The Development of China's Music Industry
During the First Half of the 20th Century

By John Fangjun Li

Introduction

The Chinese music industry (henceforth 'CMI') is a long established and complex industry system. Mainland China is one of the earliest regions where music industry activities (such as live music performance) commenced and developed as the CMI has been operating there for more than one thousand years. The early development of the CMI can be traced back to venues such as 'Wasi' and 'Goulan' that were established during the Song Dynasty (960-1279). However, the rapid development of the CMI as a modern industry began in the 20th Century, and the development of this aspect of the CMI reached a peak in the early 21st Century. This phase, from the early 1900s to the present, is defined as the 'contemporary' period for the purposes of this research. During the lengthy history of the Chinese music industry, three primary sectors of music industry such as music performance, music recording, and digital music were successively generated in different periods; they successively constituted the major systems and structures of the Chinese music industry as it developed. Currently, the CMI consists of various elements, which includes a concentration on music content and music copyright law and it can be argued that it is constituted differently to the western music industry.

During the history of the CMI, industry convergence played an essential role and greatly impacted the historical development of the CMI. While the Chinese economy as the primary economic entity impacted on and converged with the CMI, it can be argued that Chinese society, politics, and culture also greatly influenced and integrated with the CMI. In exploring these ideas, this research also considers industry convergence between major global regions such as the Chinese diaspora and the West. One of the major economic influences on the CMI is that of industry convergence. The term, industry convergence, refers in this paper to the perspective of economic convergence, that is, this perspective is limited in scope to consider only economic factors. However, in order to observe the overall development characteristics and structural conventions

---

1 The 'Chinese' term generally refers to mainland China in this research.
2 'Wasi' and 'Goulan' were typical entertainment performance locations and venues. 'Wasi' (or 'Washe') means 'centre', which refers to some large entertainment areas; 'Gou Langou' means 'open-air theatre' which refers to entertainment performance venues within those centres/areas.
of the CMI during the first half of the 21st Century, this research mainly focuses on the narrow understanding of the term ‘industry convergence’ while the wide perspectives are also considered. It can also be seen that a thorough historical approach can demonstrate the idea that most music industry sectors in China such as print music, recorded music, and digital music are ‘integration industries' indicating that the major music industry sectors in the CMI are heavily integrated into the rest of the economy. One can thus argue that the history of the Chinese music industry is in part also entwined with the history of the impact of industry convergence on the CMI.

This article will explore the general features, characteristics and laws of the MIMC during the 1900s-1940s. This exploration will involve analyzing a number of major events, organizations, products and people during this period. This research will also examine how industry convergence has impacted on the structural evolution of the music industry during this period. This convergence also involves the Western music industry, in particular the sector of recorded music in the West which has influenced the MIMC. Thus, this research attempts to answer the following questions: how was the music industry in mainland China conceptualised during this period? To what extent is the music industry integrated with other cultural and industries during this period? What was the structure of the music industry during this period?

The Background of China’s Music Industry During This Period

In order to better understand the history of the CMI and Shanghai during the period from the 1900s to 1940s, it is necessary to summarize the overall historical background, in particular, the major developmental periods of the CMI. It is also necessary to explain why this article focuses on the Shanghai music industry to reflect the overall features, characteristics and laws of the CMI.

Overall Historical Background

There is a clear historical path that led to the development of the music industry sectors that constitute the systems and structures of the CMI. The transformation of the CMI occurred during the following three periods: the first period was from the Song Dynasty (960) to the late 19th Century. This period was an era during which the Chinese economy developed; 'Wasi' and 'Goulan' were the main venues for the presentation of various forms of entertainment, such as drama and folk music (Liang, 2009). The live music sector emerged at this time and became the leading music industry sector, while Chinese music instrument making and sales also emerged at this time. During this period, industry convergence mainly involved other performing arts industries such as
dance and drama. This period represents the commencement of industry convergence in the CMI.

The second period was from the early 20th Century to the early 21st Century. The first Chinese Peking recordings of music were recorded and released by the Victor Talking Machine Company in 1904, such as the 'Zhuo Fang Cao' ('Seize and Release CaoCao') and 'Ju Ding Guan Hua' ('Raise Tripod and Look At the Picture') by Sun Junxian who was a Peking opera master. The recorded music sector of the CMI remained a dominant sector until the year 2006. This sector developed over a period of more than one hundred years in Mainland China, thus its development is approximately 50 years later than the commencement of the Western recorded music sector. This leading sector of the industry also experienced two developmental stages in Mainland China: 1900s-1940s and 1980s-2005. The former refers to the period from the early 20th Century when the New Music of China3 and the School Songs4 started, to the year of 1949 when the People's Republic of China was established. During this period, industry convergence expanded to the cultural industries and in particular to the media industry.

