November 2024

Invest 2035: the UK's Modern Industrial Strategy- UK Music Submission

1. 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 members can be found in Annex A.

2. Given the wide scope of this consultation and the number of questions, our response will focus only on those we consider most relevant to our sector.

Sector Methodology and Sectors

Question 1*: How should the UK government identify the most important subsectors for delivering our objectives?*
Question 4*: What are the most important subsectors and technologies that the UK government should focus on and why?*

3. The subsectors selected to deliver the objectives of Invest 2035 must demonstrate a proven economic track record, strong growth potential, resilience to economic shifts, and a solid global reputation with influential cultural power. Moreover, they should offer benefits beyond purely economic gains, contributing positively to other social and cultural objectives.

4. The music sector delivers on all of these and more. The UK is home to some of the biggest artists, sought after songwriters, largest festivals, busiest venues, leading record labels and publishers, and some of the most iconic recording studios in the world. As well as some of the biggest music companies in the world having a significant presence in the UK, small and medium-sized music businesses are vital economic drivers. As part of this ecosystem, our grassroots music infrastructure and microbusiness also have huge potential - if supported correctly.

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

6. 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 United States (US). In 2023, the value of British recorded music exports grew to a new annual high of £775 million. Global admiration for British music is key part of what makes the UK a cultural superpower.

7. Beyond being a key subsector in its own right, music plays a cross-cutting role within the wider creative industries, which contributed £125 billion is Gross Value Added in 2023.[2] In film, television, gaming, and advertising, music is indispensable, helping to enhance storytelling and create the immersive experiences that define these fields.

8. Music also offers a range of other unique benefits, including supporting psychological wellbeing, improving academic performance, and facilitating social cohesion within society.[3]

9. 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]

10. 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 a key growth area in the Industrial Strategy.

11. 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.[6]

12. As growing sector with even greater potential, it is vital that the Government invests in music and ensures the business environment is structured to enable investment, to ensure that the UK is not overtaken by countries who are more proactive and ambitious in promoting their music sectors.

13. To help deliver this, **the Government should develop a comprehensive, medium to long-term music strategy for growth.** A forward-thinking roadmap would provide a framework for sustained investment, growth, and innovation in the UK's music sector. Many of the policy initiatives that could form part of a strategy are noted in the rest of this submission.

Question 6: *What are the key enablers and barriers to growth in these sub sectors and how could the UK government address them?*

14. The Department for Business and Trade (DBT) have identified several policy areas that are important for growth-driving sectors and the pro-business environment.

15. Table 1 highlights music-related policy areas within these themes that would require Government intervention to unlock growth potential. It also identifies whether these areas are barriers or enabler to growth, depending on their current impact. Further details, including specific policy recommendations, are provided in the responses to the relevant questions associated with each business environment throughout the consultation.

Table 1: Enablers and Barriers to Growth in the Music Industry

DBT-Identified Business Environment	UK Music Policy Area	Enabler/Barrier/Both
People and Skills	Defunding of post-16 qualifications	Barrier
	T-Levels	Barrier
	Apprenticeship levy	Barrier
Innovation	Artificial intelligence	Both
	Research and Development	Enabler
Energy and Infrastructure	Business rates	Barrier
	VAT on tickets	Barrier
	Agent of Change	Enabler
Regulatory Environment	Strong Copyright and Intellectual Property Framework	Enabler
	Supporting Freelancers	Enabler
	Secondary ticketing regulation	Enabler
	Tax Credit to Encourage Music Production	Enabler
Crowding in investment	National Wealth Fund	Enabler
	Government-Industry Partnerships (MEGS and ISF)	Enabler
Trade and International Partnerships	Barriers to EU Touring	Barrier
	Export Support	Enabler
	U.S Visa Fee Increases	Barrier

Pro-Business Environment - People and Skills

***Question 8**: Where you identified barriers in response to Question 7 which relate to people and skills (including issues such as delivery of employment support, careers, and skills provision), what UK government policy solutions could best address these?*

16. Vocational qualifications and apprenticeships are vital pathways into the wide range of roles within the music industry. These roles include performers, composers, songwriters, promoters, managers, producers, sound engineers, music business professionals and much more.

17. Ensuring strong pathways into the industry are even more critical given skills shortages within the sector. Between 2019 and 2022, music, performing and visual arts saw a 17.4% increase in the number of job roles not filled due skills shortages.[7] The live music sector, in particular, has struggled with a declining workforce following COVID-19 and Brexit.

<u>Defunding of some post-16 qualifications</u>

18. Central Government funding is being withdrawn from BTECs and other level 3 music vocational qualifications in 2026. These vocational qualifications have always been the unsung but vital hero of the music talent pipeline, offering a well-rounded and industry-informed perspective on music that nurtures creativity.

19. Key qualifications losing their funding include those in music technology, music performance, music production, and music business. All of these represent important skills that directly translate into jobs in the sector. There are particular concerns from music industry-funded specialist creative schools, such the BRIT School and East London Arts and Music (ELAM) about the removal of UAL Level 3 Extended Diplomas.

20. There are not enough options to fill the void that defunding these qualifications will create. While the new Alternative Academic Qualifications (AAQs) that will replace them are potentially positive, it will take time to offer the range and breadth of music options provided by the current suite of qualifications.

21. Moreover, the AAQ's requirement for "assessment by examination" threatens to make what has traditionally been a subject that empowers and nurtures learners from a wide spectrum of learning styles and backgrounds less accessible. The

proposed AAQs are also not broad enough in their which removes the flexibility that can be so vital for specialist creative schools.

22. The previous Government's own impact assessment acknowledged that these level three reforms are likely to negatively impact learners from disadvantaged backgrounds. They noted that students from these backgrounds are disproportionately highly represented in the qualifications that are being defunded.[8]

23. **The Government should pause the defunding of these music qualifications, only removing them once the new AAQs have been consulted on, are considered sufficiently equitable and cover a broad range of music skills.**

24. **The Government should also loosen the exam-based assessment requirements for AAQs to help create more flexible qualifications that meet the needs of all students. Moreover, if these are going to be used to deliver technical courses, they must be funded at the same rate at T-Levels.**

<u>T-Levels</u>

25. The decision to remove funding for some level 3 vocational courses is also linked to their perceived overlap with the new T-Levels.

