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What mobile phone does to Western African music. ZikMali streaming platform: toward a new model of music distribution?

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Bamako, October 22, 2018.

At the checkout of the Golden Price Market where I had gone to do some shopping, I found the latest issue of the *Journal du Mali*, neatly stacked. An article in the *Economy* section, titled ‘ZikMali. Music Legally’¹ caught my attention. The content built on the words of Mohamed Diarra, introduced as the ‘president and general manager of ZikMali’, who had announced the opening of a ‘platform and structure for the digital distribution of musical and cinematographic works’ accessible from a mobile phone application.

These few lines piqued my curiosity. I had, in fact, been investigating for a number of years what West African societies do with the digital in terms of knowledge transfer and production, the reconfiguration of social relations and cultural mediations. My aim being to reflect on the articulation between music, digital technology and culture, and in so doing revisit the question of innovative societies in the Global South. In Mali, as in most other West African countries, the popular music industry has seen major changes with the digitisation of musical production and listening supports: multiplication of digital audio workstation (DAW) studios and electronic music; shift from the almost exclusive use of the analogue cassette to the memory card (without the intermediate step the CD, except for international distribution); disappearance of the music reproduction and distribution system in favour of dissemination on social networks and streaming platforms. A new musical ecosystem is taking shape, in which the mobile phone is not only becoming the main mode of accessing music, but is also contributing to the transformation of creation processes, to listening, exchange and storage practices, to tastes, sociabilities and the imaginaries linked to music (Olivier, 2014; 2017b).²

1

<https://www.journaldumali.com/wp-content/uploads/2018/10/JDM184.pdf>

2

From 2013 to 2015, my work on the musicalisation of everyday life in a digital regime formed part of the ANR project Musimorphoses (P.I. - P. Le Guern). In 2016, the study expanded to include an exploration of cultural mediations within the International Mixed Laboratory (LMI) MaCoTer (<http://www.lmi-macoter.net>). Since 2019, I have continued to develop my research questions within the

This chapter focuses on one of the emerging actors in this new digital culture in Mali: collectives of youth and their innovative entrepreneurial endeavours. Specifically, I follow, step by step, a project implemented by the ZikMali company in the field of digital music distribution, a virtually unexplored area of Africanist ethnography.³ In doing so, I question the commonly accepted idea of the mobile phone as ‘digital provide’, highlighting the hurdles, constraints and challenges to be overcome today in Mali in order to simply build a digital ‘access’ to music. Finally, I situate this case study relative to other work on the digitisation of cultural industries in the Global North. If the contexts of construction of a commercial offer of online music are quite similar, the underlying representations, logics and values are much more localised.

From an epistemological standpoint, my work forms part of a *sociomusicology*⁴ that focuses on the digital revolution and the changes the latter has brought about in the so-called Global South in terms of practices, uses, knowledge, professions and cultural mediations. In being situated in a contemporary world made up multiple circulations, real or virtual, in taking an interest in popular music as so many ‘unidentified political objects’ (Martin, 2002), in analysing the entire music value chain, and in questioning the technologies of production, reproduction and diffusion, the sociomusicology that I propose here moves decidedly away from *ethnomusicology*.

In addition to various interviews conducted between October 2018 and March 2023 with Mohamed Diarra, CEO of ZikMali, my observations are based on a number of field surveys carried out in Mali since 2010 with different actors in the music sector and the media, those involved in cultural entrepreneurship, with mobile phone operators and the general public. This ethnographic data is coupled with analyses of social networks and streaming platforms in use in Mali, as well as local press articles, official reports and company documents.

ANR AFRINUM programme ‘Digital cultures in West Africa: music, youth and mediations’ (<https://afrinum.hypotheses.org/>).

3

With the exception of studies by Beukeulaer and Eisenberg, 2018; Clark, 2014; Eisenberg, 2012, 2022; Perullo, 2011; Shipley, 2013, 2017; Skinner, 2015; Tch  houali, 2016, 2017.

4

A term I borrow from Denis-Constant Martin (Martin & Olivier, 2017).

The path of a young Malian entrepreneur

Mohamed Diarra was 29 years old when I met him. Born into a well-to-do family in Bamako (his father, a senior civil servant), he developed a passion for music as a teenager. He became not only a rapper, but also a producer and owner of a DAW studio. His family tried to curb his enthusiasm for music, pushing him instead to pursue a higher education. He enrolled at Cadi Ayyad University in Marrakech, where he obtained a Master's degree in public law, specialising in political science and international relations. He completed his training with a second Master's degree in information and human resources management. After graduating, he returned to Bamako at the request of his family. During an 18-month period in which he was unemployed, he developed the ZikMali project. Mohamed's very ambitious initial goal was to 'change the music sector and permit artists to live from their art'. Though, he was then quick to concede that the project would, more modestly, 'allow artists to have an additional income' thanks to dividends from consumption of their recorded music on a download and streaming application.

