

The Music Industry in Trinidad and Tobago

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Glossary of Terms

COTT	Copyright Organisation of Trinidad and Tobago
CSO	Central Statistical Office
EIDECO	Entertainment Industry Development Company
TUCO	Trinidad and Tobago Unified Calypsonians Organisation
TIDCO	Tourism & Industrial Development Company Limited
FTAA	Free Trade Area of the Americas

1. Background:

The objective of this project is to assess the contribution of the Music Industry in national development of Trinidad and Tobago, and as an element in export competitiveness of Caribbean products and services. On the one hand, it seeks to identify the products and services and to assess the nature and structure on the supply side. On the demand side, it seeks to identify the factors that may contribute to the expansion of demand both in the domestic, regional and wider international markets.

The first step in the assessment is an understanding of the nature of cultural products in an economy. Three elements need to be addressed in undertaking research on the sector – demand, supply, and the structure of production in terms of firm type that emerges to satisfy demand.

Demand: Products and services can be defined in respect of a demand in the market place for the output. There are five consumption values that may drive the process through which consumers seek to acquire or access particular goods and services. In other words, a consumer's decision will be dictated by one or more of these values:

- Functional value
- Social value
- Emotional value
- Epistemic value
- Conditional value

Functional value conforms to the notion implicit in rational choice of economic man as defined by economists. Social value derives from the association in the use of a good with particular social groups in society. Conspicuous consumption has many of the elements of social value. Emotional value relates to the affective state that is evoked in the use or in the access to a good or service.

Epistemic value refers to the satisfaction that comes from acquiring new knowledge or from the novelty factor in a new experience. Conditional value, as the name implies, refers to the fact that the use of a good may be conditioned by the use of another. Matches go with cigarettes. Music goes with festivals and party-time.

In establishing the demand for culture goods like music, it is necessary to examine the probable factors that create the demand. There are the issues of disposable

income, income elasticity of demand and taste that influence the quantum purchased. Taste is driven by a range of socio-psychological factors that lie outside the realm of economics but impact on the economics of the product. However, it must be emphasized that there is culture in all goods and services, and even what is defined solely in functional terms, is a function of culture. In other words, culture defines function. So called 'cultural goods and services' may derive value from social and emotional elements, and to a lesser extent, from epistemic factors.

For example, outside of the Caribbean, Pan has had an epistemic quality in that there remains a novelty factor for the many who would not have known that music of the highest quality could be generated from converted oil drums. For the Trinidadian, and to some extent, the Tobagonian, and for many years, it carried emotional and conditional value. Party time was associated with music from pan, and more so, the celebration of Carnival or any other street party occasion.

Pan has had an epistemic appeal internationally since there was a novelty factor for many who would have found it interesting that music of the highest quality could be generated by converted oil drums. For the Trinidadian, and to some extent, the Tobagonian, and for many years, it carried emotional and conditional value. Party time was associated with music from pan, and more so the celebration of Carnival or any other street party occasion.

Some part of the demand for music from Trinidad has been associated with the development and institutionalization of street festivals in the North Atlantic where many Caribbean migrants have settled and have adapted street festivals in their new communities of residence to their traditional celebrations: Notting Hill Carnival in London, Labour Day in Brooklyn, and Caribana in Toronto are some examples. There has been an expansion in conditional demand, as these Carnivals have spread. Calypsonians and other artistes respond to this demand and a supply structure is emerging.

Concern in academic circles and in industrial promotion divisions in the Caribbean has been on the capacity of Caribbean countries to exploit further the opportunities deriving from these sources (Henry and Nurse, 1996, and James, 2000). A clear understanding of the value process and the degree to which characteristics of the product can be manipulated are essential ingredients to the promotion of the cultural products of the Trinidad and Tobago, including its music.

Supply: On the supply side, there is the question is what determines the generation of the product or service. Of course, demand is a factor, as with any other good or service produced in the market place. However, things cultural often have a demand component that emanates from the promoter or producer directly. Thus,

there is the element of inspiration and the need for self-expression that lead the originator to create a work of art. There is 'art for art sake' and this clearly obtains in many compositions generated in Trinidad and Tobago. Irrespective of demand or a willingness of others to consume the product, the originator may be inspired to produce.

In addition, there is a social process at work, in that essential to the individual's sense of self-worth is the approval of peers and of others who are exposed to the work of art, even if this is not related directly to income. The pursuit of a career in the art form has the attraction of a calling, or avocation.

One of the more interesting features of work in the Arts and among producers of 'stand-alone-culture' goods is that many are driven to produce or to participate on the basis mainly of the psychic income that they derive from participation. Many artists earn incomes much below the alternative income that they might have received if they had devoted the same amount of time for training in other areas or vocations for which they could have trained.

This is particularly the case with the 'high culture' that may require many years of training, formal and otherwise, for mastery of the art form. The fact of achieving excellence may be the main attraction – a form of psychic income that may be more rewarding in terms of the gratification it confers than monetary income.

On the other hand, there is a much smaller number of performers and originators in the area of the arts that earn super-normal profit incomes from their participation. The characteristics that determine super normal incomes often have a lot to do with nuances and innovation within the art form that capture popular attention and invite mass appeal, often only for a short period of time. It is difficult to identify scientifically the factors that determine the popularity of Bob Marley, the Beatles, Madonna or a Michael Jackson at the time of their apogee in mass appeal.

Firm Structure: Firm structure is of no small significance in determining the functioning of markets. The Music industry is characterized by a wide variety of firms and organizations, from self-employed individual operators to conglomerates. There are power factors at work in the international Music Industry that have influenced the evolution of the industry internationally. The major recording companies, some of which are conglomerates in multi-media, have been able, in recent years, to organize control on many areas of the value chain, backward and forward from the recording studio. Signing with a label locks artistic creativity under the banner of a conglomerate. It may also allow for market expansion, given the reach of the conglomerate into many markets internationally.

Many operators emerge from a fringe culture, which is part and parcel of the process of the rejection of the mass culture created by the conglomerates, themselves. The fringe culture generates artistic segments outside the mainstream culture and has an appeal and novelty element from the mere fact of being on the fringe.

2. Musical Genres

As a direct derivative of its very plural sociological structure, Trinidad and Tobago have a number of musical traditions. There is the calypso and its offshoots that have historical roots in the admixture of African music and tradition in European dominated political order in the foundation of [British] colonies on the Caribbean. Calypso has evolved over the years with continuous experimentation. The most recent form is defined as Soca, which is characterized by a variation in beat from the Calypso. Since the 1970s, there has also emerged Rapso, which reflects influences from African American ghetto culture and from Jamaica.

There is also the musical contribution of the Indian subcontinent. The descendants of Indian indentured labourers retain some musical affinity to India and this has been sustained by film and music from India and the occasional visit of Indian stars in both the popular and classical traditions.

The local community has developed and adapted its own variants of this music. There is an element of cross-over of Indian popular music that has penetrated into the wider community and, in turn, the music of the other cultures of Trinidad and Tobago has penetrated into the Indian music fare. The two-way flow and syncretism have created genres that are distinctly Trinidadian. There is also the direct fusion: for example, there has been Trinidad Jazz music fused with pan and Indian musical instruments like the sitar.

The influx of Venezuelans in Trinidad in the 19th Century has resulted in a Latin element in the musical history of the country. The parang derives from Venezuela and is specific to the celebration of Christmas. The early antecedents were totally Hispanic with compositions in Spanish or broken Spanish. In more recent times, there has been some blending of Calypso and parang music. While songs are composed in Trinidadian English, the music blends calypso into a Latin beat. This new genre is known as Soca Parang, soca being the off-shoot of calypso. Emerging genres are chutney-soca and chutney-parang, which underline the continuous experimentation that is an ongoing characteristic of the industry in Trinidad and Tobago. Table 1 lists selected genres and prominent performers.