26. They have been pitched as a vocational alternative to A-Levels. However, T-Levels in their current form do not work for the music industry.

27. There is currently no specific T-Level in music, with the closest equivalent being one in "media, broadcast and production".

28. A core requirement of T-levels is a 45-day work placement, intended to provide practical experience in the relevant industry. No placement means no T-level.

29. According to the Independent Music Companies Association (IMPALA), 99% of music businesses are micro, small, or medium sized enterprises.[9] The prevalence of these smaller businesses means that most lack the organisational capacity to offer T-Level placements.

30. The music industry is generally concentrated in larger cities. A lack of accessible work placements for those outside of urban centres limits the ability of T levels to work for everyone. The Joint Council for Qualifications have stated that "regional inequality remains an obstacle to the success of T Levels".[10]

31. Given the Education Secretary's commitment that the Government will "make a success of T-Levels", it is vital that there is a significant rethink around how they work for the creative industries.[11]

32. **The Government should work with industry to develop a broader variety of T-Levels that address the range of technical skills needed in the music sector. This should also be accompanied by financial support that will allow small music businesses to take on placements.**

Apprenticeship Levy

33. Apprenticeships are vital for the music industry. However, music and the creative industries have faced challenges with the inflexible Apprenticeship Levy, which does not cater to the unique nature of creative businesses.

34. Since the Apprenticeship Levy was introduced in 2017, the number of people starting apprenticeships has declined by 31%. This decline is even more acute amongst small businesses, which most music businesses are, where the number of apprentices declined by 49%.[12]

35. The levy currently assumes that all businesses require a steady pipeline of long-term apprentices, with apprenticeships required to run for at least 12 months. However, as creative industries are typically made up of smaller businesses that often conduct short-term, project-based work, the Levy does not effectively support their needs.

36. It is therefore unsurprising that £3.3 billion of unused Apprenticeship Levy funds were returned to the Treasury between 2019 and 2022.[13]

37. We endorse the new Government's proposal to replace the Apprenticeship Levy with a new "growth and skills levy".[14] **The Government should work closely with the creative industries in developing the new growth and skills levy, ensuring it is flexible, easy to navigate, and allows for shorter apprenticeships.**

Pro-Business Environment – Innovation

Question 10: *Where you identified barriers in response to Question 7 which relate to RDI and technology adoption and diffusion, what policy solutions could best address these?*

Artificial Intelligence

38. As an assistive tool, AI can be a huge enabler of growth in the music sector. Assistive AI tools can support creators in their creative processes, assist with tools required for the mixing of the mixing of the final product, and enhance audience targeting and marketing.

39. However, there are significant challenges that generative AI presents, with many AI systems being developed without the consent of the original music makers and rightsholders. Unauthorised wholesale ingestion of content is impacting the growth of our statement, leading to a transfer of value from the creative sector to the tech sector, a dilution of the IP that underpins music, and a diminution in the value of human creativity.

AI - Copyright Exceptions

40. UK Music is deeply concerned that current Government thinking could lead to the introduction of a new, broad text and data mining (TDM) copyright exception, similar to the proposal the previous Government retracted following widespread criticism from the creative industries.

41. This would allow AI service providers to train their systems on music without the consent of, or need to compensate, creators or their chosen rightsholder. Research from Germany and France estimates that by 2028, 27% of music creators' revenues will be at risk due to generative AI.[15]

42. The UK has a strong copyright regime that is vital for encouraging investment and enabling growth in our sector. Weakening this regime will damage an industry that thrives in the international market.

43. Moreover, a copyright exception with an opt-out mechanism is also not an appropriate solution.

44. A copyright exception undermines the permission-based copyright standard by assuming a right to use data without seeking authorisation or permission, and without obtaining a licence. Under current UK law, express consent must always be obtained before use, not assumed – and this should remain the case. Opt-out mechanisms are not the answer to balancing the impact of broad copyright exceptions.

45. The experience in the European Union (EU), which adopted an opt-out approach in 2019, has shown that this model leads to ambiguity and unintended consequences. For example, in Germany there have been multiple cases challenging the correct interpretation of the opt-out.[16][17] The UK can benefit from the "second mover advantage" by learning from the EU's experience and avoiding these pitfalls.

46. **The Government should not introduce any new, broad TDM copyright exceptions, including those with an opt-out mechanism.**

AI – Transparency and Labelling

47. Transparency around the training process for AI models is vital for allowing creators and rightsholders to maintain control over their works, allowing them to receive proper credit and compensation for their creations.

48. In addition, transparency is crucial for establishing and managing licensing opportunities, and are necessary to ensure that generative AI systems are operating in full compliance with copyright law.

49. Requirements for record keeping would reflect international standards, as adopted under Article 53(1)(c) of the EU AI Act. Failure to adopt these standards would leave the UK behind.

50. **The Government should introduce clear transparency requirements around the AI training process, including requiring AI service providers to maintain records of trained and ingested works.**

51. Currently there are no UK legal requirements to label AI-generated works as such. This is critical for allowing consumers to distinguish between what is, or what is not AI-generated. Without this labelling, consumers may unknowingly engage with AI-generated content under the assumption it is human created.

52. Surveys indicate that consumers prefer human-created music, with research from global recorded music body IFPI showing that nearly 8 in 10 music fans (79%) felt that human creativity is essential to the creation of music.[18] Preserving the value of human artistry through labelling allows for the market to recognise and reward it – which is key to the sector's ongoing growth.

53. **The Government should ensure that solely AI-generated works are labelled as such to distinguish them from human-created works.**

AI - Personality Rights

54. AI is capable of mimicking human creativity, which has been seen by countless artists such as Drake, the Weeknd and Eminem having their voices being mimicked by AI.