The third period of industry development was from the year 2006 to the present. The year 2006 is a significant year as sales in the digital music sector in this year constituted 36 percent of total sales ($26.8 million US dollars) in mainland China. Furthermore, many record companies began to transform themselves and engaged with and involve the digital music industry, such as Shanghai Synergy Culture and Entertainment Group (former was Shanghai Audio Visual Press and Shanghai Audio Visual Companies). In this period music copyright and artist management became more important than before. During this period, the phenomena of industry convergence became pervasive within the CMI, and some information technology industries such as computing and telecommunication began converge with the music industry. This period is a peak one for industry convergence within the CMI.

Research Orientation: Why Focuses on the Shanghai Music Industry from the 1900s to 1940s?

This research focuses on the music industry in Shanghai during the period 1900 to 1940. This is because the Shanghai music industry, and in particular the recorded music

---

3 The New Music of China refers to those musics in the early 20th Century which were composed through adopting new composing technique and represented a new music style.
4 The School Songs refers to those original songs which used for music lesson in the new style schools in the early 1900s; Liang Qichao, Kang Youwei, two of the leading persons of the HDR was the first to propose to offer singing lesson at school and emphasized the importance of singing lesson at school.
industry there, developed greatly during this time. Although several other cities such as Beijing, Tianjian and Guangzhou also developed to a certain extent, the industries in these cities were less influential than the Shanghai music industry was (Ge, 2009). Moreover, Shanghai, the largest city in China, was not only China's centre for the development of industry, finance, and commerce during this period (Lou Jiajun, 2008), but it also played a leading role in the development of the culture and entertainment industry, specifically the music industry as well as professional music education during this period (Zhang, Zhu, 2007).

The 1900s involved the commencement of 'School Songs' which were influenced by 'the Hundred Days Reform' (also called 'Wu Hsu Reform'; henceforth 'HDR'), and which represented the starting point of the contemporary history of Chinese music. Furthermore, this also represented the time when Western music business activities began to influence the Chinese music industry. The People's Republic of China was founded in 1949. The music industry in Mainland China developed greatly during this period. The argument here is that this period of rapid development was due to a more open and relaxed social and economic environment after the HDR, even though some wars also took place during this time (see below).

**Concepts and Scopes: Music industry, System and Structure, and Convergence**

This section aims to establish a theoretical framework through defining the core terms that are relevant to this research, such as music industry, system and structure and integration. The subsequent historical sections expand on this.

**Music Industry**

An important initial task is to provide a delineation of the extent and coverage of the term 'music industry'. Thorsby (2002) identified the following music industry stakeholders within the music industry:

- Creative artists such as composers, songwriters and musical performers;
- Agents, managers and promoters who act on behalf of artists;

---

5 The Hundred Days' Reform was a failed 104-day national cultural, political and educational reform movement from 11 June to 21 September 1898 in late Qing Dynasty China. It was undertaken by the young Guangxu Emperor and his reform-minded supporters. The movement proved to be short-lived, ending in a coup d'état ('The Coup of 1898') by powerful conservative opponents led by Empress Dowager Cixi.
Music publishers who publish original works in various forms;
- Record companies that make and distribute records (LPs, cassettes, CDs, music videos, DVDs and digital files);
- Copyright collecting societies that administer the rights of artists, publishers and record companies;
- A variety of other service providers, including studio owners, manufacturers, distributors, retailers, broadcasters, venue operators, ticket agents, etc.;
- Users of music such as film-makers, multi-media producers, advertisers, sponsors etc.;
- Individual consumers who purchase a musical good or service (buying a record, attending a live performance, subscribing to a 'pay' diffusion service) or consume it for free (listening to broadcasts, background music, etc.).
- Music related merchandise manufacturers. (Thorsby, 2002: 3-4)

The music industry or music business therefore primarily involves the selling of compositions, recordings and performances and the people and entities that surround these processes. Many theorists argue that the meaning and scope of the music industry is synonymous with the music business as well as with the audio visual industry. These terms are often interchangeable in the West (Zhang, Wang, 2009).

