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Music occupies a curious and ambiguous place within national cultures. Its role in ceremony and tradition often makes music one of the most forceful forces in asserting the unity of national cultures. At the same time, music is a powerful reminder of social division. The role of government policy in nourishing music and the music industries is often unclear. In seeking to build secure foundations for a music industry, public policy risks closing off those processes which encourage innovation and diversity. The greatest problem facing the Quebec-based francophone music industries in recent years has come from success in creating tightly integrated firms and institutions – a success which risks leading to stylistic and economic stagnation. For the English-Canadian industries, weakness has come from the lack of integration between companies and sectors. This has led to a fragility. The recent establishment of a fully integrated English-Canadian music company, The Song Corporation, may alter this situation somewhat.

La musique occupe une place curieuse et ambigue au sein des cultures nationales. Son rôle lors des cérémonies et dans les traditions en fait souvent l'une des forces les plus affirmatives de l'unité des cultures nationales. Simultanément, la musique rappelle implacablement les divisions sociales. Le rôle des politiques gouvernementales devant nourrir la musique et les industries musicales est souvent obscur. Dans ses tentatives pour assurer des fondations solides à l'industrie musicale, les politiques d'intérêt public risquent de nuire aux processus qui encouragent l'innovation et la diversité. Ces dernières années, le plus grand problème touchant l'industrie de la musique francophone basée au Québec vient du succès remporté par la création d'institutions et d'entreprises intégrées de façon serrée, un succès qui risque de mener à une stagnation stylistique et économique. Pour les industries canadiennes-anglaises, leur faiblesse résulte d'un manque d'intégration entre les entreprises et les secteurs. Cela a créé une fragilité. D'une certaine façon, la création récente d'une entreprise musicale canadienne-anglaise entièrement intégrée pourrait modifier cette situation.

What might we say about music as a national, popular cultural form? Musical events have long been seen as nodal points around which sentiments of collective belonging take shape. Music is embedded in the ceremonies of military display and civic pomp, bound up with the most official of national rituals. Indeed, prior to the twentieth century, military and religious institutions were principal sites of musical training and composition. In its folk forms, music is heard as the guarantee of historical, cultural continuities, of the persistence

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of traditions in the face of forces that threaten to disrupt these traditions or leave them behind. Music often seems among the most stable and slowly changing of cultural forms, the most effective in asserting a fundamental and long-term relationship between culture and place. Unlike film or television, music offers the fantasy of a cultural practice which, even when caught up in highly commercial structures of promotion or distribution, is at some level artisanal, even pre-capitalist. For all these reasons, music might claim a privileged role in nourishing sentiments of national belonging. One recent document on Quebec music policy argued that the *chanson* is the best expression of a people's soul (Groupe de travail sur la chanson).

At the same time, however, in our everyday experiences of culture and place, music is one of the most forceful, unavoidable markers of difference and change. This is, in part, an effect of its mobility. Music moves, not simply because of its much vaunted (and dubious) ethereality, but because the material forms in which it is embedded travel, more easily than most other cultural commodities, across the world. Radio signals, cassettes carried in the suitcases of immigrants or backpackers, rituals of night-life transported or reinvented with the passage of people from one country to another – all of these make music a powerful force in the differentiation of space and population. This differentiation shapes our sense of space and locality, casting nightclubs as morally upright or suspicious, or clarifying the demographic content of neighbourhoods. Indeed, while music is a forceful marker of social solidarity, it is, as well, one of the most effective forces in asserting social difference. Our own music, and that of others, intrudes upon public space in ways that make it impossible to overlook differences of taste and background. Music is important in such conflicts in part because it compels us to judge the pleasure of others. The music of others regularly comes across as excessively repetitive or chaotic, loud or innocuous, boring or disruptive. Either side of these oppositions will fuel the perception that the emotional life of others is distorted relative to a norm. These perceptions play a prominent role in the stereotyping of generation, race and ethnicity. Through them, music works to fracture the fantasies of a unitary national culture.

In his study of the audiences for opera and classical music in pre- and post-revolutionary France, James H. Johnson traces a shift in the nature of concert-going as it moved from an experience of collective solidarity to one of individualist, middle-class contemplation. Music, in this context, offered a laboratory in which new modes of citizenship took shape and were given concrete expression. Over the period of two or three decades, concerts ceased being the pretext and backdrop for an élite's staging of its social games and rituals. They became events in which an emergent middle class, now reliant on the guidance of journalistic critics and socially sanctioned experts, engaged in the activity of polite self-improvement. Johnson's "social history of listening" offers one model for examining music within the context of Canadian Studies.