Mr. Diarra began by creating what he called a 'music blog' called MaliMoov, a free download and streaming platform, not unlike several that already existed in Mali (e.g. Rhhm and Bamada-city).⁵ However, Mr. Diarra views these platforms as deficient in that they 'allow illegal downloading'. His position is clear: recorded music does not generate direct income, there is no 'return on investment'. Moreover, he feels that the cost of recording is too high compared to the income generated from performances, and CDs do not sell. Mr. Diarra furthermore interprets the low visibility of African musicians on international distribution platforms as reflecting a marginalisation of Africa as well as dependence on these platforms, not to mention the fact that Malians do not have access to them.⁶ For Mr. Diarra, the risk is that West African musicians will turn only to these international platforms; that is, that the music economy will escape Africa. His ambition is to become a prominent player in this globalised digital music economy. Mr. Diarra's refusal of a new form of control of the North over Africa, described by Beukelaer and

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<http://www.rhbm.net>; <http://www.bamada-city.com>.

6

Currently, it is impossible to access international streaming platforms such as Deezer, Spotify or Apple Music from Mali. This is not, however, the case in Côte d'Ivoire, where Orange includes access to Deezer in some of its mobile phone packages.

Eisenberg as 'industry patronage' (2020, p. 11) is evident, though not without contradictions, if nothing else in his recourse to the international mobile phone operator Orange.⁷

In setting up a platform dedicated specifically to Malian music, Mr. Diarra wants to offer more visibility to Malian musicians, betting that this will substantially increase their royalties.⁸ This visibility is just as relevant, if in a different way, for the Malian public, whose low 'digital literacy' (Granjon, 2016, p. 2) puts a damper on online browsing, to say nothing of issues related to language and writing, in a country where French is poorly mastered and literacy is low. Mr. Diarra has sought to offset these difficulties by creating an environment filled with familiar and easily accessible figures. The ZikMali platform is thus meant to be a social enclave, a space where users can easily recognise one another and that they can claim as their own.

With ZikMali and the new 'business model' proposed by this distribution platform, Mr. Diarra's objective is to 'build the biggest musical library dedicated to Malian culture'. Thus, while the project has economic aims, it also has a heritage and even identity dimension. In this sense, it is set within a contemporary Malian reality imbued with the 'crisis of the North'—which is in fact a multidimensional crisis affecting the entire country (Gonin, Kotlok, & Pérouse de Montclos, 2013). For Mr. Diarra, it is important that ZikMali reflects a national identity that integrates the North and the South of the country, even if the situation today is quite different. Moreover, he is convinced that music can be an engine for 'social cohesion'. The name ZikMali was chosen for this very reason, while the visual aspect of the application is meant to evoke the culture of the country.⁹ This is also why Mr. Diarra was quick to sign a distribution contract with the

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Orange Mali is a subsidiary of the company Sonatel, in which Orange holds a 42% stake. Orange is also a shareholder of the streaming platform Deezer and former owner of the video platform Dailymotion.

8

What is more, the algorithms of international streaming platforms tend to bring to the fore of the most profitable musical content, i.e., enjoying a certain popularity, which raises the question how local cultural content fits into such a context (Tchéhoualin 2016, p. 27).

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Notably, the use of a bogolan design (fabric dyed in a particular style) and cowries (shells used as currency before the colonial introduction of money). Though I remarked that this iconography is used in the Global North to represent a largely fantasised Africa, Mr. Diarra sees them as powerful identifiers in Mali.

Essakane Productions label, known for having produced the featuring between two Malian stars: Sidiki Diabaté, associated with Manding culture, and Kader Tarhanine, with Tuareg culture.¹⁰

Within the music industry, ZikMali's objective is twofold. On the one hand, Mr. Diarra wants to move away from free access distribution to a paying system. He strongly associates the free circulation of music with a situation of illegality, citing this as the principal cause of artists' difficulty making a living from their music and an obstacle to the 'development' of the sector. This perspective aligns with the views of major international institutions (UN, UNESCO, ISESCO, EU), where the fight against piracy and counterfeiting is seen as the main prerequisite for the growth of cultural and creative industries, promoted as resources for Africa's (sustainable) development. On the other hand, Mr. Diarra is also focused on music listening mechanisms, the aim being to move away from downloading to streaming, from flat rate to subscription, from file sharing to individual use. Such changes reflect a desire for innovation: ZikMali should be 'a forerunner and market leader'. In reality, that which is being created has already existed for a number of years, in the North as well as the South. Yet, in Mali, it remains a novelty that breaks not only with the logics of access, listening and exchange of recorded music, but also the value attributed to it.

