MUSIC, MUSIC EVERYWHERE, AND SO

MUCH OF IT THE SAME....

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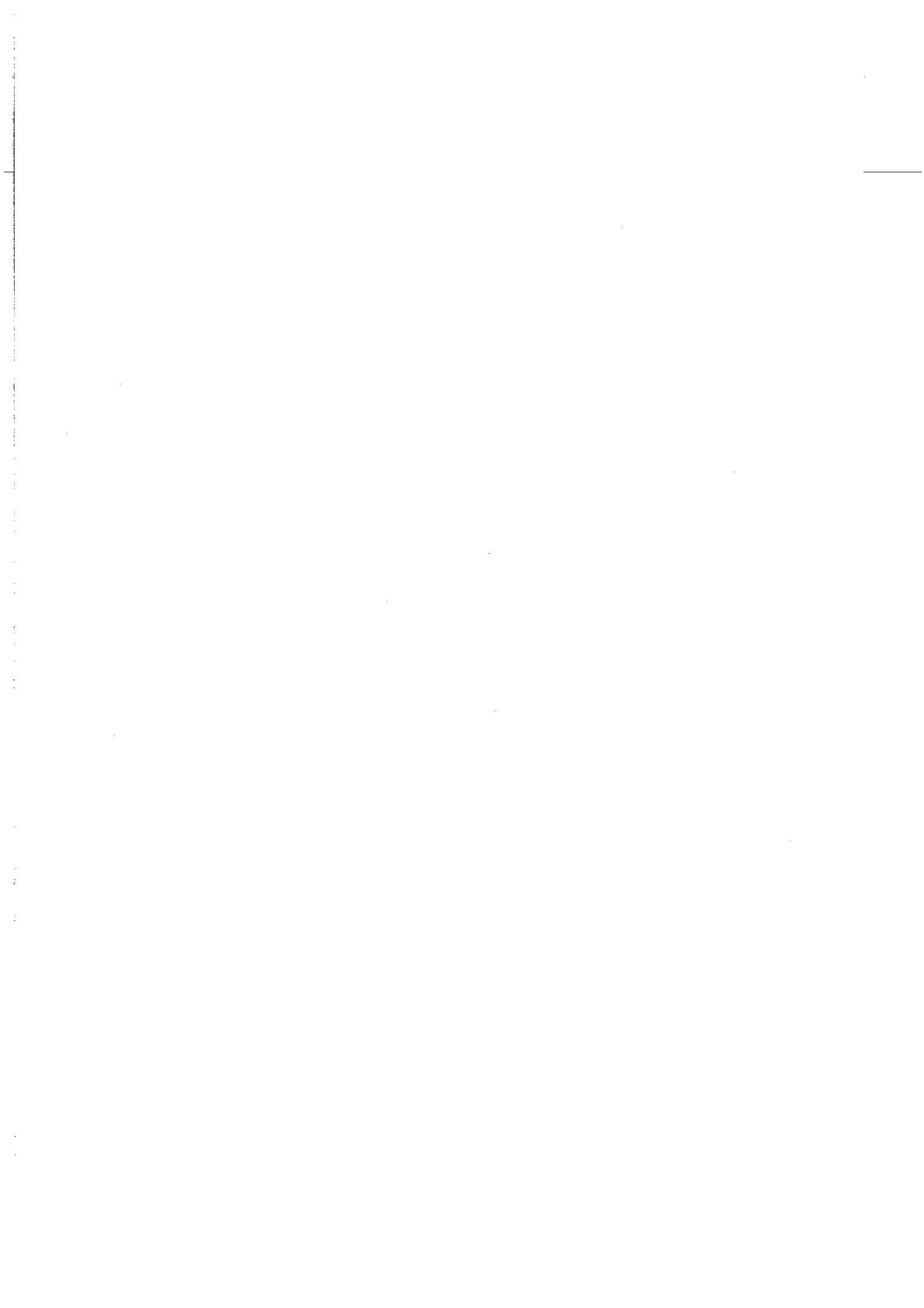MUSIC, MUSIC EVERYWHERE, AND SO MUCH OF IT THE SAME...

Internationalization and localization trends in the development of music-based Radio, and some of the implications for broadcasting strategy and media policy.

(Roger Wallis, Unit of Mass Communication,Gothenburg University, Sweden. April, 1990)
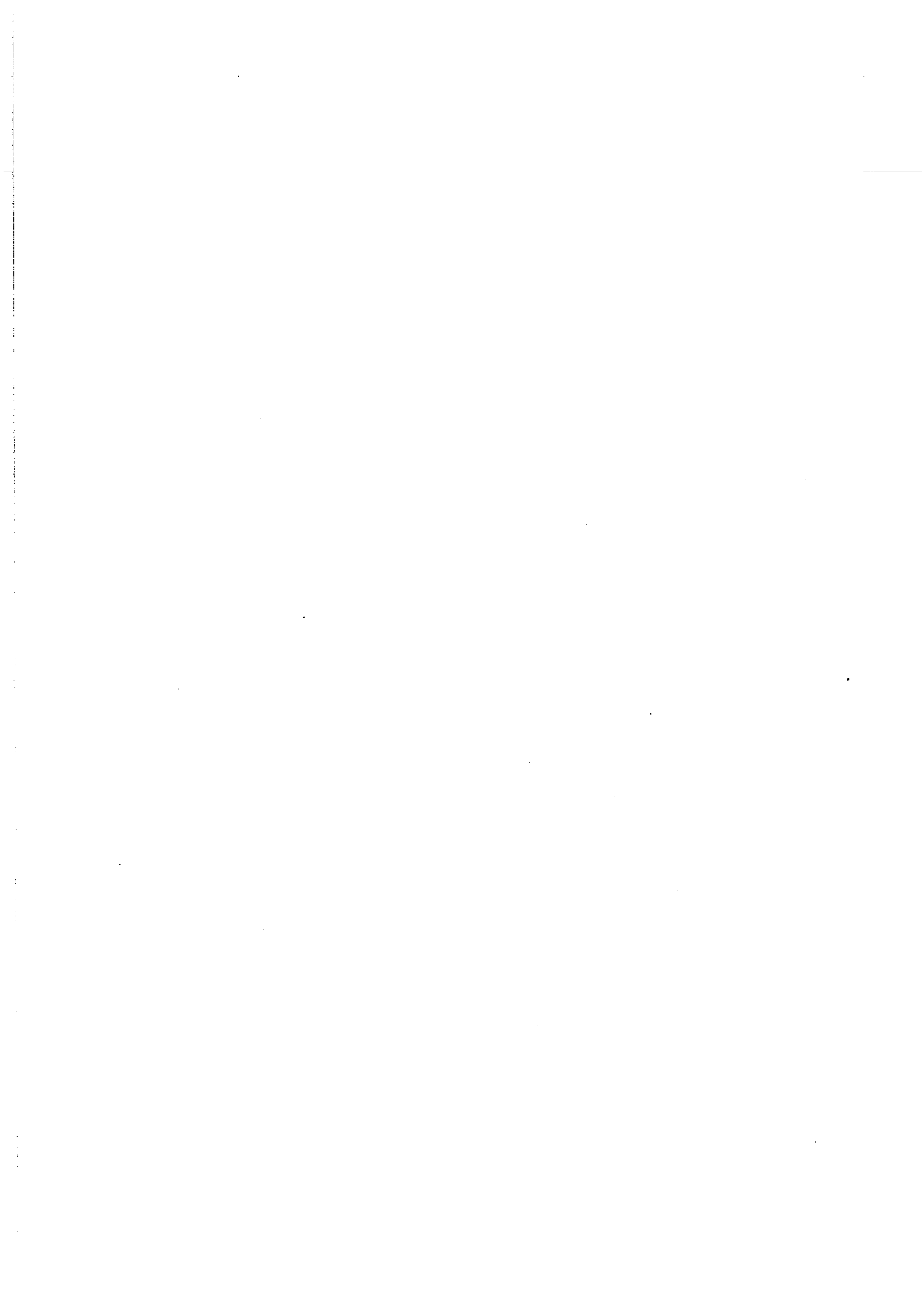
SUMMARY

The expansion of Radio over the past two decades, in terms of both hours of broadcasting and numbers of channels, has been staggering. Despite the fact that this growth would have been virtually impossible without access to cheap programme material from the Phonogram Industry, very little research has focused jointly on the relationships between the Broadcasting and Music industries. This paper seeks to redress the absence of such a focus by concentrating a) on the changing mode of integration between Radio and the Phonogram Industry, and b) by studying the relationship between the growth of Radio, internationally and locally, and similar structural changes in the music industry. Taking the particular examples of Sweden and the USA, the paper argues that developments have been remarkably similar in countries with very different official broadcasting policies. This suggests that Radio as a growing medium has its own degree of momentum which tends to override policy decisions which governments take, and even on occasions formally adopted legislation. In part, this is the result of ambivalence amongst both media policy-makers and the bodies they create to monitor and control media activities. Broadcasting is regarded partly as an internationally tradeable service, providing the public with a choice of entertainment, and entrepreneurs with business opportunities. Broadcasting is also seen as an activity with a political/cultural role, supporting principles of freedom of speech in a democratic society, and stimulating a wide range of cultural activity. The business and the cultural view are not always compatible elements in the same overall media policy. This paper also seeks to illustrate the changing role of National Radio in different countries when technological and economic developments allow for this level to be bypassed in the flow of cultural products between International and Local levels of media activities. There is a need for a new definition of the role of traditional national cultural/media institutions such as national public-service broadcasting organizations.

