

# CONTEMPORARY MUSIC: TUNING INTO BANGLADESH



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## Summing up

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Music is an indispensable part of Bangladesh's identity. For a country that has fought for its independence through blood, music and culture have played major roles in shaping and inspiring the sentiments of the people that have built this nation. Music has evolved since the liberation quite rapidly. From a classical heavy musical culture, Bangladesh has become the land to welcome a diverse range of genres and even fusion between genres as the contemporary music scene has continued to develop.

Meanwhile, Bangladesh has been affected by the globalization of trade and culture just like other countries in the world. In the new millennium, technology has started to bring in faster transformations in society and culture. An example can be brought about from the various live shows and musical productions that are being undertaken at large scale, projects that are of comparable standard to acclaimed global musical productions.

Globally, the music industry has been uniquely placed to help each of the other media industries at crucial stages of their development. It has provided opportunities for synergy that have been exploited by radio, television and cinema and now by 'new media'.

For the government, music helps create an identity of the nation. Although a small part of the overall entertainment industry, music industry is believed to have employed 0.3 million people in its various functions. Regional music tours help strengthen diplomatic relations with other countries. Music also helps express the key elements in the culture to a global audience, thus increasing awareness about the region and its offerings. According to the Ministry of Cultural Affairs, in fiscal year 2015-16, the government of Bangladesh has funded 29 cultural troupes representing Bangladesh in 23 countries.

Contemporary music as an art form touches a lot of other industries and platforms, thus creating a complex ecosystem. The different types of services provided by different genre and categories of artists, multiple players in the 'song creation and presentation' value chain further add to the complexity. In Bangladesh, the stakeholder mapping can be done keeping music professionals at the heart of the ecosystem, funders and consumers in parallel and enablers and policy support providers in the periphery. Multilateral challenges emanate from all of these stakeholders, shaping the ecosystem for good and for bad. Female contemporary artists continue to fight social and cultural obstacles, opaque financing system hurts motivation and the everlasting feud between classical and contemporary surges on. Classical veterans of Bangladeshi music scene feel the youth is deviating from Bangladesh and Bengali music's rich heritage with the advent of 'westernized' cultural elements. A person has to invest time and interest for learning classical- the taste is an acquired one. Since the millennial, generations keep listening to 'aggressive' music that has no association with local culture. They are affecting sustainability of classical music. However, the attitude towards western inspiration to folk or classical music is not entirely negative. Generation Y or millennial artists inheriting passion and drive for music from their predecessors are bringing about a slow yet positive change in forming a bridge between the two worlds.

New generation artists who have rose to fame covering famous rock or metal songs in English or have taken inspirations from the likes of Iron Maiden, Metallica, Bob Dylan- yet often seem to consider themselves marginalized and unduly criticized by cultural elites in the country. While they take pride in their work and contribution toward the culture, they feel their work do not get recognized on a national level as it should. Representing traditional music with a touch of fusion creates a question of 'legitimacy', just too often. They believe by drawing in inspirations from other cultures, they are making the local culture richer. Interestingly, young classical enthusiasts also show a positive attitude towards 'keeping up with the social trend'.

Similar to music industry all over the world piracy continues to be a problem in Bangladesh. Rapid rise in technology to store and distribute music has further aggravated the scenario and labels are struggling as current 80% of the market being served by pirated music. Digital music streaming services like GP Music and Yonder has started backed by the country's top telecom operators, companies like Bongo (Netflix of Bangladesh) has opened up which provides licensed video content and consumers are picking up with GP Music registering 600K+ paid users as of December, 2016. This coupled with the government becoming more serious on piracy as TRIPS agreement<sup>1</sup> expires and heightened consumer awareness can minimize piracy.

Government support is often limited to classical music, dance and theatre with global collaboration often limited to bilateral arrangements. However, for the music scene to develop the support needs to augment to other genres like contemporary and to participation in international music festivals.

Moreover, Government is now more open to public-private partnerships. For example, in the Bengal Music Festivals the Bangladesh Government has invested significant resources in security and management. While this is a support at a very preliminary level, this is definitely a start.

Further support will also mean that artists do not always need to depend on corporate patronization but also on cultural support from the public institutions which would in turn increase the quality of art form.

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<sup>1</sup> The agreement on Trade-Related Aspects of Intellectual Property Rights (TRIPS) is an international legal agreement between all the member nations of the World Trade Organization (WTO). It sets down minimum standards for the regulation by national governments of many forms of intellectual property (IP) as applied to nationals of other WTO member nations.



## Background

Other than a few cases where belonging to a musical family helped a new artist launch his or her music brand in Bangladesh, stepping into the music scene and creating a name for oneself is at a Do-It-Yourself (DIY) stage here. Globally, booking agencies, publishing companies, and publicity firms have begun to wield a greater influence as industry-savvy DIY artists seek out allies to navigate the business end of their careers. In Bangladesh though, majority of the organizers get in touch with artists through personal contacts, while the rest usually contact the artists directly. Starting from getting gigs to perform in to promoting and safeguarding a music-brand persona- all aspects of value creation in the fragile music economy is taken care of by the key stakeholders; the artists. Contemporary musicians continue to fight and prove their ‘legitimacy’ as artists to the conservative elites, suffer through an unstructured ecosystem without enough policy support or government interventions and miss out on opportunities for lack of collaboration and harmony between the enablers in the music environment. The age-old issues resurfacing in new ways had long been overshadowing the many good things that could come out of the local music scene. To bring some changes to status quo and make things rolling in the favor of contemporary music- one fine morning a concept called Bangladesh Music Week came into being.

## A platform to tie it all up: Bangladesh Music Week 2015

If viewed through a bird’s eye level, the Bangladeshi music scene is extremely rich on talent and immensely potential in its capacities. There is so much more that can be achieved if there is scope to develop tolerance, enforce dialogues, build collaborations and focus on structural developments in order to make this industry a reason for economic and cultural advancement for the country. Thus, the idea of Bangladesh Music Week came to be, a platform that takes a sustained initiative to bring the music professionals, the policy makers, the artists, the patrons and the audience under one platform to talk, listen, discuss, debate and collaborate to spread awareness if not bring out solutions to the problems that have been afflicting this industry. Organized under the aegis of Norway-Bangladesh Music Cooperation, on November 6-7 in 2015 at the Shilpakala Academy, the festival brought together professionals from the “music ecosystem” in Bangladesh and representative from India, Sri Lanka, Nepal and Norway to share experiences, build capacity and work together.

Illustrious musical bands performed on stage, while presentations and performances with rare musical instruments by BITA (Bangladesh Institute of Theatre Arts), also took place. Rounds of panel discussions on issues like technology, intellectual property (IP) rights, archiving music and media involvement helped exchange views from different cultures and left behind valuable insights for Bangladesh music ecosystem to ponder upon.



## Objectives of the paper

The history of music in Bangladesh is a rich one with many twists and turns. Contemporary music, drawing inspiration from western civilization and in some cases from classical elements has its journey in Bangladesh closely linked to the birth and gradual development of a new and free society. Despite the abundance of creative exhibitions, a consolidated approach to document the evolution of contemporary music still remains missing. This report, as a continuation on the topics discussed during Bangladesh Music Week, attempts at mitigating the gap.

The key idea of the report is to provide an overview of the contemporary music scene in Bangladesh for local and international audiences. Throughout the further run of this paper and if not stated otherwise, the notion of music refers therefore to the sector of contemporary music only.

This publication should also offer an entry point to further national, regional and international linking and networking in, on and for a thriving Bangladeshi music scene.

Bangladesh Music Week session outcomes, discussions, interview with key stakeholders of the industry and consumer research have provided the insights and inspiration behind the views share in this paper.

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## **Evolution of THE MUSIC – the Bangladesh Saga**

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From the pitter-patter of raindrops to hitting the chords on guitar strings- the love affair with music-be it manmade or in the nature-is a timeless affair in Bangladesh. Music inspired the millions of people fighting for their freedom back in 1971. It gave a newborn country hope of a brighter future amidst the scars and wounds the war left behind. Music now accompanies the busy professional waiting in traffic to work, gives a lively vibe to the tea stall at the corner of a rural market and follows people around whenever they come together for any reason.

Bengali music and its many genres can be traced back to a thousand years in history. Developing along two trajectories- classical and folk, Bengali music between late 19<sup>th</sup> and early 20<sup>th</sup> century had a major transformation. Brilliant composers like Rabindranath Tagore, Kazi Nazrul Islam and Atulprasad Sen created new genres of music that would mark and signify the spirit of Bengali music for years to come. Interestingly, the history of Bangladeshi music is as old as the country itself. Having its roots embedded in Bengali music, the music of the free land evolved as the country went through major social and cultural transformations. From a classical heavy musical culture, Bangladesh has become the land to welcome a diverse range of genres and even fusion between genres as the journey of contemporary music has continued.

### **Evolution of music – a time series analysis**

The first major breakthrough in music in an independent Bangladesh was the Swadhin Bangla Betar Kendro (Free Bengal Radio Centre), the radio broadcasting center of Bengali forces during the Liberation War in 1971. Famous artists like Apel Mahmud, Lucky Akhand devoted themselves to boosting up people's morale with their songs and fund raising endeavors. After nine long months of war, a free nation came into being, Bengali became the state language and people started grasping the essence of freedom in their lives.

With changing socio-cultural dynamics, some changes to contemporary music and its composition was inevitable. It was Pop guru Azam Khan who first ventured into the realm of blending Bengali lyrics with western style rendition in around 1972. This new genre of music instantly struck a chord with the young generation and leading to the emergence of some band groups in rapid succession. Azam Khan's Uchcharon Shilpa Goshthi and their new pop-rock style encouraged artists like M A Shoeb, who would in 1981 release the very first Bangladeshi music album. The ten tracks of the album sold more than 4 million copies and made him a household name.

The new trend set by Azam Khan's band was also followed by bands like Souls, Feelings, Chime, Miles, Renaissance, and Feedback. Emerging around the late 70's, they would perform gigs at hotels and clubs. Although Waves and Miles were more underground, Souls was perking up to be a mainstreamer and soon got themselves a record deal. Their first album in 1982 was an immediate success, soon making them much admired all over the country. This was the time when band solo albums were taking over conventional single artiste compilation. By early 1982, Miles would follow that track and release their first compilation. Feedback joined the bandwagon a bit later too. These debut albums set the example; bands were getting more promotional ventures through the audiovisual medium, they could be seen in TV programs. This rapidly encouraged music admirers all over the nation to visualize music as a performing art.

As tastes in music became more diverse, it was at the rim of mid '80s, when heavy metal and hard rock became the talk-of-the-town element. Bands like Rockstrata, Warfaze, In Dhaka, Aces would cover songs of Metallica, Megadeth, Iron Maiden in sold-out shows in prominent venues around the capital city. Vocalist of popular band Aurthohin, Sumon aka Bassbaba best describes the craze around the heavy metal era in Bangladesh:



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**“For the first time in Bangladesh, we saw this kind of rock stunt. That was the golden era of heavy metal music. All the tickets used to be sold-out and it was then that we realized that the good days had started for us.”**

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– Saidus Salehin Khaled (Sumon), Vocalist, Aurthohin

To capitalize on the metal momentum, record label Sargam made the first move initiating the first array of metal albums in the late 80's. Followed by mega-hit albums of Warfaze and Rock Strata, contemporary music in Bangladesh was only expected to reach newer heights from there. However, due to various reasons popular heavy metal bands started dismantling quite soon and the music scene went into hibernation.

Post heavy metal phase, Bangladesh experienced a surge in heavy rock songs and a new array of bands. With the likes of LRB (Love Runs Blind, formed in 1990), Feelings and Ark, the definition of rock became more versatile to the listeners. While Feelings were fusing rock with a psychedelic blues progression, Feedback, LRB and Ark were more into mainstream pop/rock. At that juncture as well, their music became instant hits giving superb audible pleasure. The release of Miles, Feedback, LRB gave tremendous hit albums wowing the audiences. Playing the titles during national holidays and after Eid prayers just portrayed the immense popularity of these mind-blowing songs.

While the 1990's experienced Bangladeshi bands gaining admiration from home and abroad, one band truly stood out in setting new trends for the industry. LRB has captured music headlines in Bangladesh's media for over two decades now. The band was courageous enough to bring out a double album as a debut band back in 1992, and the risky venture turned out to be a huge success. LRB also became the first ever band group to play one of the most exclusive UNPLUGGED concerts live in a city restaurant in 1996. The band has been through many transformations since its golden era, but still continues to be one of the most iconic bands of Bangladeshi music scene.

While the likes of LRB and Miles were busy being the giants of the industry, the minnows, underground bands, started a new phase at the onset of a new millennium. The materialization of underground bands would usually start from a group of friends deciding to form a band. They would buy the instruments with their own money, rent one of the practice pads that had sprung up around the capital city in Dhaka. There they would practise and gradually through word of mouth and connections, would start playing in small gigs like birthday parties, weddings etc. Building their fan base and brand names from those small gigs, these bands would later move on to receiving invitations to concerts headlined by big acts such as Artcell, Black, etc.

Cryptic Fate, Maestria, Deathrow, PsychoDeath and Jolly Roger are some of the bands who successfully made their way up through underground phases and with mixed albums gradually established their presence in mainstream music scene. The tumultuous journey of music in Bangladesh over the decades reveals some key milestones. These set the stepping-stones for new age music in Bangladesh, while continuing to change the game along a time series:



Swadhin Bangla Betar Kendra (Free Bengal Radio Centre) played a vital role in lifting people's spirit with patriotic songs and shows during the liberation war of Bangladesh.



Pop maestro Azam Khan and his band Uccharon rose to fame with their songs that described the distressed state of a country post-war grappling to stand on its feet.



'The Best of M.A. Shoeb' - the first album of any Bangladeshi singer was released in 1981 on audiotape. His western style pop songs sold more than 4 million copies later on.



Popular bands such as Souls, Miles, Feedback- although formed in the '70s started releasing their debut albums from 1982. Their presence in audio-visual medium increased audience reach and show/concerts frequency even more.



Bands like Rockstrata, Waves, Warfaze introduced heavy metal music in the mid 80s. Megahit albums and sold-out shows brought in more metal bands in the ecosystem



One of the most iconic Bangladeshi bands, LRB formed in 1991 and continued to set new records - with first Bangladeshi unplugged album, first band to release a debut album as a double feature etc. were some of the notable additions to the decade.



A new millennium brought in a new trend-small bands would make their way up through small concerts and shows, get their music out through compilation albums and thus creating the 'underground era of Bangladeshi music'

And the evolution and major course changes in Bangladeshi music is still continuing...