Mr. Diarra efforts to achieve these goals began with the creation of the ZikMali 'start-up' in September 2017. The group consisted of a small team of 7 people, 'most of them unemployed, with various skills and talents: layout artist, lawyer, programmer, audio image technicians and others.' Two were his 'brothers',¹¹ both computer programmers, one in the United States working for Google and several other large digital companies, the other in France employed by the information security company Amadeus. They were the ones who developed the distribution platform and it was thanks to the intervention of the brother based in the United States that Bank of America agreed to manage the international transactions (payment by credit card), especially for individuals of the Malian diaspora.

All between the ages of 18 and 29, the team members belong to the '3G generation' or 'generation 21', local denominations for *digital natives*. They are thus fully situated in a

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<https://www.youtube.com/watch?v=zRuotlTXZUw>

11

A kinship category that includes his brothers, half-brothers and parallel cousins.

digital environment towards which they 'profess neither anxiety nor ambivalence' (Taylor 2001: 13), unlike their elders. For them, the digital is not synonymous with a loss of control, but rather with a taking of control. This strong appropriation of technology, though it comes from elsewhere and embodies a post-colonial spectre, has nonetheless become a generational tool. Mastery of digital tools provides this cohort with a means of their own expression, a potential profession, and possible emancipation from their elders, in a society where intergenerational structures are strongly coded and hierarchical. This manifests in the emergence of a new cultural entrepreneurship, where these youth organise into collectives, some focused on production (sound and videoclips) and stage performance, others on distribution and diffusion (social networks, local streaming platforms).

The ZikMali team fits perfectly into this new music economy, while also breaking with the so-called informal sector. Indeed, ZikMali is officially registered as a 'sole proprietorship' business, with plans to evolve into a 'limited liability company'.¹² The entry of ZikMali, like that of several other music production and distribution structures,¹³ into the formal economy constitutes a major turning point in cultural entrepreneurship in Mali. It remains to be seen, however, whether this change will lead to the emergence of a new economic model based on self-employment,¹⁴ and whether these young entrepreneurs will become new 'figures of success' (Banégas & Warnier, 2001).

Once the structure of ZikMali had been created, Mr. Diarra turned his attention to the crucial question of payment method. In a country as poorly banked as Mali,¹⁵ the solution seemed obvious: Orange Money, the money transfer and mobile payment service set up in 2011 by the mobile phone operator Orange. This service has been very successful in Mali, counting 4.2 million customers and more than 29,000 distribution points in 2018

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Its board of directors is composed of five members who are also shareholders of ZikMali. Mr. Diarra holds 60% of the shares, the others 10% each.

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Such as the Vortex Group, a collective of young people in the audiovisual sector, or the Diabatéba label run by the musician Sidiki Diabaté and his family, which has been signed by Universal Music Africa.

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Mr. Diarra underlines ZikMali's self-financing, which has ensured its unusual independence from the older generation: 'We didn't get any subsidies, we didn't get any funding, we didn't get any loans, nothing. We did everything ourselves.'

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In 2017, the rate of use of the banking system in Mali was 16.5% (BCEAO, 2018, p. 13).

(Sonatel Annual Report, 2018, p. 69). Mr. Diarra thus reached out to Orange Money to obtain his Application Programming Interface (API),¹⁶ key to accessing this service.

He successfully set up the API, signing a partnership contract with Orange in return for a commission on each sale. In doing so, he demonstrated his mastery of the codes, knowledge and skills needed to enter this new world of the digital economy. This furthermore opened doors at CREATEAM, a start-up incubator and support centre, the likes of which are increasingly found in West Africa, particularly at the initiative of Orange.¹⁷ There, he has benefitted from training in project development, monitoring and evaluation, advice on setting up a coherent business model and managing his structure, as well as access to a network of companies in the digital and mobile phone sectors. ZikMali is therefore ‘in full incubation’.

In October 2018, ZikMali was the second-place winner of the 2018 Orange Social Venture Prize for Innovative Start-ups in Africa and the Middle East and received 1 million FCFA (1500 €). For Mr. Diarra, this prize was above all a sign of recognition from professionals in the sector and gave his project wider visibility. In March 2019, this appreciation was further boosted when ZikMali was awarded the ‘Jury's Favourite’ prize in the Total Mali Startup Competition, a company that is also a CREATEAM partner.

