Will Music Survive Brexit?
5th Annual Brexit Report - May 2020

Briefing by the Incorporated Society of Musicians:

- In May 2020 the Incorporated Society of Musicians (ISM) published its 5th annual Brexit report: ‘Will Music Survive Brexit?’. This annual study demonstrates the impact of Brexit on the music profession, now that the UK has left the EU. This briefing summarises the key findings from the report and is structured as follows:
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1. Introduction

About the ISM

- The Incorporated Society of Musicians (ISM) is the UK’s oldest professional representative body for musicians, set up in 1882 to promote the art of music and to protect the interests of all those working in the music sector.

- The ISM’s membership comprises approximately 10,000 members working in the music sector, including performers, composers, producers, conductors, agents, teachers, academics, advisers and sound technicians in the UK. We support our members with legal services and advice, insurances, professional development and guidance in their work as a musician.

Summary

- The music sector simply cannot cope with the simultaneously devastating effects of Covid-19 and a hard Brexit this December.

- According to our 5th annual Brexit report, over half the music workforce has identified Brexit as having a negative impact on their professional work. Our research reveals a strong trend in EU promoters and venues no longer engaging UK passport holders in work and auditions because it is now too complicated and uncertain to book UK musicians compared to their EU counterparts. Our data also shows that musicians have lost substantial amounts of work and earnings due to Brexit and their biggest concern is securing future work in the EU/EEA after the transition period.

- Plans to negotiate free trade agreements with different parts of the world, including the EU, have been stopped in their tracks by the global Coronavirus pandemic. The impact of the outbreak has been disastrous for the music sector. Venues have closed, festivals have been cancelled, work has disappeared, and livelihoods have been lost.

- Extending the transition period and providing a financial package for the creative industries would give the music sector a chance to survive.
2. Background

Economic and cultural value of the UK’s creative industries

- Creative industries are hugely successful, contributing more than £111bn to the UK economy in 2018 and growing more than five times faster than the national economy.¹ The sector employs over three million people and generates significant value across supply chains.²

- Music is key component of our fantastic creative industries, contributing £5.2 billion to the UK economy annually.³ Music also plays a vital role in the UK’s soft power and is currently ranked second in the Portland Soft Power 30 Index.⁴ The UK boasts an impressive music scene that affords us a prominent cultural platform on the world stage.⁵ In an uncertain context of Brexit and the global pandemic Covid-19, the UK’s music scene must be protected.

A precarious workforce

- The nature of working as a musician is precarious and unpredictable. The music profession has a very high proportion of self-employed, freelance or portfolio musicians, who already struggle with poor rates of pay.

- Working in the EU/EEA – whether that involves performing, recording, teaching, collaborating or other activities – is an essential part of the profession’s ability to earn. There is not enough work available in the UK for musicians to sustain their livelihoods so they must travel abroad. Until the referendum, the EU was the obvious region where the music profession can work easily and cost-effectively. However, Brexit developments have made this far more difficult and uncertain, and caused considerable harm to the music profession.

Extending the transition period

- The Government’s direction of travel since leaving the EU at the end of January had been to attempt to position the UK as a global power that is open for business. As well as publishing the UK’s mandate for negotiations with the EU in February, the Government signalled its readiness to negotiate free trade agreements with several ‘like-minded’ countries simultaneously, especially the USA.

- This incredibly ambitious approach attracted scepticism from many, including the European Commission president who stated that a comprehensive trade deal between the UK and the EU is “impossible” to achieve in eleven months. If the UK-EU trade talks fail, the UK faces the prospect of leaving on WTO terms which means full border checks, tariffs, and huge obstacles to working in the EU.

- The purpose of the transition period was to allow time to negotiate new trading agreements and minimise financial shock to the UK economy. But this time has been eroded, first by political stalemate, and then by attempts to manage the impact of a deadly disease. The UK Government must recover some of the time lost to Covid-19 that would have been spent negotiating our future relationship with the EU by requesting an extension to the transition period.

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³ https://www.ukmusic.org/research/music-by-numbers/
According to our research, just over 50% of survey respondents have identified an impact on their professional work since the EU referendum in 2016 – 99% of whom said it was a negative impact.

- This is a slight increase from last year and reflects a year-on-year increase – 19% in 2016, 26% in 2017, 40% in 2018, just under 50% in 2019, just over 50% in 2020.

Other key findings:

- 71% of respondents cited difficulty securing future bookings in EU/EEA countries (for reasons such as reluctance from EU promoters to offer work and musicians’ inability to confirm future work due to uncertainty caused by Brexit).
- More than half of survey respondents (56%) said they expected to be offered less work now that the UK has left the EU.
- 92% of respondents said they were concerned about their future ability to work in EU/EEA countries, of which 64% were ‘very concerned’ and 28% were ‘mildly concerned’
- Nearly a fifth of respondents (18%) claimed they had experienced a loss of earnings due to reduced or cancelled work in the EU/EEA as a result of Brexit, and a further 36% were not sure
- There has been a 14% increase in the number of respondents not earning in the EU/EEA since the referendum. Overall, respondents are earning less in the EU/EEA than they were before the referendum.
- 78% of respondents visit the EU/EEA at least once a year; 20% of respondents visit the EU/EEA more than 11 times per year.
- Nearly three quarters (73%) of respondents spend more than a week in the EU/EEA per year; roughly a third (32%) of respondents spend more than a month in the EU/EEA per year.
- 11% of respondents have less than a week’s notice between being offered work and taking it.
- Nearly two thirds (61%) of respondents reported that they were concerned about the transportation of instruments and equipment to the EU/EEA in the future.

Financial package for creative industries

In addition, the music sector faces unprecedented challenges as a result of Covid-19. Whilst regeneration in some sectors may happen quickly, the music sector will need careful rebuilding given the requirement to continue social distancing so that musicians can work again in a post-Covid-19, post-Brexit world.

- The sector relies on live performance which inherently requires large audiences or ‘mass gatherings’ to make it financially viable. We do not know what this will look like in the future. What we can say with certainty is that the UK – and the UK music sector - needs time and support to recover.
- If £10 million can be secured in the context of Covid-19 to bail out England’s fishing industry (part of the UK’s fishing industry worth £1.4bn per year), then the Government must act to protect an industry worth nearly four times that (the music industry is worth £5.2bn per year).
- Other European countries such as Germany and Estonia have provided substantial financial packages for the creative industries, and a financial package at EU level is currently being discussed in the European Parliament; we call on the UK Government to do the same.
3. Policy recommendations

Based on the findings of this report, the ISM calls for:

1. The Government to negotiate an extension of the transition period for two years beyond 31 December 2020.

2. The Government to negotiate a two-year, multi-entry touring visa that is cheap and admin-light.

3. The Government to negotiate a cultural exemption for the temporary transportation of instruments and equipment, or cover the cost of carnets for musicians.

4. The Government to further expand the list of CITES-designated points of entry and exit to include Eurostar, Immingham and Tyne (Newcastle).

5. The Government to scrap plans to introduce a charge for Musical Instrument Certificates.

6. The Government to maintain European Health Insurance as provided by the EHIC scheme, or provide an equivalent.

7. The Government to ensure that the A1 certificate system continues to be recognised in the EU or provide details of a suitable equivalent as soon as possible.

8. The Government to provide detailed information on new arrangements well in advance of the end of the transition period so the music sector can adequately prepare.

9. The Government not to adopt the US visa system as a model for temporary work when negotiating with the EU.

Additional recommendation based on other ISM research:

10. The Government must ensure that UK copyright laws are not undermined by post-Brexit future trade deals with the United States or any other nations.