Figure 1: Time series analysis of Bangladeshi music

## Effect of Globalization, Rising Middle and Affluent Group and Demographic Youth Bulge: The Era of Contemporary Music

The rise of the Internet has brought countries, cultures and people closer than ever in history. Bangladesh has been affected by the globalization of trade and culture just like other countries in the world. In the new millennium, with new technology, effect of globalization on the age-old culture has been more intense. Global fashion brands are finding their way into changing Bangladeshi lifestyle, people are accepting experimentation and mingling of cultures more favourably these days and youth interest in the 'new' is on the rise. It is only logical that contemporary music in Bangladesh would turn over a new leaf in this 'age of transformation' as well.

One example in this aspect would be the highly acclaimed live musical show '*Wind of Change*' being conceived, recorded and broadcasted on television. Inspired by *Coke Studio*, the trend setting musical show in India, *Wind of Change* acts as a bridge towards connecting musicians

from different parts of the world and allows these artists to exchange experiences with other fellow musicians. With the help of foreign musicians who join the local artists live on stage, the artists play their own songs previously released but in



Figure 2: A snapshot of baul song fusion in '*Wind of Change*'

different renditions, blending their style with the musicians' own unique style to create an incredible auditory experience.

The artists who performed in the show range in a diverse list of genres: From leading rock bands in Bangladesh such as Miles and Ayub Bacchu to contemporary diva Samina Chowdhury's entrancing melodies and folk artists such as Kuddus Boyati; everyone is a part of *Wind of Change*. The concept itself is not entirely unique, as other countries have experienced similar musical shows. But what makes this show really worthwhile is the level of standard it has maintained in terms of production, music and performance. Creating massive buzz among new generation music enthusiasts, as well as bringing in industry veterans – *Wind of Change* is a true globalization of Bangladeshi music. In recent years, events like Dhaka Literature Festival, Jazz & Blues Festival, Sufi Fest, International Folk Festival etc. have made mingling of cultures more fluid and convenient.

The drivers transforming Bangladeshi music post millennium are however not entirely external. The population is relatively young with a median age of 26 years, and 57% of the Bangladesh population is aged between 10-35 years<sup>2</sup>. The country's economy has been growing at a stable 6% for over a decade as well. A consumer study done by Boston Consulting Group in 2015 estimated that around 12 million people in Bangladesh belong to the Middle and Affluent consumer class (monthly household income above USD 400 for a five-member family) and this consumer class is growing by an average 10.5% annually. Bangladeshi consumers, with increasing per capita income are becoming more optimistic and quality conscious. They want to stay connected to the world, adopt socio-cultural elements from other countries within their own, and pay a premium for quality products and services. Bangladeshi contemporary music, as well as other genres of music as a result, have had to adapt to these changing dynamics of the listeners. The music scene has witnessed tribute album to John Denver in Bengali, artists are releasing videos on social media, and the meaning of music has transformed too. Contemporary music in Bangladesh has taken inspiration from diverse cultures, incorporated instruments and styles from other genres and enriched itself. The founding member of Bangladesh Musical Bands Association (BAMBA) and also an artist with 40+ years of experience, Maqsoodul Haque, describes the age of contemporary music in his words:

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**“We now have not hundreds but perhaps thousands of rock bands in Bangladesh and their genre are as international as you want them to be – be it Thrash Metal, Progressive Rock, Hard Rock, funk, reggae and for someone like me – a combination of jazz-rock fusion – which allowed me to evolve and develop newer musical trends specially from our folk heritage– but all of it in the Bengali language”**

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**- Maqsoodul Haque, Founder President, BAMBA**

Post millennium, music in Bangladesh has gone through experiments in form, lyrics, venue, presentation- literally in every aspect of its being. Some of the notable bands of this era would be Artcell (Progressive Metal), Nemesis (Alternative Rock), Stentorian (Hard Rock/Heavy Metal), Arbovirus (Experimental, Nu Metal), Shunno (Pop Rock, Alternative Rock), Bangla (Folk-Rock), Black (Alternative Rock), Powersurge (Thrash Metal), Chirkutt (Fusion). The continuing list indicates the diverse genre of music finding their way in Bangladeshi culture. But has it been a standalone event? Has music continued to evolve (and still evolving) just by itself? Or has it been that with new genres becoming a part of the culture, new ways to create synergy with music have also emerged?

The next chapter talks about the ways in which transforming contemporary music in Bangladesh has been bringing other elements of the society together, with perfect harmony.

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<sup>2</sup> According to Bangladesh Bureau of Statistics Statistical Yearbook, 2015-16



## Music creating synergy – artists, consumers, government and business

Globally, the music industry has been uniquely placed to help each of the other media industries at crucial stages of their development. It has provided opportunities for synergy that have been exploited by radio, television and cinema and now by 'new media'. In 2005 the excitement in Bangladesh over the voting for 'Closeup1 Tomakei Khujche Bangladesh', a Bangladeshi reality television programme similar to American Idol, and the subsequent release of the winner's first single



Figure 3: Season 1 finale of Closeup 1 Tomakei Khujche Bangladesh

showed benefits for television, telecom operator and the music industry in general. The first season finale received 1.4 million SMS and online votes for the three finalists, also saw the winner Nolak Babu releasing his first solo album in 2006. An instant hit, the album helped Nolak Babu release 3 more albums within the next few months. By the 4<sup>th</sup> season, the show managed to gather 14 million SMS votes, multiple recognitions for the event organizers and a fresh lot of artists and albums in the music scene. In terms of building organizing capabilities, networking opportunities and revenue generation for partner organizations- such music events are a true representation of synergy.

Another instance of music creating synergy between consumers and businesses would be the FM culture revolution in Bangladesh. After the government of Bangladesh permitted broadcast of commercial radio stations in late 2005, FM channels exponentially increased their market size using 'on-request' music broadcast as a catalyst. This modality would cater to consumer need for exposure to wide genre of music at their convenience and interactive radio shows would accompany listeners almost everywhere. The SMS facilitated interactive shows opened up revenue generation opportunities for telecom operators as well. Radio Foorti, ABC Radio etc. soon rose to fame using music as the stepping-stone.

For the government, music helps create an identity of the nation. Although a small part of the overall entertainment industry, music industry is believed to have employed 0.3 million people in its various functions. Regional music tours help strengthen diplomatic relations with other countries. Music also helps express the key elements in our culture to a global audience, thus increasing awareness about the region and its offerings. According to the Ministry of Cultural Affairs, in fiscal year 2015-16, the government of Bangladesh has funded 29 cultural troupes representing Bangladesh in 23 countries. Post sudden rise of terrorist attacks in 2016, the transformative power of music is being utilized by the government to protect the youth from extremism.

Placing music in the centre, it can be demonstrated how it brings the different platforms together and creates synergistic value for all:



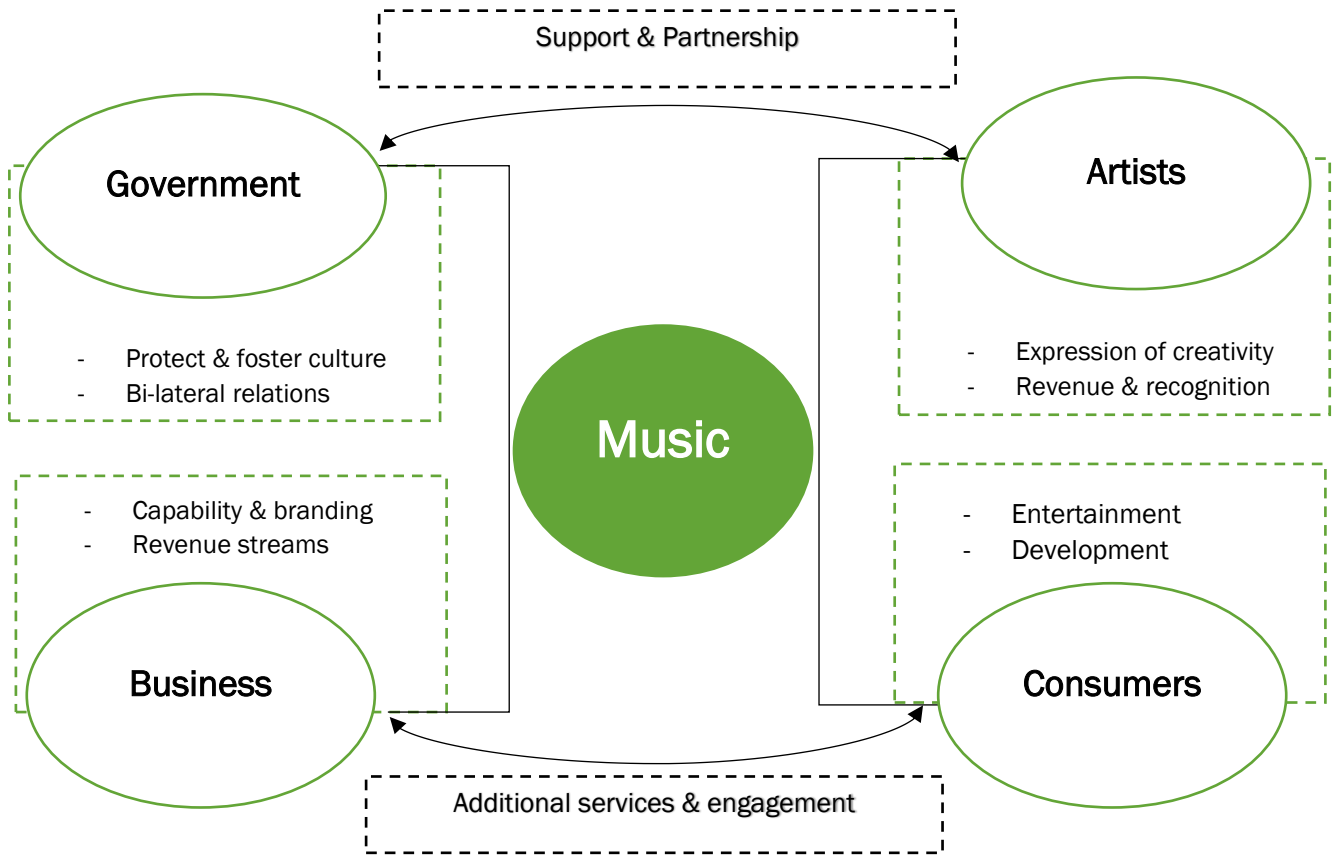


Figure 4: Role of music in creating synergy between different platforms

Generally speaking, music creates a platform for the talented artists to express their creative drive and passion while earning them fame and revenue in exchange. For the government, as it has been shown earlier, music paves the pathway to stronger bi-lateral relations with allies. Exchange of cultural views over music also helps opening up local culture to global standards. For corporations, sponsoring and organizing events have developed capacity and skills in arena. Music and artists have also proved to be a brilliant outlet for communicating brand messages to the mass. Reality shows, ring-back tunes (caller tunes), digital music streaming have opened up steady revenue streams for business organizations. And for the audience, music provides a channel for entertainment and self-development. As more innovative ways to experience music are coming up, the synergistic value continues to add up.

Now that the evolutionary journey and spread of music in other aspects of society have been established- the time has come to dig deeper and discover the woes and joys surrounding the essential elements that complete the contemporary music ecosystem in Bangladesh.

# Introducing the Contemporary Music Scene in Bangladesh: Insight into the Inside

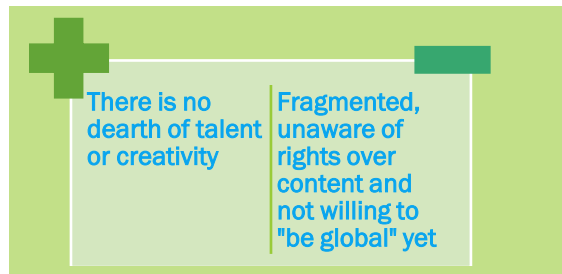
## Stakeholder identification and mapping

Contemporary music as an art form touches a lot of other industries and platforms, thus creating a complex ecosystem. The different types of services provided by different genre and categories of artists, multiple players in the ‘song creation and presentation’ value chain further add to the complexity. In Bangladesh, the stakeholder mapping can be done keeping music professionals at the heart of the ecosystem, funders and consumers in parallel and enablers and policy support providers in the periphery.

Following is a brief description of the key stakeholders, coupled with key challenges and opportunities facing each of these entities:

### I. Music Professionals

A song or a music performance usually is not a standalone creation. Although bands like Black, Aurthohin, Artcell usually take care of the entire music creation value chain on their own, there are plenty of lyricists and composers facilitating the solo artists, playback singers and also some of the bands. While majority of the playback singers have had their albums released, there are a good number of pop and folk artists who have reached out to their audience via live shows, concerts and recorded albums only.

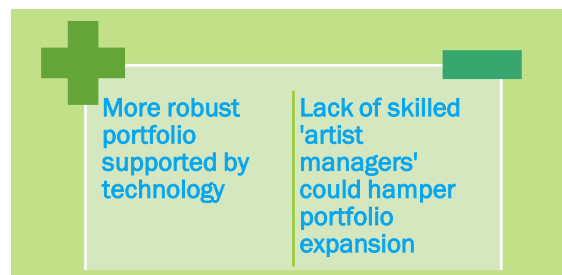


### II. Service Portfolio

Music professionals in Bangladesh reach out to their audience in numerous ways:

- Live shows on TV/radio, concerts, family or corporate events, gigs in music café’s etc.
- Recorded albums released by independent platform or record labels
- Playbacks for film industry or commercial jingles for TV/Radio commercials
- Brand endorsements

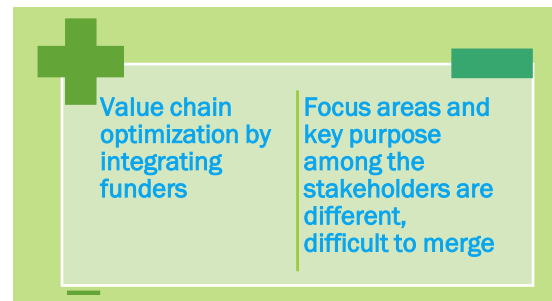
Like any other form of entertainment, front stage players get the attention and recognition while technicians and composers rely on their internal network to remain ‘marketable’. According to a survey done by Bangladesh Bureau of statistics, composers and musicians receive 50% of the fees when a famed singer performs in an event. The rest goes to the singer. Facing the need for digitization of music, record companies are switching to digital distribution of content, which is of course cheaper than physical copies of albums. As a result, artists are leaning more and more towards live shows, that pay a moderate amount at one go, instead of depending on royalties from recorded albums. Highly acclaimed artists like James, Tahsan, Shafin Ahmed has had worked as brand ambassador or spokesperson for several brands in recent times.



