Brexit and the UK live music industry

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Abstract

This chapter examines how the UK's live music industry will be affected by 'Brexit' – withdrawal from the European Union (EU). The data suggest that live music is of significant value to the UK economy and point towards the importance of unobstructed access to the European market. While the music industries as a whole will be affected, a key focus is that of touring activities in the EU and the increasing administrative and financial costs arising from Brexit, which will hit smaller, upper-coming acts, and their crews, hardest. Another consideration is the impact on industry stakeholders at the local level, which we illustrate by way of research conducted on the live music ecology of Birmingham (UK) as an explanatory example. It is not only UK stakeholders (i.e. bands, orchestras, support crews) traveling to the EU that are affected but also those hosting the European artists and music tourists (i.e. venues and their staff, festivals, and production companies). The analysis suggests that future scenario to most effectively mitigate Brexit's impact on live music will still need to be based on reciprocal agreements between the UK and EU.

Key words: Brexit, UK, Great Britain, live music, live music industry, touring, Birmingham Live Music Project

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Introduction

On 24th June 2016, the result of the previous day's national referendum was announced – the United Kingdom had voted to leave the European Union (EU). Following a fraught campaign, the citizens of the UK voted by a margin of 52% to 48% to 'exit' a political and economic union of European member states with a GDP estimated at that time as $13.887 trillion, set to increase to $15.626 trillion by 2019 (World Bank 2021). Abandoning its largest trading partner, the UK had to open negotiations on a number of international agreements and arrangements previously covered by its EU's membership[1]. Like many a break-up, this was less a one-time event, than an ongoing process, and it brought uncertainties to a range of sectors in the UK's economy and society.

The UK's live music industry is one such sector, now facing questions about the short- and long-term costs and benefits of post-Brexit scenarios. The questions raise concerns amongst a wide range of live music stakeholders. Most obviously this includes musical participants themselves (e.g.. bands, venues, promoters, agents and associated crews), but also affected are the local and regional authorities where the live events take place and where venues are part of vast supply chains (Wall 2007). These concerns are aggravated by the lack of progress in the negotiations, even at the point of writing this chapter after the signature of a Withdrawal Agreement. There is still a lack of clarity about the touring activity, work and visa permits for UK bands and their crews performing in the EU, and for their EU counterparts coming to the UK. The analysis of Brexit's impact on cultural production at large is an ongoing process.

This chapter focuses on some possible short- and long-term outcomes resulting from Brexit in a specific sub-sector of the UK's music economy – live music. We start with a quantitative overview to assess the significance of live music sectors to the UK economy. The goal there is to clearly establish what, and who, will be affected by the Brexit fallout. In the next step, we take into consideration two contextual perspectives to get a sense of the possible contours of the post-Brexit situation. First, comparisons are made to the EU's arrangements with Norway and Switzerland, and then to the US and Canada, with a view to assessing possible scenarios for a way forward for UK touring musicians and their crews. Next, we look at Birmingham, UK, and its local live music ecosystem (Behr et al 2016) to add nuance to the broader sectoral perspective of the first section and point towards the intersection of local, regional and national impacts.

UK live music and Europe (when it all started back in 2016)

Europe (and in particular countries within the EU) matter greatly to the UK's music industries. Economic estimates provided by the government's Department for Digital, Culture, Media and Sport (DCMS) suggested that the cultural sector overall – of which music is a part, along with film, television, radio, photography, crafts, museums and galleries, cultural education, and heritage – contributed £26.8 billion GVA (Gross Value Added) to the UK economy in 2016 (DCMS 2016: 6). The sector as a whole employed around 654,000 people, accounting for 2% of all UK jobs, with an estimated 142,208 employed just within the music sub-sector (House of Lords European Union Committee 2018: 10 – based on UK Music and Musicians' Union approximations). Almost half of those were self-employed (with around 10% being non-UK EU citizens; House of Lords European Union Committee

2018: 10-11). The music sub-sector relies heavily on consultants and freelancers working on a project basis, or working on multiple projects at one time. In 2016, according to UK Music – the sector's umbrella, lobbying organization – the music industries generated £4.4 billion (UK Music 2017a: 11) with confirmed continuous growth from £4.1 billion in 2014. Music exports contributed £2.5 billion in 2016 to the UK economy, most of which went to US and European markets (equal share) and they constituted 70% of the UK music publishing market.

