BRAVE NEW WORLD?

JUSTICE FOR CREATORS IN THE AGE OF GEN AI

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ORGANISATION PROFILES

The Society of Authors is the UK's largest trade union for writers, illustrators and literary translators.

The Association of Illustrators is the professional body for illustration in the UK and beyond.

The Independent Society of Musicians represents professionals working in the music sector across the UK and Ireland.

The Association of Photographers is the trade association for professional photographers.

Equity is the UK's performing arts and entertainment trade union, representing performers and creative practitioners.

Together, our organisations represent over 80,000 individual creators.

ACKNOWLEDGEMENTS

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- **Society of Authors (SoA) – Anna Ganley**
- **Association of Illustrators (AOI) – Rachel Hill**
- **Independent Society of Musicians (ISM) – Deborah Annetts**
- **Association of Photographers (AOP) – Isabelle Doran**
- **Equity – Tom Peters**

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FOREWORD

The UK government is presiding over one of the greatest acts of theft in modern history: the stripping of the UK's creative industries of their rights, livelihoods, and control over their work.

While ministers speak publicly of "balance" and "patience", they have failed to explain why global AI corporations worth billions should be granted privileged access to the cultural assets of this country — without permission, payment, or accountability — while individual UK creators are asked by their own government to sacrifice their futures.

This is an existential moment for creators. Copyright is not a technical inconvenience; it is the mechanism that allows creators to earn a living and to retain control over the meaning and integrity of their work. Remove it, and you do not merely damage an industry — you dismantle the conditions under which culture itself can exist.

What is being taken is not abstract "data". It is the accumulated cultural, emotional, and intellectual labour of millions of people: our books, music, films, images, archives, and stories. In a country where the creative industries are a cornerstone of economic growth and global influence, this represents the extraction of some of our most valuable national assets.

This report calls for justice — and that framing is crucial. There is no special pleading here, nor any blindness to the opportunities inherent in AI. What is being taken, in plain sight, is the private property of UK citizens, protected by UK law. It is not the government's to give away. To do so is an injustice. The creative industries have always embraced new technologies. Many of today's innovations were first imagined by artists, and the music, film, and design sectors were among the earliest to adopt digital tools, reach new audiences, and pioneer new business models. But treating creative work as free raw material for AI systems is not progress. It is a massive transfer of wealth from creators to corporations, from the many to the few, and from the UK to the US. There is a profound difference between learning from culture and strip-mining it.

The findings in this report are not only an indictment of policy failure; they are a call to action. Creators must not accept a managed decline. They must organise, speak out - and use this report to engage government, the media, and their fellow creators — to demand justice.

It is time for creators to get creative.

Baroness Beeban Kidron,
Crossbench Peer and filmmaker

1 EXECUTIVE SUMMARY

THE FOURTH INDUSTRIAL REVOLUTION: A BRAVE NEW WORLD?

Generative artificial intelligence (GenAI) is being sold as a major driver of the fourth industrial revolution: a rapidly advancing technology that promises a new frontier of innovation, limitless productivity and economic growth.

But there is another story to consider: the industrial scale theft of the UK's cultural riches. In this time of great change, how do we protect and support our creative industries, our creators and performers before it is too late?

Unprecedented times call for unprecedented measures: a partnership of creator organisations has collaborated to draw urgent attention to the risks facing individual creators, from job losses and declining income to the diminishing visibility of human-created work in a GenAI-driven marketplace.

This report is produced by the Independent Society of Musicians (ISM), the Society of Authors (SoA), Equity, the Association of Illustrators (AOI) and the Association of Photographers (AOP), representing over 80,000 individual creators, including musicians, writers, literary translators, photographers, illustrators and performers.

In 2026, the UK stands on the brink of losing an entire sector; one that brings not just jobs, money and global prestige, but also cultural currency, soft power and societal benefits, such as community cohesion, support for mental health and well-being, soft power and cultural heritage. Our world-leading creative industries supercharge the UK's national identity and global influence, connecting communities at home and abroad.

GenAI technology, unleashed without regulation, safeguards or guardrails, is rapidly disrupting the UK's £124.6 billion creative sector, which supports more than 2.4 million jobs.[1] Music, literature, photography, performance and art, the cultural soul of the nation, face a real and existential threat from GenAI systems that are trained on our human-made works without permission, payment or even acknowledgement. The result is an intellectual property free-for-all with multinational firms profiting while creators see their livelihoods disappear.

A NEW KIND OF INDUSTRIAL COLLAPSE

The destruction we are witnessing is digital – silent, invisible and global.

Part 2 of this report details the risks to creators: collapsing careers and income, widespread theft of intellectual property, and digital replication that puts identity itself at stake. The training of GenAI systems raises serious human rights concerns as the unauthorised use of creative works violates both privacy and intellectual property rights. The rapid replacement of human creators also undermines the right to work and to fair remuneration under Article 23 of the Universal Declaration of Human Rights.[2] As outlined in Part 3, GenAI has serious environmental consequences: the vast carbon footprint of AI data centres and training models cause environmental damage that directly contradicts the UK's net-zero commitments.[3]

In its ambition to be 'world-leading' in AI, the UK Government risks favouring multinational monopolies over British creativity and talent. Part 3 of this report analyses the economic disparity between the UK creative industries, which contribute £124.6bn in GVA,[4] and the AI sector, currently valued at £11.8bn.[5] It considers the economic consequences of policy choices that risk destabilising a mature, high-value domestic industry in favour of an emerging sector whose benefits are uncertain and likely to flow predominantly to large multinational technology companies based overseas. Without urgent regulation, transparent data practices and fair remuneration for creators, the UK risks dismantling one of its most successful and socially valuable growth industries. Part 4 responds to these risks by setting out our **CLEAR** Framework for AI, offering practical recommendations for Government and the creative industries.

