

A MANIFESTO FOR MUSIC



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INTRODUCTION

The UK is genuinely world-leading when it comes to music. We are the world's second largest music exporter, home to iconic global festivals and venues, and boast some of the most well-known and sought-after musicians working today. The UK's music sector still has significant growth potential, with Goldman Sachs predicting that the value of the global recorded music market will double by 2030 to \$50.1 billion, while the live sector is expected to increase by a third to \$39.5 billion.¹

However, there is increasing global competition from other countries vying for a share of this expanding market. Without action, the UK risks being overtaken by countries who are more proactive and ambitious in promoting and supporting their music sectors.

As we approach a general election, now is the time to set out what the UK music industry needs to supercharge growth and seize the opportunities of the future. Whatever the composition of the next Government and Parliament, it is imperative that policymakers take urgent action to support and grow the music industry.

This manifesto urges the next Government to develop a comprehensive, medium to long-term music strategy for growth. A forward-thinking roadmap, formulated by policymakers and industry, will drive growth and success through this crucial period. To help achieve this, this manifesto sets out a range of evidence-based policies, developed by UK Music members and stakeholders across the sector.

This manifesto sets out ten objectives that need to be addressed for the music sector to realise its full potential, and at the heart of these are five key asks for the next Government:

- Ensure AI supports human artistry through strong copyright standards, clear labelling and record keeping requirements, and protections for the personality rights of music makers.
- Fix the European touring crisis by securing a Cultural Touring Agreement with the EU.
- Introduce a tax credit to encourage new UK music production.
- Invest millions more in music education and recruit 1,000 more music teachers.
- Secure a fair deal for music lovers by ending rip-off secondary ticketing practices.

The next Government tackling our objectives and delivering on these key asks within a comprehensive music strategy, focused on growing and strengthening the UK music sector, is crucial to our future success.

We should aspire to make the UK the best place in the world to create, produce and consume music. This manifesto outlines a clear plan for the next Government to achieve this. Policymakers from all political parties should use it to help take the action needed to keep the UK at the forefront of the global music industry.

Our ten objectives for the next Government:

- 1 **Encourage Responsible AI**
- 2 **Safeguard Copyright and Intellectual Property**
- 3 **Boost Music Exports**
- 4 **Supercharge Sector Growth**
- 5 **Protect Music Spaces**
- 6 **Improve Music Education**
- 7 **Progress Diversity and Inclusion**
- 8 **Enhance Freelancer Protections**
- 9 **Support Public Service Broadcasting**
- 10 **Utilise Music to Benefit Society**

ENCOURAGE RESPONSIBLE AI

The accelerating development and adoption of artificial intelligence (AI) tools brings opportunities and challenges for the music sector. We are a highly innovative industry that readily embraces emerging technologies. As an assistive tool, songwriters, producers, and artists use AI to aid the creative process and provide analytics on fan engagement and audience behaviour. Moreover, at an industry level, music publishers and record companies are using AI to detect copyright infringement and predict consumer trends.

However, we must ensure that AI continues to enable human creativity rather than erode it. Many generative AI systems are being developed without regard to the rights of others and without the consent of the original music makers or rightsholders. Protections provided by IP law are a crucial incentive for human artistry, so policymakers must protect creators' and rightsholders' freedoms to choose how their works are used. In addition, AI's implications transcend national boundaries, and the UK should therefore work to ensure international cooperation. Such action will allow the UK's AI and music industries to thrive in tandem.

The next Government should:

- **Ensure AI-generated music is identifiable, either through labelling or within the metadata, to distinguish it from human created works.** Labelling AI generated products as such allows human creators to be properly recognised for their intellectual contributions and helps protect them from unauthorised exploitation. Labelling also protects consumers from misleading representations of what is or is not AI-generated.

- **Commit to respecting creators' and rightsholders' choice by ruling out any new copyright exceptions or extensions to existing ones.** In early 2023, the Government rowed back on plans to allow AI developers to use copyright protected works without the permission of creators and rightsholders. These failed plans highlight the need for policymakers to engage more effectively with the creative industries on AI-related issues and to ensure damaging copyright exceptions remain off the table.

- **Require those using music as part of the AI training process to maintain records of trained and ingested works.** Maintaining records of music ingested by AI applications is vital, especially when determining the consent of the original creators and rightsholders. There is currently no legal requirement to disclose the material AI systems are trained on. Requirements for record keeping and disclosure are included in regulatory AI proposals across the world, notably in the EU and China. The UK must avoid being an outlier on this issue.

- **Introduce personality/image rights into the UK legal framework.** AI can mimic human creativity, as evidenced by recent examples of music that unlawfully replicated the voices of Drake and Eminem. This technology can easily be abused for misappropriation or false endorsement, potentially inflicting damage on the reputation of artists, songwriters and rightsholders. The absence of a specific personality right in UK law means there are currently limited protections for creators in this space.



SAFEGUARD COPYRIGHT AND INTELLECTUAL PROPERTY

The success of the UK's music industry is built on a strong copyright framework. Intellectual Property (IP) rights ensure musicians, songwriters, and rightsholders are paid for the use of their work. A clear and robust framework creates legal certainty, allowing creators to monetise their work and giving music businesses the confidence needed to invest in emerging talent.

Policymakers must ensure that the UK has the most fit for purpose copyright framework in the world, capable of protecting rights and fostering innovation and growth. Doing so will cement our status as a cultural hub and the global destination to perform, record and do business.

