UK Music – Written Evidence (RES0037)

About UK Music

UK Music is the collective voice of the UK's world-leading music industry. UK Music represents all sectors of the music industry – bringing them together to collaborate, campaign and champion music. A full list of UK Music's ten members can be found in **Annex A.**

In 2023, the UK music sector contributed £7.6 billion to the economy, a 16% increase on the previous year.[1] It also employed 216,000 people - more than the pharmaceutical, steel, and aerospace sectors combined.

Music also delivered £4.6 billion in exports, up 15% from £4 billion in 2022. The UK is one of only three net exporters of music globally, and the second largest exporter of recorded music in the world after the US. In 2023, the value of British recorded music exports grew to a new annual high of £775 million.[2] Global admiration for British music is key part of what makes the UK a cultural superpower. It is also one of the reasons UK Music Chief Executive, Tom Kiehl, was invited to join the Soft Power Council in 2025.[3]

The UK's music sector has significant growth potential, with Goldman Sachs predicting that the value of the global recorded music market will nearly double by 2030 to $49.1 billion, while the live sector is expected to increase by more than 50% to $51.7 billion.[4]

This tallies with the rest of the creative industries, which grew at more than one and a half times faster than the wider economy from 2010 - 2019.[5] The Government is therefore right to identify this as one of its eight key growth areas in its Industrial Strategy.[6]

However, increasing global competition from markets in regions such as Latin America and South Korea are putting pressure on the UK's share of the global music market. BPI estimates that UK artists now cumulatively account for less than 10% of global audio streams, whereas their collective share of global music consumption was estimated to be 17% as recently as 2015.[7]

A crucial part of the UKs musical success is our relationship with the EU, which remains a vitally important overseas market for UK music creators. 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). A highly integrated relationship with the EU live music market is crucial for supporting emerging British creators, boosting our music exports, and facilitating cultural exchange.

However, the UK's exit from the EU has created several barriers that are making cultural tours expensive, bureaucratic, and confusing. This is hampering our music sector (as well as other cultural sectors), and negatively impacting the economy. As noted by the European Commission in their Work Plan for Culture 2019-2022, the *"UK's withdrawal from the EU… has been affecting the cultural and creative sectors, industries and markets on both sides"*.[8]

In 2022, the All-Party Parliamentary Group on Music, with the support of UK Music, published the Let the Music Move – A New Deal for Touring report, which outlined the problems and listed a series of actions the Government to take action to help UK musicians and crew tour Europe more easily. The report warned that UK music workers faced *"more costs, more complications and getting fewer opportunities"* after the UK left the EU at the end of January 2020.[9]

In May 2024, the now-Chancellor Rachel Reeves told a room of business leaders "*we will forge a closer relationship with our nearest neighbours in the European Union, to ease the burden of bureaucracy and red tape on British businesses; Including a new veterinary agreement, an agreement on touring visas, and the mutual recognition of professional qualifications".*[10]

We are hopeful that as part of the Government's UK-EU reset, they will seek agreement on touring visas and introduce measures to support touring musicians and their crew, removing bureaucratic barriers and opening up international opportunities for UK talent.

What should the reset seek to achieve in order to serve the British national interest? What would a successful reset of UK-EU relations look like?

Any reset must urgently seek to resolve the issues currently facing UK musicians touring in the EU. A successful reset of UK-EU relations will address the immediate bureaucratic and financial barriers confronting the live music sector and re-establish the dynamic, mutually beneficial relationship that has long underpinned cultural and economic exchange between us and our closest neighbours.

According to a 2023 UK Music survey, 82% of musicians surveyed said their earnings had decreased because of Brexit.[11] Meanwhile, 43% of those surveyed said it is no longer viable for them to tour the EU. The ISM places the average lost income for touring artists at £43,175. [12]

Between 2019 and 2023, PRS for Music data shows a 27% decline in small and medium-sized live performances (under 5,000 capacity) in the EU reported by its members. This decline highlights how leaving the EU is disproportionately impacting mid-level and smaller artists. Reduced touring opportunities not only directly affects the artists and their crew unable to tour, but also songwriters who will see reduced royalties.

