to acknowledge the inherent limitations of this case study and to accept its findings in terms of its contribution to theory. In particular, I would argue that the data point strongly to the importance of place and clustering in the music industry, making the case study a viable research design. With these issues in mind, let us now review the findings of the study.

One theme that emerged in every interview was the significance of social networks in the music industry, supporting existing theories on the cultural economy espoused by Becker (1982) and Scott (1997) among others. In the music industry, careers are advanced by knowing the right people and having access to a wide network of contacts; in other words, Storper & Venables' (2004) concept of buzz is extremely important. Additionally, professionals mitigate the risks of low-paying and unstable employment by functionally diversifying both vertically and horizontally within the cluster. Using Hirsch's (1972) terminology, diversification notably occurs towards the input boundary of the music industry-system. In some cases, with the help of new technology, diversification causes the journey of music between the input and output

boundaries to be truncated, reducing the filtering abilities of intermediaries. Such diversification requires networking to form vertical and horizontal linkages and to transfer appropriate skills.

Networking regularly occurs through face-to-face contact and at live performances, so inter-personal skills are vital. Since face-to-face contact is so important, clustering is the norm in the music industry, as predicted by Scott (1997) and Hirsch (1972). Most interactions are clustered, but there are exceptions; for instance, booking agents and publicists serve large geographic areas and not one particular cluster, supporting van Heur's (2007) contention that a more nuanced approach is needed to understanding the geography of interactions in the music industry. In Montreal, music functions are concentrated in three artistic neighbourhoods: downtown, Mile End, and the Plateau.

In the Plateau, the availability of cheap loft space 30 years ago led to the birth of what is perhaps Canada's most vibrant artistic neighbourhood. Musicians were drawn from across the country by the low cost of living, and eventually created a supportive infrastructure of independent music firms just as new technologies were democratizing the music industry. Today, artists are still attracted to Montreal by the low cost of living, which is enforced by rent control, but also by the presence of mature artistic clusters, educational institutions, and venues and *joie-de-vivre* rooted in Montreal's 'sin city' past. I would argue that the presence of supportive infrastructure and attitudes and practices conducive to experimentation make Montreal a hearth of independent music production, although perhaps not a stage (to use Stump's (1998) terminology).

Montreal's independent music industry developed in large part because the major labels specialize in huge international English releases, and are not particularly interested in Montreal's small and predominantly Francophone market. The relative absence of the majors has left room for independent firms and practices, and this has translated into a spirit of independence and solidarity in Montreal, leading to the growth of a set of grassroots organizations that provide information, exposure and networking opportunities to independent professionals. Meanwhile, federal and provincial cultural policies play a major role in providing professionals in Montreal with financial support.

Feelings of solidarity, which strengthen the city's music organizations, exist partly because of Montreal's bilingualism. The presence of English and French (and other languages) in the city's small artistic core area creates tight, language-based networks. For music professionals, tight networks are supportive for early development but impose limits to growth (again, making Montreal a hearth but not a stage). It is possible for professionals to reach out of their 'home' networks, but the action requires effort. Francophone and Anglophone professionals are further separated by the reality that they target different markets: Francophones look to Quebec, France, and other French-speaking countries while Anglophones look to Canada, the United States, and international markets.

Taken together, the findings of this thesis broadly describe the independent music industry in Montreal. They also point to new research possibilities and suggestions for policy design. One avenue for further research would be conduct comparative studies on professionals in classical music or those affiliated with major labels. Alternatively, the

geographic focus could be shifted; case studies on independent music could be performed in other cities such as Portland, Oregon or Austin, Texas. Indeed, one similar study is already in progress: Brian Hracs of the University of Toronto is completing comparable PhD work on Toronto musicians.

Another possibility for further research would be to explore whether actors in other artistic industries network and diversify in the same way as music professionals. Pilati & Tremblay's (2007) work suggests that this is the case for visual artists, but what about actors, comedians, fashion designers, and circus performers? Although upcoming work by Concordia University's Dr. Norma Rantisi and others will shed some light on this question, much remains to be discovered.

Returning to this research and its policy applications, a key finding was that networking and flexibility is vital to professionals in the music industry. It follows from this observation that initiatives designed to support the music industry should facilitate networking and account for the flexibility required of professionals. The comprehensive database of Quebec music industry contacts offered by SOPREF is a good example of an initiative that encourages networking, but other programs could create more of a forum for face-to-face contact to occur. In Montreal, there are already many events that bring potential collaborators together, including M for Montreal and Pop Montreal, and the results indicate that continued support should be provided to them. In many cases, only minimal investment would be required for networking to be encouraged. Something as simple as a regular meeting of music professionals where food and space is provided would probably lead to many new collaborative efforts.