The next Government should:

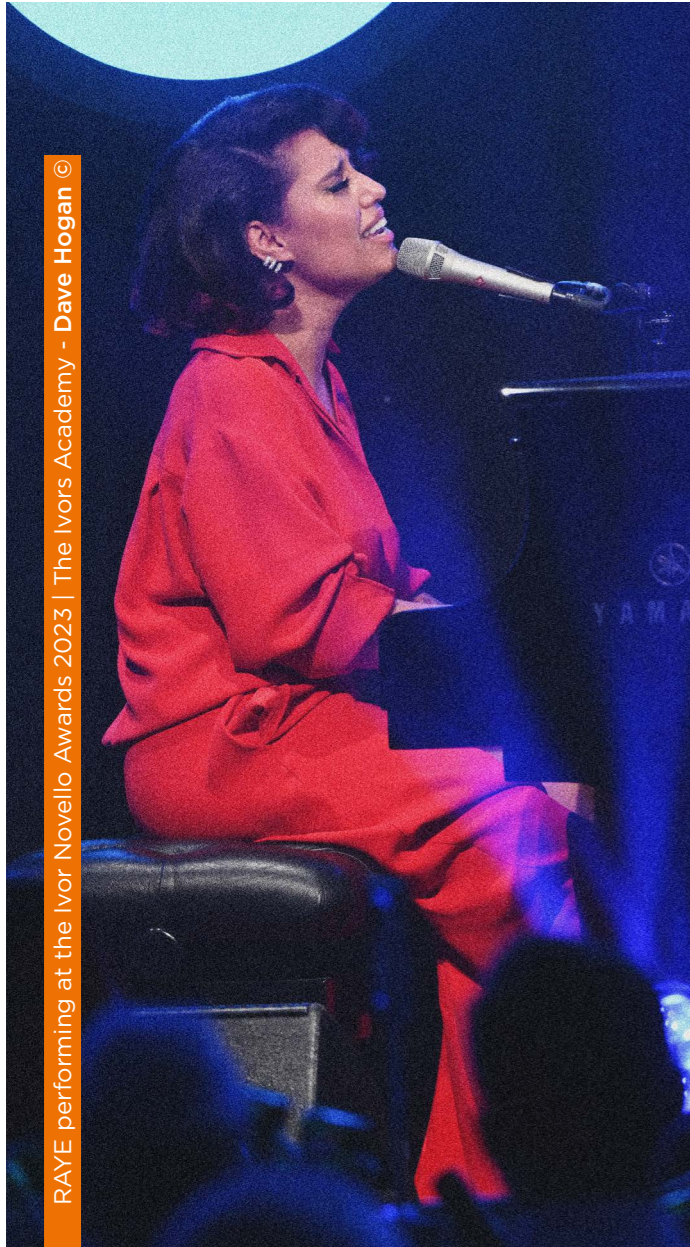
■ **Uphold and support our successful copyright and enforcement framework.** A weak IP regime in another country translates directly into lower export revenues. The UK should work to ensure other countries are upholding similarly high standards for copyright as part of free trade agreement negotiations. We should also consider aligning with other standards that will further strengthen our IP regime.

■ **Introduce stronger penalties for copyright violations and ensure platforms prevent illegal content appearing on their services.** Online piracy continues to impact the UK music industry. In the second quarter of 2023, the BPI identified 150 million visits to websites and apps that give access to unlicensed music in the UK.² According to PRS for Music, stream ripping services saw a 1390% surge in popularity in the UK between 2016 and 2019.³ Without addressing this, piracy will continue draw revenue away from legitimate channels, reducing the financial resources available to support musicians and foster creativity.

■ **Promote industry standards for metadata.** Metadata is the information attached to music that identifies the creators involved and is essential for their career development and payment. Industry efforts to improve the quality of metadata are ongoing. However, these are constrained by poor, incomplete, or absent usage data received from music users, such as user-upload services. The next Government should continue supporting the Intellectual Property Office (IPO) metadata expert groups, bringing key industry players together to find solutions. They could also use existing powers, like Article 16 of the Collective Rights Management Regulations, to ensure data provision using industry standards.



BOOST MUSIC EXPORTS



RAYE performing at the Ivor Novello Awards 2023 | The Ivors Academy - Dave Hogan ©

Music represents the best of British to the world, with our musicians, songwriters, and producers defining the global soundtrack and shaping our global reputation. Artists such as Harry Styles, Adele, and Ed Sheeran are household names across the world. Despite our relatively small size, the UK's music exports were worth £2.5 billion in 2021 and we are one of only three net exporters of music globally. In recorded music, the UK is the second largest exporter of music after only the US.⁴

However, there are challenges facing British music exports and the UK's global music standing. Bureaucratic obstacles for touring musicians after the UK's exit from the EU are holding back sector growth. Moreover, streaming growth is accelerating in key territories, and many domestic music markets, such as Latin America and South Korea, are strengthening. Intense streaming competition is putting pressure on the UK's global music share, now 12% down from a peak of 17% in 2015.⁵

Nonetheless, there remains huge growth potential in the UK music industry, with the value of the global recorded music market set to double by 2030. We must seize this opportunity and support the growth of our music globally to keep the UK at the forefront of the industry.

The next Government should:

- **Secure a Cultural Touring Agreement with the EU.** In 2019, the EU was the UK's largest live music market, worth four times the size of the US (the UK's second largest market).⁶ Increased bureaucracy for touring musicians following the UK's exit from the EU is limiting sector growth. Issues include restrictive visas and work permits, complicated red tape like carnets, and barriers related to selling merchandise and truck hire. A Cultural Touring Agreement with the EU should be prioritised, potentially as part of the anticipated 2026 Trade and Cooperation Agreement (TCA) review.
- **Create a well-funded music export office.** The UK needs to be more ambitious and systemic in supporting its music exports. Creating an export office targeted at music would provide support to British small and medium-sized music companies and future talent, helping to build their international audiences and export profile. Similar offices are common across the globe, including in Germany, Australia, and Canada. With adequate funding, a music export office will address export barriers and help to grow music as a flagship UK industry.
- **Extend and boost funding for the International Showcase Fund (ISF) and the Music Export Growth Scheme (MEGS).** Government-industry partnerships, like ISF and MEGS promote British music abroad and generate economic revenue. Every £1 invested by the Government in ISF artists led to £15 in export revenues,⁷ while MEGS has a £13.61 return for every £1 invested.⁸ The Government's decision in June 2023 to boost MEGS funding to £3.2 million over the next two years is indicative of its success. To further boost export growth, both schemes should continue to receive additional Government funding beyond 2025.