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A long-standing feature of that history for anglophone Canadians has been the supplement of affect (or the fantasy of intimate connection) that comes with the knowledge that this or that performer, working within internationally disseminated musical idioms, is Canadian (The Band, Men Without Hats, Sarah McLachlan and so on). More recently, to listen to music as an anglophone Canadian may mean attendance at events in which the sprawling bigness of the rock concert nourishes the raucous pop nationalism of the Tragically Hip, in contexts that link band, venue and audience to the national, commercial iconography of breweries, sports franchises and Canadian-owned cellular phone companies. At the same time, to listen to jazz or Brazilian music in Canada is to do so, increasingly, in the context of outdoor festivals, events that fuel both a sense of civic belonging and the feeling that one is a tourist in one's own city. These events form part of a social history of listening, a history in which forms of cultural citizenship are mobilized within the social and spatial contexts of musical consumption.

Central to that history are the regulations governing noise levels, night-time economic activity and drinking ages in towns or cities; the patterns of sociality that lead particular groups to congregate in public places, such as ethnic social clubs, or in private homes; and the recent emergence of new sites of musical performance, such as restaurants with disc jockeys or the ascendant home concert movement (in which artists perform live for several dozen fans, and sizeable fees, in the living rooms of promoters' homes). A social history of listening is, at some level, a history of affective and aesthetic connections to music, but it is also a history of the fracturing and coalescing of social affinities. Music may be the cause, pretext or backdrop to such processes; its principal social effect is here, in the making and unmaking of social solidarities.

Music becomes meaningful, James Johnson suggests, paraphrasing Hans-Georg Gadamer, when sound meets prejudice (2). The prejudices are often those that strain to pin (or reduce) music to its origins, to the specific places or social groups the music is taken to represent. Jacques Attali, winding his way around similar issues, argues that music evokes within its listeners the "quest for lost differences," a yearning for those specificities of place or community that have been lost in the standardized, serial production of music as a capitalist commodity (5). The rowdy nationalism that now marks concerts by Sloan, the Tragically Hip or the reconstituted Guess Who works to paper over the fractures that more and more (amidst the Canadian explosions of club music, Canto-pop, bhangra and hip-hop) disrupt notions of a singular Canadian popular music tradition. At the same time, this nationalism depends on its own assertion of lost differences, those features of the listening event that might make an essentially Canadian experience of rock music somehow different from one transpiring in the US or elsewhere.

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Music and Policy in Canada

Music is also, arguably, the cultural realm in which Canadian policy, over some 20 or 30 years, has seemed most successful. Canadian Content requirements for radio music programmers have been studied around the world by countries seeking to devise policies to protect and nourish local music industries. (In Canada, they are widely regarded as a major factor in the growth of a national recording industry.) For much of the past decade, Céline Dion, Bryan Adams, Shania Twain and Alanis Morrissette have figured among the world's very biggest popular music stars. MuchMusic and MusiquePlus have come to play a promotional role *vis-à-vis* a Canadian cultural industry far exceeding that of television programmes devised to build audiences for Canadian cinema or literature. The music industries in Canada are represented by professional trade associations, supported by ongoing public funding programmes and engaged in building integrated conglomerates whose structures resemble those of major multinational companies.

The meaning and pertinence of these developments, on the other hand, remains obscure. This is not simply because Canadians are uncertain of the extent to which Neil Young remains "Canadian" or unclear as to whether Céline Dion's success tells us anything at all about our national music industries. The "health" of Canadian music, as the object of public policy and intervention, resists diagnosis in large measure because the place of music within the discourses of national cultural identity remains vague and elusive. Policies to support Canadian news media are typically justified in terms that invoke the need for a national conversation, or for information that reflects the distinct concerns of Canadians. The platitudes of film and television policy often speak of these media's role in offering the dramaturgical mirrors from which a national imagery is meant to take sustenance. Policy statements about music, in contrast, rarely express more than the desire for a "healthy and competitive environment within which Canadian musical talent can flourish" (Canadian Heritage website, http://www.pch.gc.ca/mindep/misc/culture/htm/4.htm). There is an ongoing reluctance in music policy discourse – outside Quebec, where music's status as a practice of language makes it the bearer of greater cultural weight – to make significant claims about the cultural effectiveness of music itself.