A very rapidly growing genre is gospel music. It is a select category, confined to specifically to the Christian community of the country, but has been expanding with the growth of the evangelical movement, which is the fastest growing denominational category in respect of religious affiliation. While the musical fare was imported initially, in more recent times, there have been some very popular local productions, a few of which have been able to secure market entry into the religious community in the North Atlantic.

There is also the music of the North Atlantic that dominates the airwaves of the country, and is part of its musical tradition, in so far as some of its artistes work in the respective mediums. Classical music, chorale singing as well as North Atlantic popular music have their aficionados and protagonists in Trinidad and Tobago. Here too, there are adaptations some of which have been very popular in the domestic market: a few calypsonians have been involved in make-overs of popular songs composed in metropolitan countries, and have used these in widening their repertoire to include non-calypso music.

On the other hand, there have been compositions that have entered main-stream markets in the metropole, because of their adaptability. Anselm Douglas's "Who let the dogs out?" has broken out of the fringe category in which Caribbean Soca Music is located in metropolitan markets. The composition has been adapted to this market by a Bahamian Group that has, perhaps, considerable cultural proximity to the US market.

Table 1: Genres and Major Performers

Genre	Heritage	Major Artistes
Chutney Soca	Afro/Indo	Ricky Jai, Drupatee.
Soca Parang	Latin/Afro	Scrunter
Calypso/Soca	Afro	Mighty Sparrow, Machel Montano, David Rudder, Mighty Shadow

For more than a decade, the Mighty Sparrow seems to earn his income from engagements abroad, and hardly performs any longer in the local Carnival. The other artistes earn their livelihoods in both the domestic and international markets but the weight attached to each varies among them. For most entertainers, success is based on being able to make it on the international market.

3. Structure of the Music Industry in Trinidad and Tobago

The issues raised above are at the base of the analysis of the Music Industry of Trinidad and Tobago and have to be factored in attempting to identify possibilities for market expansion outside the region. The Music Industry has grown in Trinidad and Tobago and has shown many signs of formalisation into firm structures.

The industry in Trinidad and Tobago consists of the supply of goods and services to consumers in the following main forms:

- Sound recordings
- Live Performances
- Broadcast via Radio and Television
- Musical instruments
- Recorded music at retail outlets, hotels, restaurants and various offices and companies.

3.1 Data Sources:

Much of the work for the present exercise has had to be based on qualitative information and on key informants. There are general trade statistics that allow for the compilation of data on the physical movement of particular items across national boundaries. In this regard, we have relied on data provided by IDB. The services component, however, involving the movement of natural persons, has been impossible to track except through interviews with some of the known participants. While it was not possible to mount a full-scale sample survey, semi-structured interviews have been undertaken with a few of performers in the various genres, which are known to be important.

The Survey of Establishments that collects data on production by different firms largely fails to cover a key component of the sector, namely calypsonians and musicians, as well as others. The Statistical Authorities admit that they have not been successful in the consistent collection of data from Calypso Tents, as production units. Nor are calypsonians and musicians well documented through the sector 'Personal Services'.

Two important sources of data are the Household Budgetary Survey and the National Census. The former provides information on the level of expenditure of

households on music and entertainment. However, the data collected in 1997 have not been fully tabulated and work on it was suspended in order to address the requirements of the decennial census. An attempt was made to use the data from previous surveys, but with limited success.

The Census should generate data on the numbers of persons in the population that attest to occupations in the area of music production. However, the census data are known not to be very reliable in respect of providing information on incomes. In any event, the census data are only now being cleaned prior to tabulation, and were not available at the time of writing.

Another source of data derives from the monetary statistics put out by the Central Bank. By using these data as a residual method, it is possible to develop some sense of proportion in respect of the contribution of the annual Carnival to the level of economic activity in the country. Indeed, the period December to March embraces the festivities of Christmas/Parang and Carnival. An examination of the data for the 1990s suggests an increase in the money supply that is quite likely driven by circulation relating to Christmas first, and then followed by a demand almost as significant as Carnival approaches. It tapers off following the Carnival. The earnings of entertainers abroad, however, are less transparent in the money supply.

The assistance of COTT was sought in deriving generalized data on the numbers of participants in the domestic industry whose work is copyrighted and are beneficiaries of funds collected through COTT. Finally, through focused interviews and an administered questionnaire in Tobago, data were collected from a few key participants in the industry. To a considerable extent, the researchers had to depend on their direct and indirect observations and knowledge of the sector and its participants.

4. Manufacturing/Recording:

Manufacturing constitutes a very small part of the domestic music industry, with small firms offering compact discs produced from inexpensive commercial duplicating equipment. Up until recently, there was little genuine manufacturing in Trinidad and Tobago. Electro Sounds Electronics comes closest to a fully developed manufacturing establishing, reproducing audio cassettes and compact discs from DAT tapes and compact Disc masters. There are several other small establishments that offer a similar service. With the advent of inexpensive CD duplicating systems, manufacturing on a limited scale has emerged locally but had been non-existent before. It is estimated by key interviewees that there were

20,000 to 30,000 CD's and 5,000 to 6,000 Cassettes produced in the year 2000. This figure is expected to increase significantly as the demand increases for a faster turn around from recording to commercial distribution. Electro Sounds Ltd., Crosby's Record Centre and Vistrac Sounds, the main manufacturers, employ some 16 to 20 persons.

The recording industry in Trinidad and Tobago is limited to one large recording studio of international standards, the Caribbean Sound Basin, which is owned and operated by an entrepreneur, Robert Amar, and is the only genuine recording studio of international standard. Charges for the studio vary from \$150.00 TT to \$200.00 TT per hour for locals. Foreigners pay \$150.00 US to \$250.00 US per hour. Final price is based on demand. When first conceived it was anticipated that foreign entertainers would be attracted to the studio but this never materialized and the studio almost closed down last year.

If T&T were to take the lead in setting up adequate mastering and duplication facilities, the potential market throughout the Caribbean and South America would make it viable. Several other small studios using computer software and digital equipment serve the needs of aspiring recording artistes. The studios with owners/lead persons are as follows:

- "The Sound Basin" (Robert Amar)
- "Sunset Studios" (Leston Paul)
- "Agra 9" (Pelham Goddard)
- "Rituals" (Jean Michel Gibert)
- KMP Music Lab (Kenny Phillips)
- Jo Go Productions (Johnny Gonsalves)
- Coral Sounds Studio (Michael Schuler) and
- Engine Room (Robin Foster).

There are no facilities for quality mastering of recordings. As a result, recordings are usually sent to the United States on DAT Tapes for mastering. Compact Discs, Cassettes and Vinyl records are produced in the US and sent back to Trinidad and Tobago where they are retailed. Because of the advent of computer facilities for duplicating CDs, many opt for local production albeit of a lower quality. The fact is that there is not a genuine recording industry in Trinidad and Tobago. There is need for adequate mastering and duplication facilities to international standards.

It can be argued that the domestic industry is integrated, on the manufacturing side, into metropolitan industry, and performs a secondary role to it in the manufacturing of the works of the artistes of the country. Given the spread of the consumer technology into the domestic market, the standards expected by domestic consumers are dictated by quality achievements set by metropolitan

plants. Thus, domestic demand for recorded domestic music has to be satisfied through a substantial outlay on production abroad. Success at home usually stimulates demand in markets abroad – especially in the diasporic market - which can be satisfied by output that may never have been repatriated to Trinidad and Tobago.