CASE STUDIES: EXPORT SUPPORT AROUND THE WORLD

There is no universal formula for a country to boost its music exports. The following case studies detail music export support in three territories within the world's top ten music markets, South Korea (7th) Canada (8th) and Australia (10th). South Korea's significant central government investment, Australia's successful implementation of a music export office, and Canada's support from public-private partnerships have all led to increased export revenues.

While South Korea is a new and growing entrant, Canada and Australia are in a similar position to the UK as established markets seeking to maintain their global positions. If the UK wishes to remain the third largest music market and the second biggest exporter of music in the world, then it needs to implement similar support measures, or we will fall behind.

SOUTH KOREA

South Korean music exports have increased more than fifty-fold in the last 15 years, rising from £10.8 million in 2007 to £604 million in 2021.⁹ K-Pop has become a global phenomenon, with BTS, Blackpink, Seventeen and Stray Kids having four of the top 10 bestselling albums worldwide in 2022.¹⁰ This success owes much to significant government investment and a strategic focus on music as a priority sector, harnessing its soft power benefits to promote Korean culture to the world.

Music is the single largest investment in the Korean Ministry of Culture's portfolio. Funding is largely delivered through the Korean Creative Content Agency (KOCCA), which was established in 2009 and acts as a cultural export office. KOCCA provides financial support for artists performing overseas, organises international showcases and has business centres in four continents. Moreover, KOCCA facilitates connections between the global private sector and domestic music organisations. In 2021, the Government fostered connections between 76 Korean creative companies and 137 companies from 11 countries interested in their products, resulting in an export equivalent value of £7.8 million.¹¹

AUSTRALIA

Australia is open about their ambition to join the US, UK, and Sweden as a net exporter of music. In 2009, Australia formed its music export office, known as 'Sounds Australia'. The impact of the export office is clear; in less than a decade Australasian international royalty revenues have nearly tripled from £11.2 million in 2013 to £30.7 million in 2022.¹² In its first ten years, Sounds Australia has supported 1,404 Australian acts, coordinated 137 B2B networking events, provided 31 trade stands and provided over 6,000 meeting opportunities.¹³ In addition, Sounds Australia is a global curator of playlists on Apple Music, which reach people in over 110 countries.

In August 2023, the creation of Music Australia was announced: a new federal body within Creative Australia devoted to supporting and investing in Australia's music industry. Music Australia's activities will have £36 million in funds over the first four years.¹⁴ This funding will support songwriting programmes and instruments for schoolchildren, the creation of new music venues, and provide additional money for Sounds Australia. This investment highlights that the Australian Government are serious about their ambition to become the world's fourth net exporter of music.

CANADA

Canada is the seventh largest exporter of music globally, producing two of last year's top five bestselling artists: Drake and The Weeknd. Canada's export success can be partially attributed to the Foundation Assisting Canadian Talent on Recordings (FACTOR), an organisation dedicated to administering grants that promote and export Canadian music. While primarily funded through contributions from the Government of Canada, FACTOR also receives money from territorial governments, private donors, broadcasting revenues and the music industry itself. In addition, FACTOR works alongside the country's regional music offices, who provide export support at a provincial level. Separate funding avenues are even available for French language music exports.

As a state-backed organisation devoted to boosting Canadian music, FACTOR offers dozens of grants tailored to the industry's diverse needs. Whether aiding an emerging artist's demo recording or supporting an established musician's album promotion or international tour, it provides a purpose-built funding programme to suit their specific needs. Canada is also prioritising the 'song export', with specific funding available for Canadian songwriters, composers, and publishing companies to promote the influence of Canadian songwriters globally.

SUPERCARGE SECTOR GROWTH

The UK music industry is poised to be an important growth sector in the second half of this decade. In 2019, prior to the pandemic, the sector was worth £5.8 billion to the UK economy, growing 65% compared to seven years prior.¹⁵ The creative industries – of which music is an integral part – have grown at over one and a half times the rate of the UK economy in the last decade.¹⁶ The next Government now has an opportunity to tap into this significant growth potential. In an increasingly competitive global environment, a mixture of increased investment, fiscal incentives and other government-backed initiatives will help to stimulate activity, create jobs, and boost growth.

The next Government should:

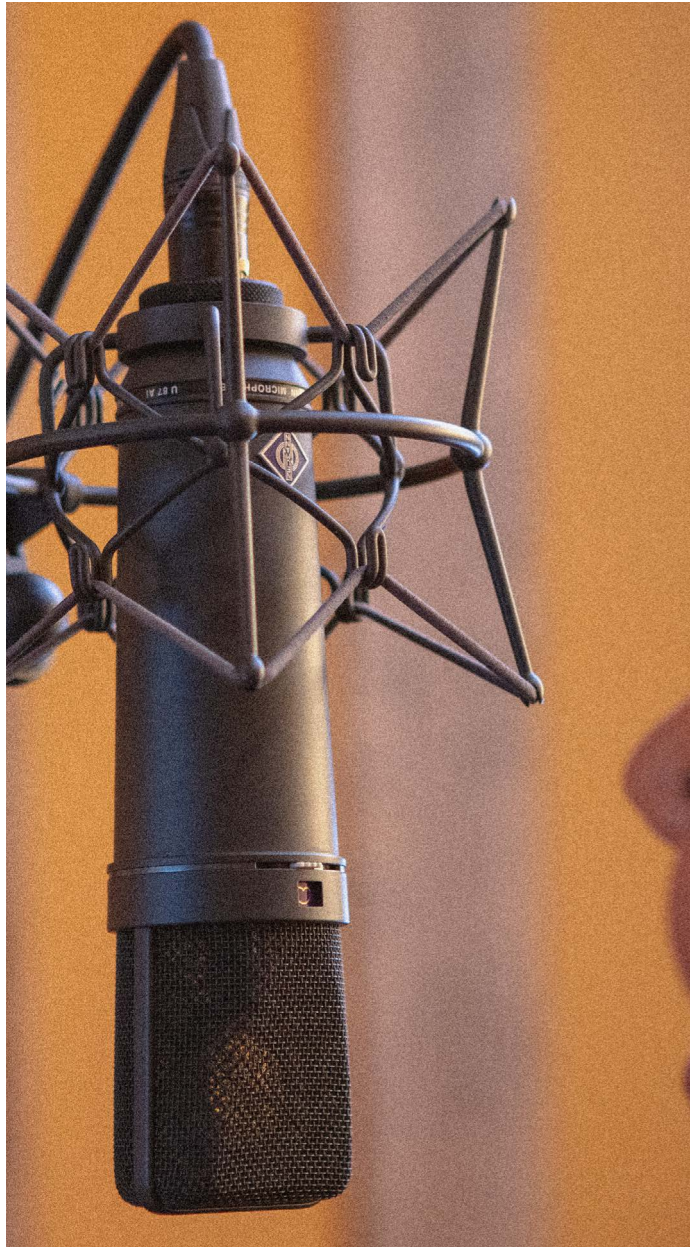
- **Introduce a tax credit to encourage new UK music production.** Unlike other creative sectors, such as film, TV, and video games, the UK music industry does not benefit from a tax credit scheme. This puts the UK at a competitive disadvantage compared to other established music markets, such as France, Australia, and some US states, who offer such incentives. A tax credit supporting music creation in the UK would allow us to retain our homegrown talent and attract significant inward investment, helping to ensure that the UK is a global destination for music making.

- **Reduce VAT on tickets to 10%.** UK gig-goers are charged 20% VAT on tickets, which is almost double the EU average (10.3%) and around triple countries like Belgium (6%) and Germany (7%).¹⁷ Reducing VAT on tickets will incentivise investment in the grassroots of the sector, stimulate live music activity and boost local economies.
- **Increase Arts Council England (ACE) funding to invest in music projects and extend support to arts councils in devolved nations.** ACE, and its devolved equivalents, provide vital funding support and grants for music projects. Beneficiaries include many grassroots music venues, a diverse range of orchestras, music charities, independent labels and promoters, and music education organisations. However, funding reductions and removals from the National Portfolio have highlighted that ACE requires a larger funding settlement to continue investing in projects without making cuts elsewhere.



Stormzy performing at the BRIT Awards 2023 | BPI - JM International ©

PROTECT MUSIC SPACES



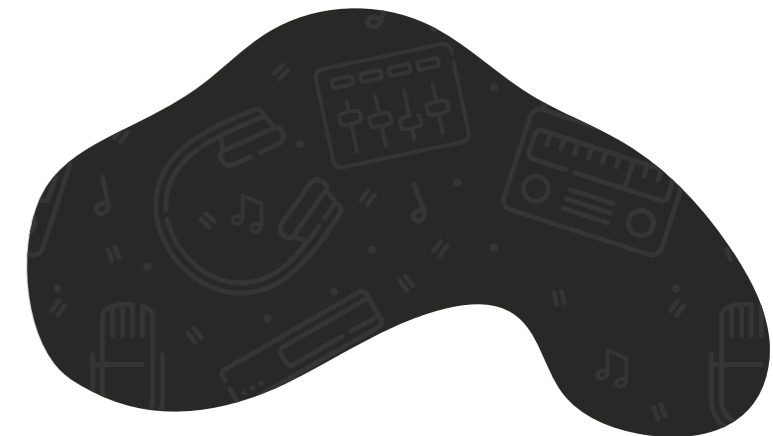
Music spaces, including recording studios, grassroots music venues and rehearsal spaces, are fundamental to the sector's success. They serve as cultural hubs, helping to develop future talent and attracting people and businesses to an area. The Music Venue Trust (MVT) estimates that every £10 spent on a ticket in a live music venue is worth £17 to the local economy.¹⁸ However, the decline of these spaces, worsened by the Covid-19 pandemic, is concerning. While the Government recently announced £5 million in additional funding for ACE's Grassroots Music Venue's Fund,¹⁹ according to the MVT British music venues are still closing at a rate of one per week. Audiences, meanwhile, are increasingly being exploited by unscrupulous secondary ticketing practices, further threatening the vitality of the live sector.

The UK also boasts world-class recording studios that historically attracted global artists and producers. However, there is a worrying trend of many top UK artists choosing to record outside of the UK due to the appeal of better serviced studios elsewhere. Adele, for example, only recorded three tracks from her latest album in the UK. World-renowned studios, such as Olympic Studios in London and Liverpool's Parr Street Studios, have closed in the last 15 years. To avoid a talent drain and secure the sector's long-term growth, we must protect and nurture these important music spaces.