The findings presented here have emerged within the context of the Swedish "Media Policy and Music Activity" project, a comparative study of the relationship between policies and cultural activity in the field of music in six small nations (Sweden, Wales, Jamaica, Trinidad, Kenya and Tanzania). This research project has been organized by Dr Krister Malm, Director of Musikmuseet in Stockholm, Sweden, and Roger Wallis of Gothenburg University and Swedish Radio. A full report is expected in 1991.

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1. INTRODUCTION

In terms of hours of broadcasting, radio has seen an enormous expansion over the past two decades. Several factors have contributed to this development. Cheap technology has certainly facilitated the production, dissemination and reception of radio programmes. International agreements and national decisions leading to the opening up of frequency spectra in the FM band previously occupied by other users (military, emergency services etc) have provided more "room" for broadcasters. Growth of lower-tier broadcasting on a local or community level has followed in the wake of policies ranging from laissez-faire deregulation to planned expansion through decentralization. Internationally, the combination of satellites and cable distribution will provide even more opportunities for the distribution of radio programmes across national frontiers. This paper concentrates on three particular aspects of the growth of radio broadcasting:

a) the importance of recorded music from the phonogram industry for filling transmission time.

b) common trends which can be discerned in different countries with different media policies and media traditions, and

c) the significance for national broadcasting of the move towards internationalization and localization of radio operations.

2. GENERAL SCENARIO
2.1 Historical Background and Trends.

As with many other structural changes in the media involving decentralization of operations, trends affecting radio are first reported from the USA. In Tunstall's study of the deregulation of the US communication industry, he sums up the state of localized US radio in the mid-80s.

"The arrival of television destroyed radio as a premier national medium and transformed it into a local fragmented background service.As radio came to offer largely national hit music, plus local chatter and advertising, regulation from Washington became increasingly without meaning or substance...One key to radio station operation was keeping costs to a minimum..At most only 5 or 6 staff voices would ever be heard on the air..even leading stations in many markets use largely or entirely pre-recorded music..Americans 'listen' to radio for some three and a half hours each day..Over half of what they hear is music." (Tunstall,J. 1986 151-2).

In western Europe, Broadcasting has never been as politically independent as either its equivalent in the USA, or indeed as the Press at home (McQuail,D.1983,Smith,A.1976). European broadcasting legislation has often been ideologically geared to avoiding the 'American situation', where a tendency towards a commercial free-for-all was seen to lead inexorably towards lowest common denominator standards (Wallis,R.,Baran,S. 1990:chapter II).

Technological and economical factors, however, have made it increasingly harder for governments to maintain even benign regulation based on the British BBC/IBA model, with near-monopoly franchises granted and monitored via the mild supervision of a selection of the "good and the wise". With the opening of the FM spectrum, wavelengths were no longer observably a scarce technical resource, as in the days of medium/longwave AM broadcasting. Costs of transmitting equipment have also dropped dramatically.

2.2 The Role of Radio Pirates.

Radio 'pirates' have played an important role in European developments.The early maritime pirates of the 1960s, first in international waters off Sweden (Radio Syd/Nord), and later all around the British Isles, came to be as a result of a combination of technological, economical and social /cultural factors. Individuals keen to get involved in the media,

presenting over the airwaves products from a bourgeoning phonogram industry (and no doubt inspired by US /Radio Luxembourg styles of music radio) could join up with financiers who saw an attractive entrepreneurial future in commercial broadcasting. Transmitters could be purchased, and dissemination was facilitated by the advantages of salt water's high conductivity for the spread of AM 'ground` waves.This was one of the important advantages of using boats in international waters - another, of course, was the unclear legal position of vessels outside territorial limits (Harris,P. 1968, Crisell,A.30- 45,1986).On the reception side, expansion was facilitated by the invention of the transistor, allowing for cheap, non-stationary (portable) receivers to be available everywhere.

With the cost of low-power FM transmitters decreasing all the time (as demand increased for commercial land-based and mobile transmitters in areas such as the transport sector) not even laws making the buying of advertisement time on pirate stations a criminal offence were an efficient deterrent to illegal broadcasters. We thus read of reports of several thousand pirates in Holland during the late 70s /early 80s varying in size "from a person playing records and greeting his or her family neighbours to a station covering a big city ..whose regular broadcasts include commercials (Rutten,P. 1983:27). Belgium could boast some 400 Flemmish-speaking pirates (Vittett-Philippe,P,Crookes,P. 1986). Rutten quotes a Dutch study from the national broadcasting organization which concludes that the popularity of the pirates stems from their "nearness" to the listeners, and the absence of the traditional, anonymous yet authoritarian voices which characterised existing, legal, regulated "official" radio. Some

other traditional broadcasters saw the pirate's popularity merely as a reflection of youth rebellion against societal rules;"the fact that they were illegal and exotic made them very attractive to their young public"(Jenke,M 1985:9).

The technological advances embodied in the communications satellite boom, with more and more footprints covering Europe, have made it even harder to retain national systems of broadcast regulation. This has primarily affected television, but the systems offer considerable technical capacity for carrying radio channels which can be distributed via cable networks, or re-broadcasts.

2.3 From Illegal to Legal Operations in an Atmosphere of Policy Confusion and Naive Optimism.

With radio developing as described above, almost under its own momentum, European media policy has been left with the only option of deregulation combined with various degrees of reregulation. The pirates have been allowed to become legal (as in France,Belgium) or the wavelengths have been opened to new operators within a new legal framework before pirates have become institutionalized. Sweden is an example of the latter with "neighbourhood radio" being gradually introduced from 1979. It is significant though that the first small transmitter established for the new broadcasters was situated in Stockholm and operated on 88mHz in the FM/VHF band, a freqency which happened to have been used regularly during the early seventies by some local, illegal (non-commercial) radio broadcasters who were active in the Swedish so-called "progressive music movement". Pirate radio was partly a way of lobbying against the official music policy of the Swedish Broadcasting Corporation, a policy which many Swedish musicians in the popular sector regarded as discriminatory.

Literature from the early and mid-80s includes a wealth of optimistic statements about the future for de-regulated, small-scale radio in Europe (eg Partridge,S.1982). As late as 1986, Crisell prophecied: "on a local scale, this opens up a truly exciting future for radio, pointing to a time when the medium will be subjected to fewer technological and political restrictions than ever before (Crisell,A.1986:40). Vittet-Philippe and Crookes stated boldly that "Local radio does not have to be boring, amateurish or trivial.Nor does it have to be a clone of the big-city network pumping out an endless supply of plastic music presented by plastic personalities". Their study of 'Local Radio and Regional Development in Europe' envisaged a radio broadcasting environment where plurality of views and diversity of styles of content is guaranteed a) by ease of access to the media and b) by actual involvement of people and organizations on a community level. The fact that two spectacular experiments in this field from the early 80s had failed (the co-operatively owned "Radio Cardiff" commercial local radio station in Wales and Radio Delle Donne, a women's movement station in Rome) is explained in terms of the problems such endeavours face " when initial money and enthusiasm run out" (Vittet-Philippe,P.,Crookes,P. 1986:158).

The Radio Cardiff experiment had involved a number of community organizations forming a Trust to run the local commercial radio station with the franchise for the Welsh capital. In 1986, the company was amalgamated with a nearby commercial station (taken over is probably the correct term) and became Red Dragon Radio. The community trust lost its veto on programmes and policy. An epithet for the experiment from the new managing director quoted

in the local paper read:

" The community venture was not commercial and it was a recipe
for disaster from day one.We will not hesitate to be as
commercial as necessary. We have, however, invited two directors
from the Trust to be on the Board. I see their role as advisory
without the veto they used to have..I am pleased that they have
accepted their role"(Western Mail,Oct 14th 1986).

In the same article, the station's new programme director
promised that " the music policy will be very much more chart-
orientated than at present".

2.4. Output and Ownership of Local Radio; More of the Same.

In 1988, another observer, Higham, concluded that Vittet/Crookes'
optimism regarding a future for small-scale radio full of
pluralism and diversification was premature. Local radio was
rapidly being replaced by what was de facto a number of
deregulated commercial networks (Higham,NM.1988:29). In Britain,
local stations were becomming more and more similar in music
choice to their major competitors, BBC's national channels,Radio
1 (Pop/rock) and Radio 2 (Middle of the Road) (Local Radio
Workshop:1983 I). In many countries, local radio stations were
admittedly still local in name, but a growing percentage of
their content was produced centrally, often distributed via
satellite networks. In some cases, an increasing number were
being incorporated into the same sphere of ownership. This trend
was more apparent in Europe than in, say the USA, since Europe
does not have the system of affiliation and limits of ownership
(including restrictions on cross-ownership between different
media) which still apply in the somewhat decimated US regulatory
system. Dyson and Humphreys note that in Italy "pluralism soon
revealed itself to be superficial.De facto national networks
developed as local companies formed links and synchronised their
programmes (thus) circumventing Italian broadcasting

law.(Dyson,K., Humphreys,P.1988:24). The same authors conclude that regulation has changed from being a " trusteeship for the national cultural heritage to regulation as an exercise in international gamesmanship`...as a means of attracting investment and jobs, and thus generating tax revenue" (p 308).