The lack of a more substantial role for music within policy discourse reflects, in part, a well-known problem in musical analysis – that of determining how socio-cultural contexts embed themselves within music and speak through it. Few would venture to argue that Canadian music, like Canadian films, should "tell Canadians about themselves" in any kind of literal way, but on what other bases might one claim a cultural role for Canadian music? If musical styles crystallize particular complexes of regional and ethno-cultural tradition, their cultural value is

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more easily grasped, but an emphasis on tradition elides the mobility, commodification, transformation and appropriation that have always marked popular musical history. Music, more than cinema, television or even literature, forces us to confront the problematic status of tradition and continuity in efforts to imagine or devise a national culture. The enshrining of jazz as "classical music" of the United States – an act as messy, in its claim of unitary national ownership of the form, as it is noble – represents one way of confronting such questions. In other national contexts, these questions are often elided through a valorization of music's busy but unspecified creativity. In the United Kingdom, in recent policy documents, music is embraced as the paradigm case of successful "small business" development (DCMS 2000).

Like literary writing, music is almost never the focus of cultural policy because of a perception that it is scarce. In this, it is unlike domestic feature films or television series, whose very existence has seemed to require forms of public support and intervention. Radio station programmers, after the introduction of Canadian Content regulations in the 1970s, complained regularly about a lack of Canadian recordings, but the shortages to which they referred involved recordings of a specified technical standard, rather than musical activity in a broader sense. Musical culture is almost always marked by an extraordinary abundance of activity, informally organized in fine gradations from amateurism through all possible levels of professionalism. The continued existence of all such levels is necessary, not only for the apprenticeship and competition on which significant musical accomplishment is based, but for the value systems in which popular music is typically embedded. The significant forms of twentieth-century Western popular music (jazz, rock, club music and so on) have all seemed to rest on informally organized bohemian "scenes" as much as on industrial structures, and a sense that such scenes continue to provide their foundations is central to the critical judgement of popular music. As Jon Stratton has argued, the success of the music industries depends, in part, on the public perception that their operations are non-rational, that their products are the result of processes (of public evaluation and selection) occurring outside their own institutional walls (1983). Policies intended to professionalize popular music culture, however well intended, will always run up against the conviction that, in doing so, they are interfering in processes best left untouched.

Industry Structures

A common problem of music industry policies is that attempts to build a stable industry infrastructure of solid companies and durable careers risk creating the conditions in which a national industry will stagnate. In Quebec in recent years, controversy over the music industries has centred on the extent to which such industries successfully

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satisfy an increasingly heterogeneous social demand for music. In a report to the Société générale des entreprises culturelles du Québec, Marc Ménard suggested that a key factor determining the sales of Québécois music in Québec might be the diversity of supply. Echoing comments by journalist Alain Brunet, Ménard warned of a possible gap between public tastes, which were becoming increasingly diverse, and the continued homogeneity of popular music released by established music companies. In particular, Brunet had complained of too strong an emphasis on pop-rock and solo singers, and of the continued domination of the music industries by an aging establishment. If the Québécois music industries were to meet ascendant public demand for hip-hop, electronica and a myriad of other forms successfully, Ménard suggested, a reorganization of industry structure to cater effectively to that demand might be desirable.

This diagnosis convincingly acknowledged a problem with long-term implications, and at the same time offered a misguided solution. The significant success of the Quebec music industries over the past decade has much to do with high levels of corporate integration, with the emergence of an efficient system through which music is recorded, promoted, given public exposure and distributed to stores. The best example of this integration is the complex of firms associated with the record label Audiogram. Audiogram's ownership overlaps with that of the concert promotion and production company Spectra-scène, the Archambault record store chain, the recording facility Le Studio, the Montreal Féstival du jazz, the *gala de l'ADISQ* (the Association québécoise de l'industrie du disque, du spectacle et de la vidéo) television programme and the record distribution companies Select and MusicCor. The Groupe Archambault is owned by media conglomerate Québecor, publisher of the *Sun* newspapers and *Le Journal de Montréal*. More generally, the various components of the music industries are more tightly integrated in Quebec than elsewhere in Canada. This integrated structure, however, does not simply offer a channel through which a newly diversified "supply" of music might be delivered. Its very structure incorporates a bias towards solo singers, professional songwriters and back-up musicians and favours the use of television and live concerts as primary means of promotion. These are appropriate to the longstanding traditions of the *chanson*, through which the Quebec industry has acquired solidity and left behind a record of fertile creativity. An industrial structure appropriate to other musical forms (club music or hip-hop, for example), however, would require more than a new set of inputs. It would presume new relationships between music and the spaces in which music is typically consumed, new sorts of scenes in which creative relationships are established, new forms of small-scale entrepreneurship.