### III. Funders & Promoters

Music professionals have in general four types of revenue streams matching with their broad service portfolio:

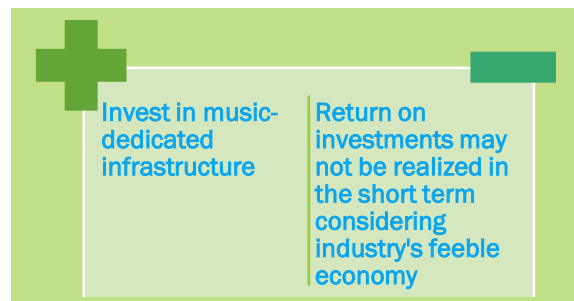
- i) Royalty from recorded content
- ii) Corporate sponsorship
- iii) Fees received from live show hosts (corporates, educational institutions, individuals)
- iv) Download or ring-back-tune revenue from digital platforms



Royalty over proceeds from recorded content and digitally distributed contents (downloaded songs, caller tunes) etc. usually come from the label companies. Big labels like G Series, GaanChill Music do just more than financing albums and disbursing royalties for artists. Since formalized artist management is missing from the scene, labels create and promote the brand personality around an artist, make them aware of their rights over recorded contents and work as a connector between the market and the artist keeping them aware of their true position in the economy. Big corporate houses in the country typically provide sponsorship and fund live shows. They would associate their brand with the events and artists and increase the mind share for their brands, while supporting the artists financially. Caller tunes consist of 2% of the industry revenue, however the payment modality favours the telecom operators more.

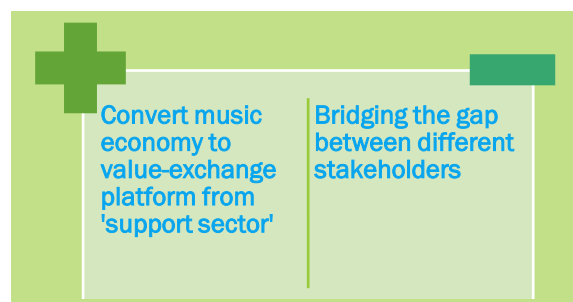
### IV. Infrastructure Providers

Supporting the service portfolio are different platforms like media, agencies and venues. Although media's key role is to promote the music scene, television and radio and in some cases digital media (YouTube live shows, Facebook live videos) work as infrastructure providers as they lend their facilities for performing music. The increasing importance of live shows has expanded media's role beyond its traditional responsibilities. Recording studio, instruments etc. are provided by label companies and the few recording studios, located mostly in the capital city. Apart from these, a unique agency like LiveSquare provide logistics support, technical expertise and enhance capability of local artists by sharing learnings from regional tours. Bangladesh has a dearth of dedicated venue for music. if not zero, and cultural institutes, community hall owners, restaurant owners etc. are the common venue providers supporting musical performance.



### V. Support Providers

Lastly, the music ecosystem in Bangladesh has policy level supporters in the form of government, music associations (BAMBA, BCIPF etc.) and foreign cultural institutions. Each of these entities' cultural focus and policies impact growth of music economy within and outside the country, regional collaboration prospects, and lastly IP rights implementation.



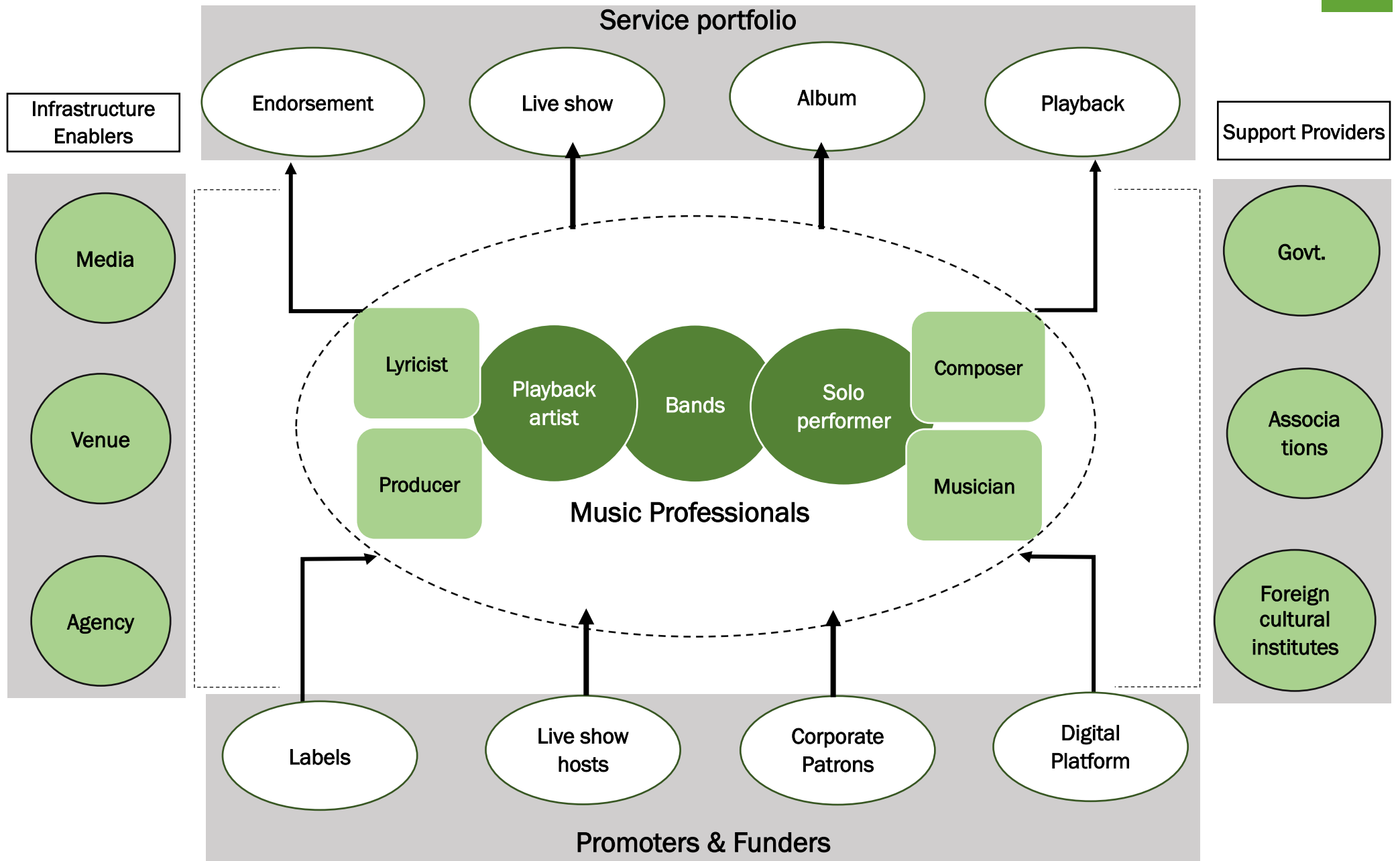


Figure 5: Stakeholder mapping of contemporary music scene in Bangladesh

## Unearthing the enablers: key issues surrounding the ecosystem

The ecosystem built around contemporary music is one of a kind with multiple enablers shaping the industry. How music is experienced, artists create and manage a brand image, how media outlets promote the world of music and what role government and corporate backing play to improve the ecosystem- the following sections explore the answers to these questions.

### Recorded Music vs. Live Music value chain

Based on the activity, the existing value chain in the music industry can be broadly divided into two chains:

#### I. Recorded Music Content Value Chain

This value chain is push driven towards the music listeners and the music content consumers through two major sources: Streaming and Non-streaming sources. Since the advent of social media has a strong presence among Bangladeshis, most of the music lovers consume contents using social media streaming services. Interestingly, the use of traditional media, like Radio and TV, has been declining ever since the streaming media have emerged. However, these music contents are basically recordings of various local and international artists done either by the artists themselves in their independent or rented studios or by the label companies. Ideally artists receive 50% of the proceeds from recorded contents, but declining physical distribution and lower profit margin on digital distribution are forcing the labels and the artists to choose new platforms to sustain.

#### II. Live Music Consumption Value Chain

This is more of a mix of push and pull driven value chain. When it involves live performances of local favourite artists, it is pull driven – consumers prefer attending live shows where their favourite music is played by their favourite local artists in front of their very eyes. However, it is push driven when it involves foreign artists since they are contacted and brought in front of the live audience by a third party event management agent or sponsors. Here, music lovers’ tastes and choices are preferred but they do not have any direct control to choose which foreign artist they would like to see perform live.

Music lovers in Bangladesh have a variety of options for a live show/event:

	Open Air	Indoor	Music Café
<i>Plugged</i>	✓	✓	✓
<i>Unplugged</i>	✓	✓	✓

While the reach of recorded contents are almost everywhere in Bangladesh, considering the socio-economic disparity in local regions, live music platforms are mostly Dhaka centric. Sporadic concerts and live shows on television or radio are all music aficionados living outside get. Off late, some initiatives to expand its scope beyond Dhaka are being taken. However, creating that atmosphere, investing on infrastructure and ensuring artists’ mobility could impact the progress being made in this arena.

These value chains indicate a robust music scene in Bangladesh. However, these value chains are not fully functional as coordination among the players are very weak and in some cases, does not exist.



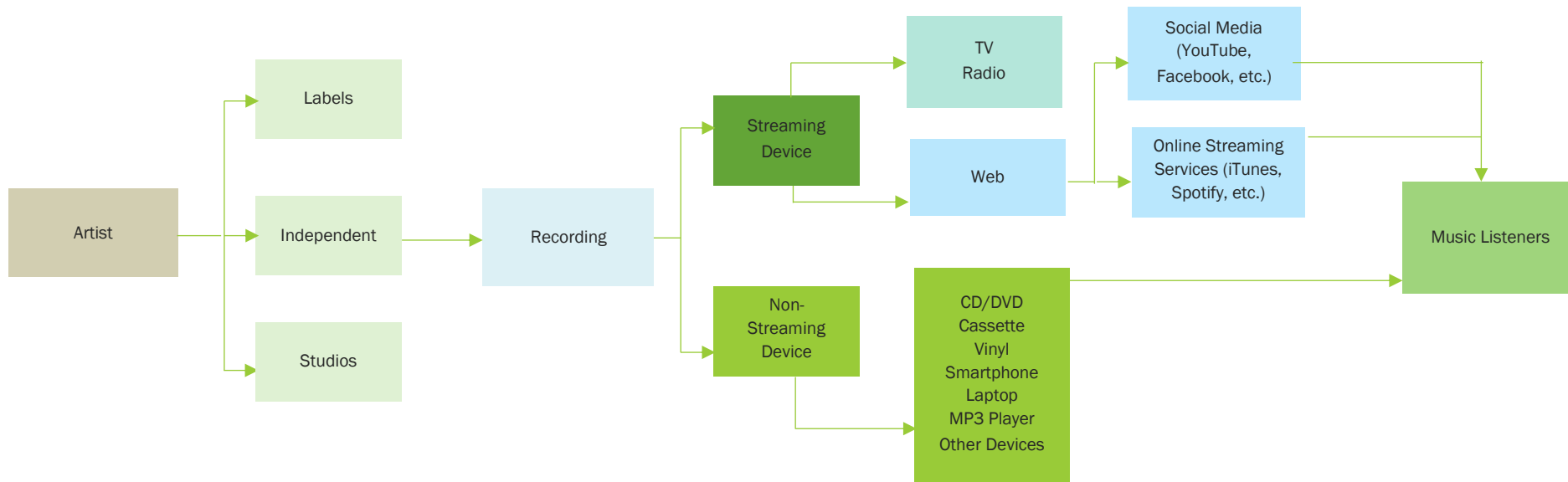


Figure 6: Recorded music value chain in Bangladesh

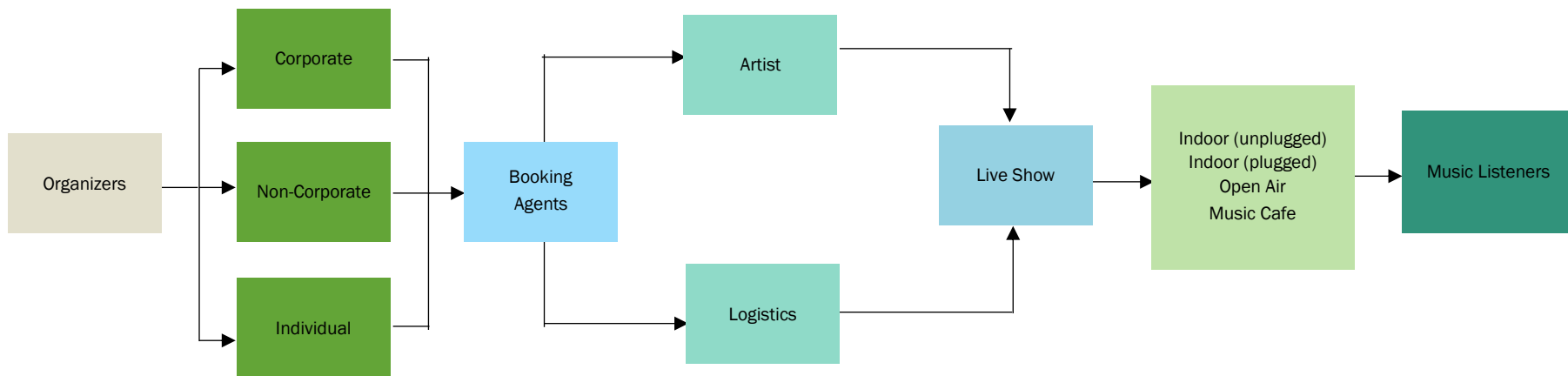


Figure 7: Live music consumption value chain in Bangladesh

## Artist Management Practices relative to global practices

In the digital era, the label-artist relationship continues to evolve, but perhaps the most unexpected factor is the increasing importance of third parties: management and other forms of artist representation. At one point, the industry might have referred to them as “middlemen,” but they’re not merely liaisons between artists and labels now, if they ever were. On an indie level, booking agencies, publishing companies, and publicity firms have begun to wield a greater influence as industry-savvy DIY artists seek out allies to navigate the business end of their careers. Even for receiving exposure via concerts and festivals, there are agents looking into connecting the events to the artists in a seamless manner. In this aspect, globally established value chain is as such:



Figure 8: Music festival booking value chain

In Bangladesh though, majority of the organizers get in touch with artists through personal contacts, while the rest usually contact the artists directly. This shows that contacting is still done on a personal, mostly one-to-one basis; most of the time there is no middleman as only 10-15% of the organizers contact artists through managers. It should be also noted that some of the organizers contact artists through other organizers. This further emphasizes the close-knit nature of the event/ festival organizer community in Bangladesh. This also tells that artist management in Bangladesh is at an unstructured stage. At best, some bands will have a few ‘roadies’ working as their tour partners and doing menial jobs for the group. Now that the industry is slowly becoming more competitive, why is there still a gap in ‘formalized’ artist management? The reasons are two pronged:

- **“We have had issues handling money via managers before”**

The artists cite trust issue as the key obstacle keeping them away from professional managers or agents. Some of them have had bitter experience in the past booking shows or handling money with their managers. With a middleman, transparency in negotiating concert or live show fees gets affected and since this is one of their key source of funding, artists would rather take care of these issues by themselves. Also, the payment received from shows is not that high to allow more incumbents to have a share in it.