This process looks like continuing into the 90s. Britain provides some striking current examples. The introduction of licences for community radio was promised and delayed several times during the 70s, as broadcasting policy was formulated and re-formulated by the British government. As one could well predict from previous observations in this paper, FM pirates became a regular feature. The different UK commercial (so-called 'Independent`) local radio stations began to be grouped into a small number of ownership spheres, as their publicly quoted shares were bought and sold. In 1989, some new licences were granted in the UK for so-called _incremental_ _stations_, stations which would operate within the same franchise areas as the existing commercial local stations, but which would have specific programme profiles. The choice of _music_ and _ethnic_ _orientation_ were two particular areas which groups bidding for the new incremental station franchises used to define their intentions. When the licences were granted, _music_ _profile_ was indeed one of the criteria which decided the outcome. What is interesting to note, however, is that once these new stations went on the air, the promises concerning specific music policies were soon forgotten in the interests of commercial success. In an article headlined: Concern grows as new stations go 'out-cremental`, the music trade magazine Music Week reported:

CHOICE FM, the south London incremental Radio contractor is to aim morning programming at a broader adult contemporary audience. Choice won an incremental contract last August to operate an ethnic service in South London.The station had proposed to

operate an output of black/dance style music... this news comes in the wake of a complaint from Capital Radio (the biggest existing commercial local radio in London) about the pop music programming of west London's ethnic station, Sunrise....Birmingham's incremental station, Buzz FM, may also face complaints from its local Independent Local Radio station..Buzz managing director, Lindsey Reid says..'We can't put ourselves out on a commercial limb.We will be offering a broader programme in the morning aimed at the people of the Birmingham inner city.(Music Week,Dec 16th 1989:26)

History does indeed repeat itself in the development of radio. The elements of this process are not so different from those described above in the case of the Cardiff Community Broadcasting Trust experiment. An irony of the London incremental story is that the plaintiff, Capital Radio, originally won its lucrative commercial franchise for the London area by promising a range of programme output which was far broader than was ever actually implemented (Local Radio Workshop, 1983 II).

2.5. The Same Story - a European Overview of Developments and Concerns.

Despite the apparent laws of streamlinging of output and concentration of ownership which the above examples link to the expansion of Radio, political faith in deregulation and market forces has continued to gain ground in Europe (McQuail,D.,Siune,K.1986:199 ff). This is not only the case in Britain, as the Conservative government's 1988 White Paper on "Broadcasting in the 90s" amply demonstrates (British Government, 1988), but also amongst EC strategists in Brussels. Broadcasting is being increasingly regarded as 'an internationally tradeable service, as an industry, with viewers being redefined as consumers seeking an expansion of choice whilst programmes are viewed as products needing more coherent and aggressive marketing'(Dyson,K.,Humphreys,P.1988:306). Such trends have also been supported ideologically by the publication of tracts such as "Freedom in Broadcasting" (Veljanovski,C.1989) from lobbying

groups like the Institute of Economic Affairs think tank in London.

Despite all the ideologically-based promises of commercial freedom leading to a plurality of listener choice, by the end of the 90s, European local radio had indeed moved far away from the situation ,say,in France on December the 8th,1984 when:

"100,000 youths demonstrated on the streets of Paris. It wasn't a school strike; there were no political slogans on the placards. It was Radio NRJ which had urged its listeners to leave their homes to save their threatened little radio station. The threat came from the government , which according to NRJ was trying to thwart NRJs development. The fans chanted "eveything for music","long live freedom" "NRJ will continue to sing".
In 1984 the French government agreed to allow local radio (Radio Libre) to finance its activities via sales of commercials. NRJ grew into a media giant. On Tuesday the 5th of December, 1989, NRJ began to be quoted on the Paris stock exchange. It now controls 130 transmitters and can boast around a 10% listnership, with a potential reach of 80% of the French population. Output varies slightly between different NRJ stations (this is required by law) but to all extenst and purposes, output is the same, with the same music, same style of presentation and sound environment".(Eklund,C. 1989).

One can add to Eklund's observations that the music content of the new French 'Radio Libre' stations, particularly in the big cities, is characterised by a large percentage of Anglo-American Top 40 discs, and very little French music. Similar though not such dramatic trends have been observable in most western European countries.   -

Europe's cultural decision-makers and commentators have not been entirely unaware of what has been happening in the radio field. A document from a Council of Europe seminar on broadcasting held as early as 1982 includes these observations:

" Both commercial stations (which are supposed to aim solely at the maximisation of both the audience and profits) and the 'alternative stations' (which aim to give an opportunity to speak to those who lack it, or rather to those who have reasons for not speaking) are in a process of increasing centralisation..(In Italy) Gamma Radio is a 24 hours-a-day computerised music station.It broadcasts on..33 frequencies and 27 stations..and covers the richest Italian cities: all the north and central part

of the peninsula."(Grandi,R.1982:4)

The same Council report estimates that the following trends characterised local radio development up to 1982.

" Only a few local commercial radio stations broadcast information (and speech) programmes. A decreasing number of information programmes are broadcast by alternative radio stations... the proportion of local radio stations' music programmes is bigger than those of national radio..

At the start of the local radio phenomenon, the role of the disc jockey was more important than now, as a characteristic of 'that' local style. ..as a consequence of the process of centralisation, the structure of the music programme schedule more than the disc jockey (becomes) the distinguishing characteristic of 'that' station or 'that' network. (Grandi,R. 1982:7)

Although media researchers and politicians involved in the Council of Europe's working group on the Cultural Industries and Broadcasting were clearly aware of developments in the early 80s, their deliberations hardly solved the dilemma of how to combine deregulation and reregulation, whilst avoiding a shift towards concentration and streamlining. The trends were presented more or less as an unfortunate fact of life. What's more, although the few available studies of the workings of the phonogram industry show an awareness of the importance of radio for marketing recorded music, just as studies of Radio do not deny the importance of a supply of recorded music as a source of programme material, all too few writers have looked at the mutual dependence of Radio and the Phonogram Industry, analysing the significance of this interdependency for the functioning of both sectors of the entertainments industry (see Wallis,R., Malm,K. 1980/1988 for two partial exceptions).

3 RADIO, MUSIC AND MEDIA POLICY - SOME HYPOTHESES.

After this cursory review of events and literature relevant to the expansion of radio broadcasting, I will return to the three focal points presented at the start of this paper, expanding on

their significance. A number of general observations can be gleaned from the previous overview.

3.1 The Relationship between Radio and the Phonogram Industry.

Access to cheap programme material in the form of recorded music from the commercial phonogram industry has been one of the prerequisites for the expansion of radio broadcasting. As the music industry goes through a continued process of internationalization, radio stations with the same hit song formats (often with exactly the same international hit songs) can be found almost anywhere. At the same time, however, available quantitative data shows that the output of the transnational phonogram companies, in terms of new releases, has not increased. They tend to concentrate more resources on marketing a smaller number of international stars.The consequences of this paradox will become apparent later.

3.2 Effects on existing radio broadcasting systems.

The traditional "national" radio broadcasters , those established before the advent of television, have become the victims of this development. With the exception of a few syndicated news and entertainment programmes, national radio broadcasts have all but disappeared in the USA. In Europe, national radio broadcasters are battling with budget problems as expanding local radio and ever-more-expensive public service television cry out for the funds they need to survive in a competitive situation, funds which come from the same dwindling financial cake. National radio finds it harder to formulate a convincing raison d'etre, and in most cases develops into a number of channels with specific content profiles (spoken-word channels with little or no music, classical music channels and popular music variants). They have their "faithful adherents, who retain the admirable if old-

fashioned view that radio should be listened to and not simply heard." But the problem is that their numbers dwindle"(Crisell,A.1986:38).

3.3 The (in)ability to affect developments through media policies. The growth of lower-tier radio and the forms that develop are remarkably similar irrespective of the media policies applied in their creation or of the media traditions in the countries where they emerge. Deregulation in the USA has produced exactly the same type of FM music stations as the "stencil of the airwaves" neighbourhood radio law in Sweden, despite diametrically opposite ideological starting points.

A number of hypothese can be formulated to explain these developments. One is that the internal dynamics of an expanding radio medium are so strong that they override external controls and presures that can be applied through national media policies and legislation. In other words, technological, economical and social factors melt together, producing inherent characteristics. of media expansion that propel the development along the same particular path irrespective of broadcasting traditions and stated media policies. It is the combination of technology, finance and people with certain interests and know-how that produces this streamlining effect. A related hypothesis is that international professional norms governing radio production have been established. These dictate the "sound" and content of new radio stations, irrespective of where they exist, so that the same formats, content and styles of presentation can be heard anywhere around the world, rather akin to the case of the international phonogram industry setting standards for the characteristics of recorded sound which bear little relation to

what the human ear expriences when music is played in a traditional acoustic setting (Etzkorn,P.1982:559). An interesting question raised by such hypotheses is whether the streamlining effects lead to this young growth industry concentrating solely on its style and image, rather than the substance of what is disseminated. This paper seeks to approach these issues and apparent paradoxes through comparing the case of Sweden and the USA, two countries with very dissimilar media policies, but where the developments in radio have been surprisingly similar.

4 THE US RADIO EXPLOSION

4.1 From Deregulated Freedom to Straitjacket Formats.

US deregulation fervour in the late 70s and 80s received its biggest boost from Ronald Reagan and the people he put in charge of federal bodies such as the FCC (Federal Communications Commission). The trend towards less rules and regulations for broadcasters started in the 1970s (Tunstall,J.op.cit. 149-154). The procedure for renewing transmission licences or changing ownership of radio stations was simplified; the number of licence transactions per annum almost doubled during the 70s whilst the total number of radio stations increased from less than 7,000 to nearly 9,000 (see Table 1). In 1981, Ronald Reagan's associate, Mark Fowler took over the FCC. An early Fowler statement was that radio and television receivers could be likened to any household appliance. A TV was quite simply " a toaster with pictures" (Fowler in O'Connor,J. 1987). The principle that market forces would guarantee that citizens would 'get what they wanted' led to dramatic relaxations of the rules governing the establishment, management, purchase and sale of radio stations. At the same time restrictions governing the number of radio and TV stations any one body could own were liberalised (though not lifted entirely).

