

DEMOS

# FACING THE MUSIC

MEETING THE AMBITIONS  
OF THE NATIONAL PLAN FOR  
MUSIC EDUCATION

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FEBRUARY 2025

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**Billy Huband-Thompson**

**Alice Dawson**

# ABOUT THIS REPORT

This report is part of our **Public Service Reform** pillar. We need a new operating model for public services which liberates professionals and communities to work together to build services that work for their local circumstances. In addition, we need to rebuild the social, civic and cultural foundations that create social capital and strengthen relationships which are the bedrock for our health and wellbeing.

This report explores the costs and challenges associated with delivering the refreshed National Plan for Music Education (NPME2). Drawing on original survey data, Arts Council England data, and workshops with those working to deliver NPME2, this report accounts for new and hidden costs associated with implementing NPME2, identifies potential barriers to delivery, and calculates an estimate of the funding needed to deliver the plan effectively. It presents a series of recommendations to government, which would help deliver an excellent music education for all children and young people.

# FOREWORD

## BY BRIDGET WHYTE



As the CEO of the UK Association for Music Education - Music Mark - I would of course say that music education is important. Indeed, I regularly cite published research into its value and tell stories of its impact on children and young people. In every conversation I have with ministers, civil servants, and other decision-makers, the value of music education is never questioned or challenged. However, this view has not been reflected in recent government funding agreements. I believe that this is as good a time as any to start to rectify this.

From the day they are born, no young person should have to grow up without music in England and it is widely accepted that it “takes a whole village” for students to truly explore music. There needs to be a music education ecosystem providing the myriad learning experiences which will help them to expand and develop musicality and musical horizons. To explore musical history, to learn one or more instruments, to find out how to read and write the languages of music (of which there are as many as there are cultures and communities of musicians), to play and sing together, to perform, to listen; this needs a significant, skilled workforce in and out of school.

Both the current government and previous governments have recognised and funded music education provision both via the schools’ grant and through additional funding for the wider ecology. This has enabled many millions of children over the years to develop musical skills. However, this funding has never met the ambitions of successive governments, and with the new government reinforcing their commitment to universal opportunity, we have to ask the question “is there enough money in the system?”

In the summer of 2024, Music Mark commissioned Demos to investigate what it would actually cost to meet the ambitions of the then government’s National Plan for Music Education. Five years of static funding has had a dramatic impact on music education in England, resulting in fewer teachers, fewer learners, and fewer opportunities. The prices charged to parents and schools has had to increase to keep pace with economic changes, and inevitably that has an impact on universal access to music teaching.

This new report outlines, among other things, why more money is needed and how much it would cost to ensure all children and young people can have a life with music. We now await a response from government and we stand ready to work with them to ensure that their ambitions for children and young people in England is realised. Whilst the national purse is challenged, the power of music makes the relatively small increased investment identified by this report not only worthwhile but essential for the cultural, social, and economic growth that this government has put at the heart of its mission.

**Bridget Whyte, CEO, The UK Association for Music Education – Music Mark**

# EXECUTIVE SUMMARY

Music is essential for our intellectual, spiritual, social, cultural, and economic prosperity. This report makes the case for greater investment and support for music education in England. Specifically, it considers the costs and challenges associated with the refreshed National Plan for Music Education (NPME2), which was introduced by the previous government. The report outlines what a fairer funding arrangement would look like and a series of reforms that would empower those working in music education to realise the potential of all children and young people.

Drawing on original survey data, Arts Council England data, and workshops with those working to deliver NPME2, this report accounts for new and hidden costs associated with implementing NPME2, identifies potential barriers to delivery, and calculates an estimate of the funding needed to deliver the plan effectively.

We estimate that by 2028/29, Music Hub partnerships will need a further £32.3m in funding per year to be able to cover the additional costs associated with the plan. Over the next five years, Hubs will require £161.4m in additional funding to keep up with cost increases based on their expenditure in 2022/23. On top of this, we estimate that a further £1.4m will be needed to cover the costs of moving to a structure of 43 Hub Lead Organisations. This means that there is a total funding gap of £162.8m that needs to be filled over the next five years, if NPME2 is to be delivered.

**Music is deeply enriching and valuable for its own sake and should be a key priority for a government looking to ensure all children and young people receive a rounded education. It also makes a crucial contribution to the UK economy and should be a key priority for a government determined to drive economic growth.**

Music is essential for our **intellectual, spiritual, social, cultural, and economic prosperity.**

There is a **total funding gap of £162.8m** that needs to be filled over the next five years, if NPME2 is to be delivered.

Despite successive governments' rhetoric, music is too often a peripheral part of children and young people's education, with pupils' backgrounds and where they grow up shaping the opportunities they can access. NPME2 is ambitious in its objectives but our findings show that staff in organisations within Music Hub partnerships, including music teachers and other professionals, are stretched and having to go above and beyond to meet the extensive demands placed on them. In the context of workload and workforce challenges, along with substantial inflationary pressures, a longer-term, sustainable approach to funding and support is needed to ensure that all children and young people can access an excellent music education.

**Our report makes five recommendations to ensure that all children and young people have access to an excellent music education:**

1. Boost funding to help Music Hubs deliver an excellent music education for all
2. Liberate Hubs from restrictive funding and reporting constraints
3. Restore the essential place of music education in schools
4. Mobilise support from the wider music sector and industry
5. Rejuvenate 'cultural deserts' through strong local investment



# INTRODUCTION

An excellent music education should be an entitlement for all children and young people. Music opens children and young people up to artistic expression; gives them a unique way to connect with others; teaches them the value of dedication and practice; allows them to engage with other places, perspectives and periods of time; and provides special experiences that can bring communities together. As acknowledged in the previous government's *The power of music to change lives* paper, music education is not just a means to an end, but an end in itself.<sup>1</sup>

More widely, music plays an invaluable role in building people's cultural and social understanding, while contributing substantially to the UK economy. UK music contributed a record £7.6bn to the UK economy in 2023, with the industry supporting 216,000 jobs.<sup>2</sup> Music is one of the UK's proudest and most recognised exports, with social and economic benefits that have spillover effects on other sectors of the economy and our society more broadly.

The new government's manifesto states that culture is "an essential part of supporting children and young people to develop creativity and find their voice" and that there is "huge potential for growth in the creative industries that benefit every corner of the UK" (p. 86).<sup>3</sup> It is therefore vital that steps are taken to ensure that all children and young people, regardless of background, can access an excellent music education, which can enrich their lives, their communities, and the country at large.

This report examines the costs and challenges associated with the delivery of the government's refreshed National Plan for Music Education (NPME2). Drawing on original survey data, existing Arts Council England data, and workshops with those working to deliver NPME2, it looks to account for new and hidden costs associated with implementing NPME2, identify potential barriers to delivery, and to calculate an estimate of what would be needed to deliver the plan effectively. In addition, it explores some of the structural challenges that threaten to compromise the delivery of NPME2 and presents a way forward for a Music Hubs model built on high-trust, secure funding and stronger partnerships.

## MUSIC EDUCATION FACES SIGNIFICANT CHALLENGES

While music continues to be a strong asset to the UK, the industry faces a range of challenges. Lisa Nandy, Secretary of State for Culture, Media and Sport, recently voiced concern that "many parts of the country have become cultural deserts", citing evidence of the closure of grassroots venues, artist remuneration, and a range of other challenges.<sup>4</sup>

1 HM Government. 2022. *The power of music to change lives: A National Plan for Music Education*. Available at: [https://assets.publishing.service.gov.uk/media/62bc1242d3bf7f292040d364/The\\_Power\\_of\\_Music\\_to\\_Change\\_Lives.pdf](https://assets.publishing.service.gov.uk/media/62bc1242d3bf7f292040d364/The_Power_of_Music_to_Change_Lives.pdf)

2 UK Music. *This is Music 2024*. 2024. Available at: <https://www.ukmusic.org/research-reports/this-is-music-2024/>

3 Labour. *Change: Labour Party Manifesto 2024*. 2024. Available at: <https://labour.org.uk/wp-content/uploads/2024/06/Labour-Party-manifesto-2024.pdf>

4 Record of the Day. Lisa Nandy MP addresses Beyond The Music conference. 2024. Available at: <https://www.recordoftheday.com/on-the-move/news-press/lisa-nandy-mp-addresses-beyond-the-music-conference>

Access to music education opportunities varies greatly across the country. The Independent Society of Musicians has documented a “sobering picture of decline and inequality in music provision across our schools”.<sup>5</sup> Strikingly, 42% of schools no longer enter any pupils for Music GCSE,<sup>6</sup> while young people’s take-up of musical instruments and ensembles varies greatly by socio-economic background.<sup>7</sup> This means that far too many young people are missing out on the brilliant benefits, experiences and opportunities that music education can bring, while we as a country are made both culturally and economically poorer as a consequence. In *A Class Act*, The Sutton Trust has laid bare the stark socio-economic inequalities that underlie our creative industries, with 43% of top classical musicians having attended private schools.<sup>8</sup> If the government is serious about tackling barriers to opportunity and ensuring that the arts and music are no longer “the preserve of a privileged few”,<sup>9</sup> the state of music education needs urgent action.

## **WHY IS MUSIC EDUCATION IN SUCH A CONCERNING PLACE?**

To understand the future direction of travel for music education it is important to understand how we arrived at this point. There are multiple factors at play here, with music’s omission from the English Baccalaureate (EBacc) accountability measure, perennial teacher recruitment challenges, and funding challenges all contributing to a challenging environment for music educators. Across the country, school leaders, classroom music teachers, Music Hub leads, music services, peripatetic teachers, industry professionals and others are working tirelessly to give children and young people in their communities the best music education possible. However, too often their work is held back by a lack of resources in the context of high inflation, weak teacher supply, poor transport infrastructure, and a lack of appropriate venues, among numerous other challenges.

Music education professionals are suffering not just from a lack of resources and weak infrastructure, but a lack of certainty and clarity surrounding future funding and delivery arrangements. In our workshops and across our survey, we heard about the toll this was taking on those working in music education, with Hub leaders forced to make challenging cost saving measures and staff wellbeing suffering in the context of future uncertainty.

As outlined in the next section, music education is currently underpinned by the National Plan for Music Education, which centres on a series of Music Hubs - partnerships that support, deliver, and enable access to music education for children and young people within local areas. Currently, Hubs are expected to engage with schools but schools have no statutory obligation to engage with Hubs, meaning Hubs’ impact can be shaped by the extent to which schools are willing and able to prioritise music education, rather than there being a universal expectation. There are also uncertainties and inconsistencies when it comes to funding arrangements. Hubs are expected to generate income from local parents, schools, trusts and foundations to help meet their delivery costs, but access to these funding sources varies greatly by place. As outlined elsewhere in this report, there are a wealth of other contextual, place-based challenges that can help or hinder delivery across different parts of the country.

5 The Independent Society of Musicians. Music: A subject in peril? Available at: <https://www.ism.org/music-in-peril/>

6 Cultural Learning Alliance. Report Card 2024. 2024. Available at: <https://www.culturallearningalliance.org.uk/wp-content/uploads/2024/05/CLA-2024-Annual-Report-Card.pdf>

7 Fraser, F. Beyond School: Why we need a new approach to school enrichment. 2022. Available at: <https://www.ukonward.com/wp-content/uploads/2022/11/Beyond-school-enrichment-report-onward.pdf>

8 The Sutton Trust. 2024. A Class Act. Available at: <https://www.suttontrust.com/our-research/a-class-act/>

9 Labour. Change: Labour Party Manifesto 2024. 2024. Available at: <https://labour.org.uk/wp-content/uploads/2024/06/Labour-Party-manifesto-2024.pdf>

In this incredibly challenging funding and policy environment, Music Hub partnerships across the country are doing extraordinary work, as demonstrated by Arts Council England data. In the 2022/23 academic year, over 120,000 pupils regularly participated in ensembles, over 160,000 participated in face to face in-person small group lessons, while Hubs delivered thousands of hours of Continuing Professional Development (CPD) to improve music education practice. However, there is still a long way to go to ensure truly universal access to an excellent music education. **Notwithstanding the best efforts of Hub leads, music services, schools and others involved in music education, there is a real danger that children and young people's experience of music education will continue to be shaped by local context and socio-economic background.**

An excellent music education is too important to be left to chance. It is not fair, on music teachers, school leaders and, crucially, children and young people, for provision to rest on the local resources at a Music Hubs' disposal. Nor is it fair or sustainable for Hub leaders, school leaders, music leads, music services, peripatetic teachers and others to be expected to go 'above and beyond' to compensate for a lack of funding and resources in the system. **For too long, the delivery of music education has relied too heavily on the good will and commitment of music educators, who provide music education despite, not because of resources available to them.**

The government needs to give music educators the backing they need to share their expertise, nurture passion and talent, and ultimately ensure that *all* children and young people, regardless of background, can access an excellent music education. This report draws on workshops with those working in music education and original survey data to better understand the challenges that music educators face and the support they need to meet the ambitions of the refreshed National Plan for Music Education. The report ends with a series of recommendations for government.