Live music events are a cornerstone of the sector. The data indicates that this sub-sector has been generating continuous surplus. In 2014, live music brought in £924 million and supported 25,100 full-time employees (festival organizers, promoters, agents, production services for live music, ticketing agents, staff at concert venues and arenas), with 16% growth in relation to 2013 (UK Music 2015: 6). In 2016, the sub-sector reached the £1 billion mark in terms of contribution to the UK economy, with 17% growth in comparison to 2015 (UK Music 2017a). When we also include the performing musicians themselves, this figure increases to almost 142,208 full-time equivalent (FTE) jobs based in the UK. Taken in total, more than 17% of income within that sector was generated while performing in the EU.

Furthermore, UK Music's figures showed 30.9 million people as having attended live music events in the UK in 2016 (UK Music 2017a: 9), an increase of almost 3 million from 2015 (UK Music 2016: 9). In 2016, overseas 'music tourists' (overseas music audiences) on average spent £850 while visiting the UK (UK Music 2017b: 6). Given the UK border/visa/entry requirements and the costs of traveling from areas further than Europe, it is safe to assume that many of those visitors were from the EU's member states. These numbers clearly show the value of the live music sector to the UK economy. But they also indicate the importance of the European market to the British music industry and, in particular, its sub-sector focused on live events. The main actors within the sector were undoubtedly agreed over the referendum debate, with 2/3 of them supporting a 'remain' vote including, for example Universal Music UK, Beggars Group, Music Managers Forum, but also individual artists like Bob Geldof and Paloma Faith (Booth 2015; Hunt 2017).

Looked at from this perspective, then, it is clear that there are a number of elements and stakeholders to consider when negotiating the UK's relationship with the EU and two, complementary, sides of the equation to balance regarding freedom of movement. Firstly, we have musicians and supporting crew who seek to tour in Europe. Additionally, we have the gig-goers, venues and their staff, and production companies hoping to welcome touring acts *from* Europe. In the next section, we focus on scenarios regarding touring activities. The two readily available scenarios are based on the existing arrangements with Switzerland and Norway (non-EU countries, but in close proximity to the EU, similarly to the UK), and with the United States and Canada (the EU's largest economic partners when it comes to the music industries, but outside of any preferential trade agreements).

Touring Europe in the post-Brexit scenarios

Switzerland and Norway

Neither Switzerland or Norway are member states of the EU. While located in close proximity to the EU (with Switzerland in particular surrounded by EU member states) both countries decided on a special arrangement in their interactions with the EU. The EU is the largest trading partner for both nations, with Germany top of the list of single nations for Switzerland and, interestingly, the UK for Norway (but directly followed by Germany, Netherlands, Sweden and France, all of which are EU members), underling the importance of keeping such arrangements in place (World Bank 2019). Both solutions to trading outside of the EU grant certain privileges (in comparison to third countries, as in the case of Canada and US, discussed later) and obligations (in particular for Norway, associated with larger 'membership' fees). While at first sight quite straightforward both approaches, however, include legal loopholes with potential and actual negative side effects for touring musicians and their crews.

The Swiss solution is based on a series of bilateral treaties in which Switzerland adopted various provisions of the EU *acquis* (the body of common rights and obligations that are binding on all EU countries) in order to have privileged access to the Union's market. Consequently, most of the conditions around the free movement of people, goods, services and capital that apply in the EU as a whole also apply in Switzerland. For example, pre-Brexit, it guaranteed that UK musicians and their crews (e.g. sound engineers, tour managers, drivers and even merch sellers) could perform and support gigs in Switzerland without any additional costs or administrative burdens. The arrangement is, however, quite fragile. The Swiss 2014 prohibitive referendum on quotas for migrants to be allowed to enter Switzerland violated the EU and Switzerland agreement on the free movement of people, risking the termination of all bilateral agreements (Traynor 2014). The issue was resolved in December 2015, with Switzerland backing off. However, the potential termination of the bilateral agreements put at risk the capacity for anyone from the EU seeking to perform in Switzerland to do so, substantially increasing red tape, including a requirement for temporary work/visa permits which would be particularly cumbersome for the self-employed. This is significant, given that over 70% of UK professionals working within the live music industry are self-employed (Webster *et al* 2017), without labels or large management structures. Even with a bilateral arrangement between the EU and UK similar to that between the EU and Switzerland, their situation, as this example illustrates, would be tenuous with potential for substantial administrative burdens and livelihoods at least partly dependent on the stability of the UK-EU relations.