55. This ability creates a risk of misappropriation and false endorsement, potentially causing harm to the reputation and personality of artists and songwriters, similar to concerns over deep fakes in the visual world.

56. In the UK, although various legal instruments exist protecting individuals from misappropriation or false endorsement, there is need for clarity around the applicability of these in relation to AI-generated content.

57. The U.S. is taking a lead on protections in this space. The bipartisan NO FAKES ACT entered the House of Representatives in July 2024 and looks to create a federal property right for every individual to control their own voice and likeness.

58. Legal certainty and protections for personality rights will ensure artists are safeguarded against unauthorised use of their image/voice. By protecting creators' rights, investors in AI technologies can have confidence that the value of IP is protected.

59. **The Government should look to clarify UK law, and potentially introduce a specific law protecting the personality and likeness of a human writer or artist(s) against misappropriation, similar to the US No Fakes Act.**

Question 11: *What are the barriers to R&D commercialisation that the UK government should be considering?*

Research and Development

60. Taxpayer-sponsored organisations like UKRI and Innovate UK are instrumental in providing grants for early-stage R&D. However, these initiatives typically favour science and technology sectors, as creative businesses are perceived to have a higher risk profile and a longer R&D cycle. However, this approach overlooks current technological advancements and growth potential within the sector.

61. Current R&D tax relief schemes are also tailored towards science and technology, making it harder for creative businesses to qualify. Yet, music companies are pioneering advancements in AI-assisted music tools, immersive listening experiences, and digital audio technology – all areas that could qualify under broader R&D definitions.

62. Research from the Creative Research and Innovation Centre (CRAIC) found that the creative industries account for 1% of overall UKRI spending – over five times less than the sector's share in Gross Value Added.[19]

63. In 2023, the Council for Science and Technology published a letter to the Prime Minister highlighting the underrepresentation of the creative industries in R&D investment. The Council also recommended increased public investment in R&D within the creative economy.[20]

64. **The Government should ensure that public investment in R&D in the creative industries is reflective of the size, nature, economic contribution, and future growth potential of the sector. This could include extending existing R&D tax reliefs beyond science and technology.**

Pro-Business Environment – Infrastructure

Question 14*: Where you identified barriers in response to Question 7 which relate to planning, infrastructure, and transport, what UK government policy solutions could best address these in addition to existing reforms? How can this best support regional growth?*

<u>Business Rates</u>

65. The current business rates system disproportionately penalises recording studios, venues, and other multi-purpose music facilities. This is because they often require a large floor space and are typically in city centres or regenerating locations, resulting in higher rates.

66. These spaces are fundamental to the sector's success and create dynamic, thriving local economies. They serve as cultural hubs, helping to develop future talent and attracting people and businesses to an area.

67. However, business rate rises are divorced from the ability of the business to pay, often effectively taxing otherwise viable small businesses out of existence. Rising rates have been a major driver of music space closures in recent years.

68. Despite post-pandemic rate cuts, the burden remains significant. The Music Venue Trust notes that the reduction of business rates relief from 75% to 40% announced in the Autumn budget will place an additional £7 million tax burden on music venues. This is on a sector that only generated £2.9 million in gross profit in 2023.[21]

69. According to a Music Producers Guild survey, 54% of recording studios are considering closing in the next year due to business rates demands, with 25% of

their net income being spent on rates. All studios surveyed said they were unable to increase the fees they charge, due to the threat of clients going elsewhere.[22]

70. Recording studios are not covered by the Retail, Hospitality and Leisure tax relief, which does covers music venues. This exclusion has placed even more financial pressure on them, since they are generally classified as offices.

71. **The Government must ensure that its planned permanent cut in business rates for 2026-27 effectively covers music recording studios, venues, and other cultural spaces. As an immediate solution, treating studios the same as venues for rating purposes would provide much-needed relief.**

72. Part of the issue with business rates is Standard Industrial Classification (SIC) codes, which determine the rates businesses pay. These a problem across the music sector. In particular, recording studios and venues lack dedicated classifications reflecting their unique characteristics, often leading to inconsistent rates due to misclassification.

73. The Music Studio Market Assessment, commissioned by DCMS, even recommended the creation of a specific category for recording studios.[23]

74. **The Government should reform SIC codes to reflect the range of businesses within the music industry, this includes specific classifications for recording studios and music venues.**

VAT on Tickets

75. UK gig-goers are charged 20% VAT on tickets, which is almost double the EU average (10.3%), and more than triple the rate in countries such as France (5.5%) and Belgium (6%). Germany's rate is also substantially lower (7%).[24]

76. 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.[25] However, paying one of the highest tax rates in Europe on gig tickets is a serious barrier to growth for the sector.

77. The Culture, Media, and Sport Select Committee, in their report from the Grassroots Music Venues inquiry, acknowledged the need to cut VAT on tickets. They recommended that the Treasury and DCMS undertake a comprehensive economic analysis of the impact of cutting VAT to a rate of 10%.[26]

78. **The Government should reduce VAT on tickets to at least 10% (in line with the EU average) to incentivise investment in the grassroots of the sector, stimulate live music activity and boost local economies.**

<u>Agent of Change</u>

79. Noise complaint-related planning and licensing disputes are an increasingly common issue. This is forcing long-standing, culturally important and economically valuable venues into costly legal disputes or even closure. Notable venues affected include Night & Day Café, the Jago, and The George Tavern.

80. The Agent of Change principle was incorporated into the 2018 revision of the National Planning Policy Framework (NPPF) to help protect live venues from closure due to noise complaints.

81. Agent of Change requires that any new development near an existing music venue must bear responsibility for noise mitigation.

82. For example, if an apartment block is built near an established music venue, the developer, not the venue, would be responsible for soundproofing. This principle also applies in reverse: if a new live music venue opens in a residential area, then it must handle its own soundproofing costs.

83. However, because the principle is only guidance and not enshrined in law, live venues still face inconsistent protection.