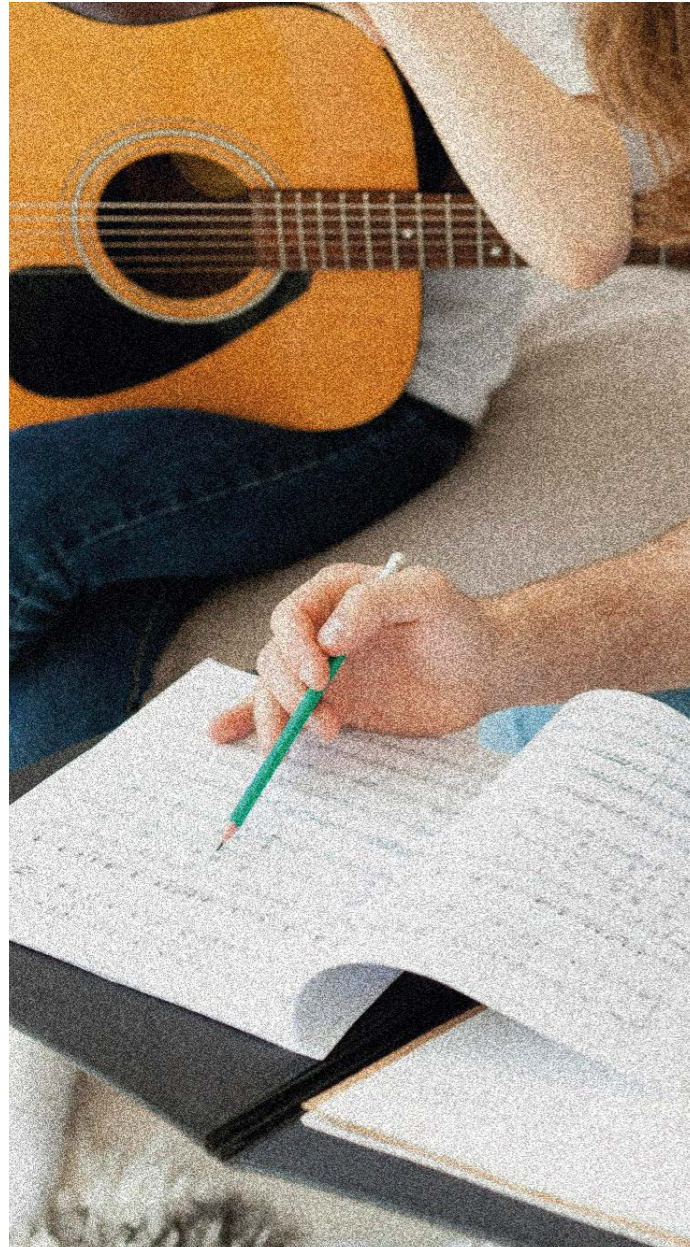
The next Government should:

- **Consider a long-term business rates cut for music spaces and reform Standard Industrial Classification (SIC) codes.** The current business rates system penalises studios and venues, since they often require a large floor space and are typically in city centres or regenerating locations. Moreover, modern music infrastructure often involves multi-use facilities affiliated with indie labels and SMEs. These locations typically include studios, rehearsal spaces and other community music facilities that suffer from high rates. Updating outdated SIC codes is critical for business rates reform, with studios, venues, and other music spaces lacking dedicated classifications reflecting their unique characteristics.
- **Put 'Agent of Change' protections in primary legislation to protect venues threatened with closure.** Many music venues are threatened by planning and licensing disputes arising from new developments and resident complaints about noise levels. The Agent of Change principle places responsibility on new developments to mitigate noise complaints when situated near existing music venues. To ensure reliable protections for venues, it is essential to enshrine Agent of Change in law and move beyond its current implementation through guidance and policy.

- **Regulate against exploitative secondary ticketing practices.** Many online secondary ticketing platforms allow event tickets to be resold at prices significantly above face value. Just hours after Eurovision 2023 tickets sold out, they appeared on these platforms for up to £9,000 - more than 20 times their original price. Exorbitant resale prices, alongside practices like bulk-buying and speculative selling only serve to enrich resellers and exploit fans. The Government should protect music lovers by introducing measures to curb these practices.



IMPROVE MUSIC EDUCATION



The global success of the UK music industry is rooted in music education and creative skills. High-quality music education is vital for securing our talent pipeline and producing the highly skilled music professionals of the future. We need them to be future world-class performers, innovators in music production, inspiring music teachers, or influential music industry executives. Moreover, music education's impact extends beyond careers, equipping individuals with a range of transferable skills and providing cultural enrichment.

But music education needs investment and support. Over the last decade, GCSE music participation has declined by nearly 25% and A-Level music enrolments have nearly halved.²⁰ Inadequate investment in state music education is increasing inequality of opportunity: 50% of children at independent schools receive sustained music tuition, compared to just 15% in state schools.²¹ Government must also invest in apprenticeships, vocational qualifications, and Music Education Hubs to ensure equitable access to first-rate music education. The music curriculum needs to be diverse and inclusive, promoting high-quality experiences for all, and offering routes into a variety of specialisms. Addressing these issues will create a stronger talent pipeline that reflects a broader range of backgrounds and perspectives.

The next Government should:

- **Train and recruit 1,000 more music teachers.** There are currently nearly 1,000 fewer secondary school music teachers today than there were in 2012.²² The removal of the music teacher training bursary in 2020 has exacerbated the challenge of restoring teacher levels to their previous numbers. Reinstating these bursaries is a crucial step to increasing the number of music numbers and ensuring the effective delivery of music education.
- **Deliver an arts pupil premium.** The current Government pledged in its 2019 manifesto to spend £90 million a year on an arts premium for secondary school pupils, however this has not been delivered. The Government should deliver the arts pupil premium to support access to music for the poorest students, ensuring no one's ability to play is contingent on their parents' ability to pay.
- **Increase funding for Music Education Hubs.** Hubs are vital for providing accessible music education opportunities, but in real terms, their budgets have been cut by 17% since 2011. The next funding settlement needs to increase funding for Hubs to give more aspiring musicians the opportunity to play, perform and create music.
- **Set up a commission of the nations and regions to address inequality of opportunity in music education.** The devolved administrations have been introducing a range of initiatives to improve access to music education for children and young people. For example, the Welsh National Music Service and Scotland's removal of tuition fees for learning musical instruments at school. A Commission would allow learnings to be shared and ensure improvements to music education access are UK-wide.
- **Grow the number of apprenticeships and vocational qualifications in music.** A diverse and adaptable music sector needs individuals who have developed their craft through vocational learning or apprenticeships. However, music and the creative industries have faced challenges with the inflexible apprenticeship levy, which doesn't cater to the unique nature of creative businesses. Further investment is needed to allow the industry and educational institutions to work together in delivering these qualifications.