The Swiss example is, in particular, disenchanting. Starting with paying for a Swiss motorway 'vignette'[2] (costing around £45, but amendable on yearly basis), which adds to the tour's costs and especially affects those bands traveling on a 'break-even budget', it also includes the ATA Carnet. The Carnet is a temporary export document that covers professional equipment and goods being tentatively exported for display at trade fairs or exhibitions, including live performances. It eliminates the need for 'customs declaration at border points and the deposit of a guarantee, bond, or cash deposit in the country of temporary importation' (London Chamber of Commerce 2016). Simplifying the jargon, the Carnet should list all the equipment used by the touring crew while performing and transferring through Switzerland (e.g. musical instruments, but also sound desks, projectors, if any, lighting equipment used in the show, and so on). Obtaining the document takes 24 hours, with an additional fee for an express option, taking 1 hour. Each carnet is valid for a year and can be used on multiple trips (assuming, of course, that the band and its crew always takes exactly the same equipment). The price of the yearly ATA Carnet is £325.96 and requires payment of a security deposit based on a percentage of the value of equipment (Gov.uk 2021). Except for situations where there are severe delays at the borders, where the document is a check against the contents of the touring van/bus, and the administrative hassle, the price of the Carnet increases the costs of tours even further. A single Carnet for multiple EU countries is a better solution than separate documentation while crossing individual borders. However, previously it was not required at all for UK touring bands, except when visiting Switzerland.

Touring in Switzerland also poses a further challenge. Bands often travel with saleable merchandise. Upon entry to Switzerland, the touring crews are required to pay VAT on their merchandise upfront according to expected sales, which is later followed by a refund on unsold items upon exiting the country. This severely limits the potential for low-budget and ad hoc touring. The bands have to provide money upfront to cover VAT and there are significant delays on the refund-payments, further locking the budget for other tours. Anecdotal evidence suggests that a very thorough customs search for undeclared merchandise rarely takes place. However, the same cannot be said about the experiences on the UK-French border for UK crews entering the EU territory (Foster and Parker 2020).

Norway is associated with the EU through the European Economic Area (EEA), being the effect of Norway's membership of the European Free Trade Association. The EEA agreement grants Norway access to the EU's internal market for the price of partial implementation of EU laws. The arrangement facilitates free movement of goods, capital, services and people with various provisions: freedom of movement of goods includes freedom from customs fees (so no ATA Carnet required), free movement of people specifies freedom of movement for workers, allowing EU citizens to work in Norway on the same conditions as Norwegian citizens (with a reciprocal arrangement for Norwegian citizens seeking work in the EU). In this scenario a lot would depend on the UK's willingness to accept the reciprocity condition. The response from the UK Government has so far been consistently negative about that option, from the Brexit White Paper in 2018, up to collapsed negotiations in 2020, followed later by the constraining Immigration Act of 2020 (Henley 2017, Home Office 11 Nov 2020).

The 'Norwegian scenario' is a bit more flexible, and possibly less dependent on the political relations between the two actors. However, it could be impacted by the prevailing economic situation. The Norwegian Krone, its national currency, and its high foreign exchange rates discourage domestic bands from performing abroad (Rozbicka and Conroy 2018). A strong standing of the Norwegian currency against other EU coinage reduces revenues from foreign tours up to the point of not being profitable (especially in the era where digital technologies provide other options for dissemination). The data from Music Norway confirms this. A disproportionally small percentage of national music industry revenues were generated from live performances by Norwegian artists abroad when its currency was particularly strong. In 2013 it was only 5%, with a marginal increase in 2014 (Music Norway 2014). The 2016, post-referendum drop in the British Pound (GBP) increased expenses for touring artists almost immediately (Stewart and Stotland 2016). It was later followed by currency fluctuations, which were highly dependent on Brexit-related political debates (Samson 2017). This brought further uncertainty about possible touring income and affected especially crews that were on tour at the time.

US and Canada

The EU's relationships with the US and Canada are similar to the Swiss scenario insofar as they are based on bilateral agreements (although negotiations for a much broader arrangement, the Transatlantic Trade and Investment Partnership, failed in 2018). When it comes to touring, arrangements revolve around existing regulations on visa entry. Based on the Citizens' Rights Directive (2004), self-employed EU citizens can work and travel within the EU without restrictions while they are exercising their EU Treaty rights. Third country nationals, such as US and Canadian citizens, and now also UK citizens, are subject both to EU rules on migration where applicable, or to the domestic immigration laws of individual member states where no EU legislation exists.