84. For example, at the Jago, a grassroots music venue in Hackney, the licensee incurred more than £15,000 in legal fees, acoustic tests, sound proofing, and construction costs following noise complaints from residents in a newly built development nearby.[27] This is despite the Agent of Change principle being in place.

85. The value of making it easier for venues to offer live music are clear. According to GigRealm, 78% of consumers are more likely to visit pubs, bars, or similar venues offering live music. In addition, 73% of consumers said they are likely to stay longer, and 76% are likely to buy more drinks - driving higher footfall and revenue for venues.[28]

86. **The Government should enshrine Agent of Change in law and move beyond its current implementation through NPPF guidance.**

Pro-Business Environment – Regulatory Environment

Question 18: *Where you identified barriers in response to Question 7 which relate to competition, what evidence can you share to illustrate their impact and what solutions could best address them?*

87. The UK music industry is consistently growing year-on-year - however this is despite, and not thanks to, the inner workings of the online market. The streaming business model developed from blatant copyright infringement into a model where music creators and the music businesses that support them see some returns, if diminished.

88. The music streaming market is predominately populated by a small number of large international companies, meaning the commercial ramifications for rightsholders of not licensing are very extreme. YouTube alone has 2.5bn monthly active users.[29] Spotify continues to dominate with its 226 million Q3 2023 subscribers representing 31.7% global market share.[30]

89. The Government should put pressure on UUC platforms to abide by Regulation 16 (known as "Users' Obligations") of the Collective Management of Copyright (EU Directive) Regulations 2016 ("CRM Directive").

90. User Uploaded Content (UUC) services, such as YouTube and TikTok, have been able to launch on a free-at-the-point-of-consumption model by incorrectly claiming they are not liable for the copyright works uploaded by their users, by virtue of the "Hosting Defence" (which originates from Article 14 of the E-Commerce Directive (2000/31/EC)).

91. In most cases UUC services will ultimately seek a licence from rightsholders for the use of music on their service, although this will be at a time of their own choosing, on their terms, and often without an admission of liability. If rightsholders cannot in practice require a platform to remove their works, the negotiation of licensing terms is no longer one of a willing seller, but rather of one who has little choice but to sell. The bargaining power of UUC platforms therefore leads to rightsholders having agreed to poorer terms than they would otherwise have done.

92. This, often called "use first, license later" model, has a negative impact on the value of music online, as UUC services will have actively avoided collecting usage data, to avoid acquiring actual knowledge of the works used, making it very difficult for PRS for Music and other rightsholders to accurately distribute royalties against usage.

93. Even when content recognition technology is deployed, the policies applied to its operation are determined unilaterally by the services without sufficient oversight or consultation with rightsholders.

94. **The Government should implement a long overdue liability regime that clearly holds online platforms accountable for the content they make available. This should include obligations that strengthen Regulation 16 (known as "Users' Obligations") of the Collective Management of Copyright (EU Directive) Regulations 2016 ("CRM Directive").**

95. This directive states that "users", i.e., platforms, should provide Collective Management Organisations such as PRS for Music with "relevant information at their disposal [...] as is necessary for the collection of rights revenue and for the distribution and payment of amounts due to rights holders".

Question 20*: Do you have suggestions on where regulation can be reformed or introduced to encourage growth and innovation, including addressing any barriers you identified in Question 7?*

Strong Copyright and Intellectual Property Framework

96. Strong IP rights are vital for enabling growth. The success of the UK's music industry is built on our well-established strong copyright framework. IP rights ensure musicians, songwriters, and rightsholders are paid for their work, and paid where their work is used by third parties.

97. A clear and robust IP framework creates legal certainty, allowing creators to monetise their work and giving music businesses the confidence needed to invest in talent, music creation and promotion. This reinforces our argument made on page X about the necessity of avoiding any text and data mining copyright exceptions that would undermine this framework.

98. In addition, a weak IP regime in another country directly translates into lower export revenues for the UK music industry, as creators and rightsholders are less likely to received fair compensation for their works in foreign markets. It is therefore imperative that we ensure other countries are upholding similarly high standards for copyright in free trade agreement negotiations.

99. **The Government should continue to uphold our successful copyright and enforcement frameworks, while also ensuring other countries are upholding**

similarly high standards. This could be achieved by ensuring IP obligations are a feature in trade agreements, for example.

100. Strong standards for metadata are vital for growth in the music industry. Metadata is the information attached to a musical work or sound recording that identifies the content and the creators involved in making it.

101. Metadata is essential for ensuring all parties are properly credited and compensated for their work. It allows for increased transparency and fairness, supporting growth by empowering music creators to maximise their royalties.

102. However, there are challenges. First, there can be a lack of understanding about what metadata is and why it is important. Second, many Digital Service Providers (DSPs) provide poor, incomplete, or absent metadata. This can lead to missed or delayed royalty payments, as well as the exclusion of contributors.

103. While the industry has taken steps to improve metadata, for example, the Get Paid Guide developed by PRS, PPL, the MPA and the Ivors Academy, and being part of the Intellectual Property Office's Metadata expert groups, there is more that can be done.

104. **The Government should continue to work with industry to develop and champion practical measures to improve the metadata picture through the Metadata Education Working Group and Technical Solutions Working Group, while also exploring using existing legislative powers to enforce industry standards on metadata.**

<u>Supporting Freelancers</u>

105. 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.

106. Freelance and self-employed workers make up as much as 72% of the sector, compared to just 15% of the overall workforce.[31] Therefore, growth in the music sector is closely tied to the support of freelancers – the two are inexorably linked.

107. Due to the nature of freelance work, many freelancers face gaps in income during periods of inactivity. This issue became particularly clear during the COVID-19 pandemic. The lack of financial security during these times of non-work forces skilled

freelancers to leave the sector due to a lack of financial security, creating significant skills gaps within the sector.

108. The Creative Industries Federation has previously recommended the Government pilot sustainable social security for freelancers – for example short-term relief grants – as well as ensuring current mechanisms such as universal credit work for creative freelancers.