CASE STUDIES: DEVOLVED APPROACHES TO MUSIC EDUCATION

After more than 25 years of devolution, the four nations of the UK have developed distinct approaches to enhance access to music education. These strategies reflect the unique educational landscapes within each nation, while also offering useful insights that can be shared to improve music education across the entire UK. Outlined here are unique policies implemented by the devolved administrations, from which valuable learnings can be applied to the other nations and regions of the UK.

SCOTLAND

In July 2021, the Scottish Government announced its decision to scrap instrumental music tuition fees in schools. This decision was influenced by the declining number of students in Scotland learning a music instrument, which reached its lowest level in 2020 since the Instrumental Music Service began collecting data. Local authorities were initially allocated £7 million in funding to eliminate tuition fees for the academic year 2021/22, an investment that was increased to £13 million for 2022/23. Since the policy's introduction, Scotland has seen a 35% increase in pupils participating in instrumental music tuition.²³

WALES

Established in 2022, the Welsh National Music Service brings together key partners and organisations to ensure that all children and young people have access to play, sing, take part in and create music. The service established a £5.5 million national instrument and equipment library, which includes adaptive musical instruments for those with additional learning needs, as well as digital recording equipment. This initiative supports local authorities in creating their own accessible instrument libraries to facilitate music access for young people, particularly those from disadvantaged backgrounds.

NORTHERN IRELAND

Northern Ireland is unique within the UK as it has a single Education Authority – a non-departmental public body should be sponsored by the Department of Education. Within this authority lies the Education Authority Music Service (EA Music Service), which offers a range of musical opportunities accessible in school settings or at designated music centres. The service's website is a particularly valuable resource, enabling parents to easily locate nearby available instruments, as well as local ensembles and workshops. The site also provides important materials for teachers and parents wishing to support children in music-making. Having a centralised website for music opportunities across the nation ensures accessibility and convenience for parents, enhancing students' opportunities to engage in music education throughout Northern Ireland.

ENGLAND

In June 2021, the National Plan for Music Education was published, outlining the Government's vision for music education in England until 2030. The plan details a strategy for music education spanning from early years to higher education and careers. Under the plan, £25 million will be made available to purchase instruments and equipment, including adapted instruments for those with special educational needs and disabilities (SEND). We hope the Government fulfils this promise which will provide high-quality learning experiences to SEND pupils. Also announced was a pilot for a Music Progression Fund. This aims to support disadvantaged pupils with significant musical potential in learning an instrument and/or singing to a high standard over a sustained period. Although the implementation of this funding is pending, these policies represent a significant step towards advancing music education opportunities and nurturing musical talent in England.

PROGRESS DIVERSITY AND INCLUSION



Having a more diverse and inclusive music industry is one of the sector's top priorities. By bringing together a wider range of perspectives, experiences, and ideas, we hope to help to foster greater innovation and creativity. Music should be welcoming to all. However, according to the 2023 Musicians' Census which draws on data from almost 6,000 musicians, 62% of respondents have either experienced or witnessed some form of discrimination.²⁴ Recent studies, including those from Black Lives in Music and Attitude is Everything, indicate that barriers and discrimination exist in music, across the intersections of gender, ethnicity, disability, and socio-economic status. This is unacceptable, and we are committed to taking further action as demonstrated by our ten-point plan to boost diversity and our Five P's action plan.²⁵

However, there is more to be done, and the next Government can play a pivotal role in helping us achieve our ambitions. Improvements can be made to general policy and programmes such as access to work and Universal Credit, but targeted approaches can be made too. If our music industry is to tell the story of modern-day Britain, then it needs to be representative of modern-day Britain too.

The next Government should:

- **Extend the limitation period for discrimination or harassment claims under the Equality Act 2010 from three months to six months.** Currently, individuals have only three months to make a claim regarding discrimination or harassment. Increasing this to six months provides a more reasonable timeframe for affected individuals to seek justice and protection under the law. Alongside other reforms to the Equality Act 2010, this extension will ensure that freelancers enjoy the same protections as other employees.
- **Mandate reporting of ethnicity and disability pay gap data while reducing the threshold to include companies with over 50 employees.** Under the Equality Act 2010, gender pay gap reporting is only mandatory for organisations with 250 or more employees. The Act should be amended by reducing this threshold and extending it to include ethnicity or disability pay gap data to help create more inclusive and equitable workplaces.
- **Commission an independent review into how the Metropolitan Police and local authorities react and respond to Black music events.** The Metropolitan Police's Form 696 targeted Black artists and music fans, putting pressure on venues to cancel shows based on the genre or ethnicity of the artist. Form 696 was scrapped in 2019, but the new 'voluntary partnership approach' serves as its equivalent in all but name. The Government should work with the Metropolitan Police and other responsible authorities to revise its approach, and a national independent review into this matter is needed.
- **Review the impact of Access to Work on those working in the music industry with a view to ensuring claimants receive support within four weeks.** The Access to Work scheme supports disabled individuals in finding and retaining employment. Many individuals require support and disability-related accommodations to participate in the music industry or pursue their artistic endeavours. However, lengthy delays and a processing period of up to six months for Access to Work claims are increasingly common and must be rectified.

ENHANCE FREELANCER PROTECTIONS

The music industry is powered by its talented workforce and the invaluable contributions of freelancers. Freelancers in music cover a wide range of roles, spanning from performers, composers, and producers to marketing experts, videographers, and publicists. Freelance and self-employed workers make up as much as 72% of the sector, compared to just 15% of the overall workforce.²⁶ Issues impacting freelancers are therefore even more salient in the music industry.