On the other hand, the domestic market is small and a big hit in the local context will seldom exceed 5000 units. At the same time, the chances of making it into wider markets depend on popularity in the domestic market and then sales abroad. Most Calypsonians have the largest share of their domestic sales of recorded music in the week immediately following the Carnival, as the visitors on their return seek a memento of their Carnival stay in Trinidad. Some CDs are sold on tours abroad as well, but information on the size of this market is exceedingly limited.

Mechanical Royalties are collected by COTT on imports for distribution to composers and publishers on behalf of Publisher Members of COTT. They number about 40. The distribution of the sound recordings is effected mainly through retail outlets. These include Crosby's Music Centre, Rhyner's Record Shop, Kam's Records, Discotrak Music Centre, Cleve's One Stop Music shop, Krishna's Music World, Maharaja Music, Jimmy's Record Shop, Bee's Hi Fi, Token Records, Music Lab, Praimsingh's Pooja Bhavan & Indian Music Shop. Some artists prefer to market their product directly but these are in the minority.

5. Recording Studios (Rental)

As pointed out above, most of the local recording is done at small studios. The one large studio operates on a rental system of an average US \$40 per hour. A flat fee per day is negotiable. The smaller studios are generally owned and operated by a musician who serves as arranger of the music for the client. A flat fee of US \$960 is the customary fee for a production that includes arrangement, live horns and vocal chorus, mixing and recording onto a DAT tape.

This is a thriving business for the musical arranger many of whom turn over close to one hundred artistes with two or more songs per year. It is also a very people intensive industry, but many of the support personnel are engaged on a part-time basis, or are not deemed to be full-time employees of the establishments engaging their services.

6. Music Publishing

The Copyright Organisation of Trinidad and Tobago has some thirty-two (32) Publisher Members registered with the organisation. The Publisher members receive annually a minimum sum called an 'Unidentified Performance Allowance' (UPA) of US \$192. The range in average income and the percentage of the Publishers receiving such sums in 1999, is as shown in Table 2 which follows:

Table 2: Range in Average Income in US \$ of Publishers

Range in Average Income Per Annum	Percentage of Publishers
Less than \$240	15
\$240 to \$799	50
\$800 to \$1599	15
\$1600 to \$3999	10
\$4000 and over	10

Source: Interview with David Bereaux, Membership Services, COTT

Investigations revealed that many persons use the publishing companies as a means of registering their own works and avoiding taxation. Some persons operating these companies seem ignorant of the true function of a publishing company and many of them are not even formally registered in accordance with the countries Company Registration Act. There is need for general education in this area as to the purpose of publishing companies and their role in the music industry.

7. Live Performances

Most of the activities in the domestic music industry relate to live performances in the two months leading up to Carnival, held two days before Ash Wednesday every year. A large percentage of the performers in the country are Calypsonians. Most of them rely on the annual Carnival celebrations for the opportunity to perform live. This takes the form of Calypso "Tents" which feature twenty to thirty performers over a five week period leading up to the street parade.

In recent times, the market segment, blending of the calypso into the parang mode, has expanded considerably, with the musicians appearing in Carnival parties. The recorded material is increasingly being targeted at the Latin American market, but again, domestic air-time and live performances provide the accreditation for

export. Some calypsonians now routinely perform and produce products for the parang season, to be followed by another genre of output for the Calypso season.

Over the past few years three main calypso tents have operated in the Port of Spain area with about four others based in Port of Spain, Arima, San Fernando and Tobago. Performances at the tents and in the domestic competitions now serve the function of an annual accreditation of the product to be marketed in metropolitan markets in the months following and in the foreign carnivals and festivals. The annual carnival in Trinidad and Tobago also serves that function for other Caribbean performers, whose work is aired at the Carnival in Trinidad along with the products of the T&T calypsonians and other performers.

There is thus, an annual cycle of production, with the physical recordings done and completed in the metropole and the live performances done in Trinidad, to establish the rating of the product for export by way of natural persons and by physical products in the months following Carnival. It is now the tradition that after Carnival, the top performers are contracted to perform in the United States, Canada, Europe and the Caribbean mainly to coincide with the celebration of T&T styled Carnivals in these areas.

In recent years, there has emerged a new post-Carnival domestic market with the packaging of live performances, with one or more local entertainers performing under a theme. There are other live performances with foreign artists with some local input, but usually with a foreign musical genre, which is popular in the domestic market, given that domestic demand is in large measure for foreign products that are given considerable air-play by the radio and television broadcast media.

Royalty income from live performances has been a source of contention among local composers. In the past year COTT has endeavored to take random samples (logs) of the music used at live shows and at selected night clubs. There is considerable resistance from many of the users of music to the payment of royalties, and some of the radio stations may not be fully compliant in the compilation of logs. However, the production of a popular calypso has served to address the issue of copyright and there is a greater public awareness of the role of COTT and its relationship to the producers of music.

The income for Calypsonians contracted at a typical tent employing twenty-five (25) performers in the Carnival Season of 2000 is illustrated in Table 3:

Table 3: Distribution of Earnings Per week in US \$ for Calypsonians in Typical Tent

Gross Earnings Per Week	No. Calypsonians Earning Sum
-------------------------	------------------------------

\$128	6
\$192	6
\$288- 319	4
\$320 to \$640	6
\$641 to \$1280	3

Source: Discussions with Calypsonians and Manager of a Tent

Calypso shows are long and last at least four hours, inclusive of a fifteen minute intermission. A highly rated calypsonian, at the higher end of the earnings scale would normally sing two compositions on an evening. Significantly, many of these entertainers spend considerable sums on the clothing for their appearance and for their props that they may have as part of their presentation. During the Carnival season, the more popular of the Calypsonians of the year, will have other engagements, on an evening, singing at the Tent, but also appearing at dances and fetes for a fee.

The fees paid at local night clubs such as The Mas Camp Pub to an individual performer, vary from as low as US \$80 to a maximum of US \$480. A large local show attracting over 5,000 persons could earn a performer between US \$240 to US \$ 1600, depending on their importance, and may require his/her singing two or more compositions.

The performers who get to travel and perform internationally, command sums of between \$1,000 US to \$4,000US per performance depending on their popularity and their success in the past Carnival (usually more recent) competitions.

There are about 20 active Calypso playing bands in the country with about six of them getting the most engagements. Musical Bands are hired for the entire Carnival Season and some of these have long standing contracts with Carnival Tents, appearing every year with the tent. They provide the accompanying music for the entire show. A ten man orchestra playing in a Calypso tent for a season would earn about \$20,000 US. A typical engagement at a “fete” would earn a band \$1,500 US in the weeks prior to Carnival Week, and \$2,500.00 US during the week of Carnival.

Some orchestras hire additional members for the Season. In more recent years, many compositions include renditions with pan, and a pannist may be routinely retained by the tent. Some of those not attached to a tent play at fetes or carnival parties, and have enough engagements to keep them busy during the Carnival Season. Generally, steelbands are not utilized by the tents.

There are a few singers with dedicated orchestras: Machel Montano is the best known of these, and appears only with his band Xtatik. He is not likely to be

available for the forthcoming Carnival Season, having signed recently a contractual agreement with one of the mainstream labels. Montano and his band, and others of this type would play at Carnival fetes and on the road for the two days of Carnival with one of the Carnival Costumed Bands.

The other orchestras tend to have a regular group of singers appearing with them and they use a repertoire consisting of their own compositions and those of the more popular calypsonians of the season. Popular Carnival fetes would normally have as many as two calypso playing orchestras and one steelband playing at the fete. In this latter market, there has emerged competition from other Caribbean bands that visit Trinidad for the Carnival and have engagements in pre-Carnival fetes and on the road for the carnival days. Square One of Barbados visits Trinidad for every Carnival, and occasionally, Byron Lee of Jamaica is part of the non-Trinidad bands working in this country.