- **“The financial prospect simply is not motivating enough”**

On an average, a popular artist receives USD 250 for performing a song. Factor in the rising cost of living, sharing these payments with a manager becomes difficult for most artists. To provide top notch service without looking at the clock and for a very low pay cut given the low-paying music economy in Bangladesh- does not motivate most skilled resources to consider this as a viable career option.

Because the Bangladeshi artists are mostly managing things on their own, they are not being able to scale up. They are also not being able to truly optimize on their opportunities to go global. All of their effort goes into maintaining the status quo. The music scene in Bangladesh is therefore at a standstill. Nafis Ahmed, CEO, LiveSquare entertainment sees this as a prerequisite for going bigger in global arena.

**“In our current state, formal ‘artist management’ is not really required that much. We are doing okay. However, if we want to**

***increase our presence in international events, some mode of managing artists' interests should come into the picture"***

- Nafis Ahmed, CEO, LiveSquare Entertainment

Off late, some labels in Bangladesh are gradually venturing into managing public relations, fund collection and disbursement for the artists. Gaanchill Music, one of the leading record labels in the country, is transforming into an integrated music entertainment entity in the creation, production, distribution, licensing and marketing of all forms of music entertainment for its artists. The largest label company in Bangladesh, G Series is also managing their artists' royalties, brand building and promotions in addition to their regular services. These initiatives by established labels are encouraging for our ecosystem. But comparing Bangladesh's status quo with developed music economies- the road to being a more 'streamlined' sector is still a long one.

## **Music finances: How it works and for whom**

The financial prospects around music in Bangladesh are not that good- this has been touched upon earlier in this report. The sources and modalities of music finances require a much deeper look to realize the underlying causes and their far-reaching impacts.

For the creators and performers of music, revenue streams are three-pronged:

- i) **Royalty:** In theory, a 50-50-royalty payment mechanism exists between artists, composers and the record labels. However, reality is quite different. Most labels 'buy' the rights to distribute, sell and make money from songs with an upfront payment to the artists. A study conducted by Bangladesh Bureau of Statistics in 2014 found average recording costs to be around 400 USD. Buyouts of rights on the other hand range between 1000-1200 USD for prominent artists. As physical distribution is being replaced by digital streaming and caller tune services- a part of the subscription fee is shared with the labels and artists as royalty payments. The process is not always transparent and cash dependent though. According to industry insiders, instead of cash or checks, labels sometimes pay up their artists by giving them car, apartment and other high value durables. This fosters better bonding between the entities and in a way compensates the artists for their creative work. Poor implementation of copyright laws, lack of transparency, lower bargaining power of artists and composers – all of these lead to a complicated yet weak royalty mechanism in the industry.
- ii) **Proceeds from live shows:** Fees for performing in live shows vary from one artist to another. Since artist management is done on a DIY basis, there is no set rule to the fees charged. On an average though, a popular artist receives 250 USD while the composer, musician, instrument players receive another 250 USD in total for their hard work in live shows. From one medium to another, these rates vary and sometimes these vary frequently from one gig to another.
- iii) **Brand endorsements:** Corporate outlets time to time employ artists for product or PR campaigns. These fees remain largely undisclosed and work in the form of contracts. Given the nationwide craze around cricket in Bangladesh, cricketers are the top choices for celebrity endorsements. Only a handful of singers and composers get to affiliate themselves with consumer brands and corporations.

Despite the revenue prospects being quite limited, government of Bangladesh levies 30% tax duties on singers' income. Other than a few government-backed festivals, most music events are subjected to VAT and duties as well. Depending on music finances as a result is not enough.

Most major artists, lyricists and composers in the industry, particularly the ones working in contemporary music scene employ themselves in other professions and performing music becomes a part-time job for them. Khademul Jahan, the popular guitarist of band Black and CEO of G-Series sees this as the prime reason for not having explorers seeking diverse career options in music:

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***“The music economy is very small in Bangladesh. And since singers and composers get all the attention, and the rest of the players in the music creation value chain do not- youngsters do not venture into other possible career opportunities in music- mixing, mastering, music graphic designing for example”***

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- Khademul Jahan, CEO, G-Series

## Role of Media in promoting music

Media is an extremely important tool for musicians and music professionals alike to reach out to their fans or end customers. In Bangladesh, since music promotion and management is almost DIY, role of media in enhancing industry value becomes even more important. Also, music is indeed a popular form of entertainment adored by millions in Bangladesh. So it is only common that all media outlets- print, TV, radio will have columns or airtime dedicated to music almost every day. However, whether traditional media does justice to the music professionals- that remains debatable.

Assumption #1: “Taken things out of context, we often get misrepresented”

Too many times poor journalism has resulted in embarrassments and agony for the creative minds in Bangladesh. Progressing with the advent of facebook in Bangladesh in 2007, click bait news links are intentionally being designed to stir controversy. However, misunderstanding and misquoting artists is not uncommon in mainstream, credible media outlets as well. Proper representation of an artist’s opinions is primary a journalist’s duty. However, the artists have something to do in this regard as well.

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***“To avoid getting misquoted or misrepresented, I get the journalist to share the article before it is published and then I review and okay it”***

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- Mehreen Mahmud, Pop singer with 20+ years of experience in the industry

While artists agree on the point that media does have an important role in ensuring their visibility and thus mind share – whether it is a necessary evil or a blessing –they remain divided in their opinions on this issue.

Assumption #2: “The prominent artists keep getting featured”

Traditional media, particularly newspapers are alleged to have featured prominent, mass-friendly artists to their readers in the past. When the industry was still quite small and 10-15 popular names would frequently be featured in the media- this assumption would hold back then. However, as many new bands and solo artists are joining the industry almost every other week, it is important for them to get enough exposure in the beginning phase of their careers. A snapshot


from entertainment section of the Daily Star, the leading daily newspaper in Bangladesh, shows that with veteran artists, newcomers do get featured in their platform, that too on a regular basis:



### A chat with The Morse Code

It is never easy answering this question. The Morse Code is a group of people who met for the specific purpose of creating music — music that we didn't know existed or that we were capable of creating.


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### Celebrating Life 2016 Lifetime Achievement Award Winner Alam Khan

The veteran composer has been around in the industry for decades, showering the audience with beautiful melodies throughout his career. Some of his notable works include composing for “Ebadat” and “Ke Apon Ke Por” among many others.

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### A Chat With DOOB

We would define Doob as half of all our hearts. We want to do music that is so simple that it would touch everyone at their core. You could say at Doob, we don't have plugs.

Figure 9: New and upcoming bands get featured along with industry veterans quite regularly on The Daily Star

However, comparing frequency of mention, the bigger brand names in the arena do get an advantage. Also, followers in the market do not venture out to support newcomers. They keep highlighting the events and achievements of major brands (combining bands and solo artists).

**Assumption #3: “Radio broadcast does not have to pay”**

The privatized radio channels got famous using ‘on-demand’ local and international tracks as their stepping stone. However, the industry is now demanding that radio channels should pay royalty for playing their songs on air. Radio shows do promote new songs and demand more current contents than other media channels – thus contributing to the music industry. But industry standards from US and Australia indicate that role of radio does not stop here. In US, a non-profit named BMI has been working quite rigorously to make the radio channels pay their dues to the artists and succeeding so far. In Australia, radio channels make monthly payments to separate platforms – one for the artists, one for the labels. It costs around USD 4-5 to play a complete song on air.

A quick check of some of the assumptions regarding the role played by the media indicates that bulk of the assumptions do have a solid foundation. There is a disconnect between traditional media and the artists. This is hampering the music scene. Also, the country lacks enough music critics and journalists who would provide their expert opinions, create a discussion for relevant stakeholders and help the artists improve themselves. Considering the small contribution music makes to the overall entertainment industry, music journalism has not been considered a viable career option in this region.



### Corporate patronization – impact and to what extent?

The days of musicians earning money from record and merchandise sales are dwindling, that has already been established. In Bangladesh it is evident that, musicians are now turning to brand partnerships in order to rake in some income while music labels take a back seat.

Corporate backing found its way in Bangladesh in the form of free or sponsored concerts. British American Tobacco has been the pioneer in this arena with concerts (Ampfest, Live & Acoustic), Benson & Hedges Star Search competition (1999-2004) which would also work as a media for attracting potential consumers. Then came the surge of telecom operators who would launch

contests with various artists to promote a new service and sponsor concerts in educational institutions and known youth hubs in the country. Free cultural shows became a part of promoting youth festivals and competitions



Figure 10: Band Chirkutt performing in Celebrating Life Campus Festival in Sylhet

across Bangladesh

as well. One example would be Celebrating Life campus festivals sponsored by Standard Chartered Bank Bangladesh and the Daily Star. Running for 9 years since 2008 now, the youth competition has utilized sponsored shows as a means to promote participation among youth and spread the brand message in an engaging environment. Lately Robi Axiata Ltd. is hosting music shows in different restaurants in its primary market Chittagong to boost its loyalty program 'Dhonnobad' (Thank You platform).

While these events make music and artists more accessible to their fans, this has its demerits as well: Having free access to music creates the habit of not paying for contents or performances. Though it adds to brand synergy in the short run, the loss of willingness to pay for art ultimately results in poor infrastructure and decreasing investments to the industry.

At the same time, using their fandom, different corporate houses in the country are signing up senior and young artists as brand ambassadors. In the past couple of years, Bangladesh has seen industry veterans like Runa Laila promoting ACI consumer goods<sup>3</sup>, pop-artist Tahsan as spokesperson for GP Music<sup>4</sup>, lead vocalist of band Nemesis- Zohad as brand ambassador for fashion brand Cat's Eye and the list could continue further. These avenues have opened up more revenue streams for Bangladeshi artists. But does it actually dilute their own brand and artistic personality or help them boost their career? The sector remains divided on this issue.

<sup>3</sup> ACI is a leading fast moving consumer goods manufacturer in Bangladesh with wide presence in agro-input, pharmaceuticals industries as well.

<sup>4</sup> GP Music is the music streaming app launched by Bangladesh's telecom market leader Grameenphone

In other words, sponsorships are bridging the revenue gap that has become evident with dwindling CD sales and less-than-meaningful micropayments from streaming services. But too much commercialization of art forms do come with a cost. It demotivates consumer investments to the industry and can make artists lose focus. A lot of Bangladeshi bands and solo performers have been criticized over time for being “too commercial” in their latest endeavours because strong association with corporate houses resulted in them shifting their focus.

### Conservative vs. Liberal culture: can east ever meet west?

The year was 1967. Famous Sitar virtuoso Ravi Shankar partnered up with his friend Yehudi Menuhin, the American violinist to record classical music using ‘western instruments’ in their album ‘West meets East’. Topping the Billboard’s chart immediately, the album went on to having two more sequels and became the fastest selling LP in the history of the label, Angel Records. There have been many instances since these albums, where the puritan classical forms of music took inspiration from the ‘liberal’ western culture and the outcome was something extraordinary.

The Shakar-Menuhin album created a genuine interest regarding classical music and its elements among the western bands and artists. However, the opposite scenario has not always been this favourable. To date, there is a discord between the two cultures and lack of acceptance of liberal genres among the classical veterans. In Bangladesh, the population mean is 26 years with youth share to the total population further increasing. The tech-savvy, globalized youth prefer mingling of cultures and modern renditions of music. On the other hand, classical art forms receive more support from the government than its liberal counterparts. This mismatch fuels the ever-raging debate of modern genres (rock, pop, metal, electronica, jazz, blues) being anti-cultural and destroying the youth and society of Bangladesh.

Classical veterans of Bangladeshi music scene feel the youth is deviating from Bangladesh and Bengali music’s rich heritage with the advent of ‘westernized’ cultural elements. A person has to invest time and interest for learning classical- the taste is an acquired one. Since the millennial generation keep listening to aggressive music that has no association with local culture, they are affecting sustainability of classical music. However, the attitude towards western inspiration to folk or classical music is not entirely negative among the classical enthusiasts. Khairul Anam Shakil, renowned Nazrul singer and General Secretary of Chhayanaut (a cultural organization devoted to preserving local music and dance forms) thinks:

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***“What we have in the name of fusion is mostly anti-cultural initiatives. When Rabindranath Tagore or Kazi Nazrul Islam took inspirations from Scottish, Arabian music- that didn’t sound out of context. The songs and tunes they created still had a Bengali essence to them. In Bangladesh, I do not think we have that kind of content being created by modern artists. However, Joler Gaan is doing well in terms of creating fusion music which is commendable”***

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- Khairul Anam Shakil, General Secretary, Chhayanaut

New generation artists who have rose to fame covering famous rock or metal songs in English or have taken inspirations from the likes of Iron Madien, Metallica, Bob Dylan- seem to consider themselves marginalized and often unduly criticized by cultural elites in the country. While they take pride in their work and contribution toward the culture, they feel their work do not recognized on a national level, as it should. Representing traditional music with a touch of fusion creates a question of ‘legitimacy’, just too often. They believe by drawing in inspirations from

other cultures, they are making the local culture richer. Interestingly, young classical enthusiasts also show a positive attitude towards 'keeping up with the social trend'. Promising Tabla player Mir Naqibul Islam says:

***“In order to draw in audience, we need to give them what they want. With our show ‘Raaga and Rhythm’, we have given it a trendy name, the tickets are sold online and looks modern. The content inside is purely classical. But we are repackaging it as per consumer’s taste”***

- Mir Naqibul Islam, Aspiring Tabla Player

## **Role of the Government**

Government regimes in Bangladesh have so far been a barrier to promoting contemporary music. Government funded cultural tours heavily feature classical or folk singers. Institutions promoting classical music actively receive support from government. On the contrary, promoting contemporary music here or outside the country has been a DIY scenario. If anything government officials have deemed this form as 'anti-cultural'. Off late, it is neither acting as a supporter, nor is it creating an obstacle. Anything that is not considered as 'part of Bangladeshi culture' is defined as entertainment and duties and taxes are levied on it accordingly. But the government has to move away from its current stance on this issue and create the bridge between two art forms. With so much disconnect, neither of the art form can progress further.