Constraints, difficulties and proposed solutions for creating a digital 'access' to music

When I met with Mr. Diarra again in July 2019, the ZikMali application was still not available on the Play Store of my mobile phone. He recounted a number of unforeseen difficulties that had arisen in the previous months, and the solutions he had been able to implement.

The first challenge concerned the collection of music. In order to offer a sufficiently extensive, and therefore attractive, catalogue to its clients, ZikMali wants to distribute, in addition to new releases, singles and older albums of the artists with whom it has contracts. According to Mr. Diarra, the artists are in favour of this, but many have

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On Orange APIs, see: <https://orange-api.developpepez.com/solutions-orange-api/orange-api/>

17

See the website: startup.orange.com.

been unable to provide these tracks. In fact, it seems that most of the musicians have not kept any copies, either on analogue tape for older recordings or on CD, memory card, USB stick or external hard drive for newer ones. Nor has their music been kept by local labels, which are, in any case, virtually non-existent. As for recording studios, some have disappeared, taking with them all traces of their activity. Others have regularly experienced computer crashes, resulting in the simple disappearance of recorded data. Added to this is the fact that many sound engineers and music producers don't insist on having more than a single backup of the recorded music. In contrast, local radio stations, to say nothing of national radio, have for decades been archiving the music they broadcast.¹⁸ ZikMali has therefore visited numerous radio stations in an effort to get copies of recordings. This task has been 'very tiring' admitted Mr. Diarra, as he related the difficult negotiations to obtain them.¹⁹

This almost planned disappearance of recorded music reflects just how much the latter forms part of an economy based on rapid renewal. Musicians must constantly release new titles to guarantee their visibility in a fast-paced media regime, where the challenge is less ensuring the durability of a song as maintaining and renewing the attention of their audience. The value of a piece of music is therefore quickly exhausted after its release, to the extent that one might even speak of 'disposable music'. This furthermore raises a number of questions about the musicians' attachment to what they produce, the authority they exercise over their music, and their desire to create a 'work' in Hanna Arendt's sense of 'durability' (1983 [1961], p. 187-188). Indeed, if musicians are quick to claim the status of 'artist', this term and its semantic field beg further analysis. Though beyond the scope of this chapter, the fact remains that the collection of music pieces and their storage on the ZikMali platform will likely modify their life span and status, as well as, more mundanely, modes of consumption.²⁰

Mr. Diarra furthermore observed that he had not sufficiently assessed the issue of cost for users. Indeed, customers must pay twice, once for the internet connection and

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This is also the case for the Mali K7 company, which kept all the masters, mostly on magnetic tape, from which it made and reproduced analogue cassettes, though Mr. Diarra was not aware of this.

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Though Mr. Diarra did not detail the radio stations' conditions for transfer, they were the result of financial negotiations.

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The 'long tail' phenomenon, which is virtually non-existent today in Mali, notably comes to mind.

again to buy songs or subscribe to the streaming platform. As their economic power is low and they are used to accessing music freely, Mr. Diarra knows he needs to improve the ‘user experience’. To this regard, his ‘older brother’ and programmer suggested that he change server. Mr. Diarra subsequently decided to stop using IONOS’s 1&1 cloud server, opting instead for Amazon Web Services (the company’s cloud platform),²¹ which has many more availability zones than 1&1. This has allowed to significantly increase the ZikMali application’s ‘availability level’, making traffic faster and more stable. For the user, the result is a reduction in latency (the time it takes for a song or video to load) and thus also the cost of internet connection. Having found means to deal with these two difficulties, Mr. Diarra declared that he was now ready to open the ZikMali platform. For this, however, he would still need to wait a few weeks for Orange to make the API accessible to Malian companies. I return to this step in the conclusion.

The distribution system for recorded music in Mali

The beginning of the twenty-first century saw a rapid digital shift in Mali, not unlike most West African countries. That said, analogue technology was not immediately replaced by the digital. During the first decade of the new millennium, a mixed technological regime existed in which music production was digitised in DAW studios while reproduction remained essentially analogue. In fact, most Malians continued to listen to music on analogue cassettes, with CDs being destined for the international market (Olivier, 2017b). The two technologies largely coexisted until 2011. When, two years later, the stock of analogue cassettes had been fully exhausted throughout the country, Mali went fully digital.

This shift has significantly changed the Malian music industry (Olivier, 2014; Skinner, 2015). The dematerialisation of media abruptly eliminated the system of music reproduction and distribution that had been in place up until this point. Recorded music now began to be downloaded, listened to, traded and stored on mobile phone memory cards, while most musicians had no choice but to freely distribute their music on the internet.²² YouTube and social networks, first and foremost Facebook and more recently

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See: <https://aws.amazon.com/fr/what-is-aws/>

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Radio stations and television channels (especially Trace TV) also play a lot of music.