The Canadian music industries outside Quebec are marked by a much lower level of integration between different firms and functions. Indeed, the English-Canadian industry has long suffered from a high level of fragmentation, with a

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myriad of small firms each involved in complex ways with the music industries outside Canada. As a result, the English-Canadian industry has been regularly buffeted by shifts in the degree to which multinational firms are interested and involved in Canadian musical culture. In Quebec, the development of an effective, locally owned distribution system has absolved the Québécois music industry of an ongoing reliance on multinational firms. Outside Quebec, the absence of a comprehensive and domestically owned distribution system has left large Canadian record companies dependent on multinational majors. For 30 years, this situation has offered a reversal of Maurice Charland's well-known model of technological nationalism. While, for Charland, Canadians have typically built technologically based infrastructures (the railway and television broadcasting system, for example) through which American goods came to dominate our markets, international record companies operating in Canada devised the distribution systems on which a generation of Canadian-owned record companies came to depend for national distribution (cf. Straw, 1996).

One of the most revealing events in the history of the Canadian music industries transpired in 1999, to little notice outside the business sections of Canadian newspapers. In July of that year, Allan Gregg (media pundit, music talent manager and ex-pollster) announced the formation of The Song Corporation, a new music company based in Toronto. The Song Corporation is a fully integrated company: its recording division was established through the purchase of Attic Records, and its music publishing arm through the purchase, from Alliance Atlantis, of The Music Publisher. Oasis Entertainment, a new company, would serve as the Song Corporation's distribution subsidiary.

The demise of Attic Records as an independent entity signalled the conclusion of a significant historical thread within Canadian popular music, one that led from the Yorkville folk scene of the late 1960s through the growth of Canada's largest independently owned record company. The launch of Song suggested that the long-standing model of development for Canadian music companies was, perhaps, no longer a good one. For 30 years, as suggested above, most Canadian record companies operating within the English-language market had stayed out of the distribution side of the music business, confining themselves to signing and recording artists. Typically, these companies affiliated themselves with multinational firms, such as Warner or Sony; often, as was the case with Attic, they changed such affiliations regularly, to seek more advantageous terms or in the face of declining support from their distributor. Attic, Anthem and the other great Canadian music companies of the post-1970 era had survived both long and short-term alliances with multinational firms for almost 30 years.

The Song Corporation absorbed Attic Records and announced that its new distribution arm, Oasis Entertainment, would provide Canadian distribution for Attic

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and a host of other domestic and international companies. This development stood as the clearest proof yet that the two-tiered system of the previous 25 years had broken down. One feature of this system was the reliance by multinational firms on Canadian companies to do the preliminary work in seeking out Canadian performers with the potential for career development. By the late 1990s, however, the high international sales levels of acts such like Bare Naked Ladies and Céline Dion led multinational firms to sign talent directly to their American headquarters, rather than relying on Canadian independent companies to serve as intermediaries. With so many Canadian artists successful in other markets, Canadian-owned companies could no longer compete with international firms in offering advances or international distribution. The globalization of the music industries appeared to offer more opportunities to Canadian artists, but it risked transforming Canada into a talent pool, with few benefits trickling down to its own music companies.

At the same time, by 2000 a wave of mergers and buy-outs had left only four real "major" companies in the world (Aol-Time/Warner, Universal, BMG and Sony). As these four companies consolidated their operations within Canada, they cut the number of Canadian firms with whom they were affiliated. The Song Corporation's entry into music distribution was, in part, a response to this consolidation. With major companies trimming their rosters of affiliated labels, large numbers of such labels became available to smaller firms who offered to distribute them in the Canadian marketplace. The launch of Song also suggested that the English-Canadian music industry might be developing along American models, through the establishment of fully integrated firms involved in a variety of subsidiary industries. Like the recently formed Alliance Atlantis Communications Company, the new company presented itself as a fully integrated, scaled-down version of a multinational major.