A second key finding is that there is evidence that policies meant to bolster cultural industries are successful in Montreal. During the research, respondents repeatedly commented on the importance of funding and other types of support for their professional livelihoods. While the viability of Montreal's music industry at its present size without public funding is uncertain, the policies designed to support it are definitely having an impact. Other cities seeking to boost their cultural industries could be tempted to look to Montreal for inspiration. However, this research indicates that place-specific factors, particularly the small Francophone market which repels the major labels, are instrumental in allowing Montreal's independent music scene to survive. Policymakers in other cities should be aware that Montreal represents a unique case, and that cultural policies should be tailored to suit individual cities.

The Canadian film industry provides an example of how successful policy depends on local circumstances. The film industry receives public support across Canada, but domestically-produced films are only highly consumed in Quebec, due to the distinct language and culture of the province which impose barriers to entry for American movies. This goes to show that local culture matters immensely for cultural industries and policies meant to support them.

To conclude this thesis, I would like to offer a couple of thoughts on Montreal's music scene that did not fit in elsewhere. First, over the course of this research, I was struck by the phenomenal amount of talent in Montreal's music industry and the sheer number of bands who each make a unique contribution to Montreal's soundscape. Second, I realized that professionals carry on in a difficult industry because of their passion for music and the friendships they have created. For them, music is more than a cultural industry; it is an art, a way of life, and a pleasure. I would like to thank them for sharing this pleasure with all of us.

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Appendix

The interview guide used for musicians (including ISRN questions) can be found below. Interviews with other types of professionals were individually catered to their areas of expertise.

Interview Guide   **Thomas Cummins-Russell**
Date [m/d/y]:_____   **Time:**_____
Location:_____
First Name:_____   **Last Name:**_____
Notes:_____

Section A – Personal and employment background

1. Where were you born? If you were born outside Montreal, when did you first move to Montreal?

2. Please describe your educational history and credentials (institution, degree program, location, years).

3. Please describe any additional training, apprenticeships, or other on-the-job learning that you have engaged in.

4. What is your current occupation? Where do you work in Montreal?

5. Do you work another job to supplement the income from your musical career? If yes, roughly how many hours per week?

6. Does your current occupation fully utilize your skills, training and education?

7. Please describe your employment history. If you changed jobs, why did you do so?

8. To what extent have you moved between different occupational sectors? Can you effectively apply your knowledge between sectors?

9. What are your career plans and aspirations?

Section B – Characteristics of Montreal and its music industry

1. What characteristics of Montreal make it an attractive place to work in your field? (prompt: music festivals, government support)

2. What characteristics of Montreal reduce its attractiveness to work in your field?

3. Who are the key actors in the music industry that you deal with on a regular basis? (e.g. producers, recording studios, etc.)

4. Please describe the nature of your relations with these actors.

5. Are your primary networks local or global? If they are not local, where are they located?

6. Is Montreal open to experimentation and creativity? How?

7. Are certain neighbourhoods of Montreal more open to creativity than others?

8. Is Montreal a tolerant or welcoming place in terms of race/ethnicity/sexuality/gender equality?

9. What characteristics of Montreal make it an attractive place to live?

10. What characteristics of Montreal make it a less attractive place to live?

11. To what extent are Montreal's strengths unique to the city? Are these strengths more related to Canadian institutions and values in general than they are to Montreal?

12. How do other cities compare to Montreal in terms of career opportunities and quality of life?

13. If you were to move to a city other than Montreal, which one would it be and why?

14. How does this other city compare to Montreal in terms of career opportunities and quality of life?

15. How likely is it that you would move to another city within the next three years for the reasons just discussed?

Section C – Additional questions

1. How do you promote yourself?

2. Do you use the Internet to promote yourself? To what extent and how?

3. Do you network with other people in the music industry using the internet? To what extent and how?

4. Both English and French are spoken in Montreal. How does this affect you as a professional musician?

5. To what extent are your professional networks in Montreal determined by your mother tongue?

6. Do you receive any governmental support? If yes, what kind?

7. What is your age and family status?

8. Do you know anyone else involved in the Montreal music industry I should talk to?