The UK has historically positioned itself as a pioneer in balancing creativity and innovation, dating back to the development of modern copyright (the Statute of Anne, 1710) in response to the printing press. We have the ingenuity, the institutions and the international reputation to get this right. The creative sector is not asking for protectionism, but for a principled, practical framework in which AI works *with* creators, not against them. There is an opportunity for the UK to be a pioneer once again, setting the global standard for ethical AI that rewards creativity, supports innovation and restores trust in our gold-standard copyright framework.

A CLEAR FRAMEWORK FOR AI: A FAIR FUTURE FOR CREATORS

The creative workforce is not resisting progress. Our organisations call on government to set a global standard for ethical, human-centred AI through the CLEAR Framework for AI:

- **C** **Consent** first
- **L** **Licensing** not scraping
- **E** **Ethical use** of training data
- **A** **Accountability** and transparency
- **R** **Remuneration** and rights

1 KEY FINDINGS

This report brings together evidence from more than 10,000 creators across writing, illustration, music, photography and performance, revealing a sector already in freefall. The UK's creative industries contribute £124.6 billion to the economy and employ 2.4 million people,[6] a workforce almost 30 times larger than the UK AI sector, which employs around 86,000 and generated £11.8 billion in 2024.[7] Yet despite this vast contribution to the UK economy, creators report that GenAI is already displacing entry-level and 'bread-and-butter' work that sustains creative careers, making it increasingly impossible for emerging talent to build a livelihood.

Creative work is occupational rather than interchangeable: creators cannot simply replace their jobs without leaving the profession entirely. Entry-level roles are not expendable inefficiencies but the foundation of the talent pipeline on which the entire sector depends. Without intervention, the sector faces a process of digital de-industrialisation, as economic value shifts from human creators and into the hands of multinational technology companies.

These headline findings are summarised below and explored in detail in the report's primary data chapter.

Creative jobs already lost to AI

A third (**32%**) of illustrators report lost commissions or cancelled projects due to GenAI, while the situation is even more severe for photographers where **58%** have been affected. Authors report similar disruptions, with more than **half** seeing work disappear. Among musicians, **73%** say unregulated GenAI now threatens their ability to earn a living.

GenAI is stripping creators' incomes by tens of thousands

Survey data from the AOP reveals an average loss of **£14,000** per professional photographer, while illustrators report average reductions of **£9,262**. Musicians describe income cuts of up to **50%** as GenAI replaces paid work. Taken together, evidence from across the creative sector indicates that these lost commissions and reduced earnings amount to tens of millions of pounds drained from UK creators over just a few years.

99% of creators say their work has been scraped without consent

Respondents across all creative sectors report near-universal concerns about unlicensed data extraction, with between **95** and **99%** calling for consent and payment for GenAI training. Among illustrators, **99%** support retrospective compensation, while **98.5%** of photographers demand the reinforcement of existing UK copyright law to make it illegal to train on copyright-protected works without a licence.

Theft of style and voice: GenAI is cloning UK creators

Among authors, **88%** fear that GenAI can imitate their style; a fear validated by the appearance of fake and copycat books under real writers' names. Voice artists are seeing similar harms, with **83%** reporting cloned voices and AI-generated avatars already circulating online.

Musicians likewise describe sound-alikes and deepfakes mimicking their voices, composition and production styles. For visual artists, 16,000 had their styles used to train a GenAI program, which now competes with them in the digital marketplace. Of surveyed photographers, **94%** want to see a Personality Right introduced.

73%

musicians say unregulated GenAI now threatens their ability to earn a living

Musicians describe income cuts of up to...

50%

as GenAI replaces paid work

99%

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2 PRIMARY DATA

This report draws on a robust, triangulated evidence base combining large-scale survey data, cross-sector comparative analysis and supporting secondary research.

Its findings are grounded in quantitative and qualitative data gathered between 2022 and 2025 from more than 10,000 professional creators across writing, illustration, music, photography and performance, making it one of the largest multi-disciplinary datasets on GenAI's impact on creative work in the UK.

Survey datasets were provided by five national creator organisations, which included both members and non-members, ensuring a broad representation of professional creators within each sector. Further analysis and contextualisation of this primary data were drawn from supporting secondary sources, including industry reporting and parliamentary evidence.

The organisations listed below constitute the full set of primary data sources used to collate and analyse the findings presented in Part 1 of this report. For clarity and to avoid duplication, references to these datasets are not repeated elsewhere in Part 1.

- **Society of Authors (SoA):** surveys of authors, translators and illustrators (n=787, 2024; n=1,035, 2025)[8]
- **Association of Illustrators (AOI):** large-scale survey of illustrators (n=6,844, 2024-25)[9]
- **Independent Society of Musicians (ISM):** survey of working musicians (n=501, 2025)[10]
- **Association of Photographers (AOP):** surveys of professional photographers (2022-2025) (n=984)[11]
- **Equity:** surveys of performers, voice artists and audio artists (n=431, 2023)[12]

Percentages cited in this report refer to the proportion of respondents within each survey cohort. While each dataset reflects a specific profession, taken together they provide a sector-wide picture of emerging trends linked to the adoption and deployment of GenAI across the creative industries.