## **Acceptance of Civil Societies**

As was mentioned before, the cultural elites have not been in friendly terms with contemporary music forms. Any attempt at fusion has generally been criticized heavily in mainstream media. However, there has been a wind of change with more exposure to international artists and musical groups. Experimental performances featured in classical shows (Bengal Classical Music Festival for example) have been received positively in recent times. Somewhat favourable attitude towards a handful of contemporary music endeavours also point to a transformation gradually taking place in conservative culture.

As these issues continue to shape up the journey of contemporary music in Bangladeshi culture, new trends emerge as a natural part of evolution. Consumer segments are more varied than ever, female participation in the industry continues to power through obstacles, live music gains momentum and music spreads over other entertainment mediums – dance and theatre most particularly. An analytical dissection of these trends clarifies the status quo of contemporary music further.

## **Current trends driving our music scene**

### **Segmentation of different groups of listeners**

A consumer level analysis done with 120 respondents for this report showed, average music listeners in Bangladesh are male, fall within the 21-30 age group and have less than USD 200 monthly income. This suggests that majority of the music enthusiasts in Bangladesh consists of male urban youths, most likely university students, who lean towards cost-saving options for enjoying music. Factoring in different classifying variables, music listeners in Bangladesh seem to show distinctive pattern in three major aspects:

I. Language & genre preferences

Both male and female respondents show a strong preference to music in English language. However, it should be noted that majority of music in English language listeners consume through streaming and non-streaming methods, not live concerts. Pursuing avenues such as merchandise, CDs/DVDs and streaming services for English music can capture this market segment. Also, the most popular genre of music is Rock/Alternative Rock (20%) followed by Pop (12%).

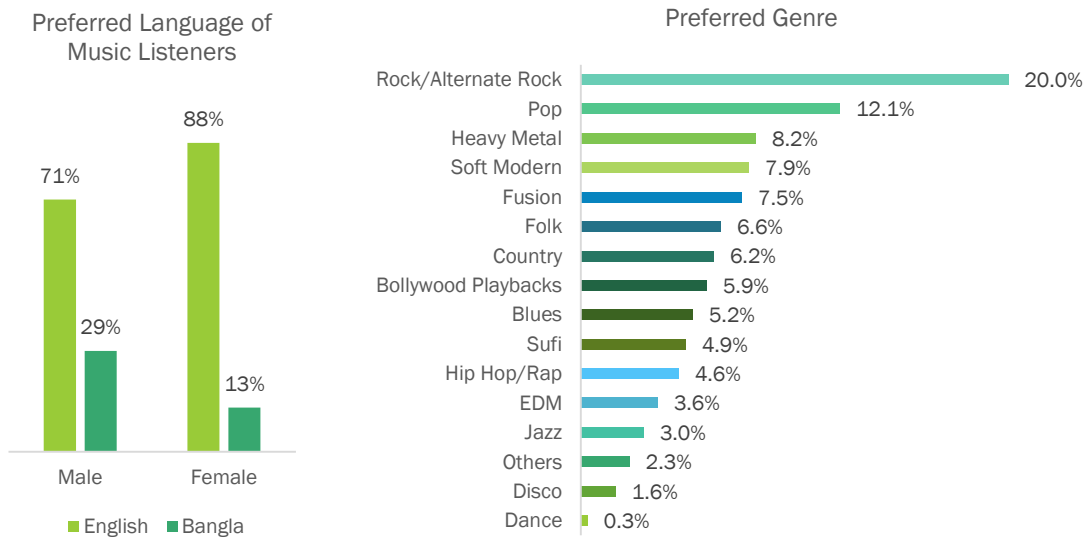


Figure 11: Bangladeshi listeners prefer English songs, preferably rock/alternative rock songs

II. Recorded music consumption preferences

Streaming is the most preferred method of music consumption for all gender, age and income groups. This reflects how the current urban lifestyle has become highly smartphone centric – most people prefer listening to music on the go with their smartphones and tabs, using streaming services such as YouTube to access music content. However, much interestingly, non-streaming methods (such as CD, DVD, and Vinyl) is still preferred by 50% of the female respondents, who mostly fall in the 21-30 age group and BDT 15,000-25,000 (USD 200- 300) income group. This suggests that female groups are still slow to catch up with the technological advancements leading to the change towards streaming content, and also that wealthier income segments also prefer having physical collection of their music.

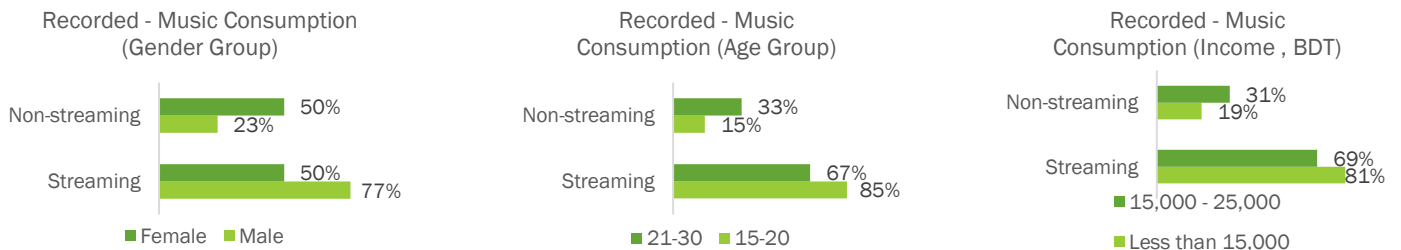


Figure 12: Teen-age, male listeners prefer streaming more

III. Live music consumption preferences

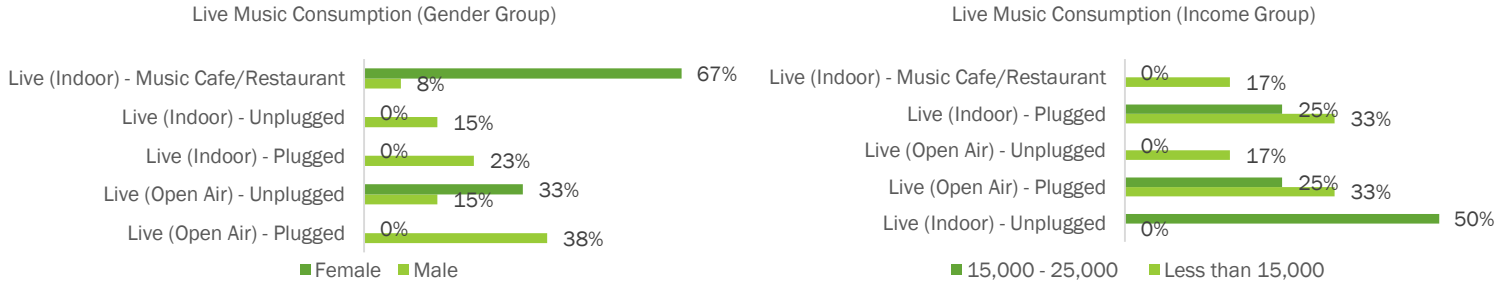


Figure 13: Female listeners prefer indoor shows, while male listeners interests are varied

Females are mostly comfortable with Live Indoor shows in music cafés and restaurants (67%) and it is quite obvious as there are security concerns for females in the outdoor shows, while their male counterparts find it not quite interesting (only 8%): They prefer live plugged shows both indoor and open air. Again, when the income groups are considered, higher income earners prefer live plugged shows (66%).

The important considerations affecting live show consumption can be grouped as various categories: convenience factors, quality factors and environmental factors.

Convenience Factors	Quality Factors	Environmental Factors
Ticket Price	Perceived Value of the Artist/Band/Performance	Occasion/Festival
Location/Distance of the Venue		Socio-Religious Factors
Mode of Transportation to the Venue		Political Unrest
Size of the Venue	Reputation of Organizer	Weather Impact on the Venue
Wi-Fi (Internet)		
Parking		
Usable Washrooms		
<b>55%</b>	<b>24%</b>	<b>21%</b>

Figure 14: Consumers look into convenience first, quality later for live shows

Collectively, convenience factors rate most highly. Of these, ticket price is the most important factor (18%), reflecting the reality that most of the concert goers have low disposable incomes and thus are price conscious. Quality factors are the next highest rated group. Here, perceived value of the artist/band/performance ranks the highest (18%), indicating that concert goers have developed tastes and preferences, showing strong brand loyalty for their favourite artists and bands.

The major segments identified here exhibit, that Bangladeshi music listeners are mostly cost-conscious, convenience seeking consumers with a wide range of interest in music. English and rock preference for music consumption indicate at the need for international quality content creation in the country. It also indicates that, Bangladeshi youth is truly becoming global citizens not staying limited to their local culture and language for music. Also, the future of streaming and possibly adequately paid streaming seems quite bright in case of Bangladesh.



### Incremental female participation in the music scene

There was a time when female artists would mostly just sing, be it in movies or in live shows. And they would be solo performers. Though the region had a few instances of female artists joining their family bands and performing in the clubs before 1971, post liberation band scene was mostly male dominated. With the exception of Georgina Huq, the country’s first female drummer who did the one show with a band named ‘Spandan’ back in 1972- female participation in music was mostly limited to being the singer. But the scenario has slightly changed. Bangladesh now has multiple bands with female vocals (Chirkutt, Lalon etc.) and artists like Tishma, Mila have ventured into composing, song writing as well.

These encouraging transformations are happening at a miniscule level however. Female listeners of music prefer to enjoy live shows-indoor. The venues hosting live shows do not always have adequate safety and hygiene facilities for females. Although there is a good number of female singers, female



Figure 15: Band Lalon performs with female vocal in the middle

participation in other areas of music creation and promotion is almost zero. There were attempts at all-female bands (3 Huq sister’s band in the ‘70s, Angel 4 in the ‘90s etc.) but none of those ventures lasted long. There are socio-cultural barriers that might keep women away from venturing into music and its other phases of value creation. Although the country has been governed by female Prime Ministers since 1991 (and as of 2017), the cultural sector is somewhat male dominated. Being associated with bands is often frowned upon and for females- the environment extra difficult. Prior to shows, rehearsals take up a good chunk of artists’ time. Despite these barriers, with their mesmerizing voices and true professionalism, bands like Runa Laila, Sabina Yasmin were formed and they became known as ‘artists’ and not ‘female artists’. This level of professionalism and dedication, could see more and more female exploring the music scene and taking this up as a viable career. The female lead from band Chirkutt, Sumi explains her experiences in entering and sustaining in the musical atmosphere:

**“Although I joined the band (Chirkutt) in 2002 I did not understand the meaning of ‘brand’. In my case having work experience in ad agencies helped learn things better. I did not get much help prior to that”**

- Sharmin Sultana Sumi, vocalist & lyricist, Chirkutt

### Contemporary music: Beyond commercial value

Since its early days in Bangladesh, contemporary music has been considered devoid of artistic values in the conservative society. And yes, despite the obvious limitations, a career in music still comes with certain perks. One hit song or an album puts an artist on everyone’s radar and until

the fame fades away, media and mass attention does seem attractive. But are the artists really in it for the glory or the money? Does contemporary music add anything to the society moving beyond commercial concerns? Take early bands in the music scene- they faced the backlash that came with a just liberated society, wrote songs on critical social norms and events, self-financed their early gigs and continued their battles until a positive change came along. Haider Hussain's songs illustrating social injustices, songs on human stories crafted by Joler Gaan- these prove the claim that the themes associated with contemporary music occasionally reflect important cultural or social concerns, greatly enhancing its artistic merit and educational value. And while many adaptations of past masterpieces today incorporate dubious musical processes or techniques, destroying the beauty of the original products, there are quite a few success stories in remake as well. Folk fusion, using modern instruments to play Tagore and Nazrul songs, have received positive acceptance in almost all walks of the society. Additionally, when most musicians have developed their career in other professions to earn livelihood, enthusiasts risking it all for the love of music are not rare in the country as well. Md Enamul Haque Omar, one of most popular and praised tabla players of Bangladesh does not regret leaving a safe and secure career in finance to devote his attention to music for a minute:

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***“Quitting my bank job and taking music as a full time profession was the toughest decision I have ever made, but it was the best decision”***

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- Md Enamul Haque Omar, Renowned Tabla player

In a few decades, Bangladesh has seen the emergence of quite a good number of musical families extending the love and passion for music from one generation to the next one. Generation Y and millennial generations of these reputed families are drawing inspirations from their predecessors, creating their own tune and leaving a unique impression of their new genre of music. Habib Wahid, Shafin Ahmed-Hamin Ahmed duo from the band Miles, Bappa Mazumder, Alif Alauddin – the list of new generation joining the music bandwagon would just go on and on.

Do they pursue for the same sentimental reasons their parents did back when the ecosystem was just developing? Habib Wahid, the celebrated composer-singer son of pop icon Ferdous Wahid sees a combination of passion and work in music:

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***“Music has crossed the boundaries of passion. Sometimes, I feel it is my work. Then I pause for some days, and again I feel the connection”***

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- Habib Wahid, Renowned composer-singer-musician

### Exploring the live music scene

Piracy and recently digital distribution of music have caused the downturn in record sales worldwide. In Bangladesh major record companies who can enjoy the benefits of economies of scale, even they are suffering as pirated and 'online' contents are affecting their physical distribution of records. Khademul Jahan, CEO of G-Series points out the challenges faced by record companies to be a sustainable source of revenue for artists:

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***“Above the costs of making a CD, we can only add a minimal markup to stay floated. Pirated contents destroy billions of taka in revenue for us. We also have online contents now. Why would consumers pay 3-5 times extra for physical copies then?”***

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***As label companies we have to invest in and promote albums mostly by ourselves. And not necessarily all investments generate profit. The shrinking record business is forcing artists to look for other alternatives”***

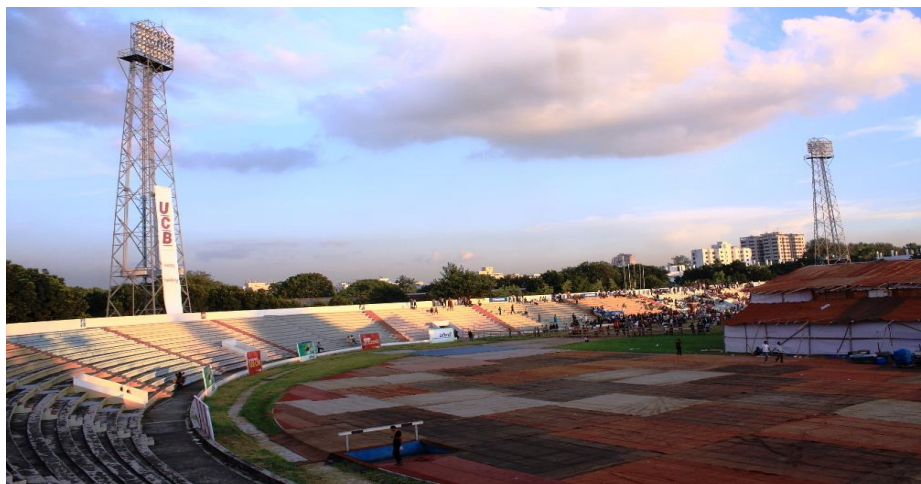
-Khademul Jahan, CEO, G-Series

Faced with all these challenges, in Bangladesh the importance of live music scene is increasing exponentially. Its ‘stream-savvy’ population also shows high levels of preference for ‘convenient’ live shows.