US and Canadian bands and accompanying crew are disadvantaged by the visa application procedures in terms of European touring. Their operations are classified under paid activities in the EU area (European Commission 2021) and can be subject to different regimes. Countries like Belgium, the Netherlands, Germany, or Lithuania, Poland and Slovenia, follow the visa-free entry for paid activities for US and Canadian citizens, albeit with various time limits. In contrast, Spain, France, Italy, Austria, Hungary, and Czechia require a temporary work permit while performing for income. The lack of a unified approach can be confusing and is certainly an extra bureaucratic consideration for artists and their teams. The main issue is increased paperwork. The work permit procedures have to be supported by proof of a beneficial economic impact for the country of visit, confirmation of employment (such as an invite issued by a Europe-based promoter), and an assurance that the operation can be fully financed by the band's own resources. The procedures are time consuming and costly and, in particular, affect smaller bands and self-employed individuals (House of Lords European Union Committee 2018: 14). There is, again, an issue of the affordability of the tour (similar to the Swiss scenario), where bands have to roll out a substantial sum in advance of the tour, with no guarantee of returns or income. Furthermore, obtaining an offer to perform from a promoter, who may not be inclined to invest time in extra paperwork for smaller, unknown acts, whose shows do not guarantee a full house, could be even more problematic.

Previously, EU membership gave UK-based artists a right to work anywhere in the EU without a special work permit (based on the Treaty on the Functioning of the European Union, art. 45). The current situation for UK bands resembles the US and Canada scenario, leaving at a high disadvantage smaller touring bands through extra red tape, which is prohibitive to them actually going out or obtaining tour support from labels (Smirke 2016). A short-term solution is omitting from those tours the states with work permit requirements (for example only transferring through France, but not doing paid gigs). But, even leaving aside the curtailment to their activities that this implies, in the long-term, not many bands can afford to free perform for free, at showcase festivals like Spain's Primavera, for example, that come with visa waivers for non-paid participation. The UK Government has so far issued a few proposals for how to solve this quandary, with various degrees of plausibility. Proposals in 2016 that toyed with preferential and reciprocity-based arrangement with the EU 27 member states (House of Lords European Union Committee 2018: 2) failed due to the hard-line stance of the UK Government on migration that developed over time (see in particular: The Immigration Act 2020). Similarly, as in the case of the US model, the options also include: permit-free festival arrangements (see, for example, South by South West, where UK crews are allowed to perform at the US festival in Austin, Texas, based on special, temporary visa waivers) and extending the permitted paid engagement, both based on the visa waiver option, or a multi-country, multi-entry short-term touring visa. However, as in the Swiss and Norwegian scenarios, and unlike the US model, any finally agreed solution will require a reciprocal commitment about which the EU has been quite clear and which the UK refuses to countenance (Peretz 2021). Again, artists and their crew who have not yet made a name for themselves are likely to be the most affected.

The various scenarios presented above have focused on the post-Brexit situation from the perspective of the musicians and their supporting crews. Looking forward, a lot depends on UK bands and their crews being able to sustain as far as possible relative freedom of movement and capacity for working within the EU. The solutions based on the Swiss and Norwegian scenarios offer access for performing artists and their support staff to the EU market with minor red tape, but with notable financial costs especially affecting younger and/or less-known acts. In comparison, the US & Canada scenario brings more complexity due to its visa/work permit requirements and the variety of applicability across the EU member states. But, as indicated above, that type of an arrangement would also require reciprocity. Given the present UK government's stance on freedom of movement and work for EU citizens in the UK, this constitutes a major obstacle. The musicians and supporting crews are key stakeholders when it comes to touring and movement of UK citizens to the EU. Additionally, we should not forget that the changes introduced by Brexit will also impact stakeholders on the other end of the spectrum. Those British gig-goers, production companies, venues and their staff, who host and watch touring acts from the EU will not remain untouched by the post-Brexit scenario. In the following section, we change the perspective from artists on the road to domestic stakeholders, and concentrate on Brexit's impact on the live music industry at a local level, through the case-study of, Birmingham, UK.