# THE NATIONAL PLAN FOR MUSIC EDUCATION

## **WHAT IS THE NATIONAL PLAN FOR MUSIC EDUCATION?**

Music education in England is currently underpinned by the National Plan for Music Education (NPME) - a policy aimed at ensuring high-quality music education for all children and young people through partnership working. The NPME has three key goals:

- 1.** All children and young people receive a high-quality music education in the early years and in schools
- 2.** All music educators work in partnership, with children and young people's needs and interests at their heart
- 3.** All children and young people with musical interests and talents have the opportunity to progress, including professionally

At the heart of these plans are Music Hubs - partnerships that support, deliver, and enable access to music education for children and young people within their local areas. They may consist of schools, academy trusts, local authorities, music education organisations including music services, and community, youth, and voluntary organisations.

They vary in terms of scale and organisational set-up, with varying degrees of local authority ownership, for instance. These partnerships are coordinated by Hub Lead Organisations (HLOs) that are “responsible for supporting, delivering and enabling high quality music education for children and young people within a local area”. Hubs are expected to work with every school to build school Music Development Plans and to help them realise these plans through training, resourcing, ensembles, and other support. Further detail about these arrangements can be found in *The power of music to change lives* document.<sup>10</sup>

## **THE REFRESHED NPME - GREATER DEMANDS AND A RESTRUCTURE TOWARDS FEWER HLOS**

The National Plan for Music Education (NPME) was first introduced in 2011 and was then refreshed in 2022. NPME2 sets out a range of new ambitious changes for those working in music education.<sup>11</sup> This includes a widening of the plan’s age range to cover the early years through to 16-25 year-olds, with an emphasis on progression into life-long appreciation and/or professional music careers. While many in the sector have welcomed NPME2’s ambitions, schools, Hubs, and others working in music education face considerable challenges in delivering the plan, including insufficient funding and a severe shortage of music teachers.<sup>12</sup>

More recently, the previous Conservative government introduced plans to restructure local Music Hubs, reducing the number of Music Hub partnerships from 116 to 43. The (then) government’s case rested on the idea that Hubs could act more strategically, covering wider geographies.<sup>13</sup> However, there have been concerns raised about this new direction of travel for Music Hubs. These include a lack of clarity around how consultation data was used to inform this decision; the absence of a comparative outcomes-based evaluation to support this shift to broader geographies; and the unique funding requirement placed on Hub Lead Organisations (HLOs).<sup>14</sup> More generally, there are concerns about the current funding levels for Music Hubs and whether they are sufficient to meet the scale of NPME2’s ambition, particularly given the current pressures facing the music education ecosystem.

10 HM Government. 2022. *The power of music to change lives: A National Plan for Music Education*. Available at: [https://assets.publishing.service.gov.uk/media/62bc1242d3bf7f292040d364/The\\_Power\\_of\\_Music\\_to\\_Change\\_Lives.pdf](https://assets.publishing.service.gov.uk/media/62bc1242d3bf7f292040d364/The_Power_of_Music_to_Change_Lives.pdf)

11 Throughout this report we use NPME2 to refer to the 2022 iteration of the NPME.

12 Independent Society of Musicians. *The Current State of Music Education and the Impact of the National Plan for Music Education*. 2023. Available at: <https://www.ism.org/news/the-current-state-of-music-education-and-the-impact-of-the-national-plan-for-music-education/>

13 Cultural Learning Alliance. *Reflections on Music Hubs*. Available at: <https://www.culturallearningalliance.org.uk/music-hubs/#:~:text=The%20DfE%20outlined%20within%20their,number%20of%20Hubs%20will%20work.>

14 Independent Society of Musicians. *The Current State of Music Education and the Impact of the National Plan for Music Education*. 2023. Available at: <https://www.ism.org/news/the-current-state-of-music-education-and-the-impact-of-the-national-plan-for-music-education/>

## FUNDING OF THE NPME

From September 2024, the new 43 HLOs now receive funding from government via Arts Council England (as the appointed fundholder) as two income streams - the Revenue Grant and a new one-off Capital Grant. In addition, they are expected to generate income outside of these channels. The two government income streams are broken down below:

- 1. Revenue Grant:** the Hub Network currently receives £76.1m in annual funding, shared between the HLOs, with allocations calculated by the Department for Education (DfE). 90% of the funding is distributed based on the total number of pupils registered on roll within each upper tier local authority area, with the remaining 10% distributed based on the number of pupils eligible for Free School Meals (FSM).<sup>15</sup>
- 2. Capital Grant:** a one-off grant totalling £25m, administered in four instalments, has been allocated by government with a duration of five years but with funding expected to be spent or committed between 1st September 2024 and 31st August 2026.<sup>16</sup> Allocations are based on the same formula as that of the Revenue Grant. Grant income can be spent on musical instruments, equipment, and technology, with an expectation that funding will include purchases designed for children and young people with special educational needs and disabilities.<sup>17</sup>
- 3. Fundraising:** In addition, it is expected within the Hub Relationship Agreement that at least 50% of each Music Hub's total income (excluding the capital grant) will come from sources outside the Music Hub core Revenue Grant.<sup>18</sup> As we discuss, the level of this income achieved through fundraising currently varies greatly between Hubs.

## UNDERSTANDING THE CHALLENGES AND COSTS ASSOCIATED WITH NPME2

At present, access to high-quality music education is too often shaped by children and young people's socio-economic backgrounds and where they grow up. Notwithstanding the extraordinary efforts of those working in music education, the promise of truly inclusive, universal provision is a long way from being realised.

There is an urgent need to recognise the challenges that Music Hubs are facing in the delivery of NPME2 and for government to give music educators the resources they need to realise the plan's ambitions. More broadly, the government needs to take steps to build stronger relationships between Music Hubs, schools, the voluntary and community sector, the music industry, and other actors to ensure that they can focus their efforts on serving their children and young people, giving them the best music education possible.

<sup>15</sup> Arts Council England. Music Hubs programme - further information on allocations. 2024. Available at: <https://www.artscouncil.org.uk/media/22869/download?attachment>

<sup>16</sup> Arts Council England. Music Hub Capital Grant for Musical Instruments, Equipment and Technology. 2024. Available at: <https://www.artscouncil.org.uk/media/22435/download?attachment>

<sup>17</sup> *ibid.*

<sup>18</sup> Arts Council England. Music Hub Investment Programme: FAQs. 2024. Available at: <https://www.artscouncil.org.uk/our-open-funds/music-hub-investment/music-hub-investment-programme-frequently-asked-questions#t-in-page-nav-7>

## There are concerns about the feasibility of the refreshed NPME

While NPME2 sets out a series of admirable objectives, there are concerns among Hub leaders, schools, teachers, and others tasked with delivering the plan about its feasibility in the context of significant resource constraints. Schools are facing a teacher recruitment and retention crisis, with the government meeting only 27% of its secondary school music recruitment target in 2023<sup>19</sup> and many primary schools lacking music specialists and/or dedicated leads. Meanwhile, Hubs have faced significant inflationary pressures that threaten to eat further into budgets at precisely the moment that NPME2 is placing greater demands on them, including the expanded age range from early years through to 16-25 year-olds.

There are also wider structural challenges at play, with around three in ten children in the UK living in poverty, meaning Hubs, schools, and other educators may encounter greater barriers to access that will need to be addressed to ensure provision is truly universal.<sup>20</sup> There has also been a significant rise in the number of children in England recorded as having special educational needs and disabilities (SEND), with 434,354 pupils on Education and Health Care (EHC) plans in 2024 - up by 11.6% from 2023 figures.<sup>21</sup> This may require greater adaptation in practice and support (such as the specialist tuition associated with adaptive instruments), which - without sufficient funding and staff capacity - may present further challenges to universal provision. Meanwhile, wider issues like poor public infrastructure can also exacerbate costs. For instance, Hubs covering areas with weak public transport may need to pay for private travel to help children and young people access ensembles, concerts and other provision.

Costs associated with NPME2 will vary greatly among Hubs depending on their context - how pronounced are teacher recruitment and retention challenges in their area? What is the availability of venues to rehearse and host concerts in? What barriers do children and young people in the area face to accessing music provision?

In addition, Hubs' income will be dependent on the context they are working in. Given Hubs are being asked to generate at least 50% of their income (excluding the Capital Grant) from outside the core Revenue Grant, this relies on their ability (and resource) to fundraise, but also the availability of funds from parents, schools, foundations, philanthropists, and others in their geographical area. This comes at a time of a cost of living crisis, significant demand for limited philanthropic resources, and with the voluntary sector under increasing financial strain.

Alongside these challenges and uncertainties, Music Hub leads and others have also been navigating the transition from a system of 116 local Music Hubs to a new arrangement centring on 43 HLOs.<sup>22</sup> For some Hubs, this has felt like a fairly natural transition, building on existing collaborative relationships and arrangements with other Hubs, with the appointment of a new HLO feeling logical. However, for others, these new arrangements have required (and still require) significant time and resources, particularly where prior relationships between Hub Partners and their new HLOs were reportedly weaker.

Overall, there is a sense that while the objectives and aspirations of NPME2 are admirable, Hubs lack the funding and structural support to meet the scale of the ambition and to cover the costs associated with such significant changes.

19 Independent Society of Musicians. Secondary Music Trainee Teacher Recruitment 'Not Good Enough', says ISM. 2023. Available at: <https://www.ism.org/news/secondary-music-trainee-teacher-recruitment-not-good-enough-says-ism/#:~:text=The%20DfE%20has%20struggled%20to,64%25%20in%202022%2F23>.

20 Joseph Rowntree Foundation. Child poverty. Available at: <https://www.jrf.org.uk/child-poverty>

21 HM Government. Special educational needs in England. 2024. Available at: <https://explore-education-statistics.service.gov.uk/find-statistics/special-educational-needs-in-england>

22 Arts Council England. Music Hubs. Available at: <https://www.artscouncil.org.uk/MusicHubs>

## Meeting the ambitions of NPME2; empowering Music Hubs; securing a brighter future for music education

This report aims to better understand the challenges and costs associated with implementing NPME2, and to present a better way forward for the new government. Drawing on existing Arts Council England data, original survey data, and workshops with those working to deliver NPME2, it looks to account for new and hidden costs associated with implementing NPME2, identify potential barriers to delivery, and estimate what would be needed to deliver the plan effectively, in terms of both public investment and policy change.

From this work, we find that the funding for Music Hubs is insufficient to meet the ambitions of NPME2. We estimate that by 2028, Hubs will need an additional £32.3m in funding per year to be able to cover the additional costs associated with delivering NPME2. Over the next five years, Hubs will require **£161.4m** in additional funding to keep up with cost increases, based on their expenditure in 2022/23, and to deliver NPME2.

In addition, our survey and workshop data analysis reveals a range of structural challenges that need to be urgently addressed if Hubs, schools, and others involved in music education are to work together to achieve the ambitions of NPME2.

Overall, we argue that the government should adopt a similar approach of ‘evolution not revolution’ that it is taking to the Curriculum and Assessment Review. It should aim to consolidate the new HLO structure, giving those working in and around Hubs the time and resources to ‘bed in’, make this transition and meet the ambitions of NPME2.

For a government that has made breaking down barriers to opportunity and driving economic growth two of its central missions, now is the time to put the necessary resources into Music Hub funding and ensure that the ambitions of NPME2 are met.