Due to the complexity of the music industry in mainland China, the concept of the music industry that is being used here is necessarily a broad one. The context of the music industry is quite different in mainland China. The meaning, scope, and orientation of the music industry in mainland China is different from that of the music business as well as the audio visual industry. The music business involves private-enterprise while the music industry also involves the public sector. The audio-visual industry is broader than the music industry as it also covers film, broadcasting (television and radio), video and multimedia industries. This research focuses on the music industry but also considers music business perspectives and the audio-visual industry under its definitional framework.

Systems and Structures

The music industry in any region is an integrated industry system. In order to shed light on the dynamics and dimensions of the structure of the Shanghai music industry during the first half of the 20th Century, this research applies system thinking as the main analytical tool to describe the system and structure of Shanghai music industry.
The CMI is a multi-level, complex, and integrated industrial system. The system of the CMI is one of small economic industry systems within the entire national economic system in mainland China; this is a subsystem of the large system of the cultural and creative industry in mainland China. Although this system has often been associated with the system of culture and the creative industries, including the performing arts (dance, drama) and media (radio, film, television, and publishing), this system has become increasingly connected with the system of information technology industries, computing and telecommunications along with the rapid development of digital technology.

The system of the CMI is a confluence of economy, culture and politics, and as such it is hard to say it is a type of economic or cultural or political activity. The CMI is not only a complicated economic system, but also a cultural system; in other words, this system involves both economic and cultural activities. Moreover, the system of the CMI often reflects the politics of mainland China’s government. Thus, it presents more complicated characteristics than the music industry in Western countries does. This system of the CMI evolved out of simplicity towards complexity as it advanced. The history of the CMI can substantiate this fact. The system of the CMI evolved from constituting only one sector (music performance) to three sectors (music performance, music recording, and digital music). Therefore the argument here is that the contemporary music industry in mainland China presents a developmental trend that involved changing from multi-separation to multi-integration.

The system of the CMI consists of numerous subsystems. The argument here is that the subsystems in this sector and region are the core systems within the system of the CMI. These subsystems and their relationship can be identified as the 'structure of the music industry'. This research focuses on three facets of this structure:

A. The music industry sector.
B. Interactions between the music industry and the cultural industry.
C. Interactions between the CMI and the Western music industry during this period.

This historical study focuses on recorded music and live music performance although other industrial sectors/forms such as music instrument making and sales and print music are also discussed.

There is the core music industry and the associated music industry. The former refers to the sectors of the music industry that involve the content of music generating the
primary value within the products of the cultural and creative industries, such as music recording, live music performance, music instrument making and sales, and print music. This core music industry can also be called the 'primary industry' or the 'main industry' or 'leading industry’. The latter refers to the cultural and creative/entertainment industries which link to the music industry, such as radio, film, and advertising. The music content/music industry is at the core of this industrial form/product; music content only adds additional value to the cultural and creative industry forms/products. For the purposes of this study, the latter form of industry is also called the 'associated industry' or 'mixed industry' or 'convergent industry'.

*Industry Convergence*

Industry convergence played an important role in the history of the Chinese music industry. Industry convergence in this research mainly involves three types of convergence: the first is the general perspective of industry convergence. This concerns the economy and mainly includes the convergence of technology, market business and management, and regulation. The second involves cultural convergence which is also called 'content convergence' or 'product convergence'. Thus, this type of convergence involves the scope and process of industry convergence in essence. The third is the inter-regional (international) music industry convergence. This mainly refers to the convergence of the recorded music sector in the West and that of mainland China.

Convergence has fulfilled an essential role in the music industry’s development. For the purposes of this research, convergence is defined as involving the moment when systems and structures of the music industry merge with related industry systems such as the media industry and the creative industries. This convergence of the CMI system reflects a fusion of politics, culture, and the economy on the mainland during the long process of historical development. The CMI is not only part of the cultural and creative industries in mainland China, it is also part of the international music industry. It is an example of industrial convergence and it indicates some distinct regional characteristics (products/content, regional music industry distribution). The music industry in mainland China involves a convergent process. This process involves many facets of convergence during its evolutionary process. These different facets of convergence relating to the music industry include content convergence, technological convergence, regional convergence, and market convergence.