Regulations governing information content in the output of radio stations were also relaxed and replaced with a desire for "flexibility" (NAB, 1982:2). This meant in practice that stations in densely populated areas could concentrate almost entirely on an entertainment format by claiming that citizens had good access to other sources of societal information. In FCC terminology, "programme logging requirements were abolished and non-entertainment percentage guidelines were removed" (NAB,1984:12). Another one thousand commercial (as opposed to educational) FM stations, almost all with a high music content, have joined the airwaves since 1980 bringing their total up to over 4,000 broadcasters. Licence transactions have also seen a dramatic increase, from 268 in 1970 to almost 1600 stations (nearly 16% of the AM/FM total) changing ownership in 1985 in business deals totalling over 1,400 million US Dollars (Broadcast, Feb 15th 1990:41).

A common denominator has been the use of recorded music to fill airtime - " more music, less talk" became a common slogan. The US music copyright society, BMI, one of the organizations which collects performance fees from radio stations and distributes them to composers and publishers, estimates that 9,000 US commercial radio stations play about <u>40 million hours</u> of music per annum. This is based on an estimated average music content of 67% of airtime and is equivalent to 790 million songs (BMI.1989). On top of this some 1,400 educational stations - many linked to colleges and universities - also play large quantities of music, particularly in the Art vein.

Spoken-word channels exist mainly in the form of all-news stations, mostly on AM, but their numbers are dwindling.There

were three in Washington,DC in the mid-70s. Ten years later,two of these had closed (New York Times, Dec 12th 1986). Nominally non-commercial National Public Radio produces several hours of news and current affairs programmes daily, but they are distributed via satellite to educational stations which are local in essence, using all or only parts of the NPR output, and transmitting at different times.(Wallis,R.Baran,S.1990).

YEAR	AM	Stations registered June 30th FM commercial	FM Educational	TOTAL	Licence Transactions
1970	4292	2184	413	6889	268
1975	4434	2636	717	7787	363
1980	4559	3155	1038	8752	424
1981	4619	3324	1106	9049	625
1982	4668	3380	1112	9154	597
1983	4720	3441	1091	9252	669
1984	4749	3610	1153	9512	782
1985	4792	3801	1194	9787	1558
1986	4839	3923	1247	10009	959
1987	4887	3969	1272	10128	775
1988	4913	4085	1339	10337	845
1989	4957	4210	1398	10565	663

Table 1.Growth of number of US radio stations during the 70s and 80s.Sources; FCC, NAB and World Broadcasting Handbook.

4.2 Streamlining and Segmentation of Output.

With this huge increase of music-based radio, it's hardly surprising that competition for listeners and advertisers also served to increase the degree of streamlining of output. "Rivals in Conformity", the term Bigman once coined to describe competing local news papers, is ‾ highly applicable here (Bigman,S.K.1984:127-131). As less successful stations eyed or "eared" more attractive competitors, certain styles of presentation and genres of music began to dominate; radio became more 'formatted'. By defining the format in terms of labels such as "adult contempory","R and B" or "Country", etc stations could be identified by not only by listeners but, even more importanly by advertisers wishing to reach a particular target audience for their message. Expansion led thus to streamlining of output or

segmentation, and fragmentation of the audience. This in its turn, by definition, led to the phenomenon of exclusion with musics which did not fit into the formats that had developed finding it hard to get on the air. This explains the basis for an interesting complaint voiced by a leading figure in the US phonogram industry, Dick Asher (former President of Polygam Inc). He describes music on US commercial radio in terms of:

"the tent which gets you in where all the products of the advertisers are displayed... if the people who like certain sorts of music are not the people who want to buy soap, then their music won't get played" (Asher,D. in Wallis,R.,Malm,K. 1988:268).

Even in a highly streamlined media situation, new trends can emerge. Significantly, most of the experiments with new music formats in US radio can be found in those universities which have not decided to use their campus stations as fund-raisers through sales of commercial slots, but which concentrate on training and teaching in the field of media studies.

4.3. Style and Content

A general observation from US commercial radio, however,is that , with the high degree of music segmentation, stations tend to seek a competitive advantage in terms of style rather than content. The format defines the music content; a TOP 40 stations rotates the TOP 40 songs. It will almost certainly carry regular news, weather and traffic updates. The style, personality and professionalism of the presenter will be what is seen to attract listeners. The traditional European public service , mixed format music output would be unthinkable in the US context (there wouldn't be a name or 'label' for it) except in the case of a few nominally non-commercial, ie listener- or sponsor-supported stations.

The above postulate regarding the relative importance of style,

compared to content in the search for success in the US radio market may seem to contradict an earlier generalisation in the introduction. Grandi, I noted, reporting from a Council of Europe seminar on broadcasting in 1982, claimed that with centralisation, it was the structure of music content rather than DJs' specific personalities and styles which were tending to distinguish local radio stations in Europe. The explanation is that we are referring to different stages in an institutionalization process. In 1982, the process of streamlining and segmentation in Europe was very much an on-going phenomenon, with a wide range of styles represented including many representing different language areas. In the USA, the relative division of main music formats (Country and Western,Adult Contemporary etc) was established in the 70s and has stayed much the same throughout the 80s, even despite the higher rate of changes of ownership made possible by deregulation.

4.4. Music Sources for US Commercial Radio

Virtually no US radio stations record their own music, apart from a few tailor-made snippets such as jingles. Even some of the larger listener-supported "public" stations such as KQED in San Francisco that used to be big recorders of classical music concerts have found this too expensive. Spoken-word formats relying on material from NPR, as well as sponsored or free material often from international broadcasters such as the BBC World Service or Radio Canada International are seen as attractive, cheap alternatives.

Commercial radio relies entirely on the commercial phonogram industry for music. Has the demand for 120 million extra phonogram plays per annum throughout this decade been matched by

increased output of material from the phonogram industry? Statistics from the major companies show , somewhat surprisingly, an opposite trend. Values of sales have admittedly been maintained, mainly thanks to the introduction of the CD attracting customers wishing to update their software. The number of new releases, of both singles and LPs, on the other hand has <u>decreased</u> during the 80s if we are to believe researchers at Polygram USA.

	Phonogram sales USA(millions)				Value	New releases USA	
YEAR	Singles	LP	MC	CD	Total	Mill USd	Singles	LPs
1981	147	272	174	-	593	3,636	2,315	2,810
1982	137	241	197	-	575	3,592	2,285	2,630
1983	125	240	243	1	609	3,815	2,105	2,300
1984	131	235	338	6	705	4,370	1,980	2,170
1985	120	167	339	23	849	4,389	2,200	2,360
1986	94	125	346	53	618	4,651	1,815	2,345
1987	82	107	410	102	701	5,567	1,762	2,406
1988	90	72	450	150	762	6,254	NA	NA

Table 2.Sales of phonograms and releases of phonograms in the US market. Figures apply to the major companies affiliated to the Record Industry Association of America(RIAA).Sources:IFPI,London and Polygram,USA and RIAA research department. Note:CD releases in the USA in 1987 totalled 3571; it is reasonable to assume that the difference between this and the figure for LP releases is accounted for by the large number of CD rereleases of older. material. The RIAA, according to their research dept, stopped collating release data after 1977.

A number of hypotheses can be ventured to explain the trends in Table 2 :

1) The introduction of the video clip and its use in music television has radically increased marketing costs for international phonogram stars (the phonogram companies pay for the video clips in most cases).

2) Streamlining and segmentation in both US radio <u>and</u> US music television also have an effect on the phonogram industry's willingness (or unwillingness) to invest in artists and music styles which might not find their way into the available formats.

3) The growing popularity of nostalgia formats ("Golden Oldies")

decreases further Radio's interest in newer artists,songs and styles, i.e the current output of the phonogram industry. Since the USA does not recognise the right of producers and performers to receive remuneration for public performances of phonograms, not having signed the Rome Convention, then a shift to playing older records means less money for the phonogram industry. The fallback can only be covered in part by issuing re-releaqses of older records, particularly on the new CD sound carrier.

A similar upswing for Radio stations playing songs of the Sixties can be seen in Europe. Capital Gold, the AM outlet of Capital Radio in London, is currently enjoying high listnership.

A general observation in the USA is that the degree of mutual dependency between the phonogram industry and the broadcasters (including cable and satellite) has increased, but with the bargaining strength of the phonogram industry weakening in this demand-reward relationship. Sponsors and advertisers have also increased their influence in this system, even to the extent of signing exclusive contracts with certain international stars. Integration trends both within the music industry, and between the music industry and other related entertainments, electronics and consumer industries have become much stronger. This has also made it harder for radio stations to break out of the format straitjacket (Wallis,R.Malm,K. 1988).

5 THE CASE OF RADIO IN SWEDEN

Tunstall's claim that US radio had become a "local,fragmented background service", consisting of "largely national hit music, plus local chatter" applies in many respects to Sweden (if one replaces the term 'national' with 'international'), even though this Scandinavian nation has been one of the last countries in

Western Europe to keep advertising out of terrestrial radio and television. The political decisions taken to expand lower tier radio (local and community) have produced results not all that different from the effects of deregulation in the USA.