Alongside quantitative findings, respondents provided narrative accounts of their experiences of GenAI. Survey data and testimonies were systematically coded to identify recurring themes across sectors, including replacement of entry-level and mid-tier work, reduced commission rates, market substitution, widespread scraping of copyrighted material, and digital identity cloning and reputational harm.

Triangulation is achieved through comparison of independent surveys conducted by five separate creator organisations, the consistency of reported impacts across different creative professions, and alignment between the report's primary findings and international industry research. Convergent trends, including job loss, income reduction and unlicensed data extraction (scraping), appear across all datasets, strengthening the validity of the conclusions.

Findings were further supported by analysis of academic literature on AI training, copyright and labour markets, relevant legal cases, policy briefings, government studies, and economic research on job displacement and income risk.

Survey data is self-reported and reflects the experiences and perceptions of working creators. However, the scale of the dataset, the consistency of findings across sectors and corroboration with independent international research together significantly reduce the risk of bias and strengthen the reliability of the evidence presented.

This mixed-methods, triangulated approach ensures that the report's findings are robust, grounded in multiple independent data sources, and reflective of a clear and consistent pattern across the UK's creative industries.

OUR FINDINGS EXPLORE THE FOLLOWING AREAS:

2A CREATIVE CAREERS UNDER THREAT: JOB LOSSES AND INCOME IN FREEFALL

Across the creative industries, the message is clear: without safeguards, GenAI is putting creative jobs and livelihoods on the precipice.

Authors: writing no longer pays

Job losses

- **57%** of authors say their career is no longer sustainable due to the impact of GenAI
- **26%** of illustrators and **36%** of literary translators report cancelled or redirected commissions in favour of GenAI
- **72%** of authors say job opportunities have already been cut due to GenAI

Income hit

- **43%** of literary translators and **37%** of SoA illustrators saw earnings fall because of GenAI
- **65%** of fiction and non-fiction writers expect further income decline; **77%** of literary translators and **78%** of SoA illustrators agree
- **86%** of authors say GenAI has already reduced their earnings

Illustrators: the loss of 'bread-and-butter' work

Job losses

- **32%** of illustrators have already lost commissions to AI-generated art
- Routine 'bread-and-butter' work is hardest hit: book covers, concept art and marketing imagery

'I feel a huge sense of dread knowing AI generators are everywhere. It's wrecked my morale as a new graduate trying to start out.'

AOI SURVEY PARTICIPANT

Income hit

- Average losses: **£9,262** per illustrator
- When applied across the affected proportion of the sector, this translates into tens of millions of pounds of lost income across the UK illustration sector since the widespread adoption of GenAI

86% **authors** say GenAI has already reduced their earnings

Musicians and performers: commissions displaced, royalties lost

Job losses

- **73%** of musicians (ISM) say unregulated AI threatens their ability to earn a living
- **53%** (ISM) say they have already lost work to GenAI or can't be sure that they haven't
- **17%** of respondents (ISM) reported having undertaken AI-related work under pressure and many described the loss of session and songwriting work as studios replaced musicians with AI-generated session players
- **65%** of performers and 93% of voice artists (Equity) see AI as a threat

'The advertising and TV industry is in freefall with unscrupulous producers looking to cut costs. A global biscuit company employed AI to write the score for their commercial which was on global TV and cinema. A fee for that worldwide coverage would normally be in the region of £20-30k. That's income and royalties gone overnight. This is becoming a huge issue in the industry.'

ISM SURVEY PARTICIPANT

Musicians warn that if routine commissions and session work disappear, the consequences will ripple across the entire ecosystem, from instrument makers and studios to engineers and producers.

'A whole world of interdependent skills is at risk.'

ISM SURVEY PARTICIPANT.

Income hit

- Lost commissions worth **£10,000** or more
- Income cuts of **40-50%** as briefs dry up
- Only **7%** of musicians have ever been approached to license their work for GenAI training, and fewer than one in five of those received any payment

'Music labels and publishers will negotiate awful deals... it will be similar to Spotify's VERY low per stream rates, making a deal basically worthless to individual composers.'

ISM SURVEY PARTICIPANT

73% **musicians** (ISM) say unregulated GenAI threatens their ability to earn a living

£10,000 WORTH OR MORE reported in lost commissions to musicians and performers

Photographers: assignments vanish almost overnight

Job losses

- **30%** lost assignments to GenAI by September 2024; **58%** by February 2025
- Each lost shoot (reportedly worth **£30,000-£100,000**) affects 2-10 additional workers: models, stylists, assistants, retouchers and art directors

'I've personally experienced a drop of £100k but that's for full production lost. The actual photographic part of this is about £20k, the rest is what we supply with the package, i.e. studio, equipment, post-production, producer and stylist.'

AOP SURVEY PARTICIPANT

Income hit

- Average losses: **£14,400** per professional photographer
- Around **£43.2 million** lost in total across AOP membership based on membership value transfer (£14,400 x 3,000)
- The value of transfer is approximately **£432 million** based on an estimated 30,000 professional photographers working in the UK (£14,400 x 30,000)
- Even small global drops in demand for stock images could mean $232-698 million in annual losses

'I just lost €15,000 to an AI. A beautiful photo contract – and I couldn't compete... we were dropped in favour of another agency that offered them a 100% AI-generated campaign... Brands are now turning their backs on our craftspeople – pushing them further into isolation. That hurts.'