Many European festivals are choosing not to book UK artists, with the number of British artists booked for EU-based festivals down by a third on pre-Brexit levels, according to research from Best for Britain.[13] Equally, some artists based in the EU are choosing not to tour the UK, or scale down their plans, due to the additional paperwork and costs.

There is no single solution to address the challenges impacting the music industry after leaving the EU. A comprehensive set of measures is needed across various areas to help restore our sector to its pre-2020 competitiveness. The sector has been united and campaigning hard for solutions, for example through the Let the Music Move campaign which received backing from over 200 artists including New Order, Little Mix and Radiohead.

A successful reset would cover the major issues facing the music industry set out in this submission:

1. Short term touring
2. Longer touring engagements
3. ATA Carnets
4. Cabotage
5. CITES and Musical Instrument Certificates
6. Creative Europe
7. Merchandise

What is your assessment of the Government's aims and approach to the reset? Is the Government being too ambitious, or not ambitious enough?

The Government's approach reflects a clear recognition of the pressing challenges facing UK cultural touring in the EU. We are glad that the Government has identified touring in the EU as a priority, but it must be more ambitious in resolving these issues urgently. A delay in implementing these solutions risks further eroding the opportunities available to UK musicians, potentially decimating young careers in the process.

1. Short term touring

Some solutions don't need to be so ambitious, for example around short-term touring. A bespoke EU-UK visa waiver agreement (VWA) would help resolve issues with short-term touring, allowing performing artists and associated crew the freedom to take up short-term work on an ad-hoc basis for up to 90 out of 180 days. This would harmonise existing regulations across various EU member states, removing a large part of the complex red tape that has existed since we left the EU.

The EU proposed a VWA to the UK during the Brexit negotiations. There is precedent for this, with the EU entering 28 VWA or Joint Declarations with third countries since 2009. These agreements, while not covering persons carrying out "a paid activity", almost all contain exceptions for sports persons, artists etc, performing on an ad-hoc basis.

A VWA is widely supported within the creative industries – with over 300 organisations signing an open letter calling for one. The UK and EU Domestic Advisory Groups, as well as the UK Trade & Business Commission, have also called for a VWA to be negotiated for cultural touring.

2. **Longer touring engagements**

The Government may need to be more ambitious when negotiating longer touring engagements, by working with the EU to introduce a touring visa that allows some music workers to stay in the Schengen area for more than 90 days within a 180-day period.

The restrictions on days spent in the Schengen area mean that music workers (not just performers, but also technical support staff etc) must keep track of how many days they have spent in the area. There are incidents where individuals have exceeded the 90-day limit, resulting in them being unable to tour or even take personal holidays in Europe due to having used up their permitted stay.

Workarounds are expensive, environmentally damaging and a drain on individuals as they inevitably involve flying in to and out of Schengen on rest days. The impact of this is particularly damaging for UK-based orchestras and the theatre sector, who typically need to be in Europe for extended periods. 90 days in 180 is insufficient in this line of work. In addition, these restrictions impact session musicians and crews who may move from tour to tour, rather than staying with one act in this period. A specific touring visa for those involved in longer-term touring work is a solution to this issue.

The European Commission proposed this exact solution for touring artists from third countries in 2014.[14] In the proposal, the Commission noted that the current 90 days in 180 were insufficient for creative workers. The Commission also noted that the potential gains from introducing this visa for touring artists from third countries would amount to €500 million. The Government must be ambitious in pursuing this solution for touring musicians.

Should the Government have any 'red lines' for the UK-EU reset?

As well as making it easier for artists to tour the EU, the Government must see removing additional bureaucracy around carnets, cabotage and CITES as a red line for any negotiation.

3. ATA Carnet

Post-Brexit, an ATA Carnet is now required for bringing unaccompanied instruments into the EU. These cost around £410 including VAT, as well as a security deposit priced at 30-40% of the value of the equipment being transported. Carnet costs can escalate as more equipment is brought over. For instance, touring orchestras may face fees ranging from £2000 to more than £5000.