5.1. Traditional National Radio in Sweden.

National Radio in Sweden runs three channels. P1 is for spoken-word output with little music content (8%) and runs from early morning to late evening seven days a week; BBC Radio 4 has clearly been a model for Sweden's P1. P2 contains a mixture of educational and immigrant programmes during the daytime and becomes an "art music" channel in the evenings continuing throuhg the night. P3 is primarily a light music programme, on 24 hours a day, which in common with BBCs Radio 1 was established to satisfy perceived demands of the market when the first radio pirates off the Swedish coast were made illegal through legislation affecting advertisers. The establishment of such a light music channel in the early 60s marked, in other words, a shift away from an educational view of radio to one where entertainment and relaxation were acceptable goals and rewards for broadcasters and listeners.

5.2. Expansion of Licenced-financed Radio through the 70s and 80s in Sweden.

Output in terms of hours on Sweden's national radio channels has been fairly constant throughout the 70s and 80s, amounting to about 20,000 hours per annum. An increase could be noted in 1988 when P2 began running through the night, repeating daytime programmes in the early morning hours. Even here, recorded music accounted for this increase, which meant in effect an increase in the amount of imported music disseminated via Swedish radio (Strid,I.,Weibull,L. 1988:178).

The decentralization of radio started in the 70s with the creation of local organizations for programme production which could opt in and out of the P3 popular music channel during certain fixed times (morning, lunch and late afternoon slots were available). Gradually, these entities became fully fledged local radio stations with their own transmitters (known as P4 transmitters), thus allowing P3 to become a purely national channel once again, rather than the hybrid existence it led during the 70s and early 80s.

By October 1989, 24 Local Radio stations , non-commercial and comprising a separate company in the Swedish Broadcasting Corporation (Sveriges Radio), had all got their own transmitters. Once again, recorded music was one of the tools used to fill programme time.According to Sveriges Radio's own statistics, music on phonograms accounted for 2,700 hours in local radio in 1980, but had increased to almost 18,000 hours in 1988 (Sveriges Radio.1988).Total hours of local radio broadcasting increased over the same period from 21,000 to 56,000. An important point is that the 2,700 hours of phonogram music quoted above (local radio 1980) refers only to local radio's own programme production; local radio could also fill out with a so-called "musiktapet" (music wallpaper) service provided by National Radio.

5.3 Third Tier or "Neighbourhood Radio" in Sweden.

The biggest increase of radio, in terms of programme production and transmission, is that provided by Swedish "Naerradio" - 'neighbourhood' or 'community' radio.

Introduced as an experiment in 1978, this step towards the decentralization of broadcasting comprised in effect the first formal attack on the traditional monopoly of the Swedish

Broadcasting Corporation (Sveriges Radio). As such it was a controversial move by a non-socialist coalition during their short 6-year period in charge of running Sweden (1976-82).

The airwaves were opened up on June 1st 1978, at first for a three year trial period. The briefly worded Act of Parliament makes little mention of content, but merely states that any body involved in "voluntary, political, trade union or religious activities" could apply to the newly created Neighbourhood Radio Board for time on a local transmitter (Swedish Government Bill 1978:479). Finance via advertising was forbidden.

Three years later, in 1981, the experiment was reviewed and made permament (Bill 1981/82:127). The many comments from a wide range of organizations which are summarized in the Bill's postscript concentrate mainly on the need for wide tolerance as regards safeguards for freedom of expression, as well as legal issues such as the right of reply. Some of the early programme suppliers do make references to the role of commercially available music in the output, and the emergence during the trial period of groups whose main interest appeared to be disco-radio for the sake of attracting listeners, not primarily for informing members of an organization about forthcoming activities or issues of mutual interest.(Bill 1981/82:127 page 50). The lawmakers, however, ignored such concerns. The Bill included no conditions which would limit the available range of programme material, nor did it specify a relationship between style and content of programmes and the intended purpose of Neighbourhood Radio. The door was thus left more than ajar for a wide range of interpretations and activities.

The term 'neighbourhood radio' is actually somewhat misleading.

It does not refer to tiny transmitters covering a block of flats or a village. Swedish neighbourhood radio transmitters cover in principle a radius of about 5 kilometres. In practice, however, with the use of various boosting techniques, signals can be heard up to 20 kilometres from the transmitters. In some rural, sparsely populated municipalities, the Neighbourhood Radio Board which controls this form of broadcasting has allowed increases in transmitting power to cover even larger areas. In city areas such as Stockholm and Gothenburg, the law allows the same programme producer to transmit the same material over several transmitters simultaneously, as long as they are situated within the same municipality (ie within the city limits). The result is in effect that Swedish Local Radio described above, which covers whole counties, has become a form of Regional Radio, being replaced on a local level by Neighbourhood Radio.

The 1981 act making Neighbourhood Radio permanent also confirmed that it would continue to be non-commercial. Any non-profitmaking association can apply for time on a neighbourhood radio station, ostensibly to spread information about its activities (the politicians described the new medium as "the stencil of the airwaves"). Since 1981 volume of programme production has increased to a staggering 250,000 hours per annum, produced by 2,500 groups and disseminated via 150 FM transmitters. Once again, recorded music has been a major prerequisite for this growth, a growth which has contributed to a 15-fold expansion of radio production in Sweden during the 80s (source:Naerradio Board,Stockholm).

Neighbourhood radio is also beginning to make its presence felt in the annual Swedish media statistics,even if the relevance is hard to interpret since not all Swedes can actually hear

Neighbourhood radio. The annual "media barometer" from October 1988 shows an average over the whole country of 9% of Swedish 15-24 yearolds listening regularly to neighbourhood radio (compared to a figure of 4% for the combined values of listening to the two national channels, P1 and P2 in the same age group). In the major cities where several small transmitters overlap, sometimes transmitting the same music-based programmes, the figure is almost certainly much higher. A major problem with such estimates based on listener reponses is that listeners don't always know exactly which type of station they are receiving, finding it particularly hard to distinguish between neighbourhood radio and local radio (Hedman,L,.Strid,I.in MediaNotiser 1990/1).

5.4 Music, Radio, the Phonogram Industry and Cultural Policy in Sweden.

The music content on Sweden's national P2 (classical/jazz/art) and P3 (pop/rock) amount to 75 and 70% respectively. The central management of the Local Radio company plan for a 60/40% mix of speech and music in 1990 with the goal of a 50% Swedish music content. Figures from 1988 show a 50/50 mix with the content of Swedish music varying from 45 to 70% of music output on different local radio stations (Sveriges Lokalradio.1988/1989). Neighbourhood radio has also come to rely heavily on phonograms, as broadcasters with a goal of attracting as many listeners as possible have moved in, outnumbering in terms of programme production those who merely wish to use the medium for spreading information of one kind or another to listeners with the same specific interests .Exact statistics covering the use of phonograms do not exist. Estimates can be gleaned, however, from data concerning music licences sold by the Swedish copyright organization (STIM); these follow a tariff system based on the

quantity of music used. By 1985, 26 programme producers had purchased licences allowing them to transmit 600 or more hours of music per annum (over 12 hours /week). In 1988 their number, according to STIM, had increased to 42.

```
                15                                                    /
                14                                                  /
                13                                              _.-
                12                                          _.-'
Value of        11                                      _.-'        .
music           10                                   _/         .. '
licences/        9                               _/          x'
Increase of      8                           _/           ..'
total trans-     7                        _/         ..-x'
mission time     6                      _/       ..-'
(both as         5                   _/    ..-x'
multiple of      4              _.-x'-''             .  Music Licences
value 1980)      3        _..-x'                     x  Transmission Time
                 2    ..x'-'
                 1 _x'-'
                 0
 PERIOD  80/81 81/82 82/83 83/84 84/85 85/86 86/87 87/88 88/89 90
```
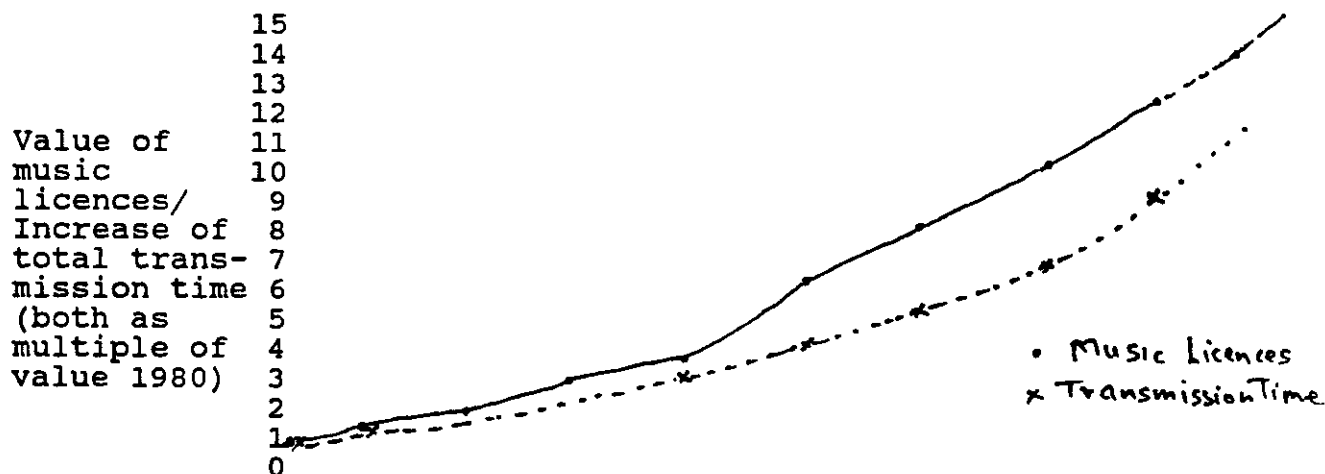Figure 1. Proportional increase in total value of music licences
        for neighbourhood radio stations collected by STIM (figure
        for 1990 is a projection), compared to the proportional
        increase of total transmission time per annum.