CÉDRIC PRATS, PHOTOGRAPHER[13]

The AOP warns that without urgent regulation, GenAI could hollow out the UK's £2.4 billion photography industry within five years, shifting value from freelancers to large tech firms overseas.

Across every creative field – writing, art, music, performance and photography – the same pattern is emerging. Jobs are disappearing without warning, incomes are collapsing, and entire ecosystems of skilled workers are being replaced by machines that pay no tax, hire no teams, and give nothing back.

58% lost photography assignments to GenAI by February 2025

£43 MILLION

lost in total across the UK sector from those surveyed, extrapolated to the **photography** sector

SUPPORTING EVIDENCE

Global evidence of job displacement

- **68%** of UK creative freelancers say their job security has been 'diminished' or 'greatly diminished' due to AI[14]
- **21%** of UK writers and **17%** of image creators report decreased demand for their services because clients are turning to GenAI instead[15]
- **70%** of US writers believe publishers will begin using AI to generate books 'in whole or part'[16]
- Creators report lower fees for 'fixing' AI output instead of producing original work[17]
- **82%** of creators in Australia and New Zealand are concerned that the use of AI in music could lead to the de-professionalisation of the industry[18]
- Impacts on creative workers 'are likely to get worse in the coming years'[19]

Projected UK job displacement

- Tony Blair Institute: up to **3 million** UK jobs could be displaced by AI by 2030[20]
- CVL Economics: **204,000** US creative jobs could be disrupted within three years, including sound design, music editing and studio engineering[21]
- The real disruption to jobs is likely **55%** higher when freelancers are included[22]
- International Monetary Fund: **60%** of jobs in advanced economies are exposed to AI automation risks[23]

Global evidence of income decline

- **71%** of 15,000 French and German music creators/ publishers believe AI will deprive them of income and threaten their future[24]
- In Europe, **27%** of authors' and composers' revenue at risk, with projected losses of €2.7 billion in royalties[25]
- **61%** of UK creators say the value of their skills has already dropped[26] with **55%** reporting that their financial compensation has already fallen due to the spread of AI tools[27]
- **82%** of musicians in Australia and New Zealand fear AI means they can 'no longer make a living' from their work[28]
- **23%** of music income (over A$500 million) at risk in Australia and New Zealand by 2028[29]
- SACEM/GEMA modelling warns of **€950 million** in losses annually by 2028 in France and Germany[30]
- By 2028, around a **quarter** of all creative income could be wiped out if GenAI continues unchecked[31]

2B SCRAPED WITHOUT CONSENT: THE HIDDEN EXTRACTION ECONOMY

Across the creative industries, creators are waking up to a grim discovery: their work has been stolen; copied, scraped and fed into GenAI systems without consent, payment or even knowledge.

From books to photos, songs to voices, the UK's intellectual property is being stolen on an industrial scale. This is wholesale exploitation: a system that extracts value invisibly while stripping creators of consent and control.

Authors: books stolen for machines

Evidence

- Many authors have discovered their books in GenAI training datasets, such as *Books3*, which contains around **180,000** copyright-protected titles and has been widely used to train large language models with no licence and no payment

'This is outright theft and undermines years of professional labour.'

SOA SURVEY PARTICIPANT

Musicians: recordings reused without consent

Evidence

- The ISM reports deep concern among musicians that copyrighted recordings have been swept into training datasets, but no one can say where or how

'How can I realistically know if my trumpet sound has been fed into a model? If it has, where is the consent, where is the payment?'

ISM SURVEY PARTICIPANT

'This is Spotify-level exploitation all over again, only worse.'

ISM SURVEY PARTICIPANT

Many authors have discovered their books in GenAI training datasets, such as *Books3*, which contains around

180,000 copyright-protected titles

Photographers: industrial-scale piracy

Evidence

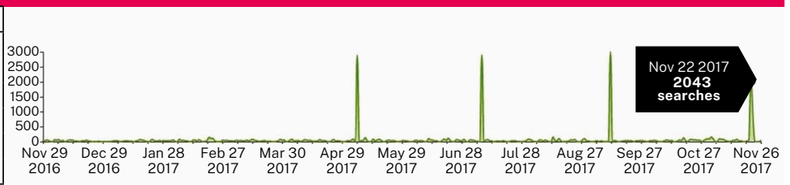
- The AOP confirms that current 'do not scrape' tools like robots.txt offer no protection at all; they are nothing more than a 'gentlemen's agreement' that AI companies ignore
- UK photographers already lose **£13,437** each per year to copyright infringement, more than £400 million industry-wide, before AI
- **90%** of AOP members warned that technological protections measures (TPMs) used to reserve their rights could reduce their online discoverability
- A small image library website of **50,000** photographs monitoring traffic to the site revealed machine-driven data surges: bots harvesting images at industrial speed (see Fig. 1)
- The LAION-5B dataset consists of nearly **six billion** scraped images to train GenAI services such as Stable Diffusion and Midjourney

'The importance of traceable records of images used in datasets, and the provenance of that data, becomes paramount... The responsibility of Government is to protect the interests of copyright owners and not introduce legislation that deprives them of their right to earn income from their works.'