### **To meet the ambitions of NPME2 and ensure that all children and young people have access to an excellent music education, we make five key recommendations:**

- 1.** Boost funding to help Music Hubs deliver an excellent music education for all
- 2.** Liberate Hubs from restrictive funding and reporting constraints
- 3.** Restore the essential place of music education in schools
- 4.** Mobilise support from the wider music sector and industry
- 5.** Rejuvenate ‘cultural deserts’ through strong local investment



# CALCULATING THE COSTS ASSOCIATED WITH NPME2

To understand the costs and challenges associated with NPME2, we used data and insight from Music Hubs, which are the key partnerships charged with delivering the plan. Here, we drew on both Arts Council England data and original survey data. This data is linked to the previous iteration of NPME (not the refreshed NPME) and so is based on the system of 116 Hubs, rather than the new system built around 43 HLOs.

At present, Arts Council England collects data, including financial data, from Hubs and operates a Data Dashboard. This dashboard provides insights concerning Music Hub income, expenditure, and activity across the country, which we have drawn on in this work.

In addition, to more fully understand the challenges Hubs are facing, we surveyed leaders within Music Hubs (a mixture of HLO and non-HLO staff), collecting a range of on-the-ground insights that allowed us to understand the challenges and constraints they were currently working under. The survey was sent to Music Hubs that are members of Music Mark - the UK Association for Music Education. 13 Hubs from a variety of different regions across the country responded to our survey between July-September 2024, including Hubs from the Midlands, the North, South West, South East, and London. The small sample size means we should exercise some caution in our analysis. That said, asking Hubs directly about their experiences of delivering NPME2, including in-depth qualitative survey responses and workshop discussions have allowed us to get a more comprehensive understanding of the costs involved in delivering the plan.

We asked about particular cost areas, areas where Hubs expect costs to change, and gave Hub leaders room to share any additional barriers they were facing and the effect this was having (or was likely to have) on their delivery of NPME2. In addition, we used workshops with Hub leaders (including those not represented in our survey), school leaders and others involved in the delivery of NPME2 to discuss these costs and other pressures in greater depth.

## The data we collected in the survey included:

- **Staffing costs:** annual expenditure on staffing costs and any anticipated spending changes over the next 12 months
- **Instrument and equipment costs:** annual expenditure and any anticipated spending changes over the next 12 months
- **Restructure costs:** how much has been spent to date on the transition to a new system of 43 HLOs and staff time spent on developing the HLO bid and preparing for the transition
- **Fundraising costs:** annual expenditure on fundraising costs and staff time spent on fundraising

Our workshop and survey findings reveal a number of hidden costs that Hubs face when looking to deliver NPME2. We have used our data insights, along with Arts Council England data, to make our calculations and create a trajectory of the potential increases in Music Hubs' expenditure going forward.

## Inflation

Alongside our understanding from surveys and consultation of how much Hub expenditure will need to increase to deliver NPME2, we used inflation data from the Office for Budget Responsibility (OBR) to consider the real terms cost increase that Hubs face. The OBR provides a forecast of the percentage change of inflation overtime using three different measurements - the Consumer Price Index (CPI), the Retail Price Index (RPI) and the GDP deflator at market prices. We chose to use the Consumer Price Index to make our calculations as this is the main measure of inflation in the UK.<sup>23</sup> A breakdown of this can be found in the table below.

**TABLE 1**

INFLATION PROJECTIONS, TAKEN FROM OBR, ECONOMIC AND FISCAL OUTLOOK, MARCH 2024.

	FORECASTED % CHANGE				
Inflation measurement	2024	2025	2026	2027	2028
CPI	2.2	1.5	1.6	1.9	2.0

To calculate how much the costs of delivering NPME2 will increase by when inflation is accounted for, we applied the OBR's forecasted percentage change to the total expenditure we had calculated for each of the different types of costs.<sup>24</sup> We then aggregated these costs to get the total amount all Hubs will spend in real terms in the years 2024, 2025, 2026, 2027, and 2028. Please note, we did not include the costs of the transition to fewer Music Hubs in the inflation calculations as activity related to the transition is unlikely to continue to 2028.

<sup>23</sup> House of Commons Library. Inflation in the UK: Economic indicators. Available at: <https://commonslibrary.parliament.uk/research-briefings/sn02792/#:~:text=The%20Consumer%20Prices%20Index%20>

<sup>24</sup> Inflation. Office for Budget Responsibility. Available at: <https://obr.uk/forecasts-in-depth/the-economy-forecast/inflation/>

Music Hubs currently receive £76.1m per year of government funding to deliver NPME. This funding has been the same in cash value since 2019, representing a significant real terms cut over this period.<sup>25</sup> This is also less than the government allocation to music education in 2011.<sup>26</sup>

Given the vast majority of music service expenditure is on staffing and that payroll inflation is likely to exceed CPI forecasts, our estimates in this area are likely conservative. In addition, as revealed by our survey and workshop insights, many Hub leaders are concerned about pensions, pay awards, and National Insurance contributions, and the significant bearing that these will have on the costs they will face looking forward. Again, these are not fully captured by the CPI forecasts.

<sup>25</sup> Music Mark. The English National Plan for Music Education. 2024. Available at: <https://www.musicmark.org.uk/news/the-english-national-plan-for-music-education/#:~:text=Music%20Hubs%2C%20a%20partnership%20of,to%20music%20education%20in%202011.>

<sup>26</sup> Ibid.

# THE COSTS ASSOCIATED WITH NPME2

In this section, we will set out the costs of NPME2 based on the calculations we have made from our survey data. We will first look at the overall cost and then explore the specific costs that are contributing to this overall figure, including staff costs, instrument and equipment costs, the costs of transitioning to fewer music hubs, and fundraising costs.

## TOTAL COSTS

Music Hubs' current annual expenditure on tasks related to delivering NPME2 is £196.4m. Based on our survey respondents, Hubs believe that their expenditure will need to increase on average by at least 10% to deliver all aspects of the plan. On top of this, we have then added the projected increase in inflation. Based on this calculation, we estimate that by 2028, Hubs will need an additional £32.3m in funding per year to be able to cover these increased costs. Over the next five years, Hubs will require £161.4m in additional funding to keep up with cost increases, based on their expenditure in 2022/23. On top of this, we estimate that an additional £1.4m will be needed to cover the costs of moving to a structure of 43 HLOs. This means that there is a total funding gap of £162.8m that needs to be filled over the next five years, if NPME2 is to be delivered. This is likely to be an underestimate, however, given the pressures that music education professionals are working under and the increased ambitions of NPME2, as we detail throughout this report.

The following table shows a breakdown of the different costs we have considered in our calculations, drawing on Arts Council England cost categories.<sup>27</sup>

<sup>27</sup> Arts Council England. Hub Data Dashboard. Available at: <https://www.artscouncil.org.uk/MusicHubs/music-hubs-survey-and-data#t-in-page-nav-2>

**TABLE 2**

THE COSTS INCURRED BY MUSIC HUBS TO DELIVER ACTIVITY RELATED TO NPME2 AND HOW THESE COSTS WILL INCREASE WHEN ACCOUNTING FOR FORECAST INFLATION

	2024	2025	2026	2027	2028
<b>Delivery costs</b>	£167.7m	£170.3m	£173.0m	£176.3m	£179.8m
<b>Administrative costs</b>	£34.9m	£35.4m	£35.9m	£36.6m	£37.4
<b>Costs related to the transition to fewer music hubs</b>	£1.4m				
<b>Instrument Costs (repairs, renewals, storage)</b>	£5.5m	£5.6m	£5.7m	£5.8m	£5.9m
<b>Other costs</b>	£12.7m	£12.9m	£13.1m	£13.4m	£13.6m
<b>Total costs</b>	<b>£222.2m</b>	<b>£224.1m</b>	<b>£227.7m</b>	<b>£232.0m</b>	<b>£236.7m</b>

Our research with Music Hubs and schools has revealed that the shortfall in funding is having an adverse impact on their ability to deliver NPME2 and provide high quality music education for all children and young people. In the remainder of this chapter, we will draw on findings from our survey and workshops to explore the factors contributing to the costs Music Hubs are facing and the implications of this for delivering NPME2.

## DELIVERY COSTS

To provide an excellent, rounded music education for all children and young people, we need a staff body of well-supported music education professionals. This includes everyone from Hub leaders, music services, expert music educators, peripatetic teachers, instrument technicians, administrative staff, and the countless others involved in delivering music education. It is vital that Music Hub networks are able to recruit and retain a strong team of people with the relevant knowledge, skills and experience, and that staff are given opportunities for professional development that help them meet the ambition of NPME2.

In our survey, we asked our sample of Hub leaders about the various delivery costs they incur and the extent to which these costs were a cause for concern. The findings make for extremely concerning reading.

Our survey evidence and workshop findings indicate that Hub partnerships are struggling to meet delivery costs, particularly staff costs, and that this is negatively impacting their ability to deliver NPME2. Taken with the testimony of Hub leaders, school leaders, and others that we spoke with through our workshops, this paints a worrying picture - if Hub partnerships do not have the resources to employ enough staff, there will clearly be an impact on the quantity and quality of music education provision in local areas. Moreover, where Hub partnerships cannot properly compensate staff for their expertise and the hours they are putting in, staff will be more likely to leave - exacerbating existing staffing challenges and placing further threats on the quality of provision. In the context of high inflation and increasing demands on Music Hub partnerships, the government urgently needs to address the current funding shortfall.

## Music Hubs are struggling to meet delivery costs

As shown in Table 2, we estimate that Music Hubs need to spend £167.7m to meet the delivery costs of the National Plan for Music Education and this will rise to £179.8m by 2028 when adjusted for inflation.<sup>28</sup> These figures are far beyond what can be covered through the current funding arrangement for Music Hubs. In addition, several Hub leaders in our survey explained that their staff salary offers were currently too low and that this weakened their ability to attract good staff and provide meaningful career progression. We also regularly heard testimony from Hub leaders about staff having to go above and beyond to deliver and that this raised concerns about the retention of current staff. Our calculation of delivery costs is therefore likely to be an *underestimate* based on current market conditions; the true costs for delivering NPME2 - particularly compensating staff properly and building staff capacity to fully deliver NPME2 - would likely be higher than our conservative estimate.

The very real, material consequences of these staffing issues were apparent across our surveys and workshops, with a lack of funding compromising Hubs' ability to realise the ambitions of NPME2. One Hub leader explained that they were being forced to downsize their team due to rising staff costs and funding shortages - reducing their offer to the community as a consequence. Another Hub leader explained that they were having to increase fees for schools and families due to insurmountable staffing costs. Such a step threatens to exacerbate existing socio-economic inequalities and to compromise the inclusive, universal provision that is meant to be at the heart of NPME2's ambitions. While NPME2 sets an expectation that Hubs and schools should make efforts to remove barriers to music education for children from lower socio-economic backgrounds, the current funding situation is itself creating financial barriers to access.<sup>29</sup>

The individual organisations within Music Hub partnerships are not making these difficult decisions lightly - no one involved in the delivery of music education wants to see reduced teams and greater costs for parents and pupils. However, in the current funding situation, Music Hubs across the country are having to make these difficult decisions every day to balance their books and keep their work going. It should be acknowledged here that this survey was conducted prior to the October 2024 budget and the associated National Insurance rate increase, which will place a further cost pressure on Hub partnerships.

The remainder of this section explores different aspects of staffing costs and their associated challenges, drawing on survey and workshop insights.