The Birmingham Live Music Ecosystem and Brexit[3]

Birmingham's music scene has contributed significantly to the UK national music portfolio. The city has produced acts like Black Sabbath, UB40, Steel Pulse as well as, more recently, grime artists like Lady Leshurr and Jaykae. With a rich musical history the urban cultural economy of Birmingham and its surroundings bring around 877,000 music tourists to the region, spending £252 million and supporting around 2,453 FTE jobs in 2019 (UK Music 2020). The Birmingham Live Music map,[4] which at present includes 195 venues that host live music, demonstrates that Birmingham has a wide variety of venue types, ranging from social and student clubs (~ 14%), all the way to medium sized and large dedicated live music venues (~3%). Another prominent feature of Birmingham's musical ecology are its pubs, bars and small venues (49.36%) with capacities below 400. Consequently, the music offer in the city is quite broad, not giving predominance to any particular type of music, type nor level of artist (i.e. both internationally recognized stars and beginners in the industry can be easily accommodated due to the variety of venue sizes). This makes it a useful indicative example for the effects of the issues described in previous the previous sections. Since the 2016 EU Referendum, there has been considerable uncertainty about the potential costs and benefits from Brexit to the live music industry in the city. While above, we focused on the provisions around touring activity and work permits/visa regimes, several issues are very specific to the local level (although with the potential to be replicated at national level; Rozbicka et al 2019).

On the ground in Birmingham the issue of disruption to just-in-time supply chains is one source of anxiety. Festivals and large-scale performances in the region, for instance, reveal the practical issues associated with hosting major touring acts, which are reliant on those just-in-time supply chains. Those include, indicatively but far from comprehensively, matters like the ad hoc provision of rigging, extensively large PA systems, or simply allowing entry at the border the stage parts and equipment traveling with crews. The usual response to that issue is securing storage space. However, the disruptions and delays at the UK and EU border created lost opportunities. Both the UK as a whole and Birmingham specifically now have a shortage of warehouse space (Butler 2019) – previously mitigated by the just-in time supply chains characteristic of pre-Brexit operating conditions – which has resulted in an increase in the cost of storage. The laws of supply and demand suggest that the remaining space may eventually become prohibitively expensive for smaller stakeholders.

Another local concern is the future of the high number of production companies (i.e. companies handling matters related to lighting, staging, and tour management) located in Birmingham. These companies have been important regional employers in terms of youth training and employment opportunities in the sector and for more established, skilled professionals like sound and lighting technicians. As the UK, and to a degree Birmingham, has historically often been a staging-post for international acts touring the EU, the latest visa and work permit regulations directly impact those companies which are markedly less competitive against companies located in Ireland, an EU member also in close proximity to the continent, and other EU countries, such as The Netherlands.

There are also concerns over the recruitment of skilled employees following Brexit. When it comes to the West Midlands region, for which Birmingham is the primary urban centre, 29% of businesses linked with the creative industries (including music) employ non-UK nationals (Bakhshi and Spilsbury 2019: 22). The new restrictions on employment for EU nationals in the UK (and, in particular, the minimum income cap; The Immigration Act 2020, Gov.uk 2020) will make it harder to bring in low-skilled employees from EU nations, while also curtailing work opportunities for skilled workers and specialists who are at an earlier stage of their career. This applies to employment both 'front of house' (orchestral musicians, for instance) as well as back-stage (technicians, and production crew). A possible longer-term consequence of this could be a general decline in diversity across the performing arts sector.

Another background worry expressed by stakeholders (Rozbicka et al 2019: 11), one difficult to quantify though nonetheless very real, is the potential reputational damage to the UK caused by Brexit. Smaller, lesser-known bands from the EU will find it more difficult to tour in the UK without additional funding to cover potential Visa and other fees, and due to the increased costs and administrative processes for venues and promoters hosting EU acts, thereby making hosting smaller European bands financially unviable. Even beyond the immediate practical constraints on coming to the UK to perform, there is the associated concern that a *sense* of being unwelcome – or of it being too much trouble to make the effort – might dissuade some acts, over time, from coming to the UK. Given the sometimes-toxic rhetoric around Brexit, there is a related concern about a drop in the number of inbound music tourists from EU countries. The economic fallout here would spread beyond the live music sector to tourist related business and the service industry more widely.