The growth of copyright incomes from neighbourhood radio programme-makers (Fig 1 above) illustrates dramatically the increase in use of recorded music. The fact that this growth rate is relatively higher than the total growth rate for neighbourhood radio transmission time (based on annual schedules) indicates a growing importance of recorded music as the medium expands and develops.

5.5 Programme-makers and Programme Development in Swedish Neighbourhood Radio.

Swedish neighbourhood radio has followed a process of streamlining and segmentation not unlike that witnessed in deregulated US radio. In the early years of the Eighties, while neighbourhood radio was still in the experimental stage, a number of organizations run by music enthusiasts produced programmes for

this new decentralised medium. They often featured recordings of their own and their friends creative musical endeavours. A pot-pourri of Swedish grass-roots culture could be heard. This phase didn't last long. Enthusiastic amateurs do indeed get tired at times and often lack funds. In actual fact, this category soon started to disappear from the Swedish neighbourhood radio airwaves. The trend was no doubt enhanced when copyright organizations formulated and successfully negotiated demands for public performance fees from those broadcasting music on neighbourhood radio.

In a second phase of neighbourhood radio, churches and religious associations dominated airtime, accounting for almost 60% of output in 1984. By the spring of 1989, however, religious content was down to 22% and another type of large operator had come to dominate neighbourhood radio. The third phase of development was characterised by political parties and wealthy organizations with a message to sell requesting and being granted large blocks of transmission time. They began to dominate output, introducing formats very similar to those which have developed in both US and other European local radio. Their message is not directly "Buy soap!", but has more of the character of vague ideological platitudes. Music content is high and 'sound' and 'style' are very similar. The development, in other words is not unlike that noted in previous summaries of local radio growth in Europe, despite the absence of the commercial carrot.

Data from the Neighbourhood Radio Board concerning percentage changes throughout the Eighties in the number of licences and transmission time for different categories of neighbourhood stations give a clearer empirical picture of the development referred to above (Table 3).

LICENCE CATEGORY	% of transmission time				
	1982(w9)	1984(w13)	1986(w45)	1988(w12)	1989(w26)
Religious(churches)	55	59	45	36	22
Political groups	5	9	17	22	19
Music societies	8	3	2	2	3
Education groups	1	3	6	9	12
Trade Unions			1	2	6
Student Unions	6	8	8	7	8
Others	15	11	16	17	24

LICENCE CATEGORY	% of total licences granted				
	1982(w9)	1984(w13)	1986(w45)	1988(w12)	1989(w26)
Religious(churches)	32	34	27	22	22
Political groups	16	19	29	28	27
Music societies	10	4	2	2	2
Education groups	2	5	6	7	7
Trade Unions			2	4	5
Student Unions	6	7	3	4	4
Others	19	18	18	21	22

Table 3. The development of neighbourhood radio in Sweden during the 80s: transmission time and distribution of licences by major categories. Some categories are missing from this table, including sport, immigrant, handicap and teetotaler groups which show little change. Source: Swedish Neighbourhood Radio Board based on measurements during one sample week (indicated in parentheses).

The figures in Table 3 show the largest increases for the categories 'political groups', 'trade unions' and 'others'. The dual increase for the first two of these categories reflects the link between the trade unions and the political labour movement who have coordinated their publicity activites in neighbourhood radio (Dagens Nyheter July 6th 1989:20). The 'other' category, accounting for almost a quarter of all transmission time includes a variety of groups with the resources and know-how needed for running a professionally sounding radio station.

Some of programme producers covered by the category "others", in Table 3 above, are merely "Neighbouthood Radio Associations" formed to coordinate the activities of different groups/organizations using a particular transmitter and mediate with the Neighbourhood Radio Board; they often play music to fill out empty slots.

The most spectaclar of the "new" neighbourhood radio operations

are those funded by SAF (the Swedish Employers' Federation) via nominally non-commercial associations called 'business radio', created for the purpose of channeling funds to the new medium. SAF Radio in Gothenburg calls itself Radio City 103. Only short propagande messages (jingles) promoting concepts such as private enterprise ("more efficient than State involvement") or Sweden joining the EC ("isn't it cold enough up here already without being left out") are produced centrally by SAF. In actual fact, these promos, which function more or less as advertisement slots in commercial radio, are delivered as 'play-ready'products by an advertising agency under contract to SAF. Actual programming on the Gothenburg Radio City transmitters is produced by a private contracted company, ICB (Inner City Broadcasting). This construction tends to support the notion that SAF's involvement in Neighbourhood Radio is primarily motivated by a desire to prepare the way for the introduction of commercial radio to Sweden (something which has been on the agenda of the Conservative party, which has a close relationship to business and industry, for many years)(Dagens Nyheter,June 28,1989:22).
The success of Radio City can be compared to the early fortunes of the Swedish radio pirates back in the 60s. According to one survey, Radio City can claim an audience in the 15 - 34 age-group of as much as 35% (Kisch,K. Stolz,M. 1989). The same study also found that most of the Gothenburgians who appreciate Radio City were unaware of its financial and ideological link to business and industrial interests.

Another group of programme producers in the "others" category are the "radio for the sake of radio" enthusiasts who generate the

necessary funds for renting transmission time, paying music licences etc, through campaigning for support over the air. Svalans DX Club in the West coast town of Helsingborg is one such example. Started by a group which presumably had an interest in listening to shortwave radio, Svalans transmits 40 hours of pop music a week over the local transmitter in the centre of Helsingborg. Svalan has its own playlists with different degrees of rotation, including a "power play" disc which is played every halfhour. Music output is related to current disco hits and promotion give-aways from the major phonogram companies. Most of the music consists of Anglo-American international hits. The format consists of a high tempo presentation of phonograms interspersed with jingles (Station IDs) and weather and traffic reports - in other words, not very different from the majority of deregulated, US FM stations.

Svalans uses a variety of means for generating funds required to cover operating expenses. Listeners are urged to become members of the club. They are then offered rebates in certain shops; funds are also generated by a discotheque operation. Svalans, in other words, tries to balance gently on the edge of what would normally be regarded as a regular commercial radio operation. In March, 1990, its licence was suspended by the Neighbourhood Radio Board follwing a complaint from a listener that specific products were being advertised over the air. The sanction, however, was more in the nature of a temporary repremand. After a month, the station was back on the air, business more or less as usual.

Yet another much publicised neighbourhood radio station is Radio Nova, some 50 km south-west of Stockholm. Its management makes no attempt to hide the fact that the station does all it can to get round the ban on financing via commercials. It has also been

threatened with closure by the neighbourhood radio board on a number of occasions (Expressen Feb 4th 1989:2, Dagen Nyheter Jan 8th 1990:21). Music plays a significant role in the 24 hr a day output; the station's music library was initially created by inviting people in the neighbourhood to bring their favourite discs to Radio Nova so that they could be taped. Nova's prime mover has described his goal, somewhat flippantly as " freeing the radio spectrum from all politicians" (Nydahl,C 1989).

The entrance of large, wealthy national organizations has led in effect to a concentration of control over neighbourhood radio (the exact opposite of the politicians' original intentions) even if these organizations operate formally through decentralized local branches. The Neighbourhood Radio Law does not formally allow for the relaying of material produced centrally by national organizations over several local neighbourhood radio transmitters. This does happen, all the same, as the above case of SAF's propaganda jingles shows. At the same time, broadcasting · legislation introduced in Sweden to cover areas such as Neighbourhood Radio/TV and Cable is vague; when new broadcasters achieve a high degree of popularity, it's easier for regulatory bodies to turn a blind eye to many possible transgressions rather than to apply sanctions and attract a critical public debate.

The above examples illustrate the sturdy momentum developed by the growth of Neighbourhood Radio in Sweden, a momentum so strong that it has rendered the official body installed to oversee and regulate its development somewhat toothless. Much neighbourhood radio quite patently bears little or no relation to the original intentions of the law-makers, and there appears to be little that can be done with the present construction of both the Law and the

regulatory body to affect this fact of life.