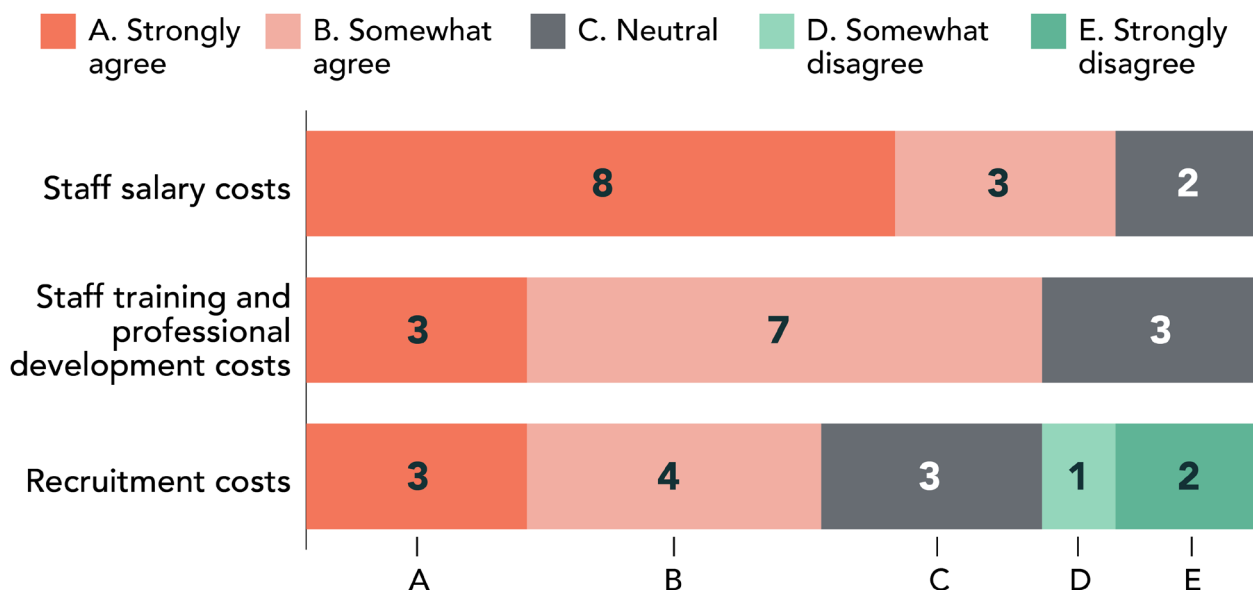
<sup>28</sup> This figure combines the delivery costs for both core and extension roles but does not represent the full cost of implementing the NPME.

<sup>29</sup> HM Government. 2022. The power of music to change lives: A National Plan for Music Education. Available at: [https://assets.publishing.service.gov.uk/media/62bc1242d3bf7f292040d364/The\\_Power\\_of\\_Music\\_to\\_Change\\_Lives.pdf](https://assets.publishing.service.gov.uk/media/62bc1242d3bf7f292040d364/The_Power_of_Music_to_Change_Lives.pdf)

**FIGURE 1**

**Music Hub leaders were particularly concerned about staff salary and training costs.**

Music Hub leader responses to the statement "I am concerned about our ability to meet \_\_\_\_\_ staff costs in the next academic year"



### Staff salary costs

The vast majority of Music Hubs in our sample reported staff salaries being a cause for concern across employers within the partnership. It is clear that consistently high-levels of inflation, alongside stagnant revenue funding for Music Hubs have placed significant pressures on both Hub partners and staff. While music services and others within the Hub partnerships have seen their salary costs rise, many members of staff have still seen real terms falls in their wages, putting the future of Music Hub staffing in a precarious position. In addition, a range of other costs - including those associated with the increased age range to be covered by NPME2 - are not accounted for in the current funding arrangement, placing yet further pressure on Music Hub partnerships and threatening to compromise the achievement of NPME2.

The remainder of this section outlines some of the key staffing cost issues that Hub partnerships are navigating, drawing on survey and workshop insights.

#### i) Increasing age range

Across our workshops and surveys, we heard that the expanded age range being covered as part of NPME2 required additional capacity, which is difficult to meet within current workload and staffing constraints. While Hubs are now being asked to cover the early years and take a renewed focus on young people's progression into music-oriented careers and routes into industry, these increases in scale and scope are not reflected in the current funding arrangement. Moreover, there are concerns that a Music Hub's geography will greatly shape its ability to cover the extended ambitions of NPME2, given the variation in resources at their disposal (as discussed elsewhere in this report).

The government needs to ensure that Music Hub funding reflects the true costs associated with meeting NPME2's extended demands, including the increased age range.

## ii) Teacher pay award and Teacher Pension Scheme

During a workshop with Hub leaders and other stakeholders in late June, as well as in our survey of Hubs, we heard about Hub partners, in particular Music Services, struggling to meet their teacher pay and pension contributions, which have not been matched by increased funding and income. The new government has taken positive steps in both these areas, especially supporting music services still within Local Authorities, but concerns remain about the long-term support for teacher pay and the Teacher Pension Scheme (TPS).

Shortly after being elected, the government accepted the School Teachers' Review Body's recommendation of a 5.5% pay increase for teachers and leaders, with funds coming through the Core Schools Budget Grant (CSBG) to support schools to meet these costs in the 2024/25 financial year.<sup>30</sup> In late August, the Minister for School Standards confirmed that they expected local authority-based Music Hub partners' centrally employed teachers to be included in this distribution.<sup>31</sup> While this funding is welcome, the funding will not cover non-LA based Music Hub partners' teacher costs. Moreover, given that many music education staff have contracts linked to or which closely reflect Teacher Pay and Conditions, there are concerns about the ability of some Hub partners to meet these increased costs. The costs of this increase will likely vary across Hubs, depending on their reliance on LA-based versus non-LA based teachers within delivery organisations.

The government also recently announced that the DfE will provide support to non-LA HLOs and Delivery Partners who still have staff in the Teacher Pension Scheme (TPS) to cover increases to employer contributions implemented since 2019, with funding to make up this difference until the end of this financial year (31st March 2025).<sup>32</sup> While this provides some short-term relief, as Music Mark has noted, the DfE's delay means that some employers have already made decisions to freeze staff pensions and draw up alternative pension schemes. For those still able to provide TPS, the announcement does little to give assurances about a long-term strategy for providing support with the rising costs of pension contributions.<sup>33</sup> One respondent to our survey explained that they had been forced to remove teaching staff from the TPS as a cost saving measure, which had affected take-home pay and conditions of service and, in turn, hurt staff morale. Moreover, this approach is not possible for LA-based music services, which would need to move teaching staff to the Local Government Pensions Scheme (LGPS) were they to withdraw them from the Teacher Pension Scheme (TPS). With the end of this financial year fast approaching, uncertainty surrounding pension top-ups is a great cause for concern, threatening again to hurt staff morale and take time away from music education delivery.

These insights speak to the complexity of the staff pay and pension landscape, which varies across Music Hub partnerships. It also emphasises the importance of having a long-term funding arrangement that gives Hub partnerships and the staff within them assurances that they will be fairly compensated for their work. Assurances about long-term funding can help Hub partnerships to manage the costs associated with renegotiations and restructures and also improve staff satisfaction, which should help boost recruitment and retention efforts.

## iii) Staff training and professional development costs

Investment in staff training and professional development is crucial in ensuring that Hubs are sharing and developing best practice, and that the education they provide is informed by the best available evidence. The vast majority of the Hubs we surveyed reported being concerned about the ability of the partnership to meet staff training and development costs in the next academic year.

30 Music Mark. Teachers Pay Award: Letter to the Secretary of State for Education. 2024. Available at: <https://www.musicmark.org.uk/news/teachers-pay-award-letter-to-the-secretary-of-state-for-education/>

31 *ibid.*

32 Music Mark. Support Confirmed for the Teachers' Pension Scheme. 2024. Available at: <https://www.musicmark.org.uk/news/support-confirmed-for-the-teachers-pension-scheme/>

33 *ibid.*



As previously discussed in relation to salary costs, there are concerns about what the increased ambition of NPME2 might mean for training and continuing professional development (CPD) needs. For instance, the increased age range may require peripatetic staff to receive additional training to support Early Years Foundation Stage settings. Elsewhere, HLOs may wish to acquire ongoing specialist training and support as they look to develop their inclusion strategies, including approaches to supporting pupils eligible for the pupil premium and those with special educational needs and disabilities (SEND).

The restructuring of Hub governance to 43 HLOs could present opportunities but also additional costs when it comes to training and CPD. As discussed during the Select Committee Hearing on 21st May 2024,<sup>34</sup> there may be benefits to economies of scale in terms of sharing good practice and CPD, and pooling expertise to improve provision. However, there were also concerns raised around possible diseconomies of scale, where organising training across large geographical areas incurs significant costs, despite the best collaborative efforts of partnership leaders. The (then) Schools Minister, Damian Hinds, acknowledged the challenge of trying to balance economies of scale against the need for local responsiveness (Q72).<sup>35</sup>

It is crucial that staff feel that their development needs are met and that they have opportunities to improve their practice and specialisms. Music education is only as good as the specialists working every day with children and young people. The government needs to empower Hub partnerships to invest in their staff and ensure they are giving children and young people the best music education opportunities they possibly can.

### Recruitment costs

Across our survey and workshops, Hub leaders were concerned about staff recruitment and retention. Many of these concerns were associated with staff salaries, pensions, development needs, and wider working conditions, such as workload. In the context of concerns about staffing shortages, it is important to acknowledge recruitment costs - in terms of staff time and external costs.

To deliver the ambitions of NPME2, Music Hub partnerships need to recruit excellent staff. However, the majority of Hub leaders in our sample reported being concerned about meeting recruitment costs in the next academic year. One of our respondents explained that slow wage growth in their organisation had meant that they were paying below the market rate, leaving them with concerns about attracting good staff. Another explained that there was no contingency built into their budgets for long-term absence or maternity leave, meaning that their staffing situation was not resilient to such changes. We also heard from one Hub leader who explained that it was unacceptable to expect staff to deliver at the level expected of classroom teachers but on a much lower level of pay. In this challenging context, Hubs were often struggling to recruit staff and having to invest greater staff time into recruitment and/or funding external recruiters.

### Schools-related challenges and staff costs

Underpinning many of the staffing challenges that Hub partnerships face is the wider context of music teacher recruitment and retention in the UK. In 2023, the government met only 27% of its target for secondary school trainee music teachers.<sup>36</sup> If there are not enough music teachers, Hub partnerships and schools will not be able to provide high-quality music education to all children and young people.

<sup>34</sup> Education Select Committee. 21st May 2024 - Music hubs - Oral evidence. 2024. Available at: <https://committees.parliament.uk/event/21635>

<sup>35</sup> *ibid.*

<sup>36</sup> National Foundation for Educational Research. Teacher Labour Market in England Annual Report 2024. 2024. Available at: <https://www.nfer.ac.uk/publications/teacher-labour-market-in-england-annual-report-2024/?web=1>

Schools are facing a pronounced teacher recruitment and retention crisis, with teacher supply in a dire state, and enduring concerns about teaching workload and working hours, partly driven by worsening pupil behaviour since the pandemic.<sup>37</sup> In this context, there are fears that a lack of specialist music teachers and a wider lack of capacity across the system may see music squeezed out of school life. This then places further demands on Hub partnerships, who have to do their best to plug gaps in the system with limited resources.

NPME2 sets out the need for music to “be represented in every school’s leadership structure, with a designated music lead or head of department at school and/or academy trust level, for primary and secondary phases” (p. 5).<sup>38</sup> It also requires schools to work in partnership with their Hub to develop a Music Development Plan that “captures the curricular and co-curricular offer and sets out how it will be staffed and funded”. With enduring teacher supply issues, many schools may struggle to make music a priority in this way and to have a designated member of staff driving this work. We heard from one school leader that a lack of capacity would leave them with little time to engage with Music Hubs. This may present particular challenges to certain schools, such as smaller schools, where senior and middle leaders take ownership of a greater number of curricular, extra-curricular, and other responsibilities, for instance. There were also concerns that the cost of supply teachers (often obtained through expensive agencies) would act as a barrier for school teachers to get time out of class to support Hub activities (such as shared Hub-wide concerts and attending CPD ) that require time out of the school day.

Outside of teacher supply, there are also concerns about accountability measures incentivising schools to deprioritise music education.<sup>39</sup> At present, the EBacc exerts a significant influence over what students study at secondary school.<sup>40</sup> Schools have been incentivised to prioritise certain subjects to increase the proportion of their pupils achieving the EBacc (which is achieved by gaining GCSE qualifications in a certain set of subjects). This has come at the expense of music and other arts subjects, which are excluded from the measure.<sup>41</sup> The government has shown promising signs of addressing this issue - its manifesto includes an ambition for children to study a creative or vocational subject up to the age of 16 and for accountability measures to reflect this.<sup>42</sup> The Curriculum and Assessment Review will be a great opportunity to recalibrate our accountability system to support the place of music in schools and to consider placing music on a stronger statutory footing.<sup>43</sup>

Overall, these school-related barriers may compromise schools’ ability to meet the aspirations of NPME2 delivery but also present additional costs for Hubs, which will have to put more time and resource into engagement and compensation for schools’ lack of capacity. The government needs to accompany a significant uplift in Music Hub funding with a concerted effort to raise the support for and profile of music education in schools. This includes reassessing the ITT bursary available to secondary music teachers and extending it to the primary phase as well as recalibrating accountability measures following the Curriculum and Assessment Review.