In addition, the process of acquiring a carnet is bureaucratic, complex and a time burden. For example, they require details such as the serial number of each instrument. They must also be sourced well in advance and need to be signed by border officials at a specific place. Delays due to carnet checks are common. One band, White Lies, had to cancel a concert in Paris in 2022 because of these delays.[15]

This is requiring bands to add extra travel days – increasing costs and eating into their Schengen allocation. One artist told the ISM: *"We can never book a gig on a carnet day; we have to keep it purely a travel day just in case we encounter any problems at any of the customs (Douane) offices. Because of this we have to pay extra wages to crew and extra nights in hotel rooms that we never had to do before".*

A cultural exemption for ATA Carnets agreed between the UK and EU would remove these logistical and financial burdens. Under such a waiver, music professionals could be exempt from the requirement to obtain and pay for a carnet, provided they can demonstrate proof of a legitimate performance engagement within the EU.

In the immediate term, the Government should work with relevant Chambers of Commerce to reduce the cost of carnets. The cost of a carnet is much higher in the UK than in the rest of Europe – largely as a result of these countries taking steps to help reduce the costs, in particular the security deposit. For example, in Portugal, a carnet costs £98-£156; in Spain £140, and in Austria between £59.50 and £85. Carnets are issued by the London Chamber of Commerce (and other local Chambers of Commerce) and the Government is well placed to work with these bodies to lower fees, reduce required deposits, and streamline the application process.

4. Cabotage

Cabotage refers to the practice of transporting freight between two places within the same country by foreign-registered trucks. Previously, EU rules allowed UK trucks to operate freely in the EU, but new restrictions are in place following Brexit.

Post-Brexit cabotage rules limit UK trucks to making three stops in the EU. This forces many tours to avoid using UK-flagged trucks (damaging our event haulage sector that was once at the centre of the European industry), or to reroute their trucks back to the UK every three stops, at huge time, environmental and financial cost. While previously many large European tours would base themselves in the UK, now they are preferring to use the UK as a leg on the tour and basing themselves in Europe.

Many orchestras work as "Own Account" operators running their own customised vehicles to ensure the safe transport of valuable instruments. This activity now faces additional restrictions, forcing orchestras to rack up prohibitive bills renting EU-based alternatives. Some orchestras are paying up to £20,000 for replacement EU-tagged vehicles. While in 2022, the Government introduced its "dual registration" solution to resolve cabotage issues, this is not feasible for those operating on "own account" and is largely only practical for the largest operators who can afford to set up a European base.

The cleanest fix for these issues is through the TCA renegotiation. The narrow definition of non-commercial road exportation in Article 460 of the TCA could be changed to match the Liberalised Transport section of the European Conference of Ministers of Transport (ECMT). This text states that the following are exempt from multilateral and bilateral transport permit requirements:

> *"Transport for non-commercial purposes of properties, accessories and animals to or from theatrical, musical, film, sports or circus performances, fairs or fetes, and those intended for radio recordings, or for film or television production and the transport of goods on own account are exempted from multilateral and bilateral transport permit requirements".*

If possible, the EU could implement this exception sooner through a temporary agreement – with it formally recognised in the renegotiated TCA in 2026.

5. CITES

Certain instruments contain parts of plants or animal parts (e.g., rosewood and ivory) from endangered species whose export is controlled. These instruments now require a Convention on International Trade in Endangered Species (CITES) permit (known as a Musical Instrument Certificate), in addition to a carnet, to enter the EU.

CITES require a check-in on entry and exit, which can only be done at certain Designated Ports of entry, effectively barring some artists from certain forms of transport into the EU. St Pancras Station, where many musicians take the Eurostar in the EU, is not currently a designated port. Making St Pancras a CITES-designated port would simplify travel for artists touring the EU.