ASSOCIATION OF PHOTOGRAPHERS[32]

Searches

Date	Origin	Search	Pages
23 Nov 00:59	Germany	memory	1
		chopstick	
		positive	
		affirmation	
		pew	
		iiiiiii	



Searches

Date	Origin	Search	Pages
25 May 05:25	Germany	worship	1
		spindly	
		pray	
		foxtail	
		pivot	

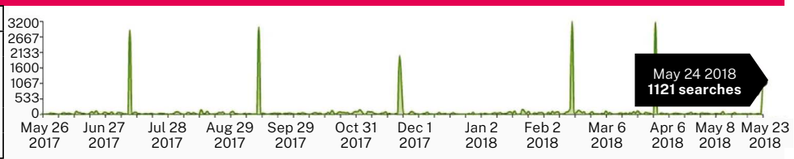


Fig. 1. TDM Scraping Diagrams: Text & Data Mining surges recorded on a small image library website of 50k images over a period of a year in 2017-18. The smaller green data shows the normal traffic (number of searches) conducted during weekly human-to-website interactions; the larger green data spikes show the website being swamped with machine-to-website interactions at a significantly larger scale, extracting text and images at intervals.

Creators must hide their works or be scraped illegally

Creators are unwillingly being enrolled in an extraction economy that treats their labour as free inputs. Creators across sectors rely on visibility online to generate income. The widespread practice of data scraping means that creators must make an impossible trade-off: pull their work from online services and suffer a significant drop in visibility and earnings, or risk their work being illegally downloaded and used for AI training. The result is self-censorship in defence.

'We're in a constant state of stress because our work is being stolen left and right... Since AI and the illegal scraping came to be, life as an artist has become so much more difficult. We worry so much more about what will happen to our art if we put it out there in the world. It's disheartening, stressful and time-consuming.'

AOI SURVEY PARTICIPANT

'I have decided to HOARD compositions to protect them from the predatory and exploitative behaviours associated with AI. This means there will be a hiatus in my ability to earn money from my compositions.'

ISM SURVEY PARTICIPANT

'I'm currently sitting on some 50 hours or compositions but I'm unwilling to expose any of it for fear of AI theft and manipulation.'

ISM SURVEY PARTICIPANT

SUPPORTING EVIDENCE

Creator perspectives

- **96%** of musicians in Australia and New Zealand say AI companies must disclose copyrighted training data[33]
- **93%** of musicians in France and Germany ask for stronger government action, with **95%** demanding full transparency[34]

Scale of scraping

- The LAOIN-5B dataset, which powers image generators like Stable Diffusion and Midjourney, was built from 5.8 billion scraped image-text pairs scraped from the web via the Common Crawl archive with no systematic check on whether the images were copyrighted or licensed[35]
- Getty Images, Inc v Stability AI Ltd[36] and independent analysis[37] confirm that LAION contains vast quantities of copyrighted material and LAION does not remove copyrighted, watermarked or trademarked content
- Akamai: By November 2024, AI scraper bots were responsible for over **a billion** daily requests across their systems[38]
- DoubleVerify: Invalid traffic, much driven by AI crawlers, rose **86%** year-on-year in the second half of 2024. December 2024 alone saw a **70%** monthly increase in scraping vs December 2023[39]

Official assessments

- OECD: identifies large-scale scraping of websites, platforms and public archives as a key method of acquiring training data, raising serious questions about copyright, personality rights, GDPR and privacy[40]
- EUIPO: leading GenAI systems depend on very large, scraped corpora of protected works[41]
- US Copyright Office: training data acquisition involves copying vast quantities of copyrighted material into machine-readable datasets, described as unlicensed exploitation[42]

Technical and legal vulnerabilities

- Opt-out tools described as 'unevenly adopted, technically complex and not retroactive', preventing creators from removing prior ingested works[43]
- TDM performed by bots that sweep the web indiscriminately ignore copyright notices, metadata protections and even terms of use[44]
- Website terms of service can, in principle, be contractually binding, meaning companies that scrape in defiance of 'no AI training' clauses may be acting unlawfully, though this remains untested in court[45]

Legal disputes

- Photographers, stock agencies and publishers have brought actions against AI companies such as Stability AI, Meta, Open AI and others over alleged scraping of images and text to train models:
  - GEMA v OpenAI Inc.:[46] OpenAI's system had effectively memorised and reproduced protected song lyrics with verbatim or near-verbatim lines appearing in generated text, a clear confirmation that copyrighted material is used in training and can be reconstructed and delivered back to the user[47]
  - Getty Images, Inc. v Stability AI:[48] Stability AI's model reproduced Getty's watermarked trademarks, demonstrating that distinct elements of Getty's protected image library had been absorbed into the model and were capable of resurfacing in its outputs[49]
  - LAION v Robert Kneschke:[50] The German photographer believed he had reserved rights in order not to have his images scraped for GenAI training purposes. LAION used the EU *Directive on Copyright in the Digital Single Market*[51] TDM exception (Article 3) for scientific purposes which does not provide an opt-out mechanism for rights holders, although the court did stress that reservation of rights expressed in natural language is likely to be considered machine-readable[52]

Academic perspectives

- Atkinson: scraping is now systematic, permanent copying of entire creative catalogues, not traditional, research-based TDM[53]
- Dornis and Stober: GenAI training cannot be equated with TDM fair use/fair dealing because it involves systematic reproduction and long-term retention of protected works at scale[54]

By November 2024, AI scraper bots were responsible for over

1,000,000,000

daily requests across their systems

2C IDENTITY THEFT: DIGITAL REPLICATION AT SCALE

GenAI isn't just stealing creative work; it is stealing people's identities.