In the longer term, the government should consider a move towards giving schools a statutory obligation to engage and work with Music Hubs. This will help give much-needed clarity and consistency to the relationship between Hubs and schools, and ensure that the full benefits

37 *ibid.*

38 HM Government. 2022. The power of music to change lives: A National Plan for Music Education. Available at: [https://assets.publishing.service.gov.uk/media/62bc1242d3bf7f292040d364/The\\_Power\\_of\\_Music\\_to\\_Change\\_Lives.pdf](https://assets.publishing.service.gov.uk/media/62bc1242d3bf7f292040d364/The_Power_of_Music_to_Change_Lives.pdf)

39 Independent Society of Musicians. Call for Evidence: The Curriculum and Assessment Review. Available at: <https://www.ism.org/news/curriculum-and-assessment-review/>

40 Menzies, L., Yates, W. and Huband-Thompson, B. Balancing Act: Navigating the Tensions In our School System. 2023. Available at: <https://cfey.org/reports/2023/08/balancing-act-navigating-the-tensions-in-our-schools-system/>

41 Cultural Learning Alliance. Report Card 2024. Available at: <https://www.culturallearningalliance.org.uk/wp-content/uploads/2024/05/CLA-2024-Annual-Report-Card.pdf>

42 Labour. Change: Labour Party Manifesto 2024. 2024. Available at: <https://labour.org.uk/wp-content/uploads/2024/06/Labour-Party-manifesto-2024.pdf>

43 Music Mark. The Curriculum and Assessment Review. Available at: <https://www.musicmark.org.uk/news/the-curriculum-and-assessment-review/>

of the partnerships model can be realised. Here, it will be crucial that schools are given the support, resources and incentives to enable such partnerships, and to tackle potential barriers to partnership.

### Hidden staffing costs - stretched staff and the danger of a spiralling staffing crisis

This section has highlighted a range of staffing costs and challenges associated with the delivery of NPME2. At present, Music Hub partnerships are struggling to recruit, develop and support their workforce. At the same time, budget and capacity constraints mean staff across the Hub partnerships are too often having to go above and beyond to teach pupils, run ensembles, put-on concerts, coordinate trips, build relationships with music industry, and the myriad other activities they support.

This is unsustainable. Heavy workloads and long working hours are among the most common reasons teachers leave the profession.<sup>44</sup> The additional hours that music professionals are having to work to deliver NPME2 could therefore contribute to staff turnover and exacerbate the existing recruitment and retention challenges that Hub partnerships are facing, which would put further strain on the music education system and reduce the opportunities available to children and young people.

It is evident that staff costs are putting a significant strain on Music Hub finances and much greater support is needed if we are to achieve the ambitions of NPME2.

## **COSTS ASSOCIATED WITH INSTRUMENTS, EQUIPMENT, TECHNOLOGY AND VENUES**

As is acknowledged in *The power of music to change lives*, access to good quality musical instruments, equipment and technology is a key feature of high-quality music education.<sup>45</sup> Individual tuition, ensemble playing, recording and other practical opportunities rest on having a range of instruments and technologies that are accessible, both financially and in terms of catering to different pupil needs. In addition to adequate stock, Hubs and schools need to be able to provide sufficient training for staff to use and maintain these resources, particularly those that are adapted for students with particular special educational needs and disabilities. Music provision also requires accessible, appropriate venues that can host lessons, ensembles, workshops, concerts and other provision.

As shown in Table 2, we have estimated that Music Hubs need to spend £5.5m per year in costs associated with having renewed/increased instruments stocks (repairs, renewals, storage) to deliver the National Plan for Music Education and this will rise to £5.9m per year by 2028 when adjusted for inflation.

In our survey, we found significant concerns about meeting these costs in the next academic year. While many Hubs were less concerned about their stock of instruments, particularly in the context of the Capital Grant, there were widespread concerns about a lack of funding for repairs, replacement cases and related costs - meaning they could not make use of their existing stock. These were accompanied by fears around storage costs and procurement and training for adaptive instruments. We also heard widespread concerns about the availability of appropriate venues for teaching, ensembles, performances, and other purposes.

44 National Foundation for Educational Research. Teacher recruitment and retention crisis shows no signs of abating, new report reveals. 2024. Available at: <https://www.nfer.ac.uk/press-releases/teacher-recruitment-and-retention-crisis-shows-no-signs-of-abating-new-report-reveals/#:~:text=This%20is%20particularly%20worrying%20as,compared%20to%20the%20previous%20year.>

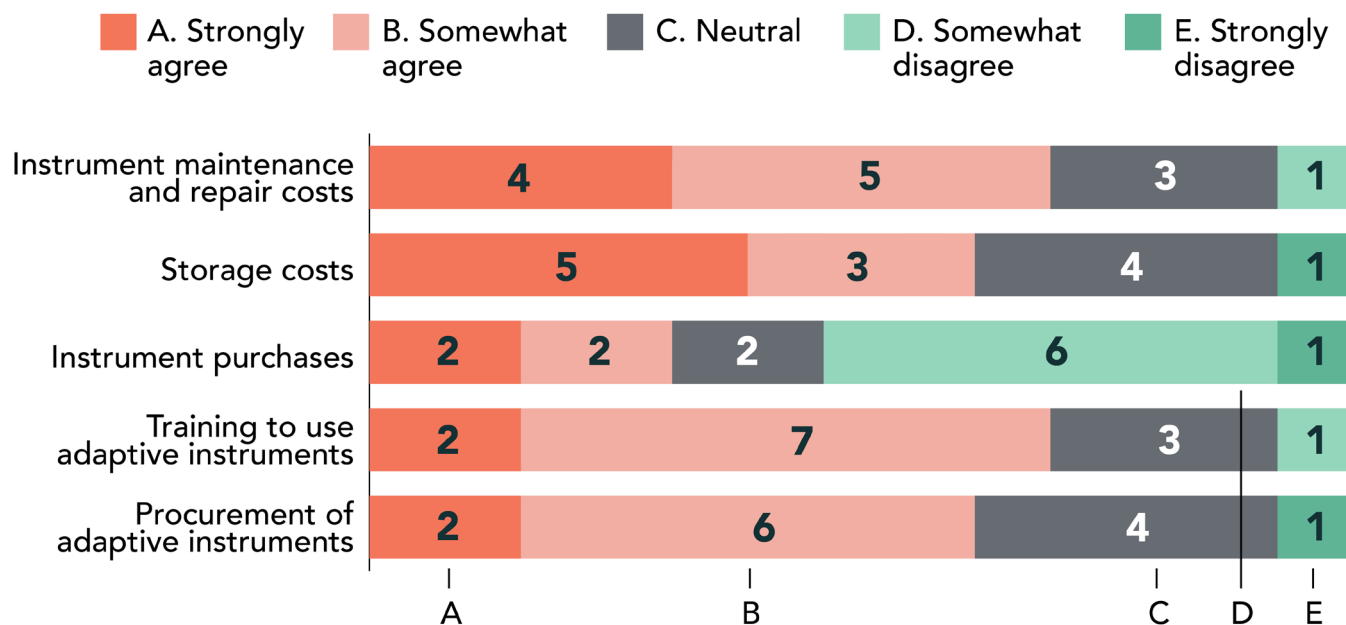
45 HM Government. 2022. The power of music to change lives: A National Plan for Music Education. Available at: [https://assets.publishing.service.gov.uk/media/62bc1242d3bf7f292040d364/The\\_Power\\_of\\_Music\\_to\\_Change\\_Lives.pdf](https://assets.publishing.service.gov.uk/media/62bc1242d3bf7f292040d364/The_Power_of_Music_to_Change_Lives.pdf)

In practice, these issues mean that music education specialists are struggling to access the resources they need to provide the best possible music education for the children and young people they serve. Music Hubs continue to be hurt by consistent cost inflation and stagnating funding, resulting in Hubs doing more for less at the precise moment that NPME2 is placing even greater demands on those delivering the plan.

## FIGURE 2

### Music Hubs leaders identified a range of costs associated with instruments, equipment and technology.

Music Hub leader responses to the statement *"I am concerned about our ability to meet \_\_\_ instrument and equipment costs in the next academic year"*



### Instrument purchases

In our survey of Hub leads, we found that just under half of our respondents were concerned about meeting their instrument and equipment costs in the next academic year. This level of concern is lower than the other cost areas covered in this section. This may, in part, reflect the Capital Grant's focus on covering such costs and Hubs' current supply of instruments.

This being said, Hub leaders expressed concerns over the costs they would take on in terms of the actual distribution of instruments themselves, which is a hidden cost associated with instrument purchases that would need to be covered through other income, outside of the Capital Grant. There were also a range of other hidden costs associated with instruments, including repair, maintenance and storage, which are covered elsewhere in this section.

### Instrument maintenance and repair costs

While Hub leaders we spoke with appreciated the availability of the Capital Grant, there were great concerns in our workshops about its emphasis on new stock at the expense of maintenance and repair. The Capital Grant does not cover 'ordinary' repairs, (such as restringing instruments), with the guidance stating that it is "highly unlikely that any repairs would meet the criteria for eligible expenditure under the scope of this grant" (p. 11).<sup>46</sup> There are also various

<sup>46</sup> Arts Council England. Music Hub Capital Grant for Musical Instruments, Equipment and Technology. 2024. Available at: <https://www.artscouncil.org.uk/media/22435/download?attachment>

instruments, equipment and technology expenses that are not covered by the grant, such as 'consumables' (like reeds, strings and cables).

In our workshops, we heard frustrations among some who reported that their Hub had, either centrally or through their partners (e.g. schools), a significant stock of instruments that were in need of maintenance and repair. These Hub leads explained that they would have liked to have spent their Grant funding on fixing existing instruments, which would be more cost effective and environmentally responsible than replacing their stock but were unable to do so through the Grant. The lack of flexibility within the Grant also means that any damage to new stock and ongoing consumable costs cannot not be covered under the Grant, meaning these costs need to be covered through other funding sources. One Hub leader explained that over the next 12 months they were expecting costs to be driven up by the need to pay skilled staff who are capable of servicing and repairing instruments - costs that would need to be covered outside the Capital Grant.

### Storage costs

Over half of our sample of Hub leaders cited suitable storage as a significant issue. Hub leaders explained that increasing their stock of instruments would come with associated storage costs, with several leaders sharing accounts of such costs increasing and/or being expected to increase. Again, Hub leaders were concerned that instrument storage costs are not covered under the Capital Grant, and that this will be another significant cost that Hubs will need to find funding for.

### Procurement of adaptive instruments

The Capital Grant can be put towards various instruments, equipment, technologies and accessories that improve accessibility (e.g. motion sensors and eye-tracking devices). However, the actual process of establishing need or providing any consultation with pupils, teachers and others is not covered by the grant.

While, as discussed earlier in this section, there appeared to be less concern about the cost of purchasing instruments in general, there were greater levels of concern about the costs associated with the procurement of adaptive instruments. This reflects not just the cost of the instruments themselves but also the staff time associated with the procurement process, including the identification of need, which may involve extensive consultation with schools, SENDCOs and other professionals. For instance, in his evidence to the Education Select Committee, Michael Summers (Durham Music Service) explained that their approach is often to go into a school, have a conversation with the child and then work with an instrument expert to make an adaptive instrument for the pupil.<sup>47</sup> Such consultation costs are not covered by the Capital Grant, meaning Music Hub partnerships will need to meet these costs through other income sources.

Moreover, Music Hubs are expected to conduct a needs analysis in order to access the Capital Grant.<sup>48</sup> However, given the grant is time-limited, this creates a situation where Music Hubs are having to judge pupil need at a given moment in time, rather than being able to use the grant to respond to the changing needs of the children and young people they support over time. This threatens to produce a mismatch between the adaptive instruments made available to Hubs through the grant and the changing needs of pupils in their Hubs.