Content convergence is an essential form of industry convergence. Convergence of the 'value chains' and the story-telling capacity of content, telecommunications and computing industries, as well as digitalisation, create a dramatic new context for
cultural studies and cultural policy (Mercer, 2009). For instance, content convergence refers to the convergence between music and other art forms such as dance, film, drama, animation and gaming. Music industry technology, such as music recording equipment, converged with media technologies such as radio, television and film. The online advertising sector (such as Google.cn) also converged with the music industry. For instance, Google has made a large amount of music available so as to attract millions of people to free downloads; consequently, millions of people may also attract a great number of advertisers to place advertisements on the website. Music industry participants participate in the advertising revenue.

Furthermore, industry convergence also concerns content convergence in this research. When considering aesthetics, music is not only an auditory art but it sometimes possesses visual characteristics especially during live concerts. Most comprehensive art forms such as film, drama, radio and television cannot part with music; in other words, music can easily be integrated with other artistic forms and industries. Thus, the music industries often play an essential role in the arts industries.

The History from the 1900s to the 1940s

The period of history during which the CMI developed ranges from the year 1898, when the 'HDR' ('Hundred Days Reform') occurred, to the year 1949, when the People's Republic of China (the 'PRC') was founded. This period includes four stages: the late Qing Dynasty, the Provisional Government of the Republic of China, the Northern Warlords, and the National Government (Zhang, et al., 2005). These stages provided the political and economic framework and background for the development of the music industry. The HDR was the consequence of the Opium Wars (1840-1842; 1856-1860). Although most writers (such as Jiang Tao, 2010; Xinhua, 2006) proposed the year 1840 as being when the breakout of the Opium War occurred which brought on the onset of modern China, Xia Dongyuan, a Chinese historian, argues that the year 1898 was the starting point of modern China. Xia (2010) suggests that the main line of Chinese modern history is the gestation, commencement, and development of modern capitalism.

---

6 The arts can be generally classified to three artistic forms: visual arts (such as fine arts, photography), auditory arts (such as music), and comprehensive arts (such as drama, film).

7 The Opium Wars, also known as the Anglo-Chinese Wars, divided into the First Opium War from 1839 to 1842 and the Second Opium War from 1856 to 1860, were the climax of disputes over trade and diplomatic relations between China under the Qing Dynasty and the British Empire.
Mainland China began to intensively accept Western ideas and develop its economy, culture and politics since the HDR in 1898. The HDR was not only a political and economic reform, but also a cultural and educational one. Thus, the HDR also marked a semi-feudal and semi-capitalist 'mixed' system through which the feudal system\(^8\) integrated with a new modern form of capitalism on a large scale in China. This mixed system lasted more than fifty years until 1949. While this reform mainly involved music education, other musical fields such as music performance, music transmission, and the music industry were also greatly affected. The context of cultural and educational reform involved the cultural industry and the music industry; moreover, this reform greatly impacted on the development of the music industry. Therefore, the argument here is that the starting point of the CMI is 1898, rather than the year of 1840 when the First Opium War broke out.

**Classical and Traditional Music Performance**

This section examines the development of the sector of classical and traditional music performance during this period. 'Classical music' mainly refers to the Western classical music performance activities while 'traditional' refers to Chinese traditional music performance activities. It also considers the way in which music education became integrated with the music industry. Moreover, music transmission also became a feature of the industry during this period. Music education was established at both a college and school level during this period. The ‘Shanghai National Conservatory of Music’ was established, as was ‘School Songs’. Professional music performance also revealed two facets at this time: one was Western classical music oriented performance, such as the music performed by the Shanghai Municipal Council Symphony Orchestra, while the other was Chinese folk music, as performed by the Chinese Folk Music Ensemble. This analysis reflects that music education and the music industry became integrated even though they developed as two different systems. Western classical music was transmitted into China through the above organization and approaches (Ge, 2009; Zhang, Zhu, 2007; Zhuang, 2010).

These activities laid a solid foundation for the music market and in particular for the establishment of a market for Western music. The music market mainly refers to the elements of audience and product. Western music became an important part of the music market and before 1949 the term Western music mainly referred to the Western classical music market, not to popular music. The main reason for this was the spread of

---

\(^8\) The feudal system was a way of government based on obligations between the lord or king and vassal.
western classical music communication by various music performance and education organizations. The Shanghai Municipal Council Symphony Orchestra (henceforth 'the Orchestra') and the National Conservatory of Shanghai were two of the major organizations at the time. The Orchestra was established under the Shanghai International Settlement\(^9\) in the late 19\(^{th}\) Century. This Orchestra mostly employed Western performers and its conductor was also Maestro Mario Paci (Chinese name 'Mei Beiqi'), an Italian eminent conductor. Similarly, The National Conservatory of Shanghai also employed mostly Western musicians, in particular Russian musicians.