Arguably, the launch of The Song Corporation had much to do with changes in the economic logic of the music industries. Revisions to the Canadian Copyright Act in 1997 had instituted a performance right under which musicians and record companies (and not merely composers and music publishers) would benefit from the playing of music on radio and other media. The Song Corporation's acquisition of significant music publishing inventories, and of the back catalogues of Attic and other recording companies, converged with one important new direction in the music industries: the stockpiling of resources from the past so as to benefit from their role in delivery technologies of the future. In 2000, an evaluation of the Federal government's Sound Recording Development Program noted that the successful Canadian music companies were typically those that had established back catalogues as steady, dependable sources of revenue (Etude économique conseil, 2000). Just as, in spring of 2000, the Quebec music charts had been dominated by

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compilations of Québécois hits from the 1960s, the Song Corporation's acquisition of scattered pieces of Canada's recent musical heritage signalled the importance of the past to an industry facing profound uncertainty over its future.

Conclusion: Models of a National Music

In historical discussions of Canadian popular music, scattered and fragmentary as these are, two models of national music may be distinguished. In one, music works to nourish and transform collective, public discourse, creating or renewing forms of language and tradition. The canonical popular music of the late 1960s (in its English-Canadian language versions, as with Gordon Lightfoot, or in the Québécois music of Harmonium or Beau Dommage) has assumed historical importance within such a model. Here, the institutional and economic dimensions of musical production are significant only in terms of the musical practices they bring to the public sphere or leave as their residues. If multinational record companies invested in the new traditionalism of the late 1960s, finding value in its integrity or authenticity, these links to international capital could be dismissed as incidental when set alongside the music's obvious rootedness in a local culture. National musical history thus stands as a series of milestones, in which the unfolding of individual careers produces the broader contours of a national tradition. Industry strategy works to confirm this sense of a tradition through its ongoing marketing of back catalogue materials as dependable, classic commodities that are reissued with each shift of sound carrier technology.

In another model, music is primarily a token of social and economic exchange – the pretext for small-scale commerce, regularized social interaction and new connections between actors in a wide range of industries and institutions. Here, the most obviously borrowed, short-lived and forgotten of musical practices might, nevertheless, create the thick webs of interconnection through which a national culture acquires solidity. What has counted in Canadian punk, Toronto techno or the Québécois yé-yé of the early 1960s, it might be argued, are the new forms and sites of social interaction that resulted, the networks and personal trajectories that drew new lines of movement and intersection across the map of a national culture. A common paradox in such examples is the discrepancy between their cosmopolitanism (or blatant imitation) and the grass-roots localism through which they are commodified. In debates over musical value, the longstanding importance attached to the "local" has often obscured attention to the fact that all music "lands" somewhere, in one or many localities. Those styles that most obviously arrive from somewhere else – jungle, disco, ska – are often those that come to be most deeply rooted in the local, small-scale micro-economies of clubs, independent stores and part-time employment. These styles are important less for the professional careers

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they enable than for the subcultural careers, which, in their unfolding, join together certain kinds of activity. Twenty years ago, a characteristic subcultural career might have linked playing in a post-punk band to study in an art school; this year, it might draw lines of connection between the defence of raves and involvement in mobilization against the World Trade Organization. In this model, music is less an expressive form (articulating and updating a sense of place and community) than a mediating moment (the point of connection and division between different activities and the populations who engage in them).

Public policy may enhance music's ability to fulfil the first of these roles by subsidizing career development plans, management expertise, and the awards shows through which a national musical culture may glimpse its scale and success. Music's more elusive, mediating function is shaped by policies that are rarely considered cultural in nature: by the regulation of alcohol consumption and nightclub closing hours, neighbourhood gentrification, work-study schemes and student loans. More and more, the resources that nourish musical consumption and creation in Canada depend on what Justin O'Connor has termed, following Jonathan Raban, "city knowledges" – acute sensitivities to shifts of style or taste, a grasping of the complex relationships and limits within which events may be organized or commodities set in circulation.

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