### ***Increasing importance of venue in the live music sector***

Most of the popular bands in a music scene would have gone through at least one of the major venues in the country in the rise of their career. They did not just start out playing to thousands of people in arenas.

Without these venues, bands and artists wouldn't have the platform they need to actually get their music out there. In the long run, that could be the death of live music or at the very least, the death of new music. Social media can only do so much, but bands need to be seen live to really connect with people.



***Figure 16: Difficulty in getting permission to host shows in an undedicated venue like Army Stadium hinders the growth of live music economy***

Being internationally categorized as a developing country, Bangladesh has infrastructural issues in almost every sector. However, the situation is not as grave as music-dedicated venues for any other sectors. Bangladesh Army Stadium is the only place suitable for open-air concerts. Yet it is very difficult to get permission to host shows there. A Bangladesh Army concern, the stadium is rented out for fairs, football matches, and corporate events- literally just about for anything. Having only one open-air venue in the entirety of Bangladesh, and that too being not dedicated to music creates problems.

Fortunately, there have been institutes like Russian Cultural Centre, which helped the underground movement significantly by lending its physical premises to up-and-coming bands. Lalon band's Drummer Titi asks-

***“If only one venue like Russian Cultural Center could help create 20+ bands, imagine how many more we could have if we had enough, decent venues in friendlier terms with us”***

- Thein Han Maung (Titi), Drummer, Lalon

Television and radio channels in Bangladesh also work as venue providers for live shows. Unfortunately, the standards are not up to the mark in those places as well. Bass music is often heard properly due to poor sound quality of television studios. The music economy has not been



able to attract investments in club or music dedicated club scenes as well. In India, a music focused club named 'Blue Frog' is gradually gaining momentum which requires visitors to pay entry fee, showcases sponsored advertisements and hosts bands covering original songs 6 days a week. Despite the heavy investments made to its sound and visual systems, and increasing presence of listeners, the principal revenue source for Blue Frog is proceeds from liquor sales.

In Bangladesh, consumers are not willing to pay premium to listen to their favourite artists; they are used to 'free entertainment'; and liquor cannot be a part of club scene like it has been in India due to active prohibition on consumption and sales.

Amidst these challenges, the 'Jatra Biroti model' could be one possible way out for having more venues available to artists. In recent months, the fashion house has utilized its available shop space to hold 'mini-concerts' selling as many as 3000 tickets to date. Priced around USD 5-8 per ticket, these shows would allow the audience a sneak peek into



*Figure 17: Paid jatra -Biroti shows are capturing interest from locals and foreigners*

music jamming sessions of their favourite artists. These micro level initiatives have been working out and could go bigger with proper government patronization- so is the sector's expectation.

**Independent paid platforms vs. brand driven free platforms**

It has already been established that corporate houses, in order to boost mind share of their brands, are utilizing the fandom of music professionals and running mostly free or highly sponsored shows in a frequent manner. On the other hand, there are a few restaurants and cafés in Bangladeshi urban scene that are unbranded paid platforms –not entirely dedicated for music- and run via audience patronization. While free platforms are short-term solutions for artists facing challenges to sustain from album proceeds, this does not result in long-term equity for the music sector. Independent and paid platforms on the other hand need significant amount of investments for increasing 'quality and convenience of the shows' and the economy is still not that big to attract enough investments. Amidst the uncertainties, Jatra Biroti model's success factors could be replicated to skew the situation in favour of paid platforms.

**Importance of music in dance and theatre**

Music is not a standalone art form. It becomes an integral part of expressing tone or moderating other performing art forms- dance and theatre. In Bangladesh, both art forms are dominated by music as dance choreography or the message being communicated by theatre-everything depends on the lyrics, rhythm and tune on music.

***The complementary roles of music and dance***

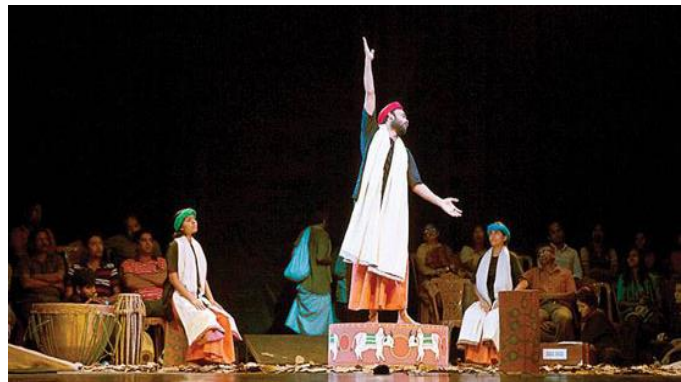
It is usually music that sets the beat, rhythm and expressions in a dance choreography. Although dance forms in this region are still classical or folk heavy, like music, dance forms are going through a lot of experimentation as well. There have been successful dance experiments done without music. In thematic choreography, lyrics are not needed all times. However, the rhythm and tone set by the music do play an important role there. There are geography specific dance forms that come with its own music and instrumental settings. In these cases, dance dominates music. In their complementary roles, classical dancing with modern twist facilitated by music, is becoming a popular art form accepted by the mass.



*Figure 18: A lot of experiments are being done tweaking the complementary roles of music and dance*

***Music dominates the theatre***

Bengali theatre has different forms and there are some which are entirely dependent on music. Kobigaan (a special performance where questions on socio-cultural issues are raised and answered as song verses), Jatra (folk-theatre) and Nrittonatto (a special form of drama where the story is depicted using dance forms and music) etc. are some of the mediums, which depend extensively on music. The theatre culture in Bangladesh is developing to global standards, as is the scope of music in theatre. As it progresses reservation of its elements in the form of ‘living museum’ is needed.



*Figure 19: Drama performance relies heavily on music*

**Linkages with the regional/global music scene**

**Existing Status Quo and events**

Bangladesh’s exposure to regional or global music events has long been supported by government initiatives of cultural exchange between allies. As consumer taste has evolved and local music scene has peaked interest among international consumers, cultural exchange have been facilitated by the private sector as well. There are instances where government and private sector have merged together to link up Bangladeshi music with the regional trends. Bengal Classical Music Festival is a glaring example of such public-private partnership that has marked its fifth year in 2016.



*Figure 20: Renowned International and promising local classical artists come under one banner every year to celebrate the rich classical music heritage*

Initially partnering with ITC Sangeet Research Academy (SRA) to organize classical music events, the Bengal-ITC SRA Classical Music festival was organized for the very first time in 2016. Attended by 70,000 people, it featured a special exhibition showcasing the heritage of classical music in Bangladesh. In February 2013, a nine-day long celebration of Bangla music featuring 52 Bangladeshi musicians took place in Kolkata, jointly organized by Bengal Foundation and ITC SRA. From then onwards, every year the festival is being sponsored by local conglomerates, supported extensively by government bodies and has established a music school to coach and promote under this festival's banner for classical music enthusiasts. Although an excellent concept and execution that promotes Bangladeshi classical artists to the gurus in a pro-active manner, this event is criticized to have affected willing to pay for entertainment habit of local consumers.

Facing increasing consumer demand, in recent years Bangladesh has also witnessed Jazz and Blues festival, International Folk festival, Sufi fest and numerous international artists having their solo or duet shows taking place. While these events are mostly private sector sponsored and do expose the local music scene to international standards in exchange of ticket fees, these are sporadic and mostly one sided events and rarely result in true exchange of talents between cultures. For networking purposes, these events are providing a brilliant platform for local artists. But lack of any visible changes in local music going global indicates that meagre presence of our local talents in international festivals still remain chance events.

### Opportunities to Expand

Bangladesh's presence in global music scene is very poor. The reasons to this gap lie in its infrastructure issues, industry solidarity challenges and complacency issues. Playing to non-resident Bangladeshis staying outside and attending few invitations from neighbouring regions



cannot be all that Bangladeshi musical talents have to offer to the world. Governmental initiatives are plagued with bureaucratic challenges and as such do not often result in fruitful outcomes. Private initiatives on the other hand are more fluid but they do not have the capacity to scale up. Also, intervention of foreign entities to promote local culture has worked so far as one-off or continuous support events. Pro-active value addition from this part has been missing from the ecosystem. All of these issues facing regional expansion actually are opportunities in disguise for Bangladesh.

### Impact of foreign cultural institutes

Cultural activities in developing countries like Bangladesh are a means to promoting democracy, humanity and social stability. This is often aligned with the missions of foreign cultural institutions, which work as a connector between the embassy and local partners or society. In case of music, this matchmaking increases the impact of these entities in local scene:



Figure 21: Foreign Cultural Institute Positioning in the value chain

In Bangladesh context, development of local culture and music scene has depended to quite an extent on support provided by foreign cultural institutions. Events like Bangladesh Music Week, that took place to address the gaps in the ecosystem and figure out some workable solutions are the ‘development initiatives’ actively endorsed by these institutes. While working as the connector, within their limited capacity, these institutes enrich the domestic society with their native language, culture and competencies. With events and workshops, network gets developed between multiple stakeholders and knowledge exchange helps everyone involved in the process. Providing ‘intermediary’ support, these institutes in the past have brought together entities in the music ecosystem that would otherwise not come under one umbrella. By emanating knowledge from their own cultural scene and providing a window to local artists and stakeholders to get a peek at global practices- cultural institutes like Concerts Norway, Goethe Institut, Russian Cultural Centre have taken attempts at bridging the gap between a lot of vital issues facing the music industry.

Be it the internal or regional consumption scene, multilateral challenges do not put up a rosy picture for contemporary music scene in Bangladesh. Despite some positive trends and initiatives being set up, this scene still lacks the energy to grow into a much bigger one like its neighbour in India. This raises the big question- can it still dare to hope? Potential in digital spectrum and room for improvement in copyright implementation pave the pathway for future transformation.

## Opportunities to Transform: The Big “2” that will change contemporary music scene

### Digital Revolution paving way for a new way of music creation and consumption

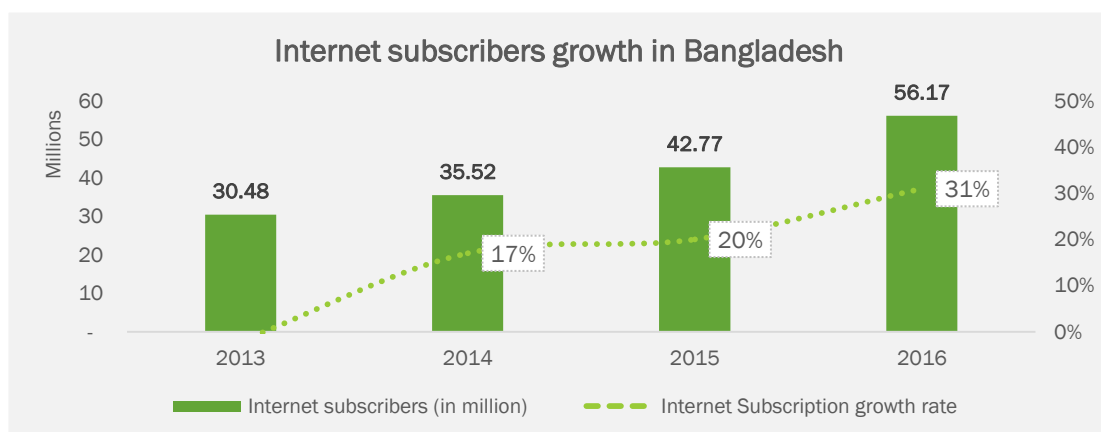
#### Bangladesh and "technological" leapfrog: penetration of mobile devices, Internet consumption and smartphones

Bangladesh’s growth story is one that few saw coming. In the face of persistent challenges, the country’s stable economic growth has provided the bedrock for a prosperous future. With a forecasted growth rate that’s only second to India in the region, Bangladesh looks to stride towards middle-income country status by 2021, banking on the shoulders of both established core industries such as the Ready Made Garments (RMG) sector as well as newer, rapidly growing sectors such as the Information and Communication Technology (ICT) industry.

The growing middle class, with its big appetite for consumerism, also has a large role to play in this future growth as well. A market of 160 million+ people is packed into a territory roughly one-quarter the size of Thailand (5th dense in the world). Geo-strategically positioned between India and China, Bangladesh consists of the world’s 8th largest population, where consumer spending is around USD 130 billion+ growing at 6% annually.

The consumer class is young, technologically adaptable and exhibits high engagement through the mobile Internet. As an emerging economy, Bangladesh has embraced technology at a rapid pace. With the advent of third-generation (3G) wireless services in 2013, consumers have adopted smartphone and high-speed Internet services rapidly. Of the 60-million+ active Internet subscribers (BTRC Jul 2016), nearly 96% are on mobile and 20 million use smartphones. Bangladesh is also enjoying demographic dividend with 57% of the total population aged between 15-54 years and the median age being 26 years.

Amidst continuous battles against climate change, the country has experienced an average 22.6% growth in Internet subscriber base after 3G services got launched in 2013:



Source: Monthly BTRC reports on internet subscribers in Bangladesh (February 2012- January 2016)

Though internet penetration still stands at 35% of total population, increasing investment in 3G network by telecom operators, positive economic outlook, prospect of 4G and LTE era enabling faster internet and proliferation of low-cost smartphones indicate a much bigger “online” population by 2021 than the 90% population coverage govt. is projecting currently.

This online population is rapidly substituting many of the traditional consumption behaviour with digital alternatives. OTT (over the top) impact on voice and messaging revenue of telecom operators is a common example to this shift in behaviour. Communication, entertainment, education, transportation even dining behaviour of this digital population have transformed in the digital era.

Since at present, 57% of the total population is aged between 15-54 years and this changes everything – including spending and saving behaviour, technology adaptability and lifestyles including apparels, eating, travelling habits, e-commerce and entertainment activities – including music consumption.

The catalysts behind this digital leapfrogging are threefold:

- Fast-paced telecom penetration covering more than 80% of population and providing nearly 100% basic network coverage.
- “Digital Bangladesh” – a vision being driven into action by the current Bangladesh government
- Increasing per capita income coupled with a demographic youth bulge which is more likely to adopt a technology at its early stage and has the financial backing to do so.