Instagram and TikTok, have been the primary places for Malian music dissemination. Malian music can also be found on international content sharing platforms such as Tubidy.com. A number of local platforms for free streaming and downloading quickly appeared, such as rhhm.net and bamada-city.com.²³ Thus, on the one hand, music began to circulate freely on mobile phones, sent or exchanged initially via Bluetooth and then WhatsApp, a less expensive solution than an internet connection (WhatsApp is included in low-cost Facebook packages).²⁴ On the other hand, music was sold in internet cafés and small street shops.²⁵ Internet café managers and street ‘downloaders’ would store thousands of songs and videos downloaded from the internet onto their computers and external hard drives, which they then sold individually to those who were not internet-savvy or for whom the cost of connection was too high. There also existed a wholesale market for traders in rural areas who did not have an internet connection. They would buy external hard disks full of music²⁶ and then sell individual tracks. Though, since 2017, the arrival of 4G in Bamako has significantly improved internet connectivity. This, combined with the fact that users have become more familiar with these technological tools, has led to a rapid decline in internet cafés and small shops, which have now almost disappeared.

In this new environment, artists make almost no direct profit from recorded music. Only those who have a monetised YouTube channel receive royalties, however modest. Though, YouTube does not allow the opening of such a channel from Mali nor the sending of any resulting royalties in this country, and very few musicians have intermediaries abroad (usually in France) who can effectively manage this type of channel.

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Musicians have to pay a flat fee, which varies according to the medium, audio (sound) or audio-visual (videoclip) to be broadcast. Though, to be economically viable, these platforms also offer other types of content (interviews and TV-type programmes with artists) and in doing so benefit from advertising funding.

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In 2018, the cost of a Facebook day pass was 80 fcfa / €0.12; one week, 400 fcfa / €0.60; one month, 1000 fcfa / €1.50.

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In Bamako in 2017, you could buy a single for 50 CFA (€0.08) and a videoclip for 100 CFA (€0.16).

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The price is determined by the data weight of the audio and video files.

Meanwhile, mobile phone operators are becoming cultural operators. On the one hand, they are developing their own music content services in a particular listening format that is very popular in Africa, as well as the Middle East and Asia²⁷: personalized ring back tones. On the other hand, they are allowing local platforms to deliver content (on a per-use basis or by streaming) via their mobile-payment systems. In this way, they are transforming the music ecosystem, breaking with the largely informal *modus operandi* that has until now prevailed,²⁸ and monetising music.

ZikMali: towards a new music distribution model?

In this context, how does ZikMali differ from existing offers and what new music distribution model does it promote? As we have seen, Mr. Diarra's objective is to 'change consumption habits' and to do this he proposes two types of services. The first already exists in Mali, even if it remains marginal compared to free access music: the purchase of singles and albums for download.²⁹ The second consists of streaming by monthly subscription: a mode of consumption of cultural content that already works in many countries of the North and South, but which is new in Mali, to the point that even the term 'streaming' is hardly known. Moreover, many artists are reluctant to participate as they 'don't understand how it works' acknowledges Mr. Diarra, who limits his explanation to: 'It's just a way of listening online.' Indeed, streaming represents a radical change in the way music is accessed and listened to since the dematerialisation of music media. The idea of an unlimited music offer is still foreign to most Malians, for whom the cost of an internet connection remains prohibitively high and who only go online occasionally through the purchase of prepaid units.³⁰ To add to this, there are network access

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This type of service was initiated in South Korea, where it is used by some 70% of mobile phone owners.

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By 'signing' musicians to commercially exploit their works, through international music providers such as Digital Virgo, Comviva or Huawei.

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In 2018, the price proposed by ZikMali was 200 fcfa (0.30 €) per song and 2000 fcfa (3 €) per album.

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In 2018, Orange Mali's internet packages ranged from 100 fcfa / €0.15 (10MB / 1 day) to 10,000 fcfa / €15 (5GB / 1 month). The data penetration rate of Orange Mali customers was 37% for a mobile

differences between urban and rural areas, a slower flow rate than in the Global North, and infrastructure malfunctions (Mattelart et al., 2015; Devine & Boudreault-Fournier, 2021). Mali is far from the 'abundance regime' promoted by large digital companies (Auray, 2011). To date, the preferred solution for freeing listening from this strong time constraint has been to download the tracks and then listen to them offline on one's mobile phone. Thus, if the logic underlying downloading is often interpreted in terms of 'ownership' (Rifkin, 2000), in reality in Mali it rather allows to have music at one's disposal and to circulate it.