5.6 The Music Output of Swedish National Radio in the Present Scenario.

The development of neighbourhood radio in Sweden is a good example of the trend towards internationalization of the music media, involving a greater degree of Anglo-American content. The same can be noted in many areas where culture has been industrialised, eg books, television programmes and phonogram records (Strid,I.Weibull,L. 1988:178). Swedish Local Radio, as noted earlier, claims to aim for a Swedish music content of around 50% (Lokalradio 1988). Statistics for the national popular music channel, P3, which averages about 35% Swedish music showed a decrease in the amount of Swedish music played during the period 1986-88 (Sverikes Riksradio 1989:13). In other respects, music output on P3 has been remarkably stable throughout the mid-80s, despite the dramatic changes in the Swedish radio environment:

COUNTRY OF ORIGIN OF PHONOGRAMS	% of phonograms played on P3			
	1984 March	1986 October	1987 October	1988 October
Sweden	29.1	35.1	35.5	33.9
Scandinavia	3.4	3.2	2.6	2.2
UK	17.8	16.1	17.5	17.0
USA	33.9	32.0	32.3	34.8
W Germany	3.0	2.1	2.3	2.1
France	2.7	3.1	2.6	2.6
Italy	1.7	1.3	1.1	1.2
rest of Europe	5.8	3.5	2.4	2.8
rest of world	2.7	3.6	3.7	3.3
GENRE OF MUSIC PLAYED	% of phonograms played on P3			
	1984	1986	1987	1988
General light music	33.6	39.1	36.0	36.9
Pop	25.9	28.9	34.6	29.6
Rock	16.1	11.3	10.8	12.4
Jazz/country	16.1	13.8	14.8	16.8
easy classics	6.5	5.5	2.3	2.0
signatures	1.4	1.4	1.5	1.3

Table 4. Music output of Swedish national radio,P3 by country of origin and music genre.Source:statistics from Sveriges Riksradio (Swedish National Radio) based on annual 3-week samples.Phonograms have accounted for app 90% of music output on P3 throughout this period.

Table 4 shows a remarkable stability in the output of P3 as regards the Anglo-American content on phonograms. The only clear trend one can discern as regards the breakdown of genres is a move towards more pop, possibly at the expense of popular classics. This reflects a move in programming towards a slicker, more up-tempo presentation which is facilitated by pop hits rather than by playing more selections of either Heavy Metal rock and raucous punk or Middle of the Road, Henri Mancini-style evergreens.

National Radio, in other words, has not markedly changed the character of its music output in response to the increased dissemination of Anglo-American hits in Sweden resulting from the advent of Local and Neighbourhood radio. Neither can one find a link between the ups and downs in the output of Swedish phonograms on Swedish national radio and the output of the domestic Swedish phonogram industry. New releases of Swedish LPs have remained constant at around 700 per annum during the past three years (86 - 88), thanks in part to a system of production grants linked originally to a tax on blank tapes. Subsidies cover on average about 41% of production costs for around 100 Swedish LPs per annum (Kulturraadet, 1988:50). The majority of these subsidized LPs have received litle radio exposure and have sold in small quanties, on average less than 3,000 copies during the first year. Somewhat paradoxically, sales of Swedish phonograms as a whole in the period 1986-88 rose from 29 1/2% of all phonogram sales to 34%, mainly as the result of some major successes by certain popular artists (IFPI,Sweden.1986/7/8). During the same period, the percentage of Swedish music (music created by composers registered in Sweden or performed by Swedish musicians) played on P3, that is of the total output of

music on phonograms and live recordings, <u>decreased</u> from 39 to 34%. Swedish Radio also cut down its own recording operations with Swedish popular music during the same period in a bid to save money, thus increasing its dependence on the commercial phonogram industry for programme material.

The above observations and statistics raise a number of questions about the future for national media, particularly radio, in the current media scenario.

6 THE FUTURE FOR NATIONAL RADIO BROADCASTERS

6.1 <u>International</u> and <u>Local</u> <u>Media</u> <u>Activities</u> <u>Bypassing</u> <u>National</u> <u>Intermediaries.</u>

A traditional model which sees the role of <u>national</u> media as being primarily a window on the world of music, reflecting the international cultural/show business scene and diffusing it to the nation, has no longer any relevance as regards popular music. We are witnessing both an <u>internationalization</u> and a <u>localization</u> of media. A small neighbourhood radio somewhere in the provinces can get hold of the new release by international star X as quickly as Swedish national radio (the local guy can even lift it off the MTV stereo sound channel). In other words, playing the international Top 40 and relying on a novelty value no longer gives a national radio channel a competitative advantage. Accessible technology at an affordable price has also had a marked effect on activities at a local level. The local DJ can achieve a high degree of professionalism, producing an impressive, high-tempo flow of music, chat and sound effects using a small mixing console, two phonogram players and a cassette or cartridge player. The same professionalism has

allowed small radio stations to produce music programming which sounds to the average listener no different from something produced in the most luxurious, well-equiped national radio studio. The same development can be observed within the phonogram industry. The advent of cheap recording equipment (to say nothing of a future with DAT and/or WORM) allows for a local production of phonograms of exceedingly high quality.

As regards RADIO, one can predict that the international distribution of both software (international music) and hardware (recording, production and disseminating equipment) can lead to TWO forms of localization. One is typical of the present situation within Swedish neighbourhood radio. A number of wealthy organizations backing up radio enthusiasts can produce programme output of a high professional standard (high tempo, good sound, service information of various sorts included etc) where the music content is based on a format of internatioal hit songs. Which particular songs are played has very little significance as long as their contribution to the sound and flow is right.

But there is another alternative. The same professionalism and style can be used to promote local music activities (the more professional the use of radio production technology in composing the menu of the output, the greater the degree of freedom as regards choice of music). An input of local production also has the advantage of publicising musicians whom listeners can actua see locally on stage or in the street, and maybe even touch - very different from Michael Jackson.

To sum up, the internationalization of the availability of hardware and software (I) can lead to two extreme forms of localization (L). One involves using available technology to spread international culture products on a local level (LI). A

small neighbourhood radio station in Sweden playing exclusively US Top 40 songs would be such a case. Another extreme would involve using professional techniques and machines which are universaly available to produce an output with a high content of local musics (LL). One can also envisage any number of positions on a scale between these two extremes.Once again it should be stressed that such operations can emerge independently of any activities on a national level (Figure 2).

INTERNATIONAL LEVEL (I)
↓
NATIONAL LEVEL (N)
↓
LOCAL LEVEL (L)

Traditional interaction model

INTERNATIONAL LEVEL (I)

(NATIONAL LEVEL)

LOCAL-INTN'L (LI)   LOCAL-LOCAL (LL)
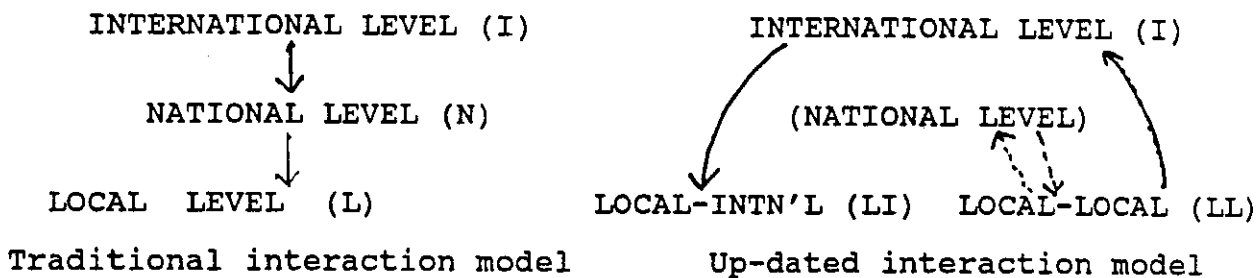
Up-dated interaction model

Fig 2. The availability of cultural products and technology on a local level changes the role of national institutions as intermediaries.

The developments discussed here present traditional national media institutions with an interesting dilemma. If such national media no longer play the role of being the main mediators between international show business and the public at large, then what should be their emphasis? Of course, they too will attempt to achieve a greater degree of professionalism, with more up-tempo, live transmissions ("with it " radio). But achievements in style do not provide a competitive advantage if there are numerous other actors in the media arena who are just as competent. SAF Radio in Stockholm, for instance, is staffed by professional presenters , schooled in the tough competitive world of nightly 5-hour discotheque stints (compare the Beatles and their Hamburg period!). Even if the substance at times is

minimal, SAF radio is very pleasant to listen to. Happy with the style, SAF Radio presenters in Stockholm have significantly begun to expand substance of late, starting themselves to move into the area of local music, presenting not only Swedish music but also presenting local artists in person, using a format commonly used by local Radio Stockholm.

6.2 A Future Strategy For National Music-based Radio

What does the future hold for National radio organizations in this scenario? Are they doomed to go under? Two possible strategies for survival do come to mind. Both are based on the assumption of a need to develop a specific profile, ie a combination of professional style and interesting substance which differs from the cases described above (Local-International or Local-Local). One is to concentrate more on the domestic scene, but from a national perspective, playing the best of music by artists which local radio stations discover in their areas (assuming that local radio also focuses on local music activities rather than non-stop international hit songs), and even recording more domestic artists in order to increase the organization's independence from the commercial phonogram industry.

Another strategy would involve more exchange with other national radio companies, bringing national music from other nations to a domestic audience. In the case of Swedish National radio this could involve replacing part of the regular 52% Anglo-American output (see table 4 above) with, for instance, music from other European countries, or other continents. Such a strategy, of course, assumes the presence of personnel who are a) knowledgable about such musics, and with the right channels of communication to sources of music, and b) who are competent in the art of professional radio production and presentation.

6.2.2 Formulating Goals in Denmark, Finland and Sweden.

One national radio company which seems to have followed the above line of argumentation in its strategy deliberations is to be found in Denmark. The non-commercial/licence-funded Danish Radio popular music channel, P3, according to its programme director, intends to introduce a set of priorities which govern music policy. The following order will be observed:

1) Danish music, not only on phonogram but also acquired through an increase in the company's own recording activities.

2) Music from the Nordic area (Sweden, Norway, Iceland, Finland, Faroes, and no doubt former Danish colony, Greenland which can boast a lively production of local music, much of it available on CDs)(Isaksson,D 1989:33)

3) Music from the rest of Europe and from other nations which are not normally represented in the international Top 40 repertoire.