Steelbands are orchestras comprised totally of pan, the musical invention of Trinidad and Tobago. The bands were previously community steelbands but many have advanced beyond that, and while having a community base, have a large number of participants from a wide geographic space. The lead up to the Carnival is the peak period for these orchestras, which acquire a large number of temporary adherents for the Carnival. The larger bands may have as many as 150 playing members over the period.

Most members play in bands for the sheer love of participation in a band, deriving satisfaction from being a member of the band, which may have a long and established tradition in local competitions. In a sense, there is a 'demand' for participation, with 'psychic' income being derived from being a playing member of the band over the Carnival Season. Occasionally, there may be monetary returns in the form of performance fees at fetes or from competitions, but that is not usually the driving force in the participation of the pannists. Playing pan for most is part of being a committed hobbyist, and money income is earned from other sources of regular employment. The few become professional pan players and earn their income from this source.

Steelbands were once the core of Carnival but are now limited to Carnival fetes and to the main Pan competition, Panorama, that involves all the bands of the country, under the umbrella of PanTrinbago. There are a number of preliminaries in the lead up to the finals some days before the Carnival. This competition derives from efforts by the Government to curb violence among steelbands whose origin in the immediate Post World War II years, was concurrent with considerable gang warfare in some lower income communities in the 1940s and 1950s. The bellicose past of the Steelbands, is reflected in the names of some of the bands that adopted names inspired by the Second World War – Tokyo,

Desperadoes, Casablanca – and often depicting a military theme for the Carnival like Sailors or Soldiers of the Second World War. Panorama became institutionalized as a healthy form of competition among steelbands.

The annual Panorama competition is the high point in the life of a Steelband, and brings acclaim to the band, and prize money on winning. For most of the audience, there is the emotional and conditional value driving demand. In some senses, Carnival is only started with the beginnings of the Pan Competition and the opening of the Calypso Tents.

Government subventions and considerable outlays by corporate sponsors sustain pan: the monetary support from both are as institutionalized as pan is institutionalized. In other words, there is a social demand for pan, and this is supported by Government, the corporate sector and the participation of the general public at the annual Panaroma competition. The public, however, expects to pay a minimal fee for entry to competitions.

A few steelbands appear on the road on Carnival days. Mobility has been one of the problems for steelbands on the streets on Carnival days, and their market for musical accompaniment has been effectively eroded by disc-jockeys and the regular calypso orchestras, which, on the bed of trailer trucks, can provide far more sound with greater mobility than steelbands. In more recent times, steelbands have sought to use amplification technology with a shrunken version or ‘stage-side’ in seeking to recover this market but with limited success. The absence of singers is also a handicap.

Pan, although different, follows a similar pattern to the Calypso cycle, in that the professional Pan Tuners, Arrangers and Players enjoy some form of income in the weeks leading up to Carnival. After Carnival they depend on foreign contracts, but these tend to be few and far between. The large size of an effective ensemble seems to have been one of the problems in widening the market. Some individual pannists acquire contracts in the Far East and on cruise ships operating in the Caribbean, and are hired as entertainers. It is important to note that most of the larger steelbands depend on corporate sponsors to sustain them, and the provision of instruments is funded, not by earnings of bands, but rather by subventions provided by the sponsors.

Some of the bands, which secure high marks in the competition, may get selected for major events abroad, and may be contracted for promotional activity by the Tourism and Industrial Development Corporation. Their appearances abroad cater to the satisfaction of the yearning for novelty in foreign locations – epistemic value – where the country seeks to promote its distinctiveness. In even more rare occurrences, the corporate sponsor may seek, in marketing its product abroad, to

utilize the services of the steelband that it has sponsored. It has become rare for the steelbands to participate in the Carnivals abroad: in that regard, they have not been as successful as the other orchestras in winning work abroad. Occasionally, they have been selected for major events and have appeared in prestigious shows and locations, such as the Royal Albert Hall in London.

A significant feature of the industry is the wide disparity in income generated abroad as compared to local engagements among the local performers. Artistes can earn up to six times the standard fee for a foreign *vs.* local performance. This also applies to local music bands who depend heavily of the parties (fetes) prior to Carnival for the income to support their members. Large sums are also negotiated for playing on the road during the two days of Carnival. And, almost as soon as the local Carnival has ended, the Orchestras go abroad to ply their trade in the regional market and in the North Atlantic.

The domestic market is therefore integrated into the foreign market in the minds of the producers, and the presence of large Caribbean communities in the North Atlantic has expanded the primary market space both for live performances and for recorded materials that may be sold from agents abroad or less frequently from domestic distributors. The calypsonians and other musicians operate in a transnational mode, in that some of their market space is decidedly beyond the domestic market in respect of both supply and demand.

A comparable trend is emerging in respect of the producers and musicians of East Indian derived music, with markets abroad including the Indo-Caribbean and Indian Diasporic communities in the metropole. Mastana Bahar and Chutney competitions serve a similar function of accreditation for participants seeking to go abroad to perform in the diasporic communities. The local competitions are annual events and attract a considerable following among the East Indian community of Trinidad. A few entertainers from Suriname and Guyana participate from time to time. Some of the Chutney singers, who are of East Indian descent, are also involved in the Calypso Art form. However, a small number of non-Indians do participate in Chutney and Mastana Bahar Competitions.

As with calypso and soca, a hit in the Chutney genre in Trinidad can lead to invitations to perform in Suriname, Guyana and in East Indian communities in North America. While there is not an established dance-hall or party music tradition in the Chutney genre, there are occasions around the festivities of East Indians in Trinidad, at which Chutney music is the main music played, eg. at weddings etc.

Chutney has not yet had the success abroad as have calypso and soca. One entertainer has suggested that while Chutney music is accepted by Indians from

the sub-continent, the market remains small relative to the size of that community in the North Atlantic. Performances abroad, therefore tend to be among the Indo-Caribbean Communities in the North Atlantic and to a lesser extent among Mauritian and South African Indians. Bacra music enjoys a much greater appeal among Indians from the sub-continent, but Chutney singers from Trinidad have won engagements to appear in Indian popular clubs in Britain.

There have been attempts to stage major Chutney events in North America, but there is nothing as yet that approximates the Carnival type events. Chutney singers suffer similar problems to calypsonians and soca parang artistes, in respect of piracy of their material. One Chutney singer has observed that his music is carried on Guyanese stations, and neither he nor his agents have ever sold any of his material in Guyana.

There are a few Indian Orchestras playing Chutney Music. Given the high level of state support enjoyed by Pan, which derived mainly from the African based communities of Trinidad and Tobago, the Government has had to provide support by way of subventions to a Chutney Association to provide some sense of equity in this plural society. There is also, correlatively, corporate sponsorship of Chutney playing orchestras.

Another newly emerging genre is gospel style music from Trinidad and Tobago in the form of recordings, for which there is a burgeoning demand abroad. It is not clear yet, however, whether this has been promoted by live performances of religious choirs abroad. The growth in this music in Trinidad mirrors the expansion of the evangelical movement in the country.

7.1 Musical Instruments

Most professional musicians purchase their instruments abroad, but there still exists a small market for musical instruments sold locally. The Pan, which is the national instrument of Trinidad and Tobago, offers a unique market for manufacturing, sales and performance. There is evidence of effective competition from producers in metropolitan countries where advanced industrial process been applied in the production of pan.