Western music, music education and Western musical instruments were extensively introduced after two Opium Wars and after the HD reform in 1898 (Zhang, Zhu, 2007). For instance, some instruments such as organ, piano and violin and their performing skills were introduced. In addition, the Christians also played an important role in the domain of music education, performance and industry (ibid).

The Shanghai National Conservatory of Music influenced the development of the CMI, particularly the live performance sector. Huang (2009) studied student performance at the Conservatory. His study gave a picture of how the Conservatory impacted the early music industry. Based on the Xudong's research concerning student performances at the Shanghai Conservatory during the period of Xiao Youmei, the Conservatory held 88 concerts, which included 53 internal concerts and 35 external concerts (ibid). The main purpose of the internal concerts was to enable an exchange of ideas between students and teachers so as to improve both teachers’ teaching quality, as well as the students’ performance standards. The internal concerts played an important role in transmitting Western classical music to a Chinese audience. Some members of the general public also attended these internal concerts, including relatives of the teachers at the Conservatory. These audiences became the first consumers of Western music.

The 35 external concerts were held in public venues and tickets were sold to these

---

\(^9\) The Shanghai International Settlement began originally as a purely British settlement. It was one of the original five treaty ports which were established under the terms of the Treaty of Nanking at the end of the first opium war in the year 1842. American and French involvement followed close on the heels, and distinct areas of settlement for the Americans and the French were drawn out to the north and south of the British settlement respectively. In 1854 a united municipal council was created to serve all three settlements, but in 1862, the French Concession dropped out of the arrangement. The following year the British and American settlements formally united to become the Shanghai International Settlement.
events. A number of concerts were also held at other universities such as JinLing University in Nanjing and Jiao Tong University in Shanghai. As Huang (2009) states: “... excellent student performers and programs were chosen from the internal concerts for public concerts, once a year tickets were sold to the public.” (Huang, 2009:1). The nature of these performances was akin to commercial performance. In addition, the quality and standard of the external concerts was better than that of the internal concerts so as to attract a larger audience and also to increase the revenue generated by the concerts and also the reputation of the Conservatory (ibid). The conservatory promoted the Chinese contemporary music industry and Western music transmission through these professional performing activities.

Some other organizations and societies also played an important role within the live music sector. These organisations and societies included the Shanghai Municipal Council Symphony Orchestra, Jiang Nan Si Zhu (‘Jiangnan Sizhu-Music From Sout’), and Shanghai Datong Music Society. These musical events formed the first peak of the development of the Contemporary Chinese music industry during the 1930s and 1940s.

The Shanghai Municipal Council Symphony Orchestra was founded in 1879. It was initially called the Shanghai Public Band and was one of the earliest orchestras to be established in Eastern Asia. It was renamed the Shanghai Municipal Council Symphony Orchestra in 1922 (‘Shanghai Symphony Orchestra’, 2011). After the beginning of the 1900s, especially after the 1920s, a great number of Western musicians joined this orchestra. All of the conductors of this orchestra, for example, were from Western countries; Jean Rémusat (from 1879), 1881 M.Vela (from 1881), 1900 Valenza (from 1900), 1907 Rudolf Buck (from 1907), Mario Paci (from 1919), Arrigo Foa (from 1942), Henry Margolinski (from 1946), Arrigo Foa (from 1942 to 1946, and from 1947 to 1951) (‘Camimusik’, 2011).

An Italian pianist, Mario Paci, served as conductor for 23 years from 1919. He expanded the ensemble into a full-scale orchestra in 1922. After the establishment of the People's Republic of China, the orchestra changed its name a few times, and in 1956 settled with the name Shanghai Symphony Orchestra, which remains its current name. During the late 1920s and 1930s, this Orchestra held many types of concerts including periodical summer concerts-in-the park and winter chamber concerts, special concerts for some events, Chamber music series, concerts for children, school concerts, radio concerts, as well as some concerts that were held in the memory of some accomplished composers or musicians (Li, 2009). For marketing purposes, the live music sector began to label the different types of concerts 'school', 'radio', 'children's', 'Chamber
Chinese folk music ensembles were also important within the live music sector during this period. There were three important styles of Chinese folk music during this period: Palace Music, Folk Music, and Literate Music (Zeng, 2003). It is evident that Chinese folk music ensembles were primarily a blend of literate music and folk music; meanwhile a form of 'big band' that imitated western orchestration also emerged. The main purpose of this music industry sector was not-for-profit since the music market was not mature at this time. Therefore most funds were obtained from public donations, membership fees, and some relevant for-profit music businesses (for example, music instrument sales).