Mr. Diarra's idea is to offer a streaming service with offline listening, similar to Facebook subscriptions. Offline listening is certainly not specific to West African Facebook packages: most international streaming platforms offer it. But Facebook is a reference that Malians know and identify with—a guarantee that this mode of music distribution will be understood by the local public, and therefore likely to be adopted.

In reality though, whatever the mode of distribution, downloading or streaming, the real issue is paying for recorded music. In fact, in Mali, music is essentially a service economy where value lies in the field of event-based performance,³¹ and from this point of view, digital technology has not changed anything. For musicians, recorded music allows them to acquire a visibility that guarantees their recognition in a media regime. This visibility allows them to perform at private parties, ceremonies and concerts and, possibly, be spotted by Pop or World Music producers. The music scene is thus highly competitive, but also potentially lucrative. As concerns the public, the willingness to pay for music reflects strong social values and positions. The money spent on paying musicians to listen to them during a concert, and even more so at private parties, is seen as an effective way of remunerating artists. The very act of paying is as much about the interpersonal bond, or even attachment, forged with the musician as it is about an ostentatious display of self. Even more so, it is about acquiring social positions and nurturing networks of sociability (Keita et al., 2015, p. 127-128).

penetration rate of 106% (Sonatel Annual Report, 2018, p.135). For the other two operators present in Mali, Malitel and Telecel, no official figures are available.

This situation is far from specific to Mali and is indeed the case for much of the global South (Lemos, 2008). Though, this service economy has also been growing in the Global North since the CD crisis and for an even longer period for certain musical genres (Olivier, 2017a).

In order to get people to accept this paradigm shift, Mr. Diarra knows that he has to move slowly. He has therefore chosen to offer a certain number of songs for free listening. These are principally ‘clipped’ tracks, i.e. those that are the object of videoclips. Mr. Diarra sees these tracks as ‘promotional sounds’ and chooses to offer them on the streaming platform in order to encourage listeners to buy the rest of the album.

In this context, two categories of musicians can be distinguished. On the one hand, (young) musicians in search of fame, for whom recording is an essential means of promotion and professionalisation. These musicians have spread onto local streaming and free download platforms, which has allowed them to build up an audience and maintain their loyalty. On the other, established musicians, or even local stars, many of whom have been more reluctant to make their music freely available, or wish to receive dividends from it, following the Northern model.³² Some have even taken the initiative of increasing the price of their concert performances to compensate for the lack of royalties.

Mr. Diarra began by addressing precisely this second category of musicians, who he has offered a directly accessible and potentially lucrative distribution space. In doing so, however, he realised that his catalogue was not sufficiently large. He has therefore gradually broadened his offer to include ‘young’ musicians and, listening to their point of view, has given them the choice of offering their tracks for sale or free access. In return, Mr. Diarra hopes that these tracks will increase the number of visitors to the platform and encourage the public to subscribe so that they can listen to the rest of the catalogue.³³ Meanwhile, the musicians expect ZikMali to be an effective tool for ‘building up recognition’ (Beuscart, 2007, p. 173).

Whatever their choice - free access or sale of their music - musicians sign a contract with ZikMali that guarantees them dividends, calculated according to the number of downloads and/or streamings. The contracts are confidential and I did not try to find out how much any of the musicians are paid. Mr. Diarra simply told me that the amount varies according to the prominence of the musician. I did, however, observe that these

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On the model of copyright rather than ‘author's rights’, thus privileging property rights over moral rights. In fact, in Mali, music is rather based on a logic of free circulation and modification of materials, provided that the source is acknowledged. Royalties are almost exclusively related to the distribution and diffusion of works (Olivier, 2014, 2017a).

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Mr. Diarra thus favours a ‘freemium’ business model, which consists of offering a free basic service and paid access to the premium service. On different business models of digital cultural content platforms in Africa, see Tchhouali (2016, p. 37-38).

dividends are paid directly to the artists, without going through the Malian Copyright Office (BUMDA), as is the case for media sales. This method of remuneration is particularly appreciated by musicians, for whom the system of ‘royalties’ managed by the BUMDA is somewhat suspect and parsimonious.³⁴ Beyond this feeling of mistrust, it is true that BUMDA does not have the necessary information to correctly account for copyright or other connected rights, if nothing else due to the absence of disc description protocol (DDP)³⁵ on the singles and albums recorded in Mali.³⁶ To fill this gap, ZikMali has had to encode its entire catalogue with its own criteria, and has set up a number of algorithms to count listens.

To create a climate of trust, ZikMali generates an account for each musician, so that they can check the number of listens and/or sales in real time and thus know the amount of their dividends.³⁷ In addition, given the low level of banking in Mali, Mr. Diarra offers payment through Orange Money.