109. There is precedent for this. In France, the “Intermittent du Spectacle” system entitles freelance creatives to financial assistance during periods of reduced work opportunities. In addition, the previous Labour Government’s New Deal for Musicians offered talented individuals on benefits access to instruments, recording studios, industry mentors and a topped-up basic allowance.

110. **The Government should explore piloting an income relief programme for freelancers during periods of inactivity, including with other grants and resources to support their careers.**

111. In addition, 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, holds back equality in the music industry, and makes it less attractive to work in. A similar discrepancy applies to parents taking adoption leave.

112. **The Government should extend shared parental leave to all self-employed workers, also ensuring equal access for parents taking adoption leave.**

113. Freelancers also lack the same legal safeguards concerning bullying, harassment, and discrimination. The protections afforded under the Equality Act 2010 do not apply to freelancers. **The Government should extend the protections relating to discrimination and harassment in the Equality Act 2010 to all freelancers.**

<u>Secondary Ticketing Regulation</u>

114. Online secondary ticketing platforms increasingly enable touts to profit from events at the expense of ordinary fans, often through illegally securing tickets and selling them on at inflated prices. This practice rips off fans and takes value out of the sector, placing profits in the hands of touts instead.

115. Within hours of tickets for Taylor Swift’s Eras Tour in the UK going on general sale for £110, they were soon on secondary ticketing sites for prices of up to £2,600.

116. Research by ITV News and FanFair Alliance looked at resale tickets for 174 festivals and outdoor events over a period of three months. Over two-thirds of tickets were being sold by just three so-called 'traders', with a combined face value of around £730,000. The total they were attempting to sell them for, though, was much higher - an estimated £1.7 million.[32]

117. Several other countries have cracked down on this by outlawing the re-selling of live music tickets for profit. Countries with such legislation include France, Australia, Italy, and Ireland.

118. **To ensure that value remains with the sector, the Government should introduce a cap on ticket resale.**

<u>Tax Credit to Encourage Music Production</u>

119. Unlike many other creative sectors in the UK, such as film, TV, video games and animation, the music industry does not currently benefit from a fiscal incentive, such as a tax credit scheme.

120. 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.

121. 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.

122. **The Government should introduce a tax credit to encourage new UK music production.**

Business Environment – Crowding in Investment

Question 22 *- What are the main barriers faced by companies who are seeking finance to scale up in the UK or by investors who are seeking to deploy capital, and do those barriers vary for the growth-driving sectors? How can addressing these barriers enable more global players in the UK?*

<u>National Wealth Fund</u>

123. In July this year, the new Government launched the National Wealth Fund (NWF) to replace the UK infrastructure Bank. The fund will seek to deploy billions in public investment, with a view to generate £1 in private sector investment for every £3 it invests.

124. The remit of the NWF extends beyond its predecessor, '*to support the delivery of our Industrial Strategy in areas where an undersupply of private finance exists'.*[33] Given the proven value and growth potential of music and the creative industries, and the Government's recognition of this growth area, a portion of this capital should be directed towards the creative industries.

125. **The Government should commit to allocating a proportion of the National Wealth Fund's new capitalisation towards businesses in the creative industries.**

<u>Government-Industry Partnerships (MEGS and ISF)</u>

126. Government-industry financial partnerships, like the BPI-administered Music Export Growth Scheme (MEGS) and the PRS Foundation's International Showcase Fund (ISF) promote British music abroad and generate economic return. This is particularly important in music, given both the sector's truly global nature and the growing intensity of global competition.

127. MEGS is designed to boost UK music exports by supporting small-to-medium-sized independent UK music companies and artists to build on the commercial potential and profile of their artists in overseas markets. Now in its tenth year, the scheme receives funding from the Government which is match funded by the music industry. It delivers nearly £14 back to the UK economy for every £1 invested by Government.[34]

128. To date, MEGS has awarded over £6.5 million to 390 artists such as Mercury Prize winners Dave and Ezra Collective, Nova Twins and Wolf Alice. The scheme is vital in helping British artists to break through on the international stage in an ever-growing and increasingly competitive global music market. It was welcome that Government funding was increased by the last administration to £3.2 million over two years up to 2025. However, the fund has tended to operate on short term funding agreements and long-term certainty would be welcome.

129. ISF offers vital export support for UK-based artists, bands, songwriters, and producers who have been invited to perform or create new music at international showcasing festivals or conferences. Supported artists tend to be at an earlier career stage than MEGS recipients. Support may include travel, accommodation and visa costs for upcoming artists looking to perform at showcase events like South by South West, Canadian Music Week and Eurosonic.

130. For every £1 of Department for Business & Trade's contribution to the International Showcase Fund, supported artists were able to generate £27 in revenues.[35]

131. These partnerships between Government and industry have a proven track record of generating economic returns and boosting export growth. **To build on this success, the Government should extend and boost funding for both MEGS and ISF.**

Business Environment – Trade and International Partnerships

Question 24: *How can international partnerships (government-to-government or government-to-business) support the Industrial Strategy?*

Barriers to EU Touring

132. 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).

133. However, our exit from the EU has created several barriers that are making EU tours expensive, bureaucratic, and confusing. This is hampering our music sector (as well as other cultural sectors), and negatively impacting the economy. It is undoubtably one of the biggest barriers to growth in the music sector at the moment.

134. According to a 2023 UK Music survey, 82% of musicians surveyed said their earnings had decreased because of Brexit. Meanwhile, 43% of those surveyed said it is no longer viable for them to tour the EU.[36] The ISM places the mean lost income for touring artists at £43,175.[37]

135. PRS for Music estimates that there are 37% fewer performances by its members in the EU in 2022 compared to 2019. For "general live performances" (those under 5,000 capacity) by artists touring the EU, PRS recorded royalties of £13.8 million in 2022 – down from £17.8 million in in 2019.[38]

136. 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 restore our sector to its pre-2020 competitiveness.