4) Anglo-American chart music.

This is the music policy formulated by management and staff of Danish national radio (Aarslev,P.1989).

Similar types of goals have been discussed in Finland in conjunction with the June-1990 launch by the Finnish Broadcasting Corporation of a new national, non-commercial radio channel aimed at an audience of "youth and young adults". Offically known as YLE 2, it will market itself as RADIOMAFIA in an attempt to distance itself from the many commercial local radio stations with standard names such as Radio City, Radio One etc. A staff of 44 will run the 24-hour operation, and music policy will be governed by the findings of a working group which spent half a year developing guidelines; some of their observations and statements of intent are listed here:

- Music and speech have equal significance. The channel's profile is created by the music it plays.

- The channel will concentrate on presenting modern popular music covering various styles, cultures and decades.

- The channel will seek to present and promote Finnish music, and be an active force in the Finnish music environment.

The route to these goals, according to Radiomafia's music charter involves:

a) Following musical trends in Finland and abroad, trying to predict changes, but also being aware of the channel's own role in creating news trends and styles via popularising records.

b) Avoiding as far as possible the influence of commercial pressures.

c) Using the Finnish Broadcasting company's record library to establish a system which will guarantee speedy and steady access to phonograms from all over the world, as well as tapes from other national broadcasters (via exchange through the West and East European broadcasting organizations, the EBU and the OIRT).

d) Producing the channel's own recordings of studio and live performances.
(YLE 2 Music Policy,1990).

When Sweden's National Radio Company tried to formulate a music

policy for its popular music channel,P3, at a seminar in early

1989 attended by all 50 or so of its producers and presenters,

the management suggested a number of possibilities. One

suggestion which mirrors elements in both the Danish and Finnish

priorities listed above read:

"Swedish music should be richly represented on P3. It should be the task of this channel to present music both from countries with which we have a cultural affinity, as well as those the culture of which is less well known in Sweden."(Kellqvist,A 1989)

The ensuing discussion at the February 1989 seminar in Sweden

reached no conclusion about the relative importance of Swedish

music and music from lesser-known areas. Most of the producers

were more keen to relate music policy to target groups defined by

age (rather in the same way as SAF neighbourhood radio in

Gothenburg or, say the MTV music television channel define their

operations, in terms of the market and target audience they seek, rather than content). The Danish and Finnish documents quoted above are clearly based on a dual assumption that a) national radio stations do have a cultural/educational as well as an entertainment role, and b) that there is an inquisitive audience waiting out there in Radioland, interested both in homegrown and unusual, foreign-born musical experiences.

The implementation of the types of strategies sketched above, in in other words,would seem to be a sensible recipe for creating a national profile based on both domestic and foreign music content. The mere act of specifying such a policy must surely be an important step to ensure that national, public-service radio does not merely follow the inherent momentum of an expanding radio medium that knows no checks or balances, where _Style_ means eveything, and _Substance_ is little more than a matter of getting the sound right.

The actual development, of course, of both Denmark's P3 and Finland's Radiomafia, will provide the real-life test of such strategic thinking.

By way of a postscript to this section, a short comparative reference to national radio in-the UK is highly relevant. The BBC's Radio One Rock/Pop channel with its gigantic national audience in the UK, is based on a music policy which in many respects is similar to those summarised above. Unlike Radio in the USA (Wicke,P.1988), the BBC can use its non-commercial status and licence funds to maintain a distance from the commercial phonogram industry.The BBC is often responsible for bringing unknown British artists to fame in their own country. The difference, of course, is that stars created in Britain provide

the international phonogram industry with artistic talent which then is marketed worldwide. This is not normally the case in Finland or Denmark; the policies might be similar, but they have different functions.

7.CONCLUSIONS

7.1 Support for the Hypotheses.

The comparison between the expansion of radio in the USA and Sweden gives considerable support to many of the hypotheses proposed at the beginning of this article. The combination of "people, money and machines", ie globally available technology at an affordable price, know-how, creative ability and enthusiasm, provide the prerequisites for professional norms setting international standards for activities on all levels in a cultural industry.

The combination provides radio with its own growth momentum which governs development more or less independently of the media political environment. Conceived to be the ultimate in decentralised, non-commercial radio, Swedish Neighbourhood radio has developed along the same lines as deregulated FM radio in the USA. Similar styles have developed, based primarily on a large content of international hit songs. Both rely on a commercial phonogram industry to provide most of the programme material. Both have witnessed the phenomenon of decentralisation being replaced by a form of centralization, via syndication of material, concentration of ownership or increased influence from large bodies with pecuniary resources and a message to sell.

With an increased demand for music on phonogram in order to fill programme time, and production of new phonograms in the music industry bearing no apparent proportional relationship to this increase, then the relationship between broadcasting and the

music industry has become closer (mutual dependency has increased). But the music industry, too, has gone through a process of internationalization _and_ localization. Available technology allows for extensive music-production activities on a local level (Wallis,R.Malm.K 1990), and can in theory allow local and even national radio to create unique profiles combining a professional _style_ with their own, particular choice of _substance._

What about the future for radio in Sweden? With the increase of radio, listeners will of course make their choices as to which stations receive their loyalty. If the advertising rules for terrestrial radio are not changed, then the willingness of large organizations to continue funding neighbourhood radio will depend on a combination of listener reaction and their evaluation of the publicity provided. If advertising is introduced into national or local (= regional) radio, then programme suppliers such as the Employers' Federation (SAF) might move up from third tier to second or first tier radio. The formal absence of advertising on Swedish radio, however, does put less pressure on the system to divide output into strictly segmented styles of music, as in the US case. Finally, as regards a European country with its own language and cultural traditions, there will always be room for National media. Whether they survive through fulfilling this need will depend on strategies adopted; this paper has suggested two alternatives.

7.2 The Future for Media Policy and Broadcasting.

The ability to mould the development of radio through media policy decisions, as we have seen, is limited. That does not mean that media policy is OUT. Neither should we conclude that the

ardent supporters of total deregulation urging us to accept an

increasing number of broadcasting channels, combined with the

laws of market economics will ultimately guarantee a greater

diversity of output:

"As the number of channels increases, there will eventually arise
an opportunity for at least one channel to increase its market
share by (offering) a different type of programme to the others.
There is a critical level of channel competition after which
diversity becomes the profit-maximising strategy for some
channels.. the point at which this will occur cannot be
determined a priori. It depends on the distribution of the
preferences of viewers.."(Veljanovski,C 1989:19).

Such is the view expressed by the market believers at the IEA in

London. Their volume:Freedom in Broadcasting has almost been

accorded biblical status by the strategists at the Swedish

Employer's Federation,SAF - they have even translated and

distributed parts of the book in Sweden

(Gallagher,R.B.,Tempest,A.1989). But this view also assumes that

we must,inexorably, pass through the phase of total streamlining,

before emerging the other side with one or more channels begging

to differ.

The difficulty with such arguments in the case of smaller

countries such as Sweden is that important facets of local

culture, which media exposure could help to survive and develop,

might get bulldozed out of existence in the process.

At the beginning of this discourse, I introduced the importance

of economical and technological factors for the growth of radio,

creating a momentum which is hard to restrict or even balance via

political decisions. The transatlantic comparison does suggest

one area where political regulation can slow down a development

towards a few giant media units. The NRJ phenomenon in France, in

theory at least, could not happen in the USA as long as onwership

restrictions and cross-media ownership controls are still

implemented by the FCC. Indirect concentration of control over radio media can of course occur, even in the US situation, via increasing the use of centrally-distributed,syndicated programme material. In the US debate over the introduction of the television equivalent of community radio ,LPTV (Low Power TV), there has been considerable lobbying against rules for ownership which could allow a few giant media groups to gain control over large chains of small stations (Singleton,L.A. 1986:51-61)).

In Europe, the notion of controlling the growth of large media companies has not been high on the priorities of politicians either nationally or on a pan-European scale. All that has emerged from discussions has been a few token rules and goals embodied in the Council of Europe May 1989 Convention concerning content and origin of audio-visual products and channels and its related, fairly similar EC directive covering the audio-video sector. Maybe Europe is so steeped in the traditions of having strong national, public-service media monopolies, that the reality of having a few equally large or larger organizations motivated purely by commercial goals, is not perceived as a threat to cultural heritage, values and aspirations.

Media Policy should be IN in Europe. It should be directed towards stimulating creative activites on local and national levels, in such a way that local and national media can get access to material which allows them to work with substance which is not merely the same international cultural products that can be seen or heard anywhere.

It can also be argued that such policies, in the long run, would also provide the soundest commercial basis for broadcasters operating on all levels. After all, those who merely promote the output of a transnational entertainments industry which is trying

to sell a smaller number of cultural products to more people will inevitably find themselves without any unique, specific competence. If the style is right, then the commercial advantage will be provided by the broadcaster with a substance which is slightly different. Presenting a fare which is merely the same as everyone else is offering, be it the latest international TOP 40 or the same 'Golden Oldies', will not constitute such an advantage in the long run.

A problem is that the lowest common denominator approach is seen as an attractive programme strategy by many broadcasting entrepreneurs since it offers what appears to be the cheapest way of operating a radio station. This is why media policies which function without becoming toothless are essential, so that resources are made available (in conjunction with the granting of franchies and licences) so that national and local broadcasters can develop their own unique competence. This, in its turn should guarantee a greater spread of creative musical activity in society, which of course also means a better future for the phonogram industry on which Radio is so dependent for programme material.

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