There is only one mechanized pan producing factory operating in Trinidad. While a considerable number of pans are produced for the large number of bands in the country, most operations are still in a pre-industrial mode with tuners undertaking the laborious process of 'sinking' drums, grooving and tuning with simple implements. In this regard, most of the advances in industrial manufacturing have taken place outside of Trinidad and Tobago, and it can be argued that, in the

production of pan, the country has already lost the technological edge to other countries. The recent World Steelband Festival held in Trinidad revealed many advances in pan architecture and technical adaptations that are still unknown to pannists in Trinidad.

Stands for pans have been effectively marketed by entities abroad, even though they might have been developed initially in Trinidad and Tobago. The mechanics of patenting and licensing are still a remote issue for many involved in advances in the domestic environment. The failure to recognize the industry element in the musical art form and in the culture of the country partly explains this fact.

7.2 Copyright

The establishment of the Copyright Organisation of Trinidad and Tobago (COTT) has brought some structure to the music industry. The producers of music are now more sensitive to their rights, and to issues surrounding copyrighting of materials. Moreover, COTT has been able to provide some measure of protection to domestic producers of music in the use of their output locally. Radio stations have to produce logs; dance hall promoters have to make payments to COTT for the use of domestic and other material.

Considerable emphasis is now placed on copyright and intellectual property rights involving music publishing and composer's royalties with COTT acting as the custodian for these rights. The advent of COTT has led to some degree of formalisation of the music industry.

COTT offers protection of author's rights both locally and internationally through reciprocal agreements with societies worldwide. Neighbouring rights of performers and producers of sound recordings are currently handled on an ad hoc basis by COTT, although there exists a Neighbouring Rights Association of Trinidad and Tobago (NRATT).

The COTT was until recently, the only authorised copyright body in operation in the country. It administers on behalf of its 400 members and about 25 publishers, performing rights and mechanical rights. COTT enjoys a reciprocal agreement with PRS (the Performing Rights Society based in London). Through PRS' reciprocal agreements with other societies throughout the world, COTT represents the world repertoire of music for the territory of Trinidad and Tobago. A rival organization has since been formed, in support of the view that COTT has not provide adequate representation to genres deriving from the Indian cultural traditions of the country.

COTT licenses the use of music to the two local television stations and some sixteen radio stations. A major portion of the income to local composers comes from licensing Carnival Celebrations. These include Calypso Tents, live performances at the “Tents”, live performances at competitions and for the parade through the streets on the Carnival Days. Videocassettes that are produced at Carnival time are another source of revenue. The main source of income for COTT is licensing for public performances at various establishments.

At present, based on an agreed arrangement with PRS, 70% of all income collected, except for the Carnival income, is remitted to PRS by COTT. This will change drastically when the recently formed Caribbean Central Database comes on stream and is able to analyse the logs within the Caribbean.

COTT is the base for the attack on piracy in the country. The sale of recorded works which during the seventies was quite good has been severely reduced mainly through the high level of piracy that developed with the emergence of cassette recording. In other words, the industry fell victim to the impact of technological change as technology aided the process of reproduction.

Piracy remains one of the greatest challenges faced by COTT as the representative of the producers of music in the country. COTT has not succeeded in inculcating among the Police Authorities as law enforcement agencies, the sense of criminality implicit in piracy. Thus, artistes have had to resort to their own means of having enforced the law relating to piracy.

Between 1997 and 2000, the number of radio stations increased from 15 to 18 but the average time devoted to local music, either during the Carnival or during the rest of the year, seems to have fallen (See Appendices). On the other hand, the number of stations providing logs has increased, thus making it possible for COTT and calypsonians to have a better sense of local content. During 2000, calypsonians began a campaign to get local radio stations and the authorities to commit to an increase local content.

8. Sale and Rental of Musical Instruments

8.1 Sale

There are a few companies that sell musical instruments on the domestic market. Pianos are the most requested item and are mainly for domestic use. Electronic

keyboards are very popular both for domestic and commercial applications. However reports are that most professionals purchase their equipment abroad.

One of the unique aspects of Trinidad and Tobago is the invention and development of the Steel Pan and its family of instruments from the Tenor (Soprano Pan) to Bass Pans. The demand for these instruments locally for each carnival season has fostered an industry in itself. Manufacture is a slow painstaking process involving the cutting of steel oil drums, sinking, grooving, tempering and tuning. The finished product is usually chromed for appearance.

A few established companies exist that manufacture, market and export these instruments. Published export reports show that this is probably the only instrument manufactured in Trinidad and Tobago that is exported in significant quantities and that yields valuable financial income.

8.2 *Rental*

Very little, if any, rental of musical instruments exist. Rental applies more to amplification equipment and sound systems. However, most of the owners of such equipment tend to provide service directly with their own staff rather than to rent out the equipment.

9. Other Services

9.1 *Music Education*

9.1.1 MUSIC TEACHERS

The piano has been, by tradition, a prime musical instrument among the middle and upper class in Trinidad and Tobago. It is expected that children of so-called cultured society would be exposed to the piano, but not to pan. Thus, there is an established demand for music teachers. There is, therefore, a large number of music teachers in the area of Piano and theory of music in preparation for examinations for the London School of Music or the Royal School of Music. Some teaching is done at Primary and Secondary Schools, by teachers who have had special training in Music but the most teaching of music is conducted at private homes.

A limited amount of teaching of Guitar playing is also done. Again this is restricted to private tuition and no formal teaching establishments exist. The playing of Wind instruments such as Saxophones, Trumpets, and Trombones is

taught at the orphan homes and many of the musicians in this field have emerged from this environment. There is a school in the southern part of Trinidad that teaches the playing of string instruments such as violins, violas and cellos.

A novel form of teaching involves the steel pan. Pan “yards” set the scene for the preparation of steelbands for the annual Carnival. Here seasoned pan men initiate new pannists in the art of playing by rote. Lengthy practice sessions improve the dexterity and skill of the budding pannists until they are capable of working alongside the veterans. A programme is in place at the University of the West Indies Creative Arts Centre to train players in the theory of music and the art of sight-reading when playing the pan.

9.1.2 AGENTS

The proper promotion and managing of artistes is sadly lacking in the country. There is great need for education in this area. Copyright matters, publishing, negotiating skills, tax management, and similar areas need to be addressed. The Producer is a dying breed in the country as more and more performers find themselves in the difficult position of having to finance their own recordings as well as promote their efforts.

9.2 Music for Film & TV

There has been no significant film industry in Trinidad and Tobago. There have been a few films produced in the country but without any significance in terms of establishing a Trinidad and Tobago presence in the international industry, or in providing material for domestic use. Local film production is limited to Television. There are two television stations; one government owned (TTT) the other privately owned (TV6). Local productions tend to use existing local music rather than have specific music composed for the productions. During 2000, TIDCO established a special desk on film, and one of its personnel has been allocated specifically to promoting the development of the industry in the country. There has been some apparent interest and response from abroad, but it is still too early even to speculate on the implications for the music of the country.

9.3 Tourism Related Music Events

9.3.1 CARNIVAL

Carnival is an annual event which climaxes on the Monday and Tuesday before Ash Wednesday. There are venues with organised events in all parts of the country. The build-up to this mammoth celebration begins as early as November

of the previous year with the launching of costumed bands, the release of new calypsos and other related activities. Expenditure related to Carnival peaks in February or March, depending on the date of the Carnival. Table 4 provides information on Visitor Expenditure from the Central Statistics Office for 1997 and 1998.