**Li Jinhui and the Music Industry**

The rise and development of the Chinese popular music industry is an essential part of the CMI during this period. The Chinese popular music industry included two parts: live popular music performance and popular music recording. The development of this industry was in part due to the efforts of Li Jinhui, who played a leading role in the commencement and development of the Chinese popular music industry. His music schools (such as the School of Chinese Song and Dance), performing troupes (such as China Troupe of Song and Dance, and the Troupe of Bright Moon Song and Dance), contemporary popular songs (such as 'Drizzle' and 'I Love You, Younger Sister'), popular entertainment stars (such as Li Minghui, Li Lili) reflect the significant impact that Li Jinhui had on the development and prosperity of the Chinese popular music industry at that time.

Li Jinhui was born in the late the 19th Century. He embraced democratic ideologies as well as some new cultural trends. He advocated and promoted the new music movement by integrating new music with new literature, dance and drama and promoted and adopted popular music and opera for the purposes of Children’s entertainment (Ge, 2009). These activities greatly expanded the audience and market for his musical activities and promoted the development of the music industry overall (ibid). For instance, he composed the first popular song 'Mao Mao Yu' ('Drizzle') which was generally acknowledged as being the first Chinese popular song in Chinese music history. It was composed in 1927 and popularized in 1929 (Xiao, 2005). This resonated with the public. Thus, he is commonly regarded to be the founder of Chinese popular music, and is often referred to as 'the Father of Chinese Popular Music' (ibid). Ge (2009)
also argues that the first phase of the Chinese popular music industry's development is the ‘Li Jinhui Period’. He (2009) argues that Li Jinhui initiated the era of popular music and song which is called the 'contemporary song' or 'popular song' era. Popular music and the Chinese music industry had a base in the city of Shanghai during this time.

Li’s music creation and industrial activities integrated with the film and radio industries, and this integration played a vital role in the promotion of artistic forms such as music, dance, and drama at this time. Li was therefore a pioneer in the Chinese popular music industry. Li Jinhui’s music and industrial activities were commercially motivated. His work was intricately tied up in the political, economic, and social systems of his time. Li’s industrial activity occurred mainly during the 1930s and 1940s, most of his music and other arts were related to popular arts. His activities were not subsidized by the governments that were in power during this time. His music performing activities were mainly for profit, thus market demand was essential. Based on this commercial purpose, he created many kinds of performing art works which integrated song, dance and drama, such as 'Sparrow and Children' and 'The Poor Qiuxiang'. Opera for children, song, dance and drama, were his main forms of performing art works.

In February 1927, Jinhui set up the School of Chinese Song and Dance in Shanghai. This School was the first music and dance institution to train professional entertainment talent in the contemporary music industry. In 1930, EMI changed its market strategy from operas, in particular Peking operas, to popular music and songs. For instance, the percentage of recordings of the Peking opera began to decline, but the percentage of sound track/movie music records and songs and recordings by commercial song and dance troupes greatly increased. These songs became fashionable and were popularized. They came to be known as 'Contemporary Songs'. Since then, this type of music (contemporary songs) has dominated the music entertainment market and has become the most important musical product in an industrial sense.

**Recorded Music**

Shanghai was one of the most important places in the early music industry in China and the World. As reported in the Journal 'the Pictorial of Dian Shi Zhai' in 1880, 'American Ai Di Sheng' ('Edison') invented a machine which was called the 'Ji Sheng Qi' (Gramophone). The music recording sector became one of the most important industrial sectors in the music industry during the first half of the 20th Century. Shanghai also became the most important centre for the recorded music sector. There were two competitive major record companies in this new music sector: 'Bai Dai' ('Shanghai Eastern EMI', which was a division of French EMI) and 'Sheng Li' ('Victory',
otherwise known as 'HMV'); these companies were owned and managed by Western companies (Liu, 1933; Ge Tao, 2009). Moreover, there were some other foreign record companies that established divisions in Shanghai, such as 'Gao Ting' ('Odeon', German), 'Pei Kai' ('Beka', German), 'Ge Lin' ('Columbia'), and ‘Bao Ta' ('Pagoda') (ibid).