A Musical Instrument Certificate is currently valid for three years and the applications can take up to a month to process, preventing some musicians from taking last-minute bookings. Streamlining the application process and extending its validity to five or seven years would reduce the frequency and increase the speed with which touring artists navigate this bureaucratic process.

While Musical Instrument Certificates are currently free, DEFRA are planning on reviewing their cost. It is essential that Musical Instrument Certificates remain free, especially as this policy has a disproportionate impact on certain sectors, for example orchestras.

In the area of trade and mobility of people, the Government has identified three priorities for negotiation with the EU: a veterinary/SPS agreement; mutual recognition of professional qualifications (MRPQs); and easier access for UK touring artists in the EU. Are these the right priorities? Are they achievable? Are there other sectors which the Government should be including in the reset—for example, in the field of financial services?

Easier access for UK touring artists should be an absolute priority and is totally achievable with the right policy and negotiation approach.

Musicians are natural entrepreneurs and will often think of creative solutions to the problems they face. But having movement across the EU taken away is hindering their ability to reach diverse audiences, build international reputations, and drive cultural exchange that benefits both sides of the Channel. Post-Brexit barriers have transformed what was once a fluid and dynamic touring landscape into a maze of bureaucratic hurdles and rising costs, threatening to stifle creativity and the UK's economic growth. If left unaddressed, this challenge will undermine the competitive edge of the UK music industry.

Urgent, targeted measures to remove these obstacles will be essential to preserve our global cultural influence, ensure the financial viability of tours, and sustain the vibrant legacy of British music on the international stage. The Government must keep it as a priority going forward.

In trade, what is—or could be—the relationship between the UK-EU reset and the UK's current or potential relationships beyond Europe?

Easing customs burdens and simplifying trade procedures for touring artists could help re-establish the UK's reputation as a reliable and innovative cultural exporter, boosting relationships in Europe and beyond. Likewise, rejoining funding programmes such as Creative Europe could reinvigorate the UK's creative industries, offering a dual benefit: reinforcing ties with European partners while enhancing the UK's cultural and trade credentials on an international stage.

6. Merchandise

For smaller bands and artists, selling merchandise can be the difference between a tour being viable or not. The sale of CDs, T-shirts, and other merchandise at gigs is a vital revenue stream. For example, one artist made a £200 profit from a 13-show tour but earned ten times that amount from merchandise sales. Post-Brexit rules are now denying touring artists this crucial source of revenue.

According to a Musicians' Union survey, 68% said they no longer take merchandise with them when performing in the EU citing that it is "*too complicated*" or "*too costly to sell*" and "*too complicated, bureaucratic and expensive to get merch to venues – simply not worth the huge hassle".* One band, Tankus the Henge, told the BBC that the additional costs resulted in them missing out on £2,500 worth of merchandise sales on their tour of France in summer of 2020.

If they wish to bring merchandise on tour, artists now need to obtain an Economic Operators Registration and Identification (EORI) number and register for VAT in each market visited.

The EU also requires a full export declaration for goods crossing the border valued at over €1,000. This declaration must be submitted, and clearance received, before the goods are allowed to leave the UK. For goods below this threshold, an oral declaration at the port is sufficient.

"Rules of origin" regulations impact musicians as most merchandise, such as T-shirts, are not made in the UK. Having a plain T-shirt overprinted in the UK is not sufficient to avoid the rules of origin. As a result, a full customs declaration must be made and duties paid, further increasing costs on artists.

We recognise that this is one of the most complex issues to resolve. Ideally, we would seek a bilateral agreement between the UK and the EU to exempt merchandise carried by touring artists from certain customs and VAT requirements, recognising the unique nature of cultural exchanges.

7. Creative Europe

Alongside prioritising touring artists in the EU, the UK must explore rejoining the Creative Europe programme**.** Creative Europe is an EU-established funding programme to support the cultural and creative sectors across Europe. For the period 2021-2027, the programme will distribute €2.44bn in funding to boost the growth and reach of creative businesses across Europe.

UK-based creative and cultural organisations were entitled to non-repayable grants, as well as training and access to market opportunities prior to leaving the programme on 1 January 2021.