Finally, a new feature has been introduced, namely electronic securing of the tracks with an SCMS copy inhibitor,³⁸ giving the user ‘exclusive ownership’, i.e., restricted to individual use, insofar as he or she is prevented from sending or copying them to another medium. Yet, exchange practices are at the heart of the musicalisation of daily life for many Malians. In addition to the high cost of internet connection, which

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For its part, in compliance with the recent law n°2017-12 on literary and artistic property, ZikMali simply pays an annual licence fee to the BUMDA, as a digital music distributor. This fee, which amounts to 5 million fca, is supposed to go to the ‘authors’ (<http://bumda.ml/wp-content/uploads/2019/06/Loi-2017.pdf>).

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The DDP (Disc Description Protocol), which acts as a digital fingerprint, includes: the PQ code (standardised format for page listing, timing, indexing, etc.), the ISRC (International Standard Recording Code) and the UPC (Universal Product Code) or EAN (European Article Number Code) corresponding to the barcode on the back of the CD cover.

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This coding is the work of mastering, which does not exist in Malian recording studios. When a single or an album is recorded in Mali but produced by an international label, the mastering is relocated to a foreign studio. This reflects the limits of the local music economy when it comes to accessing an international market.

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Tchéhouali (2016, p. 75) explains that given the diversity and complexity of remuneration models, four out of five African artists do not know how much they earn from the distribution of their music online—all the more reason why it is so important for ZikMali to ensure transparency to this regard.

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Though this security is limited due to the fact that the mp3 broadcast format is easily pirated (Beuscart, *ibid.*, p. 164)

favours the exchange of music, these practices give rise to new times and places of socialisation, just as they redefine the roles and statuses of individuals within their sociability network. In fact, the ability to possess and exchange titles that are both unpublished and coveted constitutes a real social value added (Olivier 2017b). Preventing exchange therefore represents a significant break with current modes of socialisation through music, and it is unclear how well this will be accepted. Aware of this difficulty, Mr. Diarra has decided to incorporate a 'more social dimension' into the platform, and in so doing has tried to give it the appearance of 'a mini social network'. For example, he not only proposes weekly playlists based on the musical tastes of his subscribers, but also offers the possibility of creating playlists and, above all, sharing them on social networks. The idea is to replace the exchange of music with the exchange of playlists and to make this the basis for the emergence of a 'community' of ZikMali subscribers. For those who are not subscribers, receiving playlists should encourage them to join, in order to be able to listen to the full tracks.

Mobile phone operators, online local content distribution and Africa's 'digital transformation'

The ZikMali streaming platform project forms part of a broader movement of distribution of local content online and, more importantly, of the 'digital transformation'³⁹ in Africa. In the field of cultural industries, some even predict that this movement could contribute to the development of a local economy that would create substantial revenues for both artists and cultural actors and operators (Tchéhouali, 2016).

In fact, while international streaming platforms have not yet invested much in the African continent,⁴⁰ various local and regional platforms have been created in recent years⁴¹ in response to strong demand from the public and the diaspora for local content.

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Language used by the operator Orange.

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Though, some have formed partnerships with telephone operators to increase their local audience. Notably, Deezer with the operator Tigo in Senegal, Tanzania, Ghana, DRC and Rwanda, and with Orange in Côte d'Ivoire.

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In 2014, a study by Balancing Act already counted more than a hundred African platforms dedicated to online music (<https://www.balancingact-africa.com>).

Some offer free access, but a growing number are now monetising their catalogues, using the mobile payment or Airtime services (allowing the conversion of phone credit into service purchases) offered by mobile phone operators. The MusikBi (Senegal, Côte d'Ivoire and Gabon) and Waw (Côte d'Ivoire) platforms, for example, use Orange Money, Orange's mobile payment service. In Kenya and Tanzania, Mdundo uses M-Pesa, Vodafone's mobile payment service. In South Africa, Simfy offers a choice between MTN and Vodacom mobile payment. For mobile phone operators, these partnerships are part of a policy of 'developing the monetisation of mobile data usage and value-added services' (Sonatel Report, 2018, p. 126), as well as 'supporting local entrepreneurship' (ibid: 11), the aim being to favour the emergence of a digital ecosystem in Africa.