Table 4: Visitor Expenditure for Carnival Season, Trinidad and Tobago, 1997 and 1998

Category	1997	1998	Growth, 97-98
Total Number of Visitors (19 days)	24,947	32,071	28.6
Number of Visitors per day	1313	1687	-
Total Expenditure (\$million, current)	64.51	88.74	37.6
Expenditure on Accommodation and Meals \$million	22.63	37.10	63.9
% of Total Expenditure	35.1	41.8	19.1
Expenditure on Entertainment and Other \$million	41.88	51.64	30.5
% of Total	64.9	59.2	-8.8
Total Expenditure per visitor (\$)	258.89	276.70	7.0

Source: Central Statistical Office, Trinidad and Tobago

The monetary statistics of the country suggest that Carnival has a significant impact of national economic activity (Henry and Nurse, 1996). There is clearly a trend in liquidity, suggesting that Christmas festival, which is a period of considerable expenditure, is followed by Carnival as another peak in the money supply that can be ascribed as an effect of the latter festival on the production of goods and services in the economy. Visitor arrivals peak in the two-week period just prior to Carnival. Over 30,000 visitors enter the country at this time (See Table 5). Their expenditures add to the spending stream and are part of the money supply: prior to the removal of exchange control, this would have manifested itself in a recorded increase in the supply of foreign exchange.

Table 5: Visitors to Trinidad Carnival by Origin

Country of Normal Residence	1997 Season	%	1998 Season	%	1999 Season	%
Caribbean	3410	13.7	3853	12.0	3991	12.63
Central and South America	1640	6.5	1860	5.8	2225	7.04
North America	16326	65.4	19782	61.7	18383	58.16
Europe	3359	13.4	6380	19.9	6527	20.65
ROW	169	0.67	196	0.61	229	0.72
Not Stated	43	0.17	50	0.15	254	0.80

Total	24947	100	32071	100	31609	100
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Source: Central Statistical Office, Trinidad and Tobago. Carnival Season was a selected 19-day period

Visitor arrivals also show an increase over the period. Many of the visitors participate actively in the celebrations. They are part of the audience of the Calypso “tents” where the calypsonians perform. They also visit the pan yards and the factories where the Carnival costumes are prepared for the masqueraders. Bands have embraced the Internet in advertising to the domestic and international audience, and costumes can be purchased prior to arrival in the country. There are also major “fetes” in which the tourists get involved. Thus, overseas visitors are now part of the target market of tents, party promoters, and Carnival Bands and constitute a significant source of earnings for these groups of service providers.

Carnival is a major income earner for a number of persons in the music industry. However, indirectly several organisations benefit from the increased demand for a variety of services. Transport, hotel accommodation, restaurants, retailers are among those that capitalise on the Carnival celebrations. For the performers, it means a steady income over a five to six week period punctuated by significant appearance fees at special shows.

Record sales are at their highest as the Radio Stations increase the percentage of local air play. Indeed, it is only at Carnival that the domestic genre of music dominates all the airwaves of the country. Tables 6 and 7 provide information for 1997 and 1999 respectively.

Table 6: The Percentage of Local Music in Radio Air Play, Trinidad and Tobago, 1997

Radio Station	% Local Carnival Time	% Year Round
Central	15	1
FM 103	25*	25*
Gem 93.5	45	6
ICN – 91.1	45	20
ICN YESS 98.9	100	25
ICN FM 100	80	25
Music Radio 97	8	2
Power 102	100	40
Superior 94	75	40
TBC Tempo 105	100	60
TBC Sangeet 106	10	10
TBC 95.1	10	0
Average	51%	21%

*Represents year round figures. Carnival figures not reported

Source: COTT: Local Music-Radio Survey, September 1997

Table 7: The Percentage of Local Music in Radio Air Play,
Trinidad and Tobago, 1999

Radio Station	Frequency	Type	% Local Carnival Time	%Year Round
TBC	730	AM	50	10
	95.1	FM	10	10
	105	FM	100	75
	106	FM	10	10
NBN	610	AM	50	10
	91.1	FM	50	10
	98.9	FM	100	20
	100	FM	80	15
Radio Vision	94.1	FM	50	25
	102	FM	100	25
Telemedia	97	FM	5	5
	104	FM	50	10
Independents	93.5	FM	50	10
	96.1	FM	80	10
	103	FM	25	10
	92.1	FM	10	10
	101	FM	10	10
AVERAGE			46	15

9.3.2 TOBAGO TOURISM

Tobago has become the key node in the entry of the country into the international tourism industry. The island is now an important destination for national and international visitors. With its growth has emerged a Tobago Entertainment Industry, in which calypsonians figure prominently. They perform mostly at the hotels that have sprung up on the island. A survey was conducted among forty-three (43) persons involved in one or other capacity in the industry. Sixty-five percent or 28 were Own-Account Operators, while thirty-five percent were attached to an Establishment, which are mainly steelbands but also include nightclubs and hotels. The gender distribution was heavily weighted in favour of men – 84 percent, which is characteristic of the national industry. Three of the female entertainers were attached to an establishment while the other four were own-account operators. Only 2 persons among the forty-three classified themselves as publishers. None of the six composers was female.

In addition to the celebration of Carnival, Tobago has developed its own festival sector, partly oriented at the Tourism Market. The Tobago festival, held at the beginning of August annually is emerging as an important event, in and of itself, attracting local and international visitors, and creating an additional source of income outside the circuit of hotels.

9.3.3 PAN ON THE MOVE

During the month of May, Point Fortin, a borough in the southern part of Trinidad, hosts a “Pan on the move” competition to climax a week of cultural activities. This event has grown over the years and now attracts an audience estimated at in excess of 50,000, including overseas visitors. It affords the Steel Pan much needed additional exposure and keeps the interest in local music alive outside of the Carnival season.

9.3.4 PAN RAMAJAY

What was once a popular competition highlighting the ability of pan players to extempo on the instrument has evolved into a festival with foreign musicians invited and the fusion of the Pan with conventional instruments. As a tourist attraction it shows some potential but at the moment it continues to target locals mainly.

9.3.5 STEEL BAND FESTIVAL

Every two years, in the month of October, the local Pan body “Pan Trinbago” hosts a Steel Pan Festival. In the eighties the finals of this Festival attracted a full house of six thousand at the Jean Pierre Complex, the chosen venue. In the year 2000, the Festival was turned into a World Festival involving players from the Caribbean, United States and Europe. This promises to be a great tourist lure in the future if well managed and promoted.

10. Sources of Revenue in the Music Industry

10.1 Visible Earnings

10.1.1 THE FTAA HEMISPHERIC DATA

The FTAA Hemispheric Database for Market Access provides information on the imports and exports from countries around the world. Data for Trinidad and Tobago for 1997 and specifically on music related items is provided in Table 8. The Table reveals the following:

- (a) Unrecorded Audio Tapes to a total value of \$261,000 US were imported into the country. At an average cost of .30 US cents this equates to a quantity of 870,000 units. Some of these tapes are used to record music

- either for personal use. However it is believed that a high percentage is used to record music illegally and which is sold to the public by “pirates.” At a street price of \$3.20 US for each cassette, we estimate a market of US\$3M.
- (b) Gramophone Records 33 1/3 rpm show a total import value of \$23,000 US. At an average cost of \$4.50 US each this translates to a total of 5,111 units. Gramophone records are no longer the choice for consumers and are just used by disc jockeys, hence the low quantity.
 - (c) Recorded Audio Tapes amount to \$74,000 US or estimated at 16,444 units. When compared to blank cassettes one can appreciate the impact of piracy on the market.
 - (d) Recorded Audio Compact Discs amounted to \$1,348,000 US and at an average cost of \$8.00 US it is estimated that 168,500 units are imported.
 - (e) Steelband Musical Instruments show an import value of \$53,000 US, which is surprising given that Trinidad and Tobago is considered the home of the Steel Pan where it is manufactured in great quantities.
 - (f) The only significant musical instrument exported from the country is not surprisingly the Steel Pan. A total of \$505,000 US is recorded showing that this could develop into a lucrative industry.
 - (g) No figures were available for recordable Compact Discs, which have become very popular in the last two years.