<sup>47</sup> Education Select Committee. 21st May 2024 - Music hubs - Oral evidence. 2024. Available at: <https://committees.parliament.uk/event/21635>

<sup>48</sup> Arts Council England. Music Hub Capital Grant for Musical Instruments, Equipment and Technology. 2024. Available at: <https://www.artscouncil.org.uk/sites/default/files/2024-05/Music%20Hub%20Capital%20Grant%20-%20Essential%20information%20-%20Large%20Print.pdf>

## Training to use adaptive instruments

Having purchased adaptive instruments, it is crucial that music staff are confident in being able to support children and young people to use them effectively. Our workshop participants told us that this may require additional training, which cannot be covered by the Capital Grant and will therefore entail additional costs for Hubs. Hub leaders were concerned that staff training for adaptive instruments was crucial if they were to provide a truly inclusive and accessible music education and were therefore concerned about their capacity to meet such costs.

## Venue costs

It is vital that Music Hubs are able to access appropriate venues that meet accessibility needs and capacity requirements for regular weekly tuition and rehearsals as well as for performance opportunities. This is fundamental to the continuation of teaching, ensembles, concerts and other essential music education opportunities. The majority of respondents to our Hub leader survey said that they were concerned about their ability to meet venue costs in the next academic year, putting their ability to deliver these important aspects of NPME2 at risk.

Access to appropriate venues varies greatly by geography. Some Hubs may own, or otherwise have free or subsidised access to venues - this might include concert halls, theatres, churches, gyms or other spaces. Others will have to cover often exorbitant rental costs to ensure they can access an appropriate venue for their education provision. In some cases, children and young people have to travel significant distances and/or make complex journeys to be able to rehearse and perform in suitable spaces. This then entails significant and spiralling travel costs that need to be covered by parents - creating another socio-economic barrier to access - or by Hubs, schools and others who are already navigating cost pressures under stagnant budgets. One Hub leader explained that grant allocations did not account for transport considerations, which were a significant cost for them, given their Hub's large geographical area.

The importance of access to affordable, appropriate venues was illustrated by one school leader we spoke with who, having rehearsed with a large ensemble, had to hold an event in a venue with terrible acoustics, meaning the musicians could not hear one another and the performance did not go well as a consequence. Such experiences can both undermine the significant investment of specialist music education professionals and, crucially, have a lasting impact on the children and young people that they are introducing to the rich world of music performance and appreciation.

An uplift in funding will help Music Hubs ensure children and young people have access to high-quality, appropriate venues that support the musical opportunities outlined within NPME2 and cover additional costs associated with venue access.

## Conclusion

This section has illustrated the significant, unsustainable cost pressures that Music Hubs are facing despite the welcomed funding for the purchase of instruments and technology via the Capital Grant. In addition, it shows the significant staff time and resource that is needed to administer such costs, find solutions where options are limited (e.g. seeking out instrument repairs where options are limited), compensate for the limitations of the Capital Grant, and ensure that capital (e.g. instruments) are put to effective use. It underlines the need for far greater financial investment in Music Hubs, as well as the wider system, including high-quality local venues, to ensure we can achieve the full ambitions of NPME2.

## INCOME GENERATION COSTS

Music Hubs have had to manage sustained cost inflation in the context of long-term real term cuts to funding. The previous two sections lay bare the importance of a longer-term funding arrangement, founded on greater levels of trust and rooted in sustained investment in Music Hubs, schools and wider community infrastructure.

We have argued that music education is fundamentally too important to be left to chance - reliant on the goodwill of stretched Music Hub leaders, school teachers, peripatetic practitioners, and others, or on the availability of appropriate local music venues within a given area, among many other examples. Music Hubs need proper, sustained investment to meet the ambitions of NPME2. However, the current funding model for Music Hubs - which is heavily reliant on Music Hubs conducting their own income-generating activities - threatens to exacerbate the inequalities in provision that already exist across the country and places significant additional financial and human resource costs on Music Hubs, alongside other pressures. In this section, we focus on the challenges associated with Music Hubs' income generation expectations and consider what this means for the delivery and sustainability of NPME2.

### Music Hubs are reliant on fundraising from parents, schools, trusts and other sources

At least 50% of a Music Hub's total income (excluding the Capital Grant) is expected to come from sources outside the Music Hub Core Revenue Grant.<sup>49</sup> This fundraising can come from a range of sources, including parents, schools, trusts and foundations, and other sources. According to 2022/23 Arts Council England data, Music Education Hubs, on average, raised 66.86% of income from sources other than the Hub grant, with school (24.10%) and parental (22.61%) income being the most significant.<sup>50</sup>

Traded services are an important income source for Music Hubs. However, both schools' and parents' means to pay for Hub support and services will vary between areas and communities, which threatens to exacerbate existing inequalities in music education access. Child Poverty Action Group (CPAG) has noted that children from low-income households face a range of financial barriers to education access, including stationery and equipment costs, extra-curricular activities and school trips, among others.<sup>51</sup> In this context, Music Hubs publish remissions policies and work hard to ensure that cost is not a barrier to children and young people's participation. However, in the context of increasing costs and stagnant government funding, this is an enduring challenge.

49 Arts Council England. Music Hub Investment Programme: FAQs. 2024. Available at: <https://www.artscouncil.org.uk/our-open-funds/music-hub-investment/music-hub-investment-programme-frequently-asked-questions#t-in-page-nav-7>

50 Arts Council England. Hub Data Dashboard. Available at: <https://www.artscouncil.org.uk/MusicHubs/music-hubs-survey-and-data#t-in-page-nav-2>

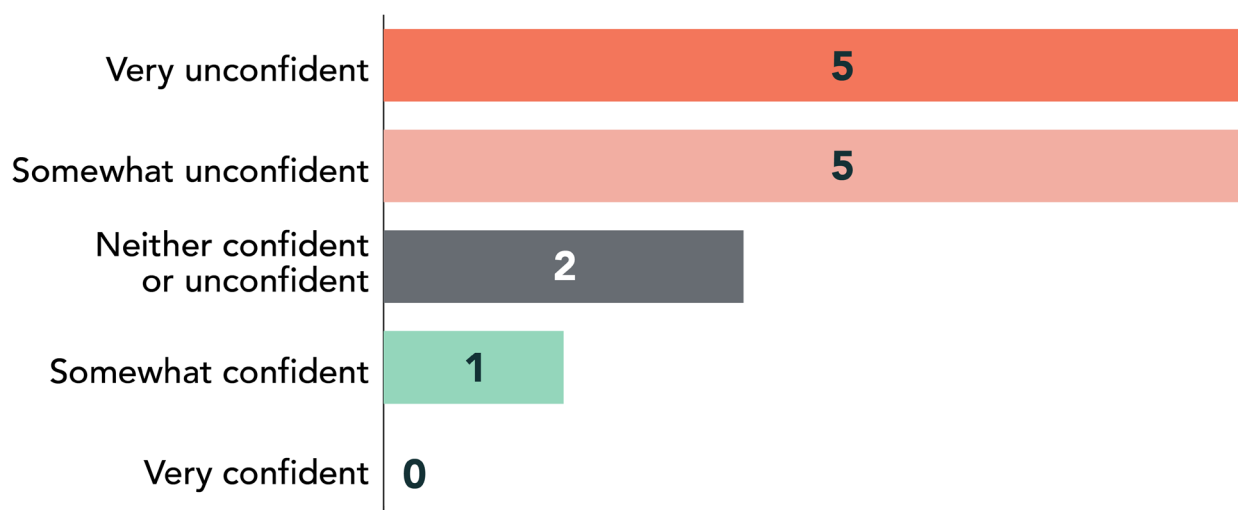
51 Child Poverty Action Group. The Cost of the School Day Calendar 2024/25. 2024. Available at: <https://cpag.org.uk/sites/default/files/2024-08/Cost%20of%20the%20School%20Day%20Calendar%202024-25.pdf>

From our survey and workshops, we found that there are a range of issues associated with the fundraising expectations placed on Music Hubs. The vast majority of Hub leads in our survey said they did not feel confident that they would be able to generate enough income to deliver the plan. This is deeply concerning and highlights the need for a guaranteed, long-term funding settlement for Music Hubs. In addition, as is discussed in the rest of this section, it is clear that fundraising opportunities and challenges vary greatly across the country, whether that be the presence of trusts and foundations in a given Hub geography, the restrictions of the Hub lead or key partners to undertake fundraising activity (i.e. Local Authorities), or the ability of parents and schools to contribute.

**FIGURE 3**

**Music hubs leaders were not confident in their ability to fundraise.**

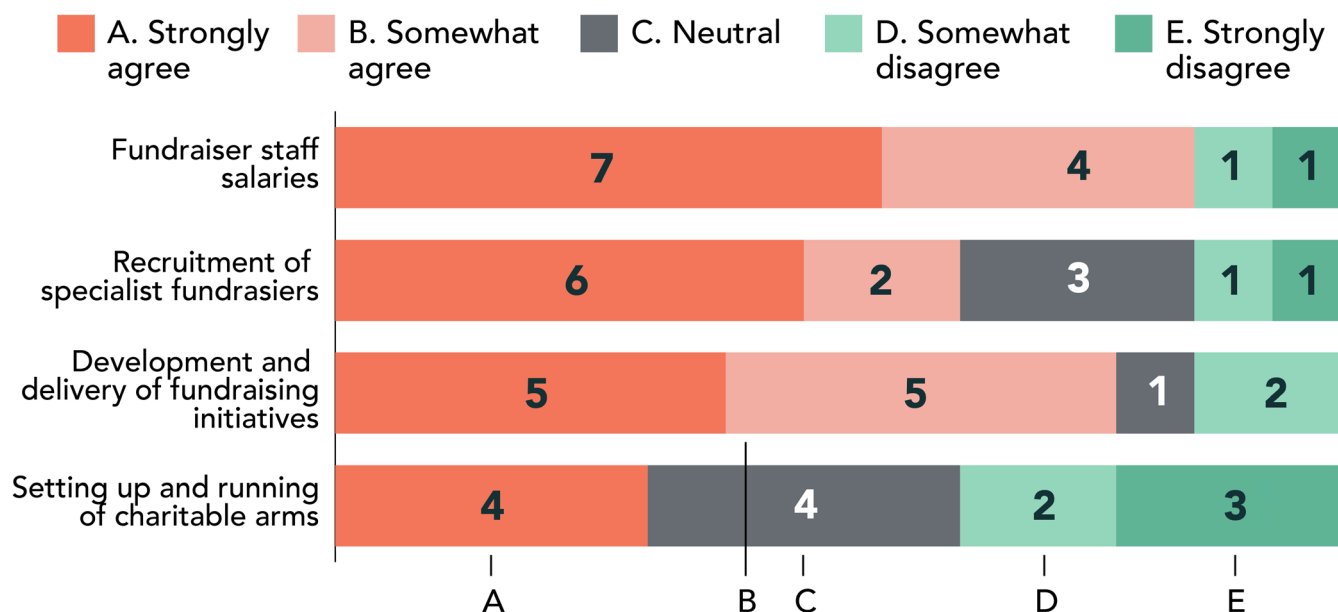
Music Hub leader responses to the question *“How confident are you that your hub will be able to raise the money needed to effectively implement the NPME2?”*





**FIGURE 4**

**Music Hub leaders voiced concern about various costs associated with fundraising.** Music Hub leader responses to the statement “I am concerned about our ability to meet \_\_\_\_\_ fundraising costs in the next academic year”



### Development and delivery of income-generating initiatives

There are multiple ways in which Music Hubs may fundraise. This could include collections at concerts and participation fees, coffee shops and other initiatives, school fees for Hub-led CPD or grants from trusts and foundations, among other sources. The composition of Music Hubs’ fundraising activities will depend on a range of variables, such as the capacity in their team, the communities they serve, and the make-up of funds available from trusts and foundations.

The vast majority of the Hub leaders in our survey were concerned about their ability to meet costs associated with the development and delivery of fundraising initiatives, revealing the precarious position that the current funding model has put Hubs in.

#### i) Traded income

Traded services are a key aspect of most music services’ income, enabling services to grow and develop. However, in the context of a cost of living crisis, Music Hubs are having to work hard to keep their services affordable for parents and schools, particularly given the cost pressures that Hubs themselves are facing. One Hub leader, for instance, explained stretched school budgets had reduced their ability to buy in Hub services. As part of these efforts to address inclusion, Music Hubs are required to have a remissions policy, giving accommodations that allow disadvantaged pupils (e.g. those eligible for Pupil Premium) to access opportunities for free or at a discounted rate but inflationary pressures threaten to make these efforts even more challenging.