From voice artists to illustrators, songwriters to performers, creators are seeing their style, sound and likeness cloned by machines that can mimic them in seconds.

This is no longer imitation; it is replication without consent. Whole careers are being copied and commercialised while the real humans behind the art are cut out of the picture. Creators now face the impossible task of competing with machine versions of themselves they never authorised.

The following case studies show how quickly this technology turns admiration into appropriation, and creativity into counterfeiting.

Authors: style mimicry at scale

CASE STUDY – Vanessa Fox O'Loughlin (Sam Blake)

Bestselling author Vanessa Fox O'Loughlin (who writes as Sam Blake) discovered an AI-generated dark romantasy trilogy titled *Obsidian Heart* published on Amazon under her pseudonym without consent. The fraudulent works deliberately mimicked her distinctive cover designs and typography and were automatically flagged to her followers as new releases on her verified author page.

O'Loughlin identified the writing as AI-generated and discovered ten of her books had been absorbed into AI training datasets without permission. While Amazon removed the books from her profile following her complaint, the platform refused to delete them entirely as they do not contravene their guidelines.

The incident caused reputational and financial harm, as readers who purchased the counterfeit books may now associate poor-quality content with her authorship. O'Loughlin has advocated for stronger platform protections against AI-generated impostor publications.

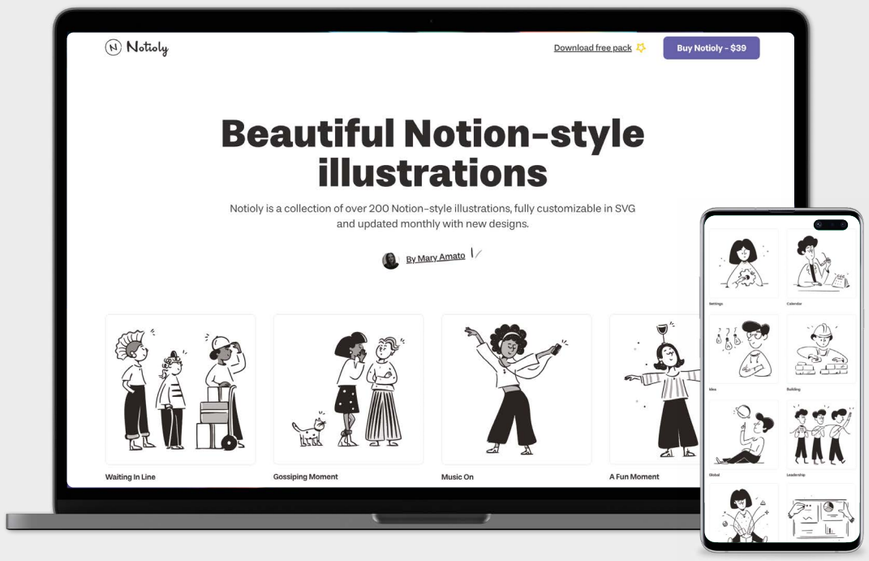
Far left: *Vannessa O'Loughlin (Sam Blake): Image by Alice-Rose Jordan*
Left: *Sam Blake's new book cover*

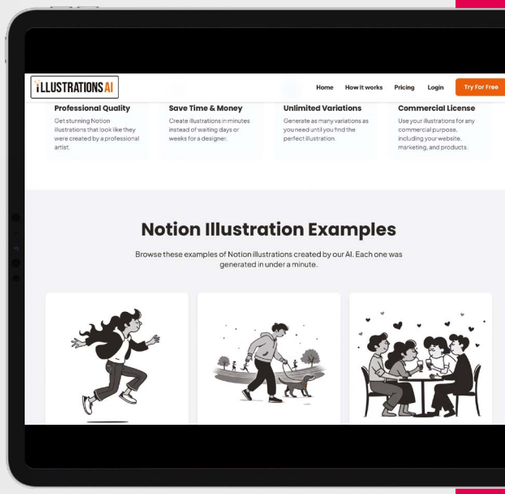
Illustrators: signature styles stolen

CASE STUDY – Roman Muradov

In a first-person account, illustrator Roman Muradov (2025) describes how AI-styled knockoffs of his distinctive Notion illustrations spread online and were repackaged and sold by others with no attribution or payment to him. He notes that the models latch onto the most generic surface traits of his drawings, 'the worst parts of my work' as he characterises them, while stripping out the craft and judgement that makes the originals valuable. The experience left him watching other people monetise a flattened pastiche of his style, a concrete example of how digital replicas can both erase authorship and transfer income away from the creator.

Above and right: *Original illustrations by Roman*
Below left: *Knockoffs of Roman's Notion style*
Below middle: *Notion illustrations menu*
Below right: *AI generated Notion illustrations*





All images from this Substack have been cleared:
dadaissues.substack.com/p/how-i-became-public-domain