Table 8: Hemispheric Data on Imports and Exports Trinidad and Tobago

No.	Description	US\$000	Category
1	Music, Printed or in Manuscript etc.	31	Imports
2	Cassette Type Sound Reproducing Apparatus	129	Imports
3	Other Sound Recording Apparatus	659	Imports
4	Audio Tapes, Unrecorded	261	Imports
5	Gramophone Records, 33 1/3 rpm	23	Imports
6	Gramophone Records, 45 rpm	12	Imports
7	Audio Tapes, Recorded	74	Imports
8	Audio Compact Discs, Recorded	186	Imports

9	Other Compact Discs, Recorded	1,162	Imports	
10	Upright Pianos	4	Imports	
11	Grand Pianos	29	Imports	
12	Other Piano and Keyboard Stringed Instruments	21	Imports	
13	Other String Musical Instruments	39	Imports	
14	Keyboard Pipe Organs; Harmoniums etc	44	Imports	
15	Brass-wind Musical Instruments	5	Imports	
16	Other Wind Musical Instruments	20	Imports	
17	Steel Band Musical Instruments	53	Imports	
18	Other Percussion Musical Instruments	55	Imports	
19	Keyboard Instruments other than Accordians	49	Imports	
20	Other Electronic Musical Instruments	10	Imports	
21	Steel Band Musical Instruments	505	Exports	
22	Other Percussion Musical Instruments	48	Exports	

Source: FTAA Hemispheric Data Base

10.1.2 INFORMATION FROM COTT

The Copyright Organisation of Trinidad and Tobago (COTT) is in an ideal position to record the quantities of Records, Cassettes and Compact Discs coming into the country. This is so because recordings involving local artistes enjoy concessions on duty and Value Added Tax. Figures provided by COTT show that 15,130 records, 53,051 Compact Discs and 7,284 cassettes were imported in 1998. While a close look at the list of items indicate that some product seems to be bypassing the system it appears that approximately 30% of all imports are of local artistes.

10.1.3 INVISIBLE EARNINGS

The earnings from a variety of areas from live performances to royalties; music education and licensing can only be obtained by a comprehensive survey.

10.2 Royalties

10.2.1 DOMESTIC EARNINGS

Table 9 provides the Income, Expenses and Distribution of COTT, 1990 – 1999. The domestic earnings have shown a steady increase from just over US \$160,000 to over US \$800,000. The growth is mainly attributable to the diligence of the organisation in collecting from the Broadcast establishments. Broadcasting accounts for 60% of the income, General Income from Public Performance and live shows amount to another 30% and the Special Events Income from Carnival amount for the remaining 10%.

Mechanical Royalties have been sadly neglected except for a collection of US \$21,120 in 1998. This fell off again in 1999 and 2000. Plans are afoot to reactivate this in 2001. The main sources of revenue to COTT are the media and their distribution by type is given in Tables 10 and 11.

Table 9: Incomes, Expenses and Distributions of COTT, 1990-1998

Year	1990	1991	1992	1993	1994	1995	1996	1997	1998
Overseas	NA	NA	127,403	295,818	196,143	200,342	286,247	307,772	344,603
B&P General	1,219,914	1,289,737	1,458,992	1,535,967	679,422	1,522,859	2,586,050	3,093,757	4,731,102
B&P Carnival	102,518	98,875	102,145	165,000	214,030	137,205	236,000	327,325	NA
Local Mechanical	NA	NA	NA	NA	50,528	NA	NA	NA	132,125
Local Collections	1,322,432	1,388,612	1,561,137	1,700,967	943,980	1,660,064	2,822,050	3,421,082	4,863,227
Total Collections	1,322,432	1,388,612	1,688,612	1,996,785	1,140,123	1,860,406	3,108,297	3,728,854	5,207,830
Growth in Collections	-	5.00%	21.60%	18.26%	-42-.90%	63.18%	67.08%	19.96%	39.66%
Distribution to PRS	552,520	451,733	622,168	512,291	NA	807,575	1,306,063	1,692,386	2,882,727
General B&P Distributions	236,794	193,600	266,643	235,329	196,427	346,106	559,741	725,309	1,233,454
Carnival Distributions	82,040	79,100	81,716	135,552	171,224	109,764	167,209	232,401	NA
Local Distributions	871,354	724,433	970,527	883,172	367,651	1,263,445	2,033,013	2,650,096	4,116,181
Growth in Local Distributions	-	-16.86%	33.97%	-9.00%	-58-37%	243.65%	60.91%	30.35%	55.32%
Expenses	430,599	644,401	523,401	699,872	482,995	369,178	720,246	676,062	614,921
Expenses + Distributions	1,301,953	1,368,834	1,493,928	1,583,044	850,646	1,632,623	2,753,259	3,326,158	4,731,102

Source: COTT

B&P is Broadcasts and Performances

NA is not available

Local collections do not feature any from television

Table 10: Radio Broadcasters in Trinidad and Tobago (April 2000)

Number of Stations	Public	Private	Licensed	Estimated Average Talk (%)	Estimated Average Regional Music (%)	Number Maintaining Logs
18	4	14	18	15.00	30.0	15

Table 11: Television and Cable/Satellite Statistics, Trinidad and Tobago, 1999

Media	Amount	Public	Private
Television Stations	3	2	1
Cable/Satellite	4	0	4

Source: Berry (1999)

10.2.2 OVERSEAS EARNINGS

Overseas income remains woefully small, still well under \$500,000 US. Given the increased popularity of the music of Trinidad and Tobago in the United States, Canada and Europe, one can only assume that the music is still not on mainstream radio and television. It is also felt that the music is not identified on the World Works List and that income due to local artistes consequently gets lost in the unidentified pools around the world.

11. Regulation and Facilitation

The role performed by COTT by way of regulation has already been addressed above. For all of its weaknesses, COTT has been able to inculcate a greater awareness among the population of the rights of producers of music. Its occasional interventions in high profile situations where it has sought to protect the interests of entertainers have helped in bringing the issue of copyright to the attention of the public. Within the last year, however, there has been formed another organisation purporting to represent musicians and entertainers in the country. The initial focus seems to be directed at protecting the interests of Chutney and other entertainers in the East Indian cultural sphere.

There is an organisation of Calypsonians – Trinidad United Calypsonian Organisation (TUCO) – which negotiates with the Government on behalf of the group. TUCO receives subventions from the State and puts on one of the major competitions for Carnival, among the Calypsonians. The Monarch Competition represents the high point for Calypsonians of the country, and to be crowned

Calypso King of the country carries status, which can be used to advantage in seeking contracts abroad.

There is also a Soca Monarch Competition but this is run by a private sector organisation. It has been increasing in popularity in recent years, and attracts a younger cohort among its audience. Dance and audience participation are more characteristic of this show, which are important in respect of audiences in the North Atlantic, where many of the competitors seek to market themselves later in the year.

The agency responsible for facilitation is Tourism and Industrial Development Corporation (TIDCO). The agency has accepted the importance of the Entertainment Industry in the generation of foreign exchange for the country, and has personnel with specific responsibility for the growth and development of the sector. In the mid 1990s, TIDCO sought to organise the various strands of the Entertainment Sector, and as a result of its initiative, Entertainment Industry Development Company (EIDECO) was formed, with key participants from the music sector represented in the organisation.