Freelancers miss out on certain protections that are afforded to other workers. In 2019, 61% of musicians surveyed by the Musicians' Union said they felt at greater risk of experiencing sexual harassment because of their freelance status.²⁷ Covid-19 further exposed the need for increased financial aid for freelancers, who often fell through support gaps during restrictions. Many expert freelancers have left the sector due to the lack of financial security, leaving significant skills gaps in many parts of the industry. The protection and support given to these workers is fundamental to the success of music in the UK.

The next Government should:

- **Extend the protections relating to discrimination and harassment in the Equality Act 2010 to all freelancers.** Freelancers are currently deprived of legal safeguards concerning bullying, harassment, and discrimination due to their employment status. Extending the coverage of the Equality Act 2010 will ensure that freelancers enjoy the same rights and protections as other employees.
- **Introduce support for freelance creatives between roles, drawing inspiration from France's "intermittent du spectacle" model.** Freelance creatives have felt significant financial challenges due to gaps in government policy during Covid-19. The next Government should introduce proposals, inspired by those in France, where freelance creatives are entitled to financial assistance during periods of reduced work opportunities. This would enhance the resilience of freelancers and contribute to the overall stability of the creative industries.
- **Extend shared parental leave to all self-employed workers, also ensuring equal access for parents taking adoption leave.** Currently, self-employed parents have no access to shared parental leave and pay, as the current system only provides Maternity Allowance for self-employed mothers, leaving the entire burden of childcare on them. This inflexible system perpetuates gender-stereotypes and is holding back equality in the music industry.



SUPPORT PUBLIC SERVICE BROADCASTING

The UK's network of public service broadcasters play a vital role in supporting the success of the music industry. They provide a platform for artists, musicians, songwriters, producers, and composers, enabling them to reach a wider audience and gain exposure. The BBC and music enjoy a particularly strong relationship. The corporation gives important exposure to upcoming talent and supports music exports through the global reach of its radio stations and licensing TV broadcast content to other territories. It also provides the broadest and most distinctive music offer of any UK media outlet. Data from PPL shows that 75% of all tracks broadcast on the full range of BBC radio services were not broadcast on commercial radio.²⁸

The BBC is the single largest employer of musicians in the UK, employing more than 400 contract musicians and many hundreds more freelancers. It is an important commissioner for media composers and is also the UK's largest commissioner of new classical music. According to an Ivors Academy survey of previous winners and nominees of their composer awards, 62% of respondents had received a commission from the BBC.²⁹ However, a mixture of cuts and uncertainty around future funding threaten the music provision offered by our public service broadcasters. Musical content represents a vital cultural expression and requires both protection and investment to ensure it continues to thrive.

The next Government should:

- **Guarantee that the BBC maintains a robust and sustainable funding model through the licence fee.** With the next BBC Charter coming into force in 2027, it is essential to secure a funding framework that enables the BBC to continue providing high-quality content and services to the public. Ensuring a stable funding model will help maintain the BBC's invaluable contributions to the music industry and the overall cultural landscape of the UK.
- **Ensure music remains at the heart of the public service broadcasting remit.** The draft Media Bill removed specific mentions of music and cultural activities from the public service broadcasting remit. The current remit, enforced by OFCOM, ensures that the BBC, ITV, Channel 4, and Channel 5 must broadcast musical content. These legislative protections must remain to avoid diluting the cultural content offered on public service broadcasters.
- **Uphold the importance of the BBC in providing a diversity of music services in the next Charter.** This includes supporting musical talent and investing in the future. For example, the BBC's performing groups showcase the UK's cultural heritage nationally and globally and represent less than 1% of the corporation's budget. Local BBC Introducing shows are vital for supporting upcoming talent. In 2020, nearly 2,000 emerging musicians received their first royalties because of a BBC play; meanwhile, seven of the top 10 best-selling songs of 2022 came from artists championed by their local BBC Introducing show.



UTILISE MUSIC TO BENEFIT SOCIETY

Music can deliver proven health, wellbeing, and societal benefits. This is why, in 2022, UK Music collaborated with Music for Dementia (The Utley Foundation) to publish the Power of Music report.³⁰ The report demonstrates how music can support staff, create financial savings, and help to achieve improved health and care outcomes for the whole country. The whole sector has been working hard to make progress in this area to improve outcomes for wider society.

Likewise, the industry has been working hard to expand work to combat the climate crisis. Impactful initiatives, including LIVE Green and the Music Climate Pact, plus specialist organisations such as Vision:2025, Music Declares Emergency, Julie's Bicycle, and Earth Percent, are making significant steps to improve the environmental impact of the creative sector. If we want to see the full benefits of what music can do for society, then the Government needs to support these initiatives.

The next Government should:

- **Better integrate music into health and care pathways by training frontline health workers on the role of music in health and care.** Establishing an accessible training module would enhance their understanding of music's role in healthcare and boost skills. NHS plans and care pathways should acknowledge the vital role of music in health care. For example, the Care Quality Commission could explicitly expect services to include music as part of their care.
- **Transform public transport for a greener music experience.** Transport is often the largest carbon emitter for musicians and music fans travelling to festivals, concerts, studios, or events. Limited travel options after 10pm in some cities can force musicians and fans to rely on driving. Improved public transport and introducing a musician's railcard offering a 25% discount on train travel would incentivise eco-friendly travel for many artists and performers.
- **Bring the creative industries to the table on net-zero discussions.** The music industry is leading on innovative solutions, setting ambitious goals (such as the Music Climate Pact and the LIVE Green Initiative),^{31 32} and raising awareness of the climate emergency, with many artists speaking directly to their fans about the issue. But the creative industries are missing from important government conversations on the issue. We need to be better involved in with discussions going forward, particularly regarding legislation.