Schools are under significant funding pressures and also face accountability pressures (such as the EBacc) that have often seen music deprioritised in schools. Without changes to accountability measures, schools are unlikely to be able to maintain or increase spend at a level that Hubs will require in order to balance budgets. This, again, poses a significant challenge for Music Hubs.

## ii) Trusts and foundations

Many Hubs have success raising funds from Trusts and Foundations, however, our survey respondents and workshop attendees stressed that the current fundraising context is very challenging. The Charities Aid Foundation's most recent Charity Resilience Index documents a rise in demand for charity services while the Association of Charitable Foundations has seen many foundations receive a greater volume of applications and higher value grant requests.<sup>52,53</sup> Hubs are seeing reduced success for the same demands of preparing applications. For example Youth Music can now fund only around one in six applications, declining many otherwise fundable projects.<sup>54</sup> Furthermore, every application requires information in different formats and reporting requirements vary, adding to the administrative burden of applying for and holding these grants.

Music Hub leaders also noted that funding availability varies greatly by geography. Some Hubs have been able to draw on local trusts and foundations that align with their mission but such funding can be hard to come by and varies by place. This is clear in the Music Hub Data Dashboard, which shows that Hubs in London reported 5.95% of their income coming from Charitable Foundations/Trusts compared to a national average of 2.16%.<sup>55</sup> There will also be significant variation in the availability of funding within different parts of London and this will have a bearing on the potential funding streams that Hubs will be able to tap into.

Hub leaders also voiced concerns that in the context of the Hub grant and traded income struggling to cover the core programme, Trusts and Foundations mostly value 'new' innovations, rather than recognising the need for consistency in provision over time to support children and young people to progress and this funding usually offers no flexibility to respond to changing and emerging local needs. We heard from Hub leaders who worried about the short-term nature of such grants and disproportionate monitoring and evaluation which involved further administrative costs and did nothing to alleviate concerns around long-term core activity funding.

### Recruitment of specialist fundraisers and fundraiser staff salaries

With Hubs facing significant fundraising expectations, some Hubs have turned to specialist fundraising staff to support these efforts. Across our survey, we heard concern about the cost of both recruiting such staff and meeting the cost of their salaries. One of the Hub leaders in our survey explained that fundraising occupied one part of one role in their team, as they were no longer able to afford a fundraising specialist. Another explained that their Hub did not have any staff or freelance workers with fundraising expertise, and had no budget available to appoint anyone, making it particularly difficult for them to successfully fundraise enough income.

### Ending the Music Hub fundraising lottery

This section has detailed the significant fundraising burden placed on Music Hubs and the significant resources required to meet these fundraising expectations. In addition, it has shown that traded income from parents and schools should not plug the gap created by static Revenue funding from government which undermines universal music education provision, while fundraising from trusts and foundations is unreliable and often limited by restrictions on how such funding can be used.

52 Association of Charitable Foundations. Foundations in Focus. 2024. Available at: <https://acf.org.uk/common/Uploaded%20files/Research%20and%20resources/Research/Foundations%20in%20Focus%202024.pdf>

53 Charities Aid Foundation. Charity Resilience Index. 2024. Available at: <https://www.cafonline.org/insights/research/charity-resilience-index>

54 <https://youthmusic.org.uk/youth-music-recharge-fund-how-we-made-decisions>

55 Arts Council England. Hub Data Dashboard. Available at: <https://www.artscouncil.org.uk/MusicHubs/music-hubs-survey-and-data#t-in-page-nav-2>

In addition, it has detailed a fundraising lottery, whereby Hubs' ability to fundraise are shaped by the areas they serve, including levels of socio-economic deprivation, the availability of funds from Trusts and Foundations, and the availability of fundraising specialists within the Hub.

Music education for children and young people is far too important for its funding to be allowed to vary by local circumstance. If the government wants to ensure an excellent music education for all, it needs to allocate the funds necessary to meet their costs. Fundraising can then be seen as an extra opportunity to expand NPME2 delivery, rather than a necessity for universal provision. A long-term realistic settlement for Music Hubs would help Hub leaders make strategic decisions, build strong staff bodies, and ensure their partnership-working is sustainable.

## THE COSTS OF TRANSITIONING TO FEWER MUSIC HUBS

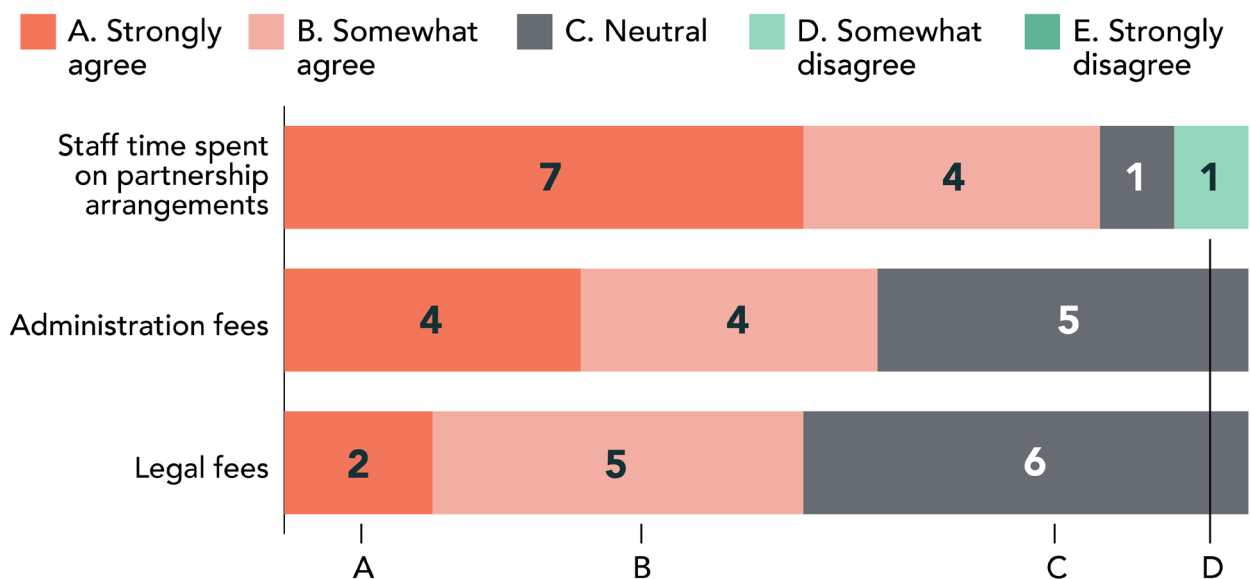
So far, this report has explored costs associated with staffing, instruments, venue hire and other considerations such as fundraising. In this analysis, we have made several references to the new Hubs structure, which has decreased the number of Hubs from 116 to 43, with newly appointed Hub Lead Organisations (HLOs) in place for September 2024. In this section, we turn to costs associated with this transition. Rather than provide a value judgement or commentary on whether the transition to fewer Hubs will be of net benefit or detriment to provision, we look to uncover the cost implications of the transition itself and the impact this may have on Hub delivery.

As noted in Table 2, based on our survey of HLOs, we have estimated that Music Hubs' total expenditure for costs related to the transition to fewer Music Hubs to prepare for launch in September 2024 has been just over £1.4m. Currently, these costs have not been accounted for in Music Hub funding agreements, meaning that Hub partnerships have had to fund these transition-related costs themselves. In addition, our data suggests that Hub leaders are also concerned that there will be further transition costs in the current academic year (2024/25).

### FIGURE 5

Music Hub leaders reported a range of concerns about meeting costs relating to the transition to 43 HLOs.

Music Hub Leader responses to statement: "I am concerned about our ability to meet \_\_\_\_\_ costs in the next academic year"



## Legal fees

In our survey, the vast majority of Hub leads reported concerns about the legal fees associated with new partnership arrangements required to create the new, reduced number of HLOs. While Hubs may be able to access some support (such as templates and training) through Music Mark and other sources to assist with this, we heard concerns about the high cost of legal fees associated with the transition. In addition, one respondent explained that their Local Authority had taken on their legal costs for them, suggesting the true costs of the transition would not be captured by Hub data alone.

## Administration costs

Administrative costs of the transition to 43 HLOs reportedly varied greatly across Hubs as they adapted to new arrangements. One Hub leader explained that under the new system, each area within the new larger Hub was still having to do their own data reporting but were then having to share these reports with their HLO who needed to homogenise the data into one report for the whole Hub. This additional administrative layer is an example of a hidden cost arising through the transition process, which challenges assumptions around economies of scale. A leader in a newly-appointed HLO explained that they were having to take on additional responsibilities - akin to acting as a Relationship Manager to their partner music services - but with no associated funding increase.

## Staff time spent on partnership arrangements

From our survey data, we estimate that an average of 1,122 hours of staff time per hub has been spent on the Music Hub restructure to date. This is likely a conservative estimate, given that many of our Hub lead respondents answered our survey before September 2024 and the majority reported being concerned about staff time that would need to be given to ongoing partnership development in the 2024/25 academic year.

Across our workshops and in our survey, there was a sense that staff time associated with the transition to fewer Music Hubs would vary significantly depending on a range of factors. For one thing, some previous Hubs reported having collaborative arrangements and connections prior to the establishment of new HLOs, allowing a smoother transition than they would otherwise. Elsewhere, some Hub leaders reported weaker relationships with their new partners, which had made their transition more difficult, time-consuming and therefore costly. One, for instance, explained that they had found it very challenging to coordinate multiple LA legal and financial teams as part of their new arrangement.

Hub leaders also noted that staff time would vary greatly depending on the extent of changes that the HLO wished to drive across schools. In discussion with school leaders, we heard that in some cases the most notable change would be a difference in the senior staff they interact with at the HLOs and that there would be little implications for day-to-day provision. However, in other cases, Hub leaders reported that excessive time spent on transition arrangements was having a substantial impact on staff wellbeing, causing stress and burnout. Some Hub leaders told us that this was contributing to staff turnover in their Hub, with concerns about what this could mean for the future of provision. For all, costs and time pressures associated with the transition have distracted, and continue to divert resource and attention from frontline delivery.

## Hubs need time to 'bed in' and government should cover transition costs

With no additional funding available to accommodate the transition to the new model of 43 HLOs, we heard from Hub leaders who were concerned about the pressures this would exert on their team and what this could mean for morale and future staffing. The recent restructure has evidently had a profound impact on many organisations and individuals within Music Hubs, putting strain on already squeezed budgets and taking time and resources away from the delivery of music education to children and young people.

The costs of the Hub transition process will gradually decline over time as Music Hub partnerships settle into new arrangements. However, our survey and workshops suggest that these transitional costs will continue through the 2024/25 academic year. In this context, the government should accompany their longer-term funding settlement for Music Hubs with a one-off grant injection of £1.4m to support the cost of transitioning to the new system imposed by the previous government.

# RECOMMENDATIONS

## WAYS FORWARD

Our research has laid bare the significant challenges associated with the delivery of NPME2. Hub leaders, school leaders, teachers, music services, peripatetic teachers, voluntary and community sector organisations, and other actors within the music education sector are working tirelessly to provide all children and young people with the musical opportunities they deserve. However, they are doing so in a context of increasing resource constraints and sustained inflation, which have substantial material effects on provision and opportunities for children and young people and mean that the laudable objectives of NPME2 cannot be achieved. Moreover, reliance on fundraising exacerbates and entrenches the very geographical and socio-economic divides in provision that NPME2 aims to address.

**To meet the ambitions of NPME2 and ensure that all children and young people have access to an excellent music education, we offer five key recommendations:**

- 1.** Boost funding to help Music Hubs deliver an excellent music education for all
- 2.** Liberate Hubs from restrictive funding and reporting constraints
- 3.** Restore the essential place of music education in schools
- 4.** Mobilise support from the wider music sector and industry
- 5.** Rejuvenate 'cultural deserts' through strong local investment

## 1. Boost funding to help Music Hubs deliver an excellent music education for all

A fairer, longer-term funding settlement is needed. The government should invest an additional £32.3m in revenue funding in 2025/26 and index-link the entire Revenue Grant to ensure that it meets and continues to meet the true cost of NPME2. **This amounts to just 0.03% of total annual UK education spend.**<sup>56</sup> As well as helping to ensure Hubs can meet the core demands of NPME2, this would then allow any further, more proportionate income generation from parents, schools, trusts and foundations, local businesses and others, to be seen as an additional opportunity to support new initiatives and extensions of work rather than being necessary to meet the inherent expectations of NPME2.