The fundamental idea in its formation was that the organisation would give voice to participants, and be a think-tank collaborating with the Government in industrial policy formulation for the industry. EIDECO, for a number of reasons, seems to have become moribund. It is not clear at the time of writing, the extent to which the Government, through TIDCO, is prepared to promote the export thrust of the sector with such arrangements as market development grants etc. There is a strong sense in some quarters of the Entertainment Sector, that the TIDCO has not made the industry one of its priorities, in spite of the potential for earning income and for its giving a higher profile to the country.

Entertainment as a subsector is not well identified in the official statistics. The Central Statistical Office has not been able to institutionalise the collection of data from the subsector through its survey of establishments. Generally, the Creative Services Sector has contributed in the region of 12 percent of GDP. It is likely that Entertainment has a growing share in the sector. Table 12 provides information on the size of the Creative Services Sector for the period 1986 – 1998.

Table 12: Contribution of the Creative Services Sector to GDP 1986-1998 – Trinidad and Tobago at constant 1985 Prices (\$TT million)

Year	GDP	% Growth Rate	Creative Services	% Growth Rate of Creative Services	Creative Services as % of GDP

1986	17,478.0	-	2234.7	-	12.8
1987	16,678.5	-4.6	2212.2	-1.0	13.3
1988	16,048.5	-3.8	1999.5	-9.6	12.4
1989	15,894.9	-0.9	1826.0		11.5
1990	16,134.4	1.5	1639.2	-10.2	10.1
1991	16,576.3	2.7	1705.6	4.0	10.3
1992	16,294.4	-1.6	1682.5	-1.3	10.3
1993	16,057.5	-1.5	1793.3	6.6	11.2
1994	16,630.4	3.6	1873.9	4.5	11.3
1995	17,288.0	4.0	1981.0	5.7	11.4
1996	17,950.0	3.8	2177.0	9.9	12.1
1997	18,507.0	3.1	2347.9	7.8	12.7
1998	19,326.7	4.4	2496.0	6.3	12.9

Source: Review of Economy, Trinidad and Tobago, 1994, 1996, 1998/9 (Following James (2000) creative services are defined as the set of service activities that tend to rely primarily on domestic capital, including traditional knowledge, for competitive production and market penetration – entertainment, including tourism, other knowledge industries, etc.)

12. Summary

The Music Industry of Trinidad and Tobago has grown and is gradually achieving the level of internal differentiation associated with the industry in other parts of the World. The domestic market serves as a sieve for processing a considerable range of product. While there is a large number of performers, the Industry producing the Trinidad and Tobago genre does not have much by way of formal training facilities, and quality is a function of the raw talent surfacing in the annual Carnival and in the other festivities for which the country is known. Formal training is normally associated with imported genres, and some of those who have been exposed to it have gravitated to the production in the local genre.

There is high social demand driven by tradition and by supported by state and corporate sponsorship for pan. The main protagonists of pan receive largely psychic income from participation and perfecting the art form. Income generated is a bonus. This aspect of the music has to be differentiated from other forms of entertainment that are driven fully by market factors on the demand and supply sides.

Many entertainers operate as self-employed persons, and are part-timers. There are the few who earn very good incomes. Indeed, demand for one's services beyond the Carnival season is what will prompt the part-timer to become a full-time operator. All high income earners are involved in providing their services abroad. In other words, sustained income generation and full time employment implies touring or movement abroad. On the other hand, there is a market emerging in

Tobago for sustained income generation outside of the festival cycle, as a result of the expansion of the Tourism Sector. In that regard, Tobago seems to be following Jamaica, where a substantial demand has been created by tourism.

Performers with pan, the national instrument, have a much smaller market abroad, and are still involved in satisfying epistemic demand characteristics through cultural exchanges etc, in which their work is seen as an object of curiosity and something to marvel at, rather than satisfying pop culture and entertainment markets. Most of the persons involved in pan are driven by the need for self-expression through the art form.

Music reflecting the East Indian culture of Trinidad and Tobago has largely mirrored the experience of the Calypso/Soca Music. Most of the entertainers are part-timers, who become full-time service providers if there is the demand. Touring is important to them also and the Indo-Caribbean migrants provide the main market. Local festivities are the occasion for heightened activity in the art form, and the competitions establish the popularity and market for the respective entertainers over the next year.

A support infrastructure has emerged, with a range of service providers. While these entities are small, for the most part, there is some amount of structural differentiation occurring. Thus, one man operations may start with an entertainer doing many things and then would achieve competence and expertise in a limited number of areas, which experience leads to specialisation.

The Industry is very much integrated with production infrastructure abroad, especially in respect of the mass production of recorded material. All of the instruments, except pan, are imported. The State Agency responsible for industrial promotion has started to play a role in the sector, suggesting greater recognition of the role of the Entertainment Industry, in general, and the Music Industry in particular, in the generation of employment and in foreign exchange earnings for the country.

There are very little hard data on incomes, and the domestic service providers are not well identified in the official statistics. The direct income to musicians and entertainers has been estimated at US \$2.0m, and the indirect income could be ten times this figure. However, these estimates are very notional and, while based on informed calculations of one of the researchers may be subject to considerable error. Thus, the contribution to national income and the size of the sector remain an area of speculation.

Meanwhile, there still exists considerable ambivalence among state institutions over the level of support that should be accorded to the music industry. The

enthusiasm of its main protagonists suggests that the benefits are much more than psychic and the country would do well to promote its cultural art form that has an essential uniqueness.

The capacity of the industry to improve its standing in the international market and even the domestic and regional markets is, to a considerable extent, based on the quality of training and preparation of the musicians. While they have made considerable advance in all the major genres that have been commercialized, they need an infrastructure of support of training to provide the base among the folk for professionalism, without, at the same time, stifling the essential vitality and creativity that have given distinctiveness to Pan, Calypso, Soca, Chutney and Parang.

13. Further Work

This study prompts the need for further research. The unwillingness of Entertainers generally, to supply information on their operations is counterproductive. Caribbean Governments have found it difficult to negotiate effectively for the sector, which is one of the few areas in which these countries produce distinctive product and services for the international market place. There is need to work with groups that are amenable to the sharing of information in the national interest and for their own longer term benefit. This will require the commitment of funding for longitudinal study.

A second area of research is the role of formal structures in the evolution of the Music Industry. The sector is still dominated by a host of informal sector operations, some of which operate in the international economy. It is possible that formal training in business and entrepreneurship will help would-be entertainers and musicians to understand the need to form structures to develop their product and to improve their earnings as commercial operations. The factors influencing industrial organization in the production and distribution of music needs to be examined.

Given the nature of the international industry and the dominance exercised by a handful of large firms, is there a role for the Government in negotiating, or in helping groups of Musicians negotiate, arrangements with one of the majors or a more promising among the independents to target on a sustained basis, marketing initiatives into the metropolitan market? There is need to raise the profile of Trinidad and Tobago Music internationally, but it is clear that the operation of market forces as present aligned, is unlikely to bring that result. Even if the state cannot, or is unwilling to make that kind of intervention, there is surely a

developmental role it could perform through assistance in market development. The modalities of bringing this about is in need of investigation.

The Music Industry in Trinidad and Tobago and in the Caribbean generally, has only recently attracted attention of academics outside those engaged in cultural analyses. There is need to promote an even greater level of involvement on the part of the Caribbean academic community in a prime economic activity in the region. Trinidad and Tobago has been distinctive in its contribution to Caribbean music, through the steel-pan and through calypso, soca, parang, and chutney. It is a veritable laboratory and should be a focus of considerable research.

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