### **Current trends in the music scene enabled by technology**

There was a time when consumers needed specialized devices like CD players, Walkman and later on mp3 players to listen to music. However, with proliferation mobile phones, which support both a wide repertoire of music formats and radio – music consumption trends have rapidly changed over the last five years in Bangladesh. This coupled with Internet connectivity and smart devices has led to extensive lifestyle changes as well.

Similar to i-tunes and Spotify, the two largest telecom players in the market have bought in app-based music listening services to the market. Grameenphone, subsidiary of Telenor Group, has introduced GP Music in 2015. As of December 2016, the application has 1.7 million trial subscribers, 600K+ paying users and ranks number 1 in terms of downloads in Bangladesh Google Play Store (in music and audio category). GP is also maintaining strong public relations to support the growth of digital music consumption by marketing activities like “Stream & Win” contest during the Bangla New Year’s celebration and organizing “The Biggest Jam Session” in Bangladesh – where over two hundred guitarists and singers came together to pay a tribute to GP Music’s flagship Band and the Iconic Rock Band of Bangladesh – “Artcell”

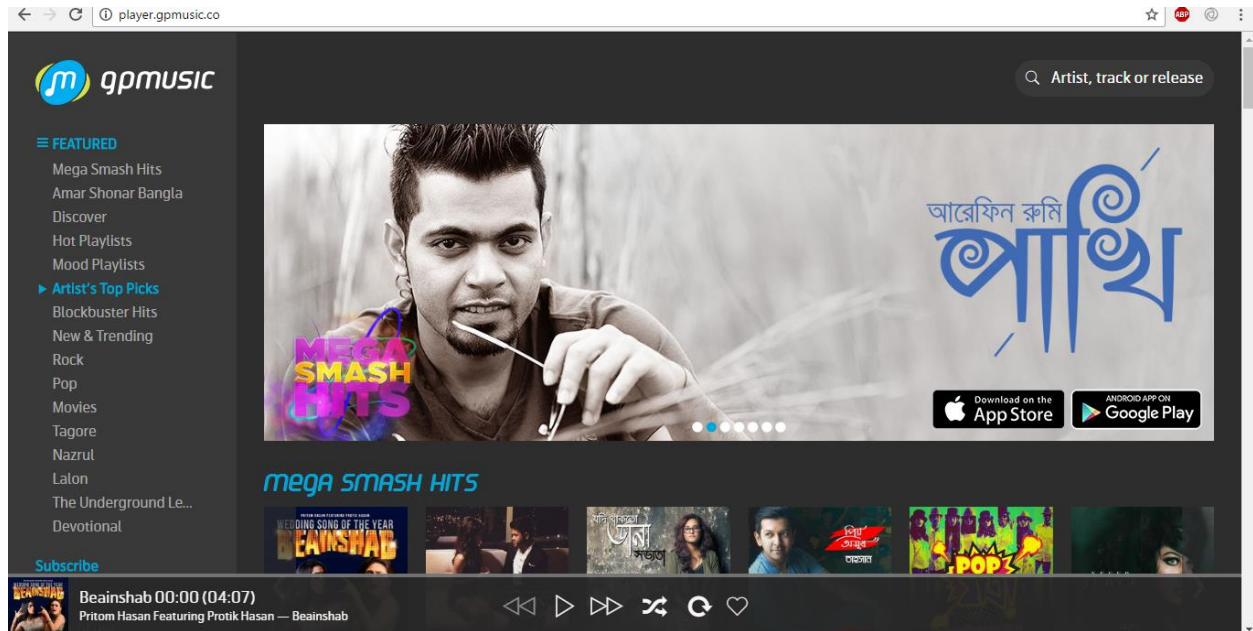


Figure 22: GP Music Player as seen in Mobile Optimized Web Portal

Not to be left behind Robi Axiata collaborated with US-based music service for smartphones, Yonder Music and launched in Bangladesh on May 2016. Yonder right now provides a rich music experience by combining exclusive content from famous local artists with the rich libraries of local labels, along with a comprehensive collection of international major labels and independent music. Right now the app can be accessed by Robi users only who can stream music for free in exchange for data packs.

Apart from audio streaming Bangladeshi consumers are also exhibit high consumption of music videos via YouTube. As per ranking by Alexa YouTube ranks as the number one visited site from Bangladesh and is ahead of even Google search and Facebook. Additionally, according to Bongo (the Netflix of Bangladesh Video Contents) music videos are among their top streaming videos as well.

And this is just the start: everyone listens to radio on their telephones and an average music consumers spend at least one hour a day on radio channels. There are a host of music download options as well which taking advantage of weak IP law enforcement in Bangladesh allowing users to consume music (e.g. music.com.bd). And this hold true not only for “Bangla” content but international content as well.

However, with companies like GP Music and Yonder providing music at competitive rates and via legal channels is expected to improve the scenario.

## Technology and globalization of music

Yonder Music is a good example of how technology has enabled globalization of music in Bangladesh. Not only it allows Bangladeshi consumers to listen to licensed “Bangla” music but also give access to their music library, which have a rich repertoire of world music. Additionally, the model that Yonder Music works with by partnering with Telecom operators have already been tested outside and right now is being migrated to Bangladesh.

For example, Yonder launched in Malaysia earlier among frontier markets and have consistently outperformed other players. A variant of that model is now being implemented in Bangladesh.

**“We look at the trends and behaviours in what we call the frontier markets. We look for the places where mobile usage is on the rise or where there is already significant use, people are transitioning from feature phones to smart phones, and where data packages can be sold.”**

- Aditya Summanwar, the president of Yonder Music, Asia

Yonder is not the only example, due to satellite channels proliferation, streaming sites like YouTube, music sharing social medias like SoundCloud – music is not just specific to a country or

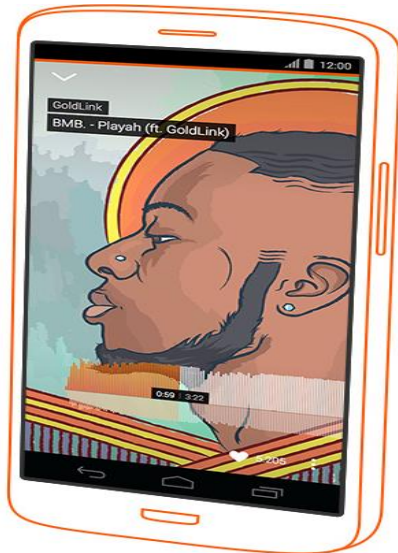


Figure 24: Soundcloud Mobile App

a region but has become universal and Bangladesh has not stayed as an exception. Another example is “Gaana” which is one of the most popular music-streaming app in India, is available in Bangladesh as well which can be downloaded to stream free music content. There is wide mix of collections – Bangla, Hindi, English which appeals to consumer taste.

Additionally, because now consumers are exposed to such a wide variety of music, local music scene

has also evolved and has released social media based music videos of popular songs and emulating music distribution cultures from other markets.

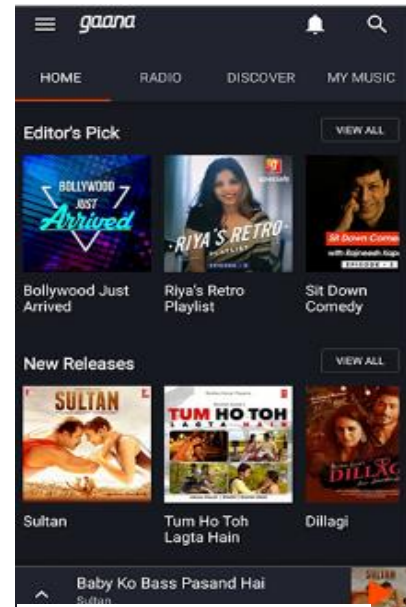


Figure 23: Gaana Mobile App

## Music Digitization and Archiving

Thanks to digital services (streaming sites and apps), downward pricing of recording and storing music, digitization has started picking up. While the streaming services boasts a large library of digital music, a lot of the process has also been crowd sourced. For example, in YouTube and social media Bangladeshi users are increasingly uploading music content meaning a significant portion of the content is now digitized.

While digitization has sped up thanks to cheaper technology and consumers being active in social media platforms, archiving still lacks behind. Apart from the professional streaming services who maintains active library proper, archiving of music along with relevant information regarding events, artists and music in a structured fashion is absent.

However, as streaming services gain traction, popular music archiving is expected to pick up at exponential rates. From where the industry stands right now the archiving service will be taken up by new companies or labels that are looking for a spin-off venture in digital space.



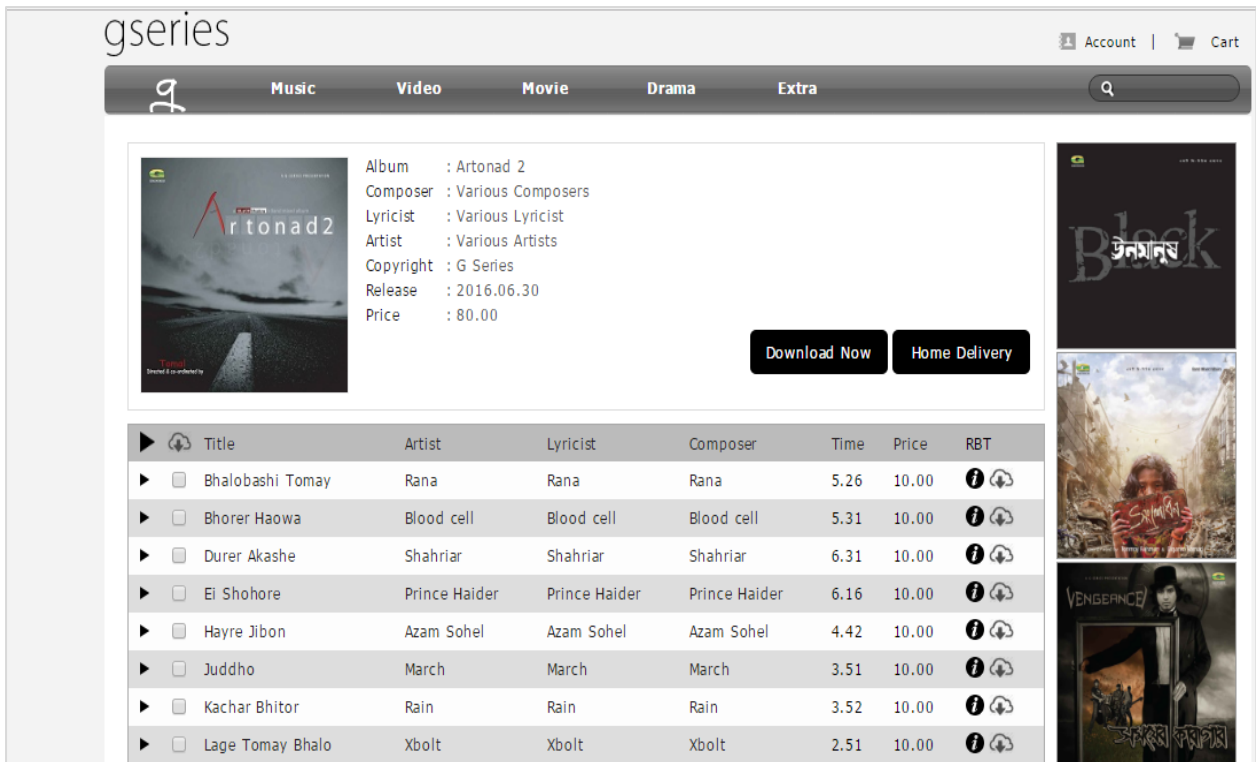


Figure 25:G-series one of the top music labels in Bangladesh opening up digital music streaming services to monetize their archived music library

### Role of technology in promoting and distributing music

Music in Bangladesh has greatly benefitted from social media exposure. Most of the popular artists have social media pages (mostly in Facebook –the most popular social network here with nearing to 20 million users). Right now digital marketing has become an imperative segment of the music promotion scene. Any time a new album is being released or a live music event is coming up, social media has exponentially propelled the promotion and distribution of the industry.



Figure 26: Facebook Page of Sumon, lead vocalist and bass player of the popular band Aurthohin. The page has ~400K followers

Additionally, music streaming services like GP Music and Yonder do extensive PR activities including launch events to promote their labels. Live music events also develop web portals and promote their activities via digital space. Additionally, ticketing for live music events are sold via digital channels as well. Consumers can book and receive tickets to live shows via digital platforms as well.

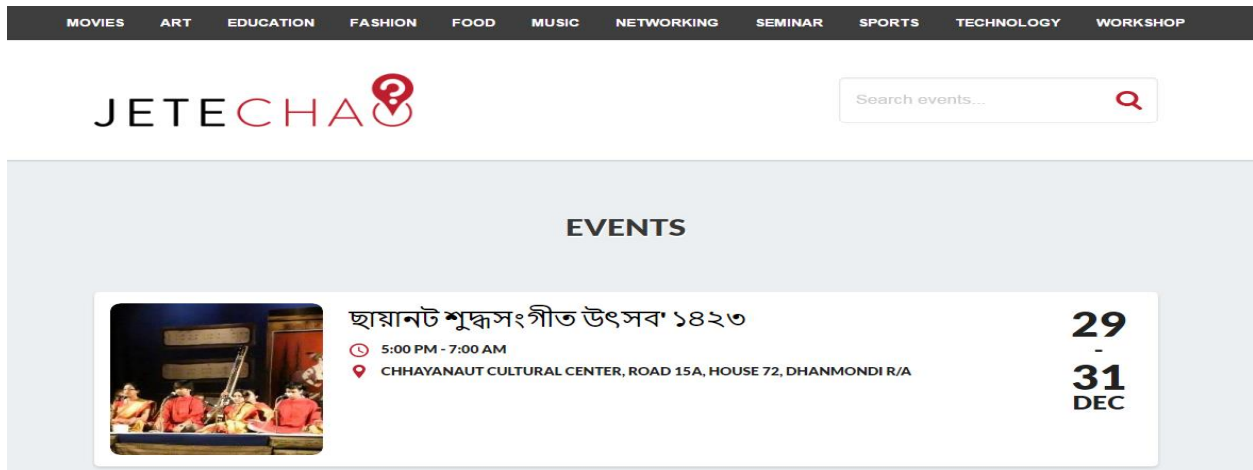


Figure 27: JeteChao, a popular local events aggregator who sales tickets to Live Music Shows

The biggest change that has happened in distribution channel for music due to technology is rapid peer-to-peer network forming whereby consumers share digital versions like mp3 of music with each other. This is due to high growth of smartphone users and rise of Internet connectivity. Traditional channels using mediums like CDs or DVDs are increasingly becoming obsolete.