In addition, the government should commit to an immediate one-off £1.4m injection that recognises and supports the specific costs associated with Music Hubs' transition to the new system of 43 HLOs, allowing these new partnerships the resource and space to properly bed-in.

## 2. Reduce the reporting burden and review restrictive funding allocated to Hubs

It has been identified that significant cost and time spent on reporting is taking funding away from delivery of activity to children and young people. The government, through the fundholder, Arts Council England should look to streamline reporting requirements where possible, ensuring that the data they collect is meaningful, that Hub partnerships are supported to collect such data, and that unnecessary data asks are dropped. Hubs should be supported to use data to inform their decision-making, rather than just looking at it through the lens of external accountability. Here, there should be a shift in emphasis from outputs towards outcomes that materially reflect the reach and impact of Music Hubs' work.

Across our survey and workshops, we heard from Hub leaders who were grateful for the availability of the Capital Grant but concerned about its restrictions, particularly concerning repairs and refurbishments. The government should consider widening costs that are in scope of the Capital Grant, including costs of repairs and refurbishments to existing stocks, as well as fees associated with the procurement of adaptive instruments (including costs of consultation with teachers, parents and pupils). This will liberate Music Hubs to most efficiently and effectively meet the instrument, technology and equipment needs of the children and young people they support.

## 3. Restore the essential place of music education in schools

Many of the delivery barriers and costs that Hubs face are exacerbated by the challenges that schools face, including teacher supply and accountability pressures.

On teacher supply, a lack of specialist music teachers threatens to limit the availability and quality of in-school music education, which then makes it more challenging for Hubs to work productively with schools. After only meeting 27% of its secondary school music recruitment target in 2023, the government reintroduced its £10k bursary for secondary school music teachers.<sup>57</sup> While this has been welcomed by the Independent Society of Musicians (ISM), they also note that this bursary is significantly less than the bursary afforded to chemistry, computing, mathematics, and physics teachers.<sup>58</sup> There is also no such bursary for primary music teachers, with the ISM previously raising concerns about a lack of teacher training courses.<sup>59</sup>

<sup>56</sup> Based on a figure of £116bn from 2023/24. Institute for Fiscal Studies. Annual report on education spending in England: 2024-25. 2025. Available at: <https://ifs.org.uk/publications/annual-report-education-spending-england-2023>

<sup>57</sup> Independent Society of Musicians. ISM Welcomes Music Teacher Bursary at Secondary Level. Available at: <https://www.ism.org/news/ism-welcomes-music-teacher-bursary-at-secondary-level/>

<sup>58</sup> *ibid*

<sup>59</sup> Independent Society of Musicians. Campaigners Welcome Reintroduction of Teacher Training Bursaries for Music. 2023. Available at: <https://www.ism.org/news/campaigners-celebrate-reintroduction-of-teacher-training-bursaries-for-music/>

The government should explore raising the secondary bursary and introducing one at primary, giving a much needed boost to the number of music specialists in schools.

There are widespread concerns about Progress 8 and the EBacc leading to music and other arts subjects being squeezed out of the curriculum.<sup>60</sup> These pressures are likely contributing to 42% of schools no longer entering any pupils for Music GCSE.<sup>61</sup> In this context, the government's current Curriculum and Assessment Review should explore ways to recalibrate accountability measures like the EBacc that currently push music out of school life. In addition, it should make the case - to parents and school leaders - that music is not a 'nice to have' but an essential part of a broad and balanced curriculum.

Ultimately, in the longer term, the government should move towards a statutory obligation for schools to engage and work with Music Hub partnerships. This would mark a significant shift in the positioning of music education in schools - from a subject that is increasingly on the margins of the school life, to one that is rightly seen as a central feature of a rounded education.

For this to happen, schools and Hubs need to be given sufficient support, resources and incentives to enable such partnerships (including the steps outlined above). Here, the government will also need to consider how they meet the needs of a range of school contexts. This includes considerations around small schools, whose staff lead multiple subject areas, for example.

#### 4. Mobilise support from the wider music industry to meet NPME2's ambitions

NPME2 has a renewed focus on pathways into the music industry and lifelong appreciation of music. Here, it is vital that the music industry steps up in this regard. This may come in a range of forms, such as record companies offering career talks and opportunities, both in school (helping schools meet the Gatsby Benchmarks) and in other settings, such as youth clubs, convened by Music Hubs. It could also involve music venues giving up their space for student rehearsals and concerts, giving them vital first-hand experience of performing in such venues. The government should consult with Hubs, music industry professionals, schools, music services, voluntary and community sector organisations, Further Education and Higher Education institutions, and others on how to best harness the music industry's resources to meet the ambitions of NPME2, building on existing good practice.

#### 5. Rejuvenate 'cultural deserts' through strong local investment

In conversation with Demos at 2024 Labour Party Conference, the Culture Secretary spoke about how, in the context of both national and council funding cuts "arts, sport, culture, music have often been the first things to go" (06:24).<sup>62</sup> She also noted that while private philanthropic donors have stepped up to fill this gap, much of this funding has often been concentrated on several large institutions in particular parts of the country. This chimes with the findings of our research, where we heard that too often the work of Music Hub partnerships was limited by a lack of local resources, such as good music venues and rehearsal spaces, with hire and rent costs taking a sizeable chunk out of operating budgets. There is a clear need for significant investment in the wider infrastructure that music provision relies upon. There have been some promising developments here, with the government backing a voluntary ticket levy on stadium and arena tickets to support grassroots venues, artists and promoters, as recommended in the Culture, Media and Sport Committee's report on grassroots music venues.<sup>63</sup>

60 Independent Society of Musicians. Call for Evidence: The Curriculum and Assessment Review. Available at: <https://www.ism.org/news/curriculum-and-assessment-review/>

61 Cultural Learning Alliance. Report Card 2024. 2024. Available at: <https://www.culturallearningalliance.org.uk/wp-content/uploads/2024/05/CLA-2024-Annual-Report-Card.pdf>

62 Demos. In conversation with Lisa Nandy MP. 2024. Available at: <https://www.youtube.com/watch?v=g9S03mnuTg0>

63 UK Parliament. Grassroots music venues: Government response. 2024. Available from: <https://publications.parliament.uk/pa/cm5901/cmselect/cmcmums/380/report.html>.



The government is engaged in a review of the Arts Council to ensure that funding is going to areas of need and working to local people's priorities.<sup>64</sup> This presents an excellent opportunity to consider both the current funding arrangements for Music Hubs and the wider resources and infrastructure that they rely on, such as high-quality local venues. As the government engages in this Review, it should look at ways to simplify funding arrangements for music education to reduce reliance on time-consuming competitive bidding to underpin core work, and instead encourage long-term, joined up community decision-making.<sup>65</sup> Arts Council England is well positioned to join Music Hub partnerships up with the wider cultural infrastructure, given its position as a funder of both. Here, it should look to build on Local Cultural Education Partnerships (LCEPs) and other local collaborative initiatives to drive this work.

The government is also currently building a 'place-based philanthropy strategy' (07:27).<sup>66</sup> This strategy could provide a good opportunity to explore both the building, purchase and repurposing of venues. This could look to build on some of the principles of The Community Ownership Fund,<sup>67</sup> with local voices, including Hub leaders, voluntary and community sector organisations (VCS), and other community voices, being trusted to identify need and respond accordingly. Here, Music Hubs could establish joint arrangements with other local services, VCS organisations, and others to build community spaces that can make music provision a lasting local asset.

Across the country, Music Hub partnerships are working tirelessly to give all children and young people an excellent music education and achieve the ambitions of the National Plan for Music Education. However, too often the efforts of these Hub partnerships are being hindered by the shortage of resources at their disposal.

The new government was right to emphasise the importance of music in its manifesto and to make curricular breadth an area of focus for its Curriculum and Assessment Review. In taking up this report's recommendations and committing to a clear, long-term investment strategy, the government can empower partnerships to offer the best music education possible and ensure that all children and young people can benefit from the musical opportunities and experiences they deserve.

<sup>64</sup> *ibid.*

<sup>65</sup> Institute for Government. The next government must end "begging bowl culture" of local growth funding.

<sup>66</sup> Demos. In conversation with Lisa Nandy MP. 2024. Available at: <https://www.youtube.com/watch?v=g9S03mnuTg0>

<sup>67</sup> HM Government. Community Ownership Fund: prospectus. 2024. Available at: <https://www.gov.uk/government/publications/community-ownership-fund-prospectus>

# CONCLUSION

An excellent music education can open children and young people up to a world of expression, community, and connection, providing them with invaluable insights and experiences that can help them understand other cultures, periods of time, and perspectives. Music is also one of the country's proudest exports, both culturally and economically, contributing a record £7.6bn to the UK economy in 2023, with the industry supporting 216,000 jobs.<sup>68</sup>

In recent years, underinvestment and a resulting uneven distribution of resources has meant that too often children and young people's music education has been shaped by their background and where they grow up. This impoverishes our country, spiritually, culturally, and economically - we miss out on a wealth of musical talent and lose the opportunity that shared understanding and appreciation of music can bring.

NPME2 rightly aims to ensure inclusive, universal access to music education across the country. However, currently, its ambitions are far away from being realised. Access to music education continues to vary across the country, while inflation has seen Hubs' costs spiral in the context of static government investment.

This report has sought to understand the financial costs and challenges associated with the delivery of the refreshed National Plan for Music Education (NPME2). Through surveys, analysis of Arts Council England data, workshops, and engagement with secondary literature, it has sought to capture the 'hidden' costs of delivery, not currently accounted for in Music Hubs' funding arrangements. In particular, it has looked to understand the challenges associated with the transition to 43 HLOs and reflect on what this might mean for the plan's delivery.

Music is one of the country's proudest exports, both **culturally and economically**, contributing a record **£7.6bn** to the UK economy in 2023, with the industry supporting **216,000 jobs**.<sup>68</sup>

68 UK Music. This is Music 2024. 2024. Available at: <https://www.ukmusic.org/research-reports/this-is-music-2024/>

Ultimately, our report reveals major challenges in delivering NPME2, with a £161.4m shortfall over the next five years that threatens to compromise the achievement of NPME2's laudable aspirations, supported by more recent rhetoric from the new government. We heard repeatedly from Hub leaders who were incredibly stretched and doing their best to meet NPME2's ambitions in the context of significant funding constraints. We also heard how wider structural issues, such as low music teacher supply and the squeezing out of music in the curriculum can exacerbate existing challenges, and place greater demands on Hubs, which must work tirelessly to navigate this lack of capacity in the system.

Taken together, Music Hubs face a concerning funding situation that puts their work and, ultimately, the music opportunities afforded to children and young people, at risk. The government needs to do more to ensure that Hubs and other actors within the music education system are given the resources they need to achieve the ambitions of NPME2. This requires a substantial shift in funding and support for expert music professionals. It means meeting a greater share of the costs of NPME2 and not relying on Hubs to generate such a significant proportion of the income needed to deliver the plan. It also means improving schools' capacity and incentives to support music education, and tackling the 'cultural deserts' that hinder the music opportunities available to children and young people.

NPME2 rightly asks a lot of our music education system. We absolutely should be ambitious when it comes to music education. However, at present, Music Hubs lack the funding and support to sustainably deliver the music education provision that children and young people deserve. **The new government has a unique opportunity to address this injustice and realise the great personal, social, economic, and wider societal benefits that music education can bring.**

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# DEMOS

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At a crossroads in Britain's history, we need ideas for renewal, reconnection and the restoration of hope. Challenges from populism to climate change remain unsolved, and a technological revolution dawns, but the centre of politics has been intellectually paralysed. Demos will change that. We can counter the impossible promises of the political extremes, and challenge despair – by bringing to life an aspirational narrative about the future of Britain that is rooted in the hopes and ambitions of people from across our country.

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