Furthermore, some local record companies such as 'Da Zhong Hua' ('Greater China'), 'Chang Cheng' ('The Great Wall') and 'Xin Yue' ('the New Moon') were established in Shanghai. Among these companies, Greater China was the biggest. Thus, Greater China, Shanghai EMI, and Shanghai Victor became the three largest record companies before 1949 in China (Ge, 2009). In the 1920s, the Shanghai record industry experienced its first rapid development; this is also considered to be the first period of the development of the contemporary Chinese music record industry.

The Moudeli Foreign Firm dominated the record market in Shanghai and China after 1903. However this situation gradually changed since the Baide ('Pathe') Foreign Firm was established in 1908 in Shanghai; the Baide was the Shanghai sales agent of the Pathé Fréres in Paris France (Liu, 1933; Ge, 2009). The Pathé Fréres was owned and operated by brothers Charles and Emile Pathe. The Chinese name 'Bai Dai' of EMI originates from the pronunciation of the French word 'Pathe' (Ge, 2009).

In August 1914, when the First World War broke out, Eastern EMI was developed very rapidly. However, the main production activities of French EMI had to move to Belgium (Ge, 2008). Thus, Eastern EMI was greatly affected. In this case, EMI decided to build a factory in Shanghai in 1915 so as to press replications of Eastern EMI recordings itself so that they were not relying solely on the French. The French Eastern EMI company became the first record production enterprise in China (ibid). Up until 1917, the Shanghai EMI factory built up, and produced red colour brand 'Xiong Ji' ('Rooster'), as this brand became very popular.

Music Instrument Making and Sales of Print Music

The sector of music instrument making and sales was a major part of the music industry during this period. The rise and development of Western music instrument manufacturing and sales, of pianos in particular, also expanded into China, and in particular into Shanghai (Zhang, Zhu, 2007). Its rise and development occurred before the sectors of recorded music including phonograph and print music.

The sector of music instruments making and sales also began to develop. In particular,
piano making and sales became a sector of the music industry in the latter half of the 19th Century in Shanghai. Meanwhile, the piano became one of the most important musical instruments during this period. Foreign churches and schools began to offer music lessons; meanwhile Western music was also introduced through piano making and sales. Before 1870, Moutire (Chinese name 'Mou Deli'), British business man established the Moutire Shanghai Piano Company Pty Ltd to sell pianos (Zhuang, 2008). This company was the first company to sell pianos; all pianos were imported from Britain (ibid).

However, the print music sector was a small music industry sector and only began to rise during this period. Although the sectors of live music performance and music recording dominated the music industry, the print music sector also affected the development of this industry. This sector played an important role in the history of contemporary Chinese music (Chen, 2006). This sector mainly included the following aspects: first, 'The Small Music Magazine' became the first music journal in China being founded in 1906 in Shanghai (ibid). Second, Li Jinhui wrote 100 'Family Love Songs' in 1930 after the Southern East Asia tour performance failed in early 1929 (Ge, 2009). These songs were classified as a few song collections and were published during 1929 and 1930. These songs collected and published by Donghua Book Bureau and Minyue Book Bureau; they include: 25 Family Love Songs; 16 Love Songs; 4 Contemporary Love Songs; and 26 Lyric Songs(ibid).

The Music Industry and the Media Industry

The music industry is an integrated industry system. Its development involved interaction with other relevant industries, in particular with the media industry. The media industry included the sectors of radio and film. The CMI underwent an integration development process during this period.

Shanghai is the birthplace of China's broadcasting business. It was the most developed area of the broadcasting business in mainland China during this period (Feng, 2006). Radio broadcasting is a kind of mass media which distributes audio content (such as language, audio, music) to a dispersed audience via radio. Radio was invented by Guglielmo Marconi, an Italian in 1895 (ibid). On the evening of the 23th of January, 1923, the technology of radio broadcasting was successfully applied in Shanghai; meanwhile this was also the first time in mainland China (Chen, 2008). In the evening,

---

10 'Family Love Songs' did not refer to those song express the narrow meaning of love feeling between man and woman; it refers to the wider meaning which expands to kinship, friendship, and nostalgia.
a radio concert of live music performance was successfully broadcasted. This concert included a violin scherzo by Jarlosa Causinnes, a Czech violinist, jazz performance by the Charlie Band, Carton vocal quartet, and Saxophone performance by George Hall. This was the first radio broadcasting concert (ibid).