A related matter here is the possibility of a slide towards more homogenized events due to the smaller pool of potential acts from abroad for venues and promoters to draw upon. The effect here might be felt in local venues – particularly those less able to take on extra expenses or administration associated with handling visiting acts from countries covered by newly stringent rules around freedom of movement. If such venues have to trim their financial sails accordingly in light of new restrictions around movement of musicians, crews and merchandise, this could have a bearing on their appetite for risk-taking in their booking policies. A workshop with local practitioners in 2019 – including venue operators and promoters – revealed this relationship between risk and Brexit derived regulations as a key underlying tension:

> Given that the local music scene has a high proportion of small and mid-size venues (i.e. those holding fewer than 500 people), and that promotion in those venues is often handled by freelance promoters, there is widespread concern that the local sector may not be able to provide sufficient support to extend invitations to bands visiting from abroad, an issue that may compound problems of stagnation. (Rozbicka et al 2019: 13-14)

Stakeholders expressed unease (Rozbicka et al 2019: 11) about the possibility that this would be potentially followed in the long-term by degradation of the range of influences on, and inspirations for, young people, in cultural terms and, economically, a decrease in music tourism. Risks to the various elements mentioned above, which impact domestic and foreign visits, could have a knock-on effects beyond live music to cultural, touristic and service-related businesses at large (e.g. food and drink, hotels, local transport services). A diminished cultural, and therefore tourism, offer would obviously threaten employment prospects in those sectors, but could also reduce the attractiveness of the city and region for inward investment-based success, thus contributing, in a worst-case scenario, to a stagnation or decline.

As well as the negative impact of Brexit, there are also some possible, if somewhat contingent, opportunities. The industry remains determined to manage the situation, referring to sectoral perseverance and an "entrepreneurial spirit" driving innovation in the face of adversity (Michael Kill, Night Time Industry Association, Interview with author). One respondent to a survey of Birmingham live music stakeholders, for instance, also noted the chance that "the potential restrictions of EU travel could see more UK bands touring more regularly in the UK with more gig goers staying in the UK rather than [going] abroad." (Rozbicka et al 2021: 40). In other words, the gap created by fewer visiting artists could be filled by local acts, with a decline in foreign travel driving an uptake of domestic cultural consumption. Whether this would offset the lost opportunities for European touring, or lead to 'overplaying' the domestic market, is an open, and fraught, question.

While the responses presented here focus on Birmingham, other cities and their live music ecosystems will likely be similarly impacted. Cities like Liverpool, Manchester and Glasgow have comparable profiles. London is an outlier here, hosting some of the largest venues and labels in the country and thus potentially facing an even greater shock to the system, though with a large local market and its status as capital city as a possible limiting factor in declining international visitors. The issues of disruption to just-in-time supply chains and the lack of warehouses are a major national concern. These are coupled with others: increased administrative and financial costs to host the EU bands and the need to replace the missing workforce previously handled by the unobstructed inflow of EU-based, skilled employees to the UK, which in turn further threatens high-end production companies and their role as trainers and employers. On a more subjective level, the damage to the UK's reputation as a positive and open place to visit, together with visa issues, could impact negatively cross-border cultural exchanges with a 'domino effect' leading to a decrease in music tourism, the livelihoods of UK musicians and music sector professionals and a slow deflation of the overall cultural outlook for the city, region and country. This somewhat gloomy prognosis can be weighed against a live music culture and industry that has proven itself resilient and resourceful (for instance, in the face of Covid-19). Nevertheless, to properly mitigate the constraints imposed by Brexit will require a government response that displays a similar degree of imagination and fleet-footedness to that displayed both by the sector itself and in the government's rapid deployment of support measures during the Covid-19 crisis.

The British jigsaw

As the previous sections have shown,, the live music is a sector where the UK has traditionally excelled. This was the case in 2016 when the Brexit referendum was held, and it continued to be so thereafter, with a £5.8 billion contribution to the UK economy in 2019 (UK Music 2020). The challenges it faces arising from the UK's departure from the EU are, however, significant. The most problematic aspect of the ongoing situation, and for the future more broadly, is uncertainty around the government's position on future negotiations and an expected rise in red tape, both from the touring perspective and from the local point of view regarding hosting EU artists and their crews. The political debate about those negotiations has been ongoing since 2016 (HoL 26 July 2018), punctured by occasional flare ups and initiatives undertaken by various industry representatives (for example: UK Music, Music Venue Trust, the Musicians' Union) to push the DCMS to engage more in the negotiations and better represent its constituency.