According to a 2021 Creative Europe Desk UK report, between 2014 and 2019, Creative Europe invested €203 million to support 609 projects involving UK organisations. The UK beneficiaries within these projects are known to have received €68 million directly. These grants are also successful in leveraging additional funding – with €140million in match funding being generated by organisations who received a Creative Europe grant.

The programme also provided broader benefits beyond financial support, including helping to build international networks, grow audiences, generate jobs and skills, and enhance UK soft power. Moreover, over half of the UK projects and organisations funded were from outside London.

UK music projects that received Creative Europe funding include Keychange (which looks to improve gender diversity in the music industry), Julie's Bicycle (an arts sustainability organisation), and the National Youth Orchestras of Scotland.

The EU has noted that the programme is open to the participation of "other third countries", indicating that the UK would be welcome to rejoin Creative Europe. This would be in line with the UK's recent re-admission into the Horizon Europe and Copernicus programmes that we left following our exit from the EU.

Rejoining Creative Europe would also offer the added benefit of potentially offering new funding avenues to help support music professionals who are facing increased costs related to touring in the EU. EU festivals and venues could also draw on funds available to book UK acts, making our artists more attractive to book again.

Annex A

UK Music's membership is made up of:

AIM - Association of Independent Music – The trade body for the independent music sector and community which make up a third of the UK's recorded music market alone. Representing 1000+ independent record labels and associated businesses, AIM's members range from globally recognised brands to the next generation of British music entrepreneurs.

BPI - The British Phonographic Industry – The representative voice of the UK's recorded music sector. Its membership consists of approximately 500 music companies, ranging from hundreds of SME independent labels to the major global record companies Sony Music Entertainment UK, Universal Music UK and Warner Music UK. BPI owns and organises the BRIT Awards and the Mercury Prize, administers the Music Export Growth Scheme (MEGS) and co-owns the UK's Official Charts Company.

FAC – The Featured Artists Coalition - FAC is the UK trade body representing the specific rights and interests of music artists. We are a not-for-profit organisation, serving a diverse, global membership of creators at all stages of their careers. The FAC is formed by artists, for artists, and we place this ethos at the centre of all we do. We are an inclusive community that advocates, educates, collaborates and researches on behalf of artists, coming together to provide a strong, collective voice within the industry and to governments domestically and abroad.

The Ivors Academy - The Ivors Academy is the UK's not-for-profit professional association exclusively for songwriters and composers. They equip their members with the skills and connections they need to succeed through education and networking events. The Ivors Academy also advocates for the rights of songwriters and composers to ensure they are fairly compensated for their work. As a community, they recognise excellence in songwriting and composing by judging and presenting the prestigious Ivor Novello Awards.

MMF – Music Managers Forum - Representing over 1000 UK managers of artists, songwriters and producers across the music industry with global businesses.

MPG - Music Producers Guild - Representing and promoting the interests of all those involved in the production of recorded music – including recording studios, producers, engineers, mixers, remixers, programmers and mastering engineers.

MPA - Music Publishers Association - The representative voice of the UK's music publishing sector. Membership includes over 95% of the country's major and independent music publishers and close to 4,000 catalogues across all genres of music.

MU - Musicians' Union - Representing over 32,000 musicians from all genres, both featured and non-featured.
PPL - licenses recorded music in the UK when it is played in public or broadcast and ensures that revenue flows back to our members. These include independent and major record companies, together with performers ranging from emerging musicians to globally renowned artists. In 2021 we collected £252.8 million while also distributing money to 147,000 performers and recording rightsholders.

PRS for Music - Here for music since 1914, PRS for Music is a world-leading music collective management organisation representing the rights of over 175,000 talented songwriters, composers and music publishers. Redefining the global standard for music royalties, PRS for Music ensures its members are paid whenever their musical compositions and songs are streamed, downloaded, broadcast, performed and played in public. In 2023, PRS for Music paid out £943.6m in royalties and collected a record £1.08 billion in revenues.

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