137. A Cultural Touring Agreement was something that the APPG on Music called for in their 2022 report, *Let the Music Move*.[39]

138. **The Government should negotiate a Cultural Touring Agreement with the EU**. Any Cultural Touring Agreement should include:

- **A UK-EU visa waiver agreement** to resolve issues with short-term touring, allowing performing artists and crew the freedom to take up short-term work on an ad-hoc basis for up to 90 out of 180 days.
- **A longer-engagement touring visa** arrangement with the EU that allows some music workers to stay in the Schengen Area for more than 90 days within a 180-day period.
- **A cultural exemption for ATA carnets** to ease the current logistical and financial burden on bringing equipment into the EU.
- **A cabotage exemption for cultural activities** to allow UK-based trucks to operate freely in the EU.
- **Solving the challenges of bringing merchandise into the EU,** as 68% of artists surveyed said they no longer take merchandise with them due to complex and costly requirements.[40]
- **Streamlining the application process for Musical Instrument Certificates, ensuring they remain free of charge and allowing their processing at St Pancras.** This will eliminate unnecessary bureaucracy for musicians touring with instruments with certain plant or animal parts.
- **Re-joining the Creative Europe Programme** to restore UK creative organisations' access to grants, from which they were direct beneficiaries of €68 million between 2014 and 2019.[41]

<u>Export Support</u>

139. Despite being one of only three net exporters of music globally, the UK's share of the global music market has more than halved in the last 10 years. This is partially because Governments around the world are being increasingly proactive in investing in supporting music exports.

140. South Korean music exports increased more than fifty-fold in 14 years, rising from £10.8 million in 2007 to £604 million in 2021. Four of the top 10 bestselling albums worldwide in 2022 were by K-Pop artists.[42] The return on public investment is clear to see: music is the single largest investment in the Korean Ministry of Culture's portfolio.[43]

141. Music export offices are also common across the globe, including in Germany, Australia, and Canada. These act as trade offices for music, seeking to support future talent by helping build their international audiences and export profile.

142. In 2009, Australia formed its music export office, known as "Sounds Australia". In less than a decade, Australasian international royalty revenues have nearly tripled from £11.2million in 2013 to £30.7million in 2022.[44] 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.[45]

143. The UK must adopt an equally strategic approach to boosting its music exports. **The Government should establish a well-funded music export office**, or risk being left behind by other, more ambitious music markets.

<u>U.S. Visa Fee Increases</u>

144. In addition to the rising costs of touring the EU, the recent quadrupling of US Visa Fees is creating a new barrier for British music exports.

145. On 1 April 2024, types of touring visa fees for non-US citizens soared in price. Petition fees for the P visa – used for acts to perform temporarily in the US increased by 251% from $460 (£385) to $1,615 (£1,352). Meanwhile, the O visa – used for longer-term working visits – climbed by 260% from $460 (£385) to $1,655 (£1,375).

146. The total number of individuals on a single petition is now capped at 25 beneficiaries. This requires numerous petitions for larger ensembles. For example, a visiting orchestra comprising 110 musicians, plus a handful of accompanying support staff now requires six visa petitions rather than two.

147. Moreover, time allotted for Premium Processing increased from 15 calendar days to 15 working days, while the cost of the service will increase from $2500 (£2,080) to $2,805 (£2,220).

148. The impact of these changes is huge, making it unaffordable for many British acts to work and perform in the world's biggest music market. The success of British recorded music is intrinsically linked to the ability of acts to tour their music in the biggest markets. British songwriters and composers will also be negatively impacted by reduced royalties from overseas performances.

149. Prior the rise, the Music Managers Forum (MMF) and Featured Artists Coalition (FAC) ran a survey of artists, managers, and other touring musicians about the issue. 70% of those surveyed said that the increased costs meant they would no longer be able to tour the USA. For those still able to find a way to tour, the new visa costs are estimated to wipe out more than a third of profits they might make.[46]

150. A number of high-profile artists have criticised these increases, including New Order, CMAT and The Last Dinner Party.

151. The case needs to be made to the U.S. Government that touring artists are vital economic contributors, and the increased fees are stifling this activity. The smaller increases for non-profits and small businesses does indicate a willingness by the U.S. Government to address the needs of sectors' who are more vulnerable to these costs.

152. **The Government should work with the US Government, and other international partners affected, to negotiate a reduction in the cost of U.S. touring visa fees.**

Question 25: *Which international markets do you see as the greatest opportunity for the growth-driving sectors and how does it differ by sector?*

Growth Driving Markets

153. According to Goldman Sachs, emerging markets will make up 70% of new music subscribers by 2030. Increasing internet access, cheap mobile data, a rising middle class and the convenience and choice offered by music streaming are driving growth in these markets.

154. Key emerging markets include:

- **China** – The world's fifth-largest music market in 2023, China's recorded music revenues grew by 25.9% in 2023 – the fastest amongst the top 10 countries.
- **India** – 450 million Indians are now under the age of 30 with an increasing interest in music. Indian recorded music revenue growth hit 15.3% in 2023.
- **Middle East** – The gulf states (UAE, Saudi) are seeing significant growth in the music sector, fuelled by new collecting societies and Government support for cultural initiatives (e.g. Saudi Vision 2030).
- **Latin America** – Latin American music exports grew by 17% last year, outpacing UK growth. They have recorded four consecutive years of recorded music revenue growth, growing by 19.4% last year, again outpacing the global growth rate.
- **Sub-Saharan Africa** – The world's fastest growing region for music with a revenue increase of 24.7% in 2023. South Africa is the largest market in this region (77% of regional revenues). Nigerian music, particularly Afrobeats, is increasingly popular, and a significant Nigerian diaspora in the UK make this a potentially key market. [47]

155. The UK must get of this trend and ensure they are continuing to develop and break emerging artists internationally, and to maximise the benefits to the UK from this

global surge. Many of these markets tilt strongly towards domestic repertoire and to musical styles that draw from a different cultural heritage, so UK must ensure we support our musical exports to reach the large audiences that are potentially available.