The initiation of radio broadcasting had a strong connection with the music industry, in particular with the recorded music sector. In the evening of the day, a few music records were also broadcast. Records were not only the accessory of the phonograph, but they were also extensively played over the radio. Thus, people began to listen to recorded music in two ways: radio and phonograph. Although more people listened to recorded music via radio for economic reasons, the phonograph could give people more options to select their favourite music and an appropriate time to listen. Moreover record companies could generate more revenue so as to further develop the music industry, especially the sector of recorded music. However, radio was a better means for promoting recorded music for some record companies.

According to the Schedules of Shanghai Radios in July, 1937 and January 1st, 1939 by the Shanghai archives entitled 'Shanghai Broadcasting Business in Old China' (1985), some data concerning the issue of how music integrated with some radio programmes in Shanghai can be summarized. There were respectively 29 radio stations in 1937 and 35 radio stations in 1939. Only 3 stations in the former did not broadcast music records each day, while the other 38 radio stations broadcast music records each day; more than 10 stations broadcasted music records more than 2 hours each day. Only one station in 1939 did not broadcast recorded music while the other 35 stations broadcasted recorded music; more than 17 stations broadcast more than 2 hours per day. This data reflects the fact that the music industry greatly interacted with the radio industry during 1930s and 1940s.

The film industry also integrated with the music industry during this period. Taking Shanghai Pathe Company as an example, this company was first owned and operated by Charles Pathe four brothers (Ge, 2009). Since 1929, it was transferred and merged by the British Columbia Company. In 1931, the British Gramophone Company (HMV), which was the largest company in Britain, merged with the British Columbia Company and constituted Electric and Musical Industries Ltd., (henceforth 'EMI'). Recorded music and film became the two main businesses within EMI and its predecessor. The film industry developed in Shanghai from the first stage of silent film during 1920s to the second stage of sound film during the 1930s.

The film song was a unique characteristic of the films during this period. The film
industry and the music industry, in particular the popular music industry or recorded music, developed rapidly. This involved contemporary songs which not only played a role in promoting the climax of a film, but also promoted the sales for the single (Hong Fangyi, 2009). EMI always undertook film song recording and distributed film song records (ibid). Some stars such as Xu Lai, Li Minghui, Hu Die, Chen Yanyan, Hu Yumei, and Zhou Xuan developed their career within these two industries. Some good film songs such as 'See you My Love' (by Hu Die), 'Wife's ABC, Husband's ABC' (by Li Minghui and Ren Xida), 'First Love' (by Wang Renmei), and 'Pink Dream' (by Xue Lingxian).

Conclusion

The overall development features of the CMI during the 1900s-1940s mainly represents the following aspects: Shanghai played a vital role and represents the development of the CMI; the music recording industry played a leading role in the Chinese and Shanghai music industry during this period; phonograph equipment and record technology was imported into Shanghai from the West; Western music business enterprises began to develop in Shanghai; Li Jinhui played a leading role in the commencement and development of the Chinese popular music industry and the emergence and development of music education based on a strong foundation for the acceptance of popular music and Western music; the sectors of live music performance, music instrument making and sales, and print music also developed. The development of the CMI was rapid during 1979-2006, thus this development during 1900s-1940s could be the first essential development period.

Shanghai became the centre of economics, culture and entertainment in China during the latter half of the 19th century and in 1949. Meanwhile, Shanghai also became a centre of the music industry in mainland China. Shanghai constructed a complete music industry development system during this period. This system not only included the music industry system itself, which consisted of music performance, music recording, music instrument making and sale, music print, etc; it also included an interactive system, which involved the integration between the music industry and other arts industries such as dance and drama, between the music industry and the media industries such as radio, film and print and between the music industry and the music education industry (such as music performance activities of Shanghai National College of Music); between the Chinese recording industry and the Western music recording industry. This industry convergence constantly pushed the development of the music industry. In this sense, the history of the Chinese music industry is actually the history of the development of industry convergence within the music industry and related
industries such as the performing arts industry and the media industry. Thus, industry convergence is the nature of the development of the music industry.

Bibliography


Feng, Q., 2006, 'The History Change of 'Shanghainess' After Mass Media and the Late Qing Dynasty', Master thesis, Fudan University