## Pitfalls of Digitization and possible way outs

As explained in earlier chapters - peer-to-peer sharing, music downloads, recording and consumption have become easier than ever. However, this has also led to high piracy and sharing of illegal music where the original music producer doesn't get benefitted. It is predicted even for commercial trades -80% of the industry local transactions are executed via unauthorized copying. This goes in direct violation of Copyright Act 2000 under Bangladesh law.

Most of the retail stores in Bangladesh, selling audio or video products, have computers inside their outlets, where they make fake copies of the music, drama and movie albums. According to the information, video piracy is causing a total loss of 150 million to the industry. This also limits the label from increasing the price of their CDs to a reasonable level as if they become significantly more expensive than their pirated counterparts then the consumers would shift.

The economic losses due to piracy are enormous and are felt throughout the music value chain. The victims include the artists whose creativity gets no reward; governments who lose millions of tax revenues; economies that are deprived of new investment; consumers who get less diversity and less choice; and record producers who are forced to reduce their artist rosters because it is impossible to compete against theft.

While an exact way out of the predicament is not yet visible but lies in stricter law enforcement, consumer awareness and alternative channels like the digital services provided by GP Music and Yonder. More on this will be discussed in the next chapter.

## Intellectual Property Rights Implementation

### Current Status Quo and foreseeable ending of the TRIPS agreement of LEDCs

The Agreement on Trade-Related Aspects of Intellectual Property Rights (TRIPS) is an international agreement administered by the World Trade Organization (WTO) that sets down minimum standards for many forms of intellectual property (IP) regulation as applied to nationals of other WTO Members. It was negotiated at the end of the Uruguay Round of the General Agreement on Tariffs and Trade (GATT) in 1994.

However, since Bangladesh was classified as a developing country – the country was allowed extra time to implement the applicable changes to their national laws. The transition period was supposed to be have expired in 2005 but later was extended twice till 2013 and then Jan 2016 – now in negotiations for further extensions.

While TRIPS might get extended for developing countries given that Bangladesh has already been classified by World Bank as a lower middle income nation – there is a high possibility Bangladesh will not be applicable for TRIPS anymore. When that happens IP laws in Bangladesh has to be strictly enforced not only for music contents produced here but also for international IPs that are violated by directly downloading pirated music.

Given this scenario, the government, in the coming future, is expected to go a lot harder against piracy than they are doing in 2017, especially for the music and film industry.



Figure 28: Snapshot shows that 60% of the pirated CDs sold are Indian Hindi Music which post TRIPs has to be dealt strongly by the Government

## Combating Piracy and strengthening copyright laws

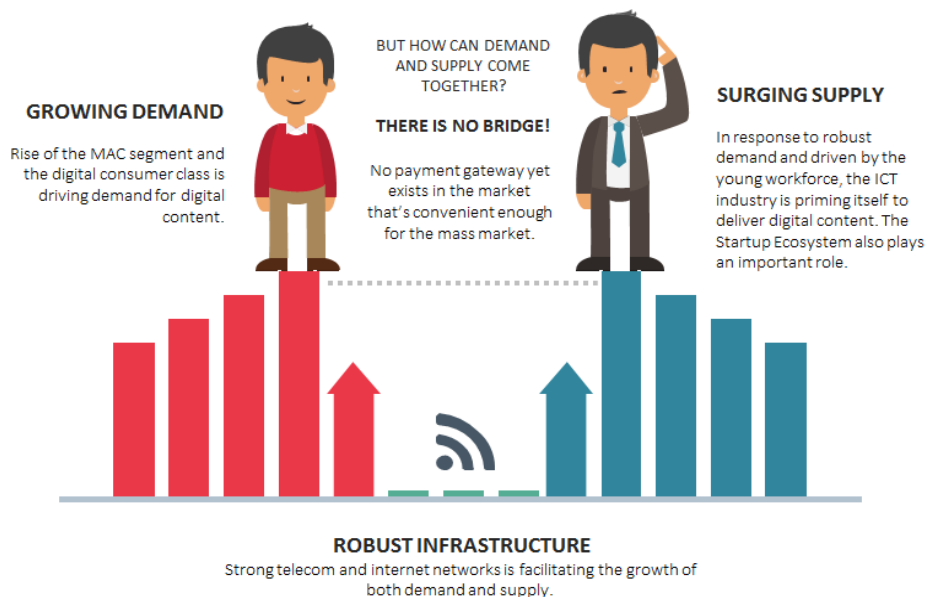
Peer-to-Peer sharing, online music downloads and streaming is here to stay. As we move towards a solution we have to bear this in mind. With proliferation of Internet over the last five years sale of music CDs has declined at double-digit rates. While strong law enforcement may stop sales of pirated CDs/DVDs the same cannot be said at a consumer level.

While Copyright Law 2000 has been amended and released under Copyright Rules 2006 – implementation is becoming increasingly difficult. The alternative model that has worked in more developed markets and seems to be the only way out is via increased transparency and seamlessness with digital music streaming services.

However, for Bangladesh, due to absence of seamless payment gateways, purchase of music via online channels is difficult. A country where 60% of the adult population is unbanked and only 6% of the population have access to debit/credit cards – a similar payment model like advanced economies will not work here.

The solution would plausibly lie at introducing mobile wallets (under mobile financial services) where individuals have individual accounts as opposed to over the counter (OTC) model which the country’s leading mobile financial services bKash (a payment service that uses mobile wallet and controls 80% of the mobile payment market) is operating with. Additionally, direct carrier billing options whereby consumers can use their mobile talk time balances to directly pay for app/play store transactions.

Initial testing by GP Music have revealed that consumers are willing to pay and innovative business models like Yonder have revealed that effective partnerships with Telecom operators can result in music being free streaming for consumers with the Telco player making money on data/internet pack sales. A coordinated effort between law enforcers, government and private sector players is needed to pull a sustainable intervention model against piracy.



*Figure 29: Direct Carrier Billing can help address the digital payment system in Bangladesh and open doors for digital content transactions using mobile talk time (given that 78% mobile penetration compared to 6% for cards this can be a win-win solution)*

## Roadmap for change

Artists copyright awareness, consumers caring for protecting their music rights, facilitating payments through online or mobile phones and music listeners' willingness to pay for music are success factors for Bangladeshi music industry to move forward in today's cyber age.

However, as said earlier this cannot happen alone, the following schema shows a way forward that can be implemented:



Figure 30: Policy Level Roadmap to achieve a vibrant and sustainable digital content ecosystem

The digital music scene is pulsating as more and more ways to channel, communicate and experience music and the lifestyle around it become available via apps and web platforms. Bangladesh has a genuine need for effective copyright law implementation for the digital revolution to be a success for all its stakeholders. The dreams, given the reality are far reaching. How does the actually optimize on its potentials? Let us explore those avenues next.



## Bridging Aspirations and Reality

### Tapping into the opportunities

#### Regional collaboration and expansion

Bangladesh is geo-strategically positioned at the heart of Asia. At one side you have the giant India while providing passage via port to China. Given close proximity to large and powerful neighbours – Bangladesh's music scene gets influenced significantly from strong cultures and media present especially from India. Additionally, corporate patronization by multi-national companies often means that similar programs that are present in other countries in the sub-continent gets adopted and tried out. For example, Coke Studio in India, Nescafe Basement in Pakistan and Wind of Change in Bangladesh follows a similar structure.

For classical music Bengal Festival (2016 saw its fifth edition) a repertoire of artists are invited from both sub-continent (mostly India) and Dhaka experiences a celebration of music nights. This is a good example of how Bangladesh has collaborated regionally to bring classical music to the mass.

However, the same is not true often for contemporary and modern music. While classical genre has received active endorsement from Government support for more westernized form of music has been minimal. Even compared other art forms like dances (classical), theatre and traditional music forms (like "Rabindra Sangeet") – modern music has received dwindling government support.

Conversely, there are exciting opportunities for regional collaboration in contemporary and modern music as well given a young globalized music consumer base. The spaces where this can happen is outlined below:

- **Appeal to large Asian consumer base as opposed to just Bangladesh:** Contemporary and modern music has wider appeal. James – one of the leading modern music singers in Bangladesh performed playback for an Indian movie "Gangster" 2006 which own significant acclaim with Indian consumers. However, similar initiatives are absent and if supported can augment a channel where we can create music for a larger market and push opportunities for "fusion" music as well.
- **Looking for music partnerships outside sub-continent and into Europe:** Bangladesh based music especially folk and contemporary are well revered in western markets as well like in European and Scandinavian regions. While these countries set-up foreign cultural centres here and host events – local artists should set aside their differences and collaborate to create high quality music forms that appeals to global audiences. While this may far-fetched from the whole "can east meet west" conundrum, recent globalization trends have seen many music bands take up western music and produce high quality art forms with bands like Miles leading the way couple of decades back.
- **Government endorsement and sponsorship for contemporary and modern music in regional stage:** As mentioned while dances, traditional and classical music are actively showcased to propel collaboration further contemporary music can go a long way. This would open doors for wide genre of music to expand their domain and allow Bangladesh music scene becoming more vibrant. Similar to public institutions giving support to classical and theatre, contemporary music should receive support in country as well.

- **Actively participate in international music festivals:** Most of Bangladesh's music performances in front of a global audience are based on bilateral exchanges. However, for stronger ties with the global music scene government has to endorse participation in music festivals that are of high value and allows brand building for Bangladesh's music scene.

### Develop culture in-tune with global trends

Compared to other countries like India, Bangladesh music scene doesn't have vibrant club music scene. In India contemporary music artists including bands start off at university level where they are called to perform at underground functions and family programs. Later on, if they are serious about continuing music as a career they enter the club scene.

Unlike other Asian countries this is where the difference happens in Bangladesh. For example, music theme based restaurants, like "Hard Rock" café, which is popular worldwide, are just getting started in Bangladesh. However, as of now consumers are yet not ready to pay an extra premium for the experience. Additionally, since being a Muslim majority country bars are not wide spread and cafes/restaurants are barred from selling alcohol, sale of which are often main revenue drivers in other parts of the world.



*Figure 31: Bands performing at Thirty-Three Music Café in Baily Road, Dhaka – one of the first of its kind in Bangladesh*

Lastly, once a band becomes popular in club scene they move on to the main stage like concerts and performances in festivals. The club scene helps them to sustain and build capacity before they face the big guns. For Bangladesh, the absence of club scene means to sustain music bands. Artists have to skip and enter the main stage much earlier and often perform in gigs as a supplement to more popular performances. Hence both sustainability and capacity becomes an issue.

Additionally, whereas merchandising (memorabilia, fashion wear, consumer durables, gadgets branded by the artists/band) plays a big role in other parts of the world – in Bangladesh the market is still nascent. Sell of exclusive cover CDs and autographed copy of concert albums are still emerging concepts here. As a result, this is another revenue source the music scene misses out on.

Therefore, for the music scene to develop we have to build a culture of consumers paying in tune with global practices. This has to be coupled with digital services around music consumption and vibrant merchandising market. Only then the artists/bands would be able to sustain and continue to produce high quality music.

### Independent platforms gaining momentum

The picture however is not all black. Music platforms have emerged and artist management practices are developing that are pushing the music scene towards growth. Bengal Music Festival has created a vibrant platform around classical music – already hosted five times including 2016. LiveSquare has created platforms like “RockNation” – catering towards contemporary/modern music – the team has already hosted the brand 6 times including 2016.

Digital services like GP Music and Yonder Music with Robi Axiata have created platforms, which are again working with contemporary music. Yonder has launched “Wind of Change” which goes into developing regional music collaboration as well modelled after Coke Studio and Nescafe Basement from India and Pakistan respectively.



*Figure 32: RockNation VI hosted by LiveSquare was widely acclaimed as one of the largest platforms for rock music*

Thus independent platforms are picking up despite not having proper support from the government yet and widespread piracy. This ensures that the music scene gets steered in the right direction and will be an integral part of propelling the industry forward in future.

### Issues, trends and challenges

As an emerging nation, Bangladesh has unique challenges to its music ecosystem and as the industry develops the market is moving forward and forming innovative solutions to the problem. Here's a snapshot of the challenges the industry is facing and trends that can act as mitigants:

- **Widening Gap between Contemporary and Classical:** As mentioned earlier, the government is more supportive to classical whereas large majority of the consumers are more open to contemporary. For to close this gap the government would need to support contemporary more and classical has to become more embracing and collaborate with contemporary.

**Trends to Mitigate:** Bangladesh consumer post the Bengal Classical Music fest (which was free of cost for all) has become more open to classical music. The domestic classical scene can take this opportunity to collaborate with contemporary and develop fusion music and cater to audiences. Bands like “Adhar” have been successful in doing so. However, one has to be careful that consumers do not take free services as a norm and is induced to pay for music consumption. The arrangement in Bangladesh can draw inspiration from the US Opera industry – which faced a decline in audience and decided to collaborate with modern forms of music and adopt a more vibrant marketing feel to popularize themselves.

- **Widespread piracy:** Similar to music industry all over the world piracy continues to be a problem in Bangladesh. Rapid rise in technology to store and distribute music has further aggravated the scenario and labels are struggling as current 80% of the market being served by pirated music.

**Trends to Mitigate:** Digital music streaming services like GP Music and Yonder has started backed by the country’s top telecom operators, companies like Bongo (Netflix of Bangladesh) has opened up which provides licensed video content and consumers are picking up with GP Music registering 600K+ paid users currently. This coupled with the government becoming more serious on piracy as TRIPS agreement expires and heightened consumer awareness can minimize piracy.

- **Government support to global collaboration:** Government support is often limited to classical music, dance and theatre with global collaboration often limited to bilateral arrangements. However, for the music scene to develop the support it needs to augment to other genres like contemporary and participation in international music festivals.

**Trends to Mitigate:** Government is now more open to public-private partnerships. For example in the Bengal Music Fests Government has invested significant resources in security and management. While this is a support at a very preliminary level, this is definitely a start. Further support will also mean that artists do not always need to depend on corporate patronization but also a cultural support from the public institutions which would in turn increase the quality of the art form.

- **Development of a vibrant club scene and music merchandising:** As stated earlier, a club music scene which serves as a sustainability sources for upcoming artists is absent in Bangladesh with consumers not willing to pay a premium for such services. Additionally, merchandising of artist memorabilia, fashion wear and consumer durables are at a very nascent stage in the market.

**Trends to Mitigate:** Music cafes have started picking up in the capital and while consumers do not directly pay for the services, with time the consumables can be priced higher to include remuneration for the artists. Merchandising especially those related to live concerts has just started picking up and shows potential to be leveraged by a formal distribution channel in shopping complexes.

## Further reading

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