156. While these emerging markets offer significant growth potential, we should still not ignore our largest and most established markets. The EU is the largest market for UK live music and overall, North America and Europe make up 79% of all UK music earnings overseas.[48]

Place

Question 26: *Do you agree with this characterisation of clusters? Are there any additional characteristics of dimensions of cluster definition and strength we should consider, such as the difference between services clusters and manufacturing clusters?*

157. A core objective of the Industrial Strategy is to unleash the full potential of the UK's cities, regions, and nations by attracting investment and creating the optimal environment for businesses to thrive.

158. Much like the rest of the UK economy, the music industry's economic performance has historically been skewed towards London and the South East. However, with so many brilliant bands and artists emerging from across the UK, the music industry has a genuine opportunity to drive growth throughout the nations and regions—provided it receives the right support.

159. Within the Government's consideration of clusters there must be a role for creative and cultural industries including music, film, performing arts, gaming, fashion, publishing, and digital content creation. This could be a specific characterisation or a sub-category outside of manufacturing and services (as the creative industries will always cut across both).

160. A creative industries category would reflect the originality, human creativity and intellectual property that is often rooted in place-based identity and local pride.

161. The cultural heritage of a specific region often plays a critical role in shaping an artist, creating a strong sense of place that attracts both investment and tourism.

162. For example, singer-songwriter Sam Fender has boosted the Newcastle's profile around the world. Fender's fans have embraced the Geordie brand, wearing t-shirts

featuring his name and the Newcastle Brown Ale logo and buying tickets for his home show at the Newcastle United Stadium, St James' Park.

163. The decision to host ABBA Voyage in London underscores the UK's reputation as a premier destination for celebrating music.

164. This immersive concert experience, featuring digital renditions of the iconic Swedish pop group, has drawn fans from around the globe eager to witness this unique and nostalgic event.

165. ABBA Voyage serves as a testament to the UK's ability to host high-profile international shows and attract visitors who are passionate about music. The ABBA Voyage producers estimate that the show contributed £322.6 million to the London economy in 2023, but these opportunities must exist outside of London.

166. The creative industries benefit from intersections with other sectors, such as technology, tourism, and education. These cross-cutting industries should also be considered as part of the cluster categorisation. A vibrant music scene might not only boost live performances and digital streaming but also invigorate local tourism through festivals, music venues and new visitors drawn to the excitement, whilst simultaneously providing opportunities for education in fields like sound engineering or music production.

167. Creative and cultural hubs often build highly localised ecosystems built around small, specialised entities such as independent record labels, boutique recording studios, or live performance venues.

168. Their success is often tied to the creative people who live there and believe in the power of creativity. If properly supported, this reach can extend far beyond local boundaries, allowing creative entrepreneurs to access global audiences while maintaining a distinctive local identity.

Question 27: *What public and private sector interventions are needed to make strategic industrial sites 'investment-ready'? How should we determine which sites across the UK are most critical for unlocking this investment?*

169. To make strategic industrial sites investment-ready for the music industry, both public and private sector interventions should prioritise the support of purpose-built infrastructure such as recording studios, rehearsal spaces, and live performance venues including festivals, alongside robust transport and digital connectivity.

170. Public sector collaboration, particularly at the local government level, can enhance the authenticity and regional identity of music, such as Liverpool City Region's support for Eurovision in 2023. Simplified planning laws and strengthened Agent of Change processes are critical for establishing vibrant music hubs, while grants and subsidies can support emerging artists, independent labels, and the refurbishment of historic venues.

171. Education and skills development partnerships with schools and universities can build a strong talent pipeline, ensuring the long-term sustainability of a potential creative industries cluster.

172. Tax incentives and VAT reductions for music spaces could stimulate private sector participation and encourage the growth of these ecosystems.

173. Private corporate sponsorships of festivals, venues, and training programmes may further solidify the creative industries economic foundation.

174. London City Island has been transformed in recent years from a disused industrial site into a thriving, fine-grained, arts inspired riverside community. The area has been the permanent home of the English National Ballet since 2018. Key to this development is the balance between residential, retail and workspaces alongside fresh cultural institutions that have brought a range of independent makers and artists to the Island.

175. A major factor in the success of this project was the partnership between property developer Ballymore, Glenn Howells Architects and the ENB, who ensured the space was tailored and permeable to the unique needs of the ENB and the firm belief from the developers in bringing art to a new audience. In doing so they have found they are able to enhance unit values in areas when there is cultural space in the development. This highlights the cultural, social and commercial benefit to developing these sorts of partnership.

176. To determine which sites are most critical for unlocking music industry investment, several factors should be considered. Areas with a strong cultural or historical connection to music, such as Liverpool or Manchester, naturally attract interest due to their legacy and identity. Regions with established creative ecosystems, a vibrant youth demographic, or strong tourism potential offer further opportunities for growth.

177. Areas like Glastonbury are associated with the annual music festival but with Government support may be able to become a music hub all year round. The presence of advanced digital infrastructure, such as high-speed broadband, is

particularly essential for supporting modern music production and distribution outside of cities.

Question 28*: How should the industrial strategy accelerate growth in city regions and clusters of growth sectors across the UK through local growth plans and other policy mechanisms?*

178. UK Music's 2023 Here, There and Everywhere report emphasised the need for Local Growth Plans for music, through its four key policy recommendations. The Government should do the following:

179. **Use data to ensure music is at the heart of planning and licensing policy.** This includes noting the importance of incorporating music data into long-term planning and decision-making processes. Cardiff's music strategy serves as a successful example, using data to guide strategic decisions and ensure meaningful consultation with stakeholders. This also advocates for the implementation of the Agent of Change principle to protect music venues from potential development impacts.

180. **Regenerate empty spaces as hubs for music, culture and community.** This involves transforming vacant spaces into hubs for music and cultural activities to revitalise communities. Examples include Sunderland's conversion of a department store into a music-led creative hub and Southwark's creation of a register for arts and culture spaces. These initiatives demonstrate the potential to foster community engagement and enhance cultural vibrancy.