CONCLUSION: A CALL FOR A NATIONAL MUSIC STRATEGY

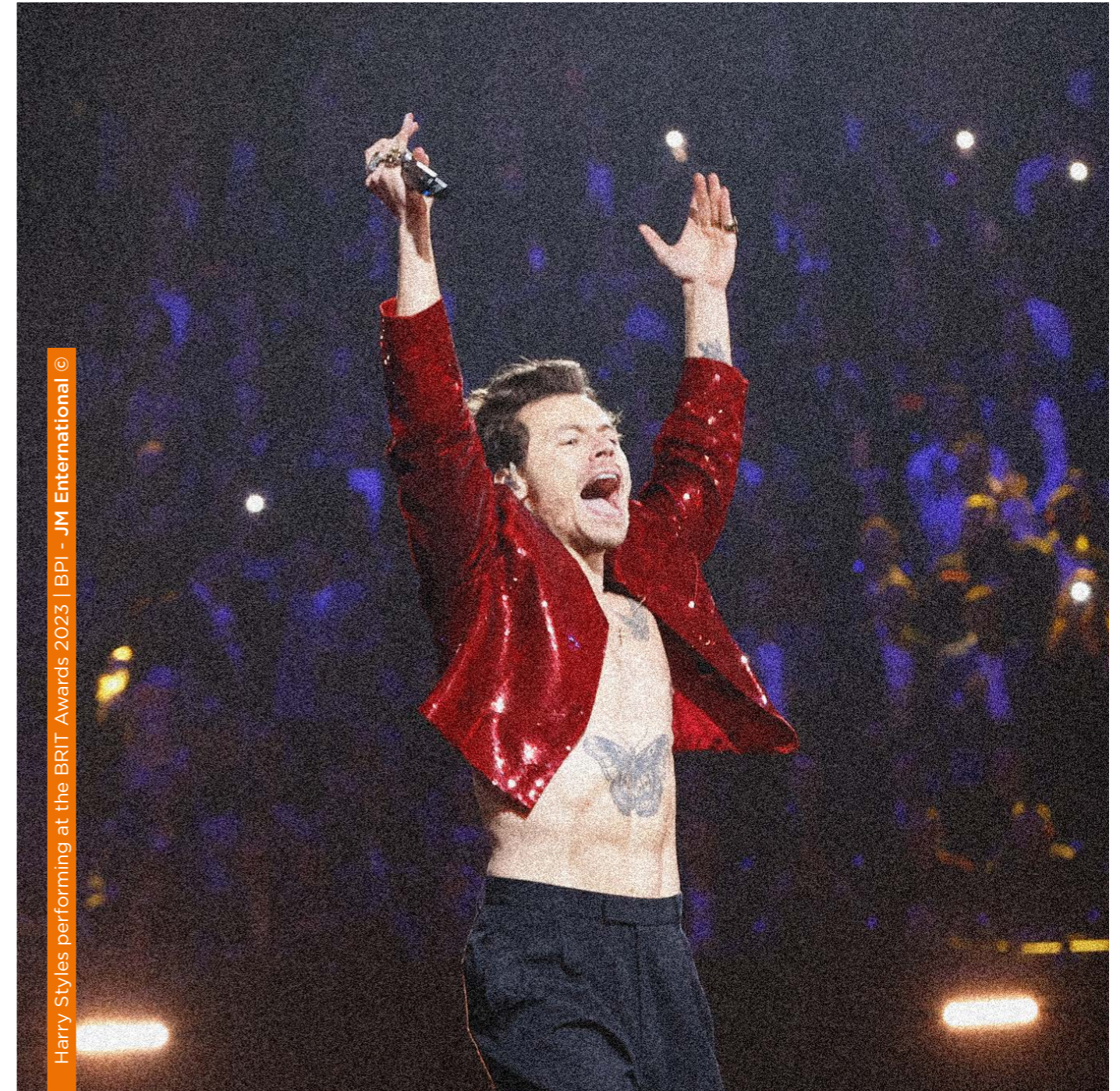
We hope that everyone who has dedicated time to read this manifesto has gained insight into a sector that is dynamic, innovative, and impacts all parts of society and the economy. These qualities underpin why, over the decades, the UK's music industry has firmly established itself as a world leader.

However, past performance is not indicative of future success. Increasingly, nations with governments that significantly support and invest in their music sectors are providing the strongest competition to the UK's position at the top.

The second half of the decade represents a crucial period with clear opportunities and challenges that can be harnessed to propel our music sector to new heights. Our manifesto has detailed a roadmap for the next Government to achieve this. Policymakers, from all political parties, should embrace this call to action and employ it as the basis for devising a national music strategy focused on growing and strengthening the sector.

A national music strategy would provide a structured framework for sustained investment, growth, and innovation in the UK's music sector. It would guide initiatives aimed at stimulating economic growth, preserving our musical heritage, and enhancing quality of life through music.

We must ensure that our music sector not only maintains its global standing but flourishes in the years to come. The time to act is now.



Harry Styles performing at the BRIT Awards 2023 | BPI - JM International ©

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ACKNOWLEDGEMENTS

Throughout this project, we have received invaluable support from all of UK Music’s members and beyond. Without their collaboration, this report would not have been possible.

The policies in this manifesto are the result of extensive engagement across the music sector. In March 2023, we launched a public survey to gather views on the key issues facing the UK’s music industry. The survey received 61 responses from 40 individuals and 21 organisations.

Thank you to the UK Music team for their drafting, editing and design contributions, particularly Tom Kiehl and Hannah McLennan for their support throughout.

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UK Music is the collective voice of the UK’s world-leading music industry. We represent all sectors of our industry - bringing them together to collaborate, campaign, and champion music. The members of UK Music are: AIM, BPI, FAC, The Ivors Academy, MMF, MPA, MPG, MU, PPL, PRS for Music. UK Music also has an informal association with LIVE (Live music Industry Venues & Entertainment).