Illustrators: signature styles stolen

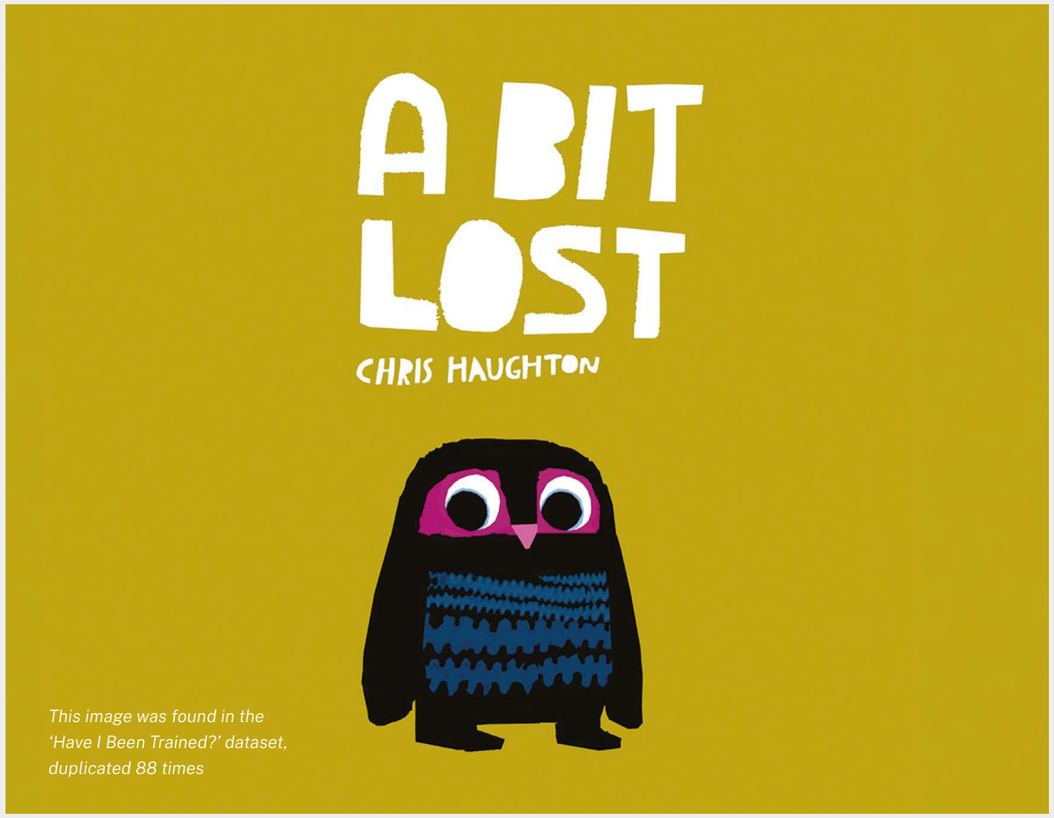
CASE STUDY – Chris Haughton

Award-winning children's book illustrator Chris Haughton tested the GenAI image platform MidJourney by prompting it to create 'a squirrel in the style of Chris Haughton'. The result reproduced his distinctive colours, shapes, and backgrounds, work that resembled his style 'on a bad day'. When he prompted ChatGPT to write a story in his style, it generated familiar language and content clearly derived from his published books.

Investigation via the 'Have I Been Trained?' database revealed thousands of his images had been scraped without permission. One book cover appeared 88 times in duplicate.

These images, representing years of creative development, were used to train commercial AI systems without consent or remuneration.

Haughton argues the issue extends beyond individual livelihoods to broader questions of intellectual property and economic equity. He critiques proposed UK copyright reforms that would permit AI companies to scrape copyrighted work by default, requiring creators to manually opt-out, a mechanism he describes as practically impossible. Under such frameworks, millions of creative workers would have their life's work appropriated freely by a handful of predominantly US technology companies, fundamentally undermining the creative economy.



This image was found in the 'Have I Been Trained?' dataset, duplicated 88 times

Musicians: cloned voices and sound-alikes

CASE STUDY – Holding Absence

Welsh rock band Holding Absence spent nearly a decade building their audience to 850,000 monthly Spotify listeners. In September 2025, frontman Lucas Woodland discovered that Bleeding Verse, an AI-generated project, had replicated his band's distinctive sound, vocal style and artistic identity, and had surpassed them in monthly listeners in just two months.

Bleeding Verse's rapid growth was facilitated by algorithmic playlist placement, with their top track accumulating over four million streams since July 2025. The AI project appropriated Holding Absence's sonic signature, the unique musical identity the band had spent years crafting, without permission or acknowledgement.

Woodland reported that listeners reported being 'fooled' by the AI-generated music, believing they were hearing human artists or Holding Absence themselves. He has called for stronger protections against digital likeness theft, including mandatory consent requirements and clear labelling on streaming platforms to prevent algorithms from amplifying copied identities. His warning that artists must *'oppose AI music, or bands like us stop existing'* highlights the existential threat to human musicians.

'An industry peer reached out to offer me £1 to train his AI voice module with my voice, offering me a vague split of future generations using my voice via his app. I said no, but I know he can just train it from my releases online and I would have to find out and prove it in order to have any recompense. I am a Black female independent singer/songwriter – he is a white male major label producer.'

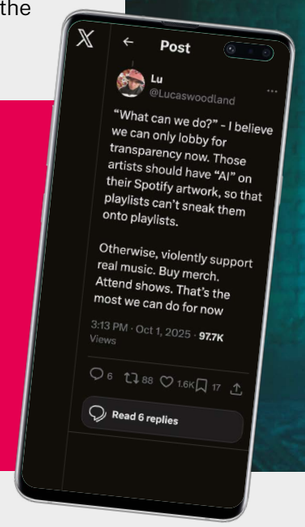
ISM SURVEY PARTICIPANT

Holding Absence live at Liverpool O2 Academy UK, 28th January 2023

Holding Absence bandcamp: sharptonerecords.bandcamp.com/album/holding-absence

Holding Absence website: holdingabsence.com

YouTube documentary the making of album: youtube.com/watch?v=idFhiUfBNr8&t=4s



Performers: voices and likenesses replicated

CASE STUDY – Tilly Norwood

An AI-generated virtual performer named Tilly Norwood sparked controversy in 2025 when its Dutch creators announced the virtual performer was in discussions with talent agencies. Norwood was created by Dutch actor Eline Van der Velden, who stated her intention for Norwood to become the 'next Scarlett Johansson'.

The virtual performer's social media presence resembles that of an emerging human actor, featuring AI-generated photographs and promotional reels.

The Screen Actors Guild-American Federation of Television and Radio Artists (SAG-AFTRA) condemned the creation, with support from prominent actors including Emily Blunt and Natasha Lyonne. SAG-AFTRA issued a statement asserting that Norwood *'is not an actor, it's a character generated by a computer program that was trained on the work of countless professional performers. It has no life experience to draw from, no emotion and, from what we've seen, audiences aren't interested in watching computer-generated content untethered from the human experience.'*

Scottish actor Briony Monroe believes her likeness was used in developing Tilly Norwood and is pursuing the matter with support from the actors' union. The case illustrates ongoing challenges regarding transparency in AI-generated characters and the difficulties creative professionals face in protecting their likeness from unauthorised use.

Left: *Briony (left) and Tilly (right)*

Performers are among those most severely affected by the rapid spread of digital replicas, which allow voices, faces and performances to be captured once and reused indefinitely without further consent, control or payment. Evidence from Equity's 2023 survey of performers shows how quickly these practices are reshaping working conditions and undermining performers' rights:

- One in six performers (**17%**) have undertaken AI-related work: performance capture (**40%**), text-to-speech (**29%**), voice replication (**24%**)
- Among performers doing AI-related work, **24.3%** were involved in voice synthesis or voice replica jobs and **24.3%** worked on AI-generated avatar productions
- Actors report being routinely asked to undergo full digital scanning on arrival at film and television sets, often pressured to sign consent terms without time to seek legal advice or fully understand the implications
- Voice artists describe being rushed into signing broad and all-encompassing usage clauses and assignments of IP rights without clarity on how their voice may be reused, altered or monetised in the future
- **80%** of performers did not fully understand their rights before signing contracts
- Many performers sign non-disclosure agreements and only later discover that they have assigned rights to their voice or likeness, sometimes becoming aware of reuse only when their image or sound reappears in an AI system

Photographers: Style and authenticity under siege

CASE STUDY – Tim Flach

Award-winning wildlife photographer and President of the Association of Photographers Tim Flach became aware his distinctive photographic style was being replicated by AI when a researcher informed him that he was among the most 'scraped' artists. In March 2023, he tested a generative AI platform with the prompt 'Tim Flach Tiger image', which produced an image mimicking his signature aesthetic: direct subject gaze, black background and characteristic lighting techniques.

Court documents from a US class-action lawsuit subsequently revealed that Midjourney had trained its models on work from approximately 16,000 artists, including Flach's portfolio. As President of the AOP, Flach has engaged UK policymakers on copyright and AI ethics, arguing that the central issue is not AI technology itself but the legislative framework governing its use.

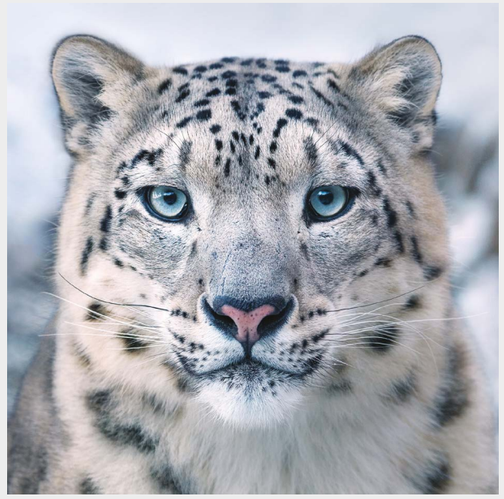
Flach warns that the societal implications extend beyond economic concerns to fundamental questions about photography's evidentiary function.

As AI-generated images become increasingly sophisticated, photography's historical role as documentation of reality is being eroded, collapsing the trust barriers that distinguish authentic documentation from fabrication.

In his forthcoming book *Feline*, featuring cats with genetic modifications, Flach has embedded QR codes linking to behind-the-scenes videos that authenticate his seemingly surreal subjects. As he observes: *'The problem in the past used to be just getting the cat to stay on the table. Now the problem is proving it was ever there in the first place.'*

Below left: *Eagle portrait by Tim Flach: the original work scraped for AI training*

Below right: *Eagle – MidJourney V5: The image the AI model MidJourney output when prompted with 'Eagle by Tim Flach'*



Above left: *Snow Leopard portrait by Tim Flach: the original work scraped for AI training, 2017 /* ***Above right:*** *Snow Leopard – midjourney V5: The image the AI model 'MidJourney' output when prompted with 'Snow leopard by Tim Flach, snowy mountains on a background, photo realistic, close-up, perfect bokeh'*

Legal protections are not keeping pace

GenAI is exposing a major gap in the UK's legal framework: while copyright protects creative works, it does not fully protect the *person* who creates them.

The rise of digital replicas – cloned voices, faces, gestures, styles and identities