181. **Enshrine music and the local community in regeneration and development.** This involves embedding music within broader regeneration strategies to drive economic and social development. For example, Bradford's use of music in its long-term growth plan and London City Island's integration of residential and cultural spaces.

182. **Create a music advisory commission with local business leaders, stakeholders, and tourism boards.** Establishing music boards or commissions to facilitate collaboration between local stakeholders and promote music-related initiatives have proven successful. Music boards have been created in cities like Liverpool, Cardiff, Sheffield, Manchester, and the West Midlands, which engage with various community stakeholders.

Question 29: *How should the industrial strategy align with devolved government economic strategies and support the sectoral strengths of Scotland, Wales and Northern Ireland?*

183. In Scotland, Wales, and Northern Ireland, the music industry holds significant cultural and economic potential that could be fully realised through targeted investment and empowered regional decision-making. Scotland's vibrant festival culture, Wales's heritage as the "Land of Song," and Northern Ireland's dynamic live music scene represent distinct opportunities for growth.

184. The Industrial Strategy should align with devolved governments' economic strategies by recognising local strengths and addressing regional disparities in opportunity in the creative sectors, including music.

185. The strategy should empower local councils as key anchors of this development. Starting with building a fuller picture of funding for the UK's creative, cultural, and heritage ecosystem would enable better alignment between devolved and UK-wide strategies, ensuring resources are effectively directed to unlock these regional strengths.

186. By resourcing these efforts with additional investment and legitimacy in decision-making spaces, the UK Government and devolved administrations can enhance the resilience and competitiveness of the entire music industry, ensuring it contributes to both regional development and the UK's creative leadership on a global stage.

Partnerships and Institutions

Question 30: *How should the Industrial Strategy Council interact with key non-government institutions and organisations?*

187. The Industrial Strategy Council can best support the UK Government in delivering and monitoring an effective Industrial Strategy by ensuring permanent representation from music and across the creative industries. The voice of music and the creative industries within the Council should be treated equally to any of the other high-growth sectors sat on the Council.

188. The Council should also prioritise diversity in its membership to reflect the demographics and regional makeup of the creative industries. It should also work closely with other industry bodies and research institutions to ensure recommendations it makes are data driven.

Annex A

UK Music's membership includes:

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.

Annex B – List of Policies

Policy Area	Policy Recommendation – “The Government should…”
Overarching	Develop a comprehensive, medium to long-term music strategy for growth
Skills	Pause the defunding of these music qualifications, only removing them once the new AAQs have been consulted on, are considered sufficiently equitable and cover a broad range of music skills.
	Loosen the exam-based assessment requirements for AAQs to help create more flexible qualifications that meet the needs of all students. Moreover, if these are going to be used to deliver technical courses, they must be funded at the same rate at T-Levels
	Work with industry to develop a broader variety of T-Levels that address the range of technical skills needed in the music sector. This should also be accompanied by financial support that will allow small music businesses to take on placements.
	Work closely with the creative industries in developing the new growth and skills levy, ensuring it is flexible, easy to navigate, and allows for shorter apprenticeships.
Artificial Intelligence	Not introduce any new, broad TDM copyright exceptions, including those with an opt-out mechanism.
	Introduce clear transparency requirements around the AI training process, including requiring AI service providers to maintain records of trained and ingested works.
	Ensure that solely AI-generated works are labelled as such to distinguish them for human-created works.
	Look to clarify UK law, and potentially introduce a specific law protecting the personality and likeness of a human writer or artist(s) against misappropriation, similar to the US No Fakes Act.
Research and Development	Ensure that public investment in R&D in the creative industries is reflective of the size, nature, economic contribution, and future growth potential of the sector. This could include extending existing R&D tax reliefs beyond science and technology.
Business Rates	Ensure that its planned permanent cut in business rates for 2026-27 is effectively covers recording studios, venues, and other cultural spaces. As an immediate solution, treating studios the same as venues for rating purposes would provide much-needed relief
	Reform SIC codes to include specific classifications got recording studios and music venues.
VAT on Tickets	Reduce VAT on tickets to at least 10% (in line with the EU average) to incentivise investment in the grassroots of the sector, stimulate live music activity and boost local economies.
Agent of Change	Enshrine Agent of Change in law and move beyond its current implementation through NPPF guidance.
Copyright and Intellectual Property	The Government should implement a long overdue liability regime that clearly holds online platforms accountable for the content they make available. This should include obligations that strengthen Regulation 16 (known as “Users' Obligations”) of the Collective Management of Copyright (EU Directive) Regulations 2016 (“CRM Directive”).

	Uphold our successful copyright and enforcement frameworks, while also ensuring other countries are upholding similarly high standards. This could be achieved by ensuring IP obligations are a feature in trade agreements, for example.
	Continue to work with industry to develop and champion practical measures to improve the metadata picture through the Metadata Education Working Group and Technical Solutions Working Group, while also exploring using existing legislative powers to enforce industry standards on metadata.
Supporting Freelancers	Explore piloting an income relief programme for freelancers during periods of inactivity, including with other grants and resources to support their careers.
	Extend shared parental leave to all self-employed workers, also ensuring equal access for parents taking adoption leave.
	Extend the protections relating to discrimination and harassment in the Equality Act 2010 to all freelancers.
Secondary Ticketing	Introduce a cap on ticket resale.
Tax Credit	Introduce a new tax credit to encourage new music production.
Access to finance	Commit to allocating a proportion of the National Wealth Fund's new capitalisation towards businesses in the creative industries.
	Extend and boost funding for both the Music Export Growth Scheme and International Showcase Fund.
Barriers to EU Touring	Negotiate a Cultural Touring Agreement with the EU.
Export support	Establish a well-funded music export office
	Work with the US Government, and other international partners affected, to negotiate a reduction in the cost of U.S. touring visa fees
Place	Use data to ensure music is at the heart of planning and licensing policy.
	Regenerate empty spaces as hubs for music, culture and community.
	Enshrine music and the local community in regeneration and development.
	Create a music advisory commission with local business leaders, stakeholders, and tourism boards.

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