In Mali, as in other countries on the continent, this 'digitalisation' process necessarily involves mobile telephony, which, for almost the entire population, is the only interface for accessing services. Knowing this, mobile phone operators have opened up their APIs to local digital companies. Mr. Diarra is well aware that competition is tough. Indeed, other entrepreneurs are already positioning themselves in this sector. Digital Virgo is one example, an international digital content creation company and local music provider for Orange Mali, which has just launched the Digster streaming application in Senegal. In this rapidly changing digital music industry landscape, will the distribution model proposed by ZikMali manage to become a viable part of the music value chain? Three years after its creation in 2020, Mohamed Diarra observes that his company has achieved mixed results.⁴² On the one hand, the catalogue has grown considerably, thanks to artists' growing belief in ZikMali. The exclusively distributed albums have been widely downloaded, and this despite an overly complicated payment procedure for a clientele whose digital literacy remains low. On the other hand, subscriptions are primarily limited to Malians living abroad and are few in number. In 2022, ZikMali won the Orange Fab Start-up Accelerator award, which has allowed the company to develop its activities and strengthen its business management abilities. Yet, notwithstanding this support, ZikMali has not managed to obtain an API from Orange that would allow it to offer daily, weekly or monthly packages, along the lines of the Facebook packages so popular in West Africa. To make their activity viable, Mr Diarra and his team are looking to change their business model. Specifically, they would like to generate revenue through advertising using a dedicated software (Adware).

⁴² Interview with Mohamed Diarra in Bamako on March 7, 2023.

Conclusion

Generally, the digital revolution, and even more so the mobile internet, has led to a transformation of the cultural industries in the Global North as in the South. While this has taken similar forms, the technological, economic, social and cultural contexts differ significantly, to say nothing of regional and even national disparities. However, the major difference in the North, compared to the South, is that emerging actors try to find their place within a formal ecosystem, organised around established actors, headed by labels, within a complex web of rules that define 'the division of labour, the standard distribution of profits, and product forms' (Beuscart, 2007, p. 146). For France, Jean-Samuel Beuscart shows how this emerging online music market is the result of 'the renegotiation of these rules, and therefore of the strategies, alliances and power relations between the various stakeholders' (ibid.). In Mali, in contrast, the music market is largely informal⁴³ with little intermediation (absence of labels) and is part of a service economy outside the copyright system. The new forms of online music marketing aim to break with this context by organising a (hitherto weakly) structured market and setting up a legal system based on intellectual property, with the support of mobile phone operators through their mobile payment APIs. In doing so, these new forms of music marketing are, as in France, integrated into an existing music distribution chain (free download and streaming platforms), while negotiating 'a viable insertion into the value chain' (ibid). Another important difference is that, given contextual particularities, Malian actors are subject to heavy constraints that hamper their capability to act. As we have seen, the absence of intermediaries, and even more so of an established catalogue, makes ZikMali's business venture long, laborious and uncertain.⁴⁴ Added to this is an unfamiliarity with streaming on the part of a many musicians, coupled with distrust of the copyright system linked to an ingrained imaginary of the corrupt State. When it comes to mobile phone users, weak digital literacy is an obstacle as is, on another level, a low willingness to pay for recorded music.

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Even if it is fully part of the real economy, creating jobs and redistributive (Chabal 2009).

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For France, Beuscart points to the reluctance of record companies to open their catalogues to first generation streaming platforms (2007, p. 160).

Despite such constraints and uncertainty about the viability of this new model of online music distribution, many players are positioning themselves in this sector. In the Global North, these initially consisted mostly of independent actors, start-ups largely not from the music industry and financed by investment funds or venture capital (Beuscart, *ibid*, p. 148). In Africa, this new sector is instead driven by the major mobile phone operators (Orange, MTN, Vodafone, Millicom, Etisalat, Airtel) who are, on the one hand, developing their own music content services (though subcontracting various components to local intermediaries), and on the other, creating marketplaces in allowing local and international platforms to deliver content through their mobile payment services. The result is that the content offer is very different depending on the scale at which these services are found. Local platforms offer catalogues composed mainly of local artists, which has the effect of amplifying the circulation of identity discourses that particularise culture and reinforce conservatism. Conversely, international mobile phone operators and their music content providers ignore ethnic or identity cleavages in favour of an 'extension of the listening domain' (Olivier, 2017b, p. 293) towards the music of neighbouring countries⁴⁵ and even international music. This openness is part of a certain depoliticization of societies in favour of an economy that gives rise to the producing actor on the one hand and the consuming individual on the other.

This chapter aims to contribute to the development of a new field of research on digital cultures, a field that remains little explored in France and where most work on music focuses on the Global North. The objective here is to decentralise this gaze in order to understand digital technology as a *cultural artefact* and thus update the postulates of this digital globalisation, which do not sufficiently take into account the practices, the logics, but also the constraints and the capacity for action of the Global South.

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In French-speaking West Africa, the catalogue of these suppliers is thus opening up to music from English-speaking countries, Nigeria in particular.

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