Various proposals have been mooted, including a reciprocal 'touring passport' for musicians operating between the EU and the UK (Musicians Union 2020) – a petition in support of which gained 109,000 signatures in short order. This was also included a wide-ranging 10 point plan proposed by opposition MP Harriet Harman, which also suggested: a cultural exemption from the 'cabotage' and carnet rules that govern movement of goods and people; a Music Touring Fund; a designated minister to work on re-negotiating cultural travel arrangements; and the creation of a Music Export Office (Harman 2021: 3). While the Secretary of State at DCMS has indicated tentative interest in a cultural export office, the core proposals around touring have fallen prey to the current administration's more intransigent stance on immigration and, therefore, movement of goods and people as part of its broader hard line in discussions with the EU. It was revealed in early 2021, for instance, that UK negotiators had rejected an offer from their EU counterparts to include reciprocal exemptions from work visas for musicians (Merrick 2021).

An optimal solution for the live music industry thus looks currently unlikely. A survey by the Incorporated Society for Musicians and the Musicians' Union showed that 94% of respondents had been negatively affected by the post-Brexit agreement, 77% expecting their earnings from Europe to decrease, only 43% still planning future shows or tours in the EU, 42% considering relocation, and 21% considering a change of career (ISM 2021). As one respondent put it:

> It seems a complete nightmare… As it is, we see no way to recover our pre-Brexit working schedule making survival very difficult. (ibid.)

The existing and above discussed scenarios (Swiss and Norwegian, US and Canadian) could be copied across the UK case, but would require greater levels of reciprocity than the current government is prepared to accept. Part of the problem is that the live music industry – indeed, culture at large – appears not to be a governmental priority in the UK's negotiations with the EU: leisure, hospitality and entertainment take a back-seat to financial services, manufacturing, and agriculture (Trendell 2021). Indeed, a dispute over fishing rights was a major sticking point in the withdrawal negotiations despite the fact that its value to the economy as a whole is around £1.2billion (Cunliffe 2020), as opposed to £111.7 billion for the creative industries (DCMS 2018: 4) – with £5.2 billion for music, including a £1billion pound live sector (UK Music 2019: 6-7)[5] – whose concerns were treated as a second order matter, at best.

While live music's economic significance has, then, been clearly established, the consequences of Brexit for this sector have been largely overlooked by the government. The export of recorded and live music has served the UK well in the past but its current policy of cleaving to nationalism looks likely to stand in the way of future accomplishments in the EU market. Proponents of Brexit have cited the success of rock giants in the 1960s whose careers launched before accession to the EU, but those were different times. Counterparts of The Beatles would struggle to gain a residency in Hamburg today, for instance. Further, the number of smaller touring acts now compared to the early sixties is considerably greater and the industry has grown massively, creating fierce competition. Only more developed bands can realistically hope to achieve international success and thus be in a position to have the kind of industry infrastructure that could support the visa entries required to perform. Finally, tours are more than just one venue in Hamburg. While the Beatles in those early years did not need access to the rest of Europe, one gig in Germany is not enough to provide a sustainable income or the building of a fan base in today's environment. Although industry bodies, and political opposition, are lobbying hard for measures to ameliorate the effects of Brexit, the road ahead does not look straightforward. Constructive ideas abound, however, and it is to be hoped that, as the dust settles from the initially fractious withdrawal process, and given music's social and cultural contributions to the nation, the political climate will soften towards making the most of the solutions on the table.

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[1] In 2015, UK exports to the EU were valued at £223.3 billion, while UK imports from the EU stood at £291.1 billion (Office for National Statistics 2016)
[2] A 'vignette' is a pass displayed on a vehicle windshield that is a legal requirement for motorway travel in Switzerland.
[3] Insights in this section are based on workshops and interviews conducted within a project titled 'The UK Live Music Industry in post 2019 era: A Globalised local perspective' made possible by a grant from the Creative Industries Policy and Evidence Centre (PEC), which is

led by Nesta and funded by the Arts and Humanities Research Council. The research took place between February 2020 and January 2021.

[4] The Birmingham Live Music Map is available at: https://livemusicresearch.online/blmp/

[5] The sources and datasets for the overall creative and industries and for music are different, since DCMS does not disaggregate specifically for live music. The underlying point still pertains that government negotiators engaged in brinkmanship over fishing while passing over the concerns of the creative industries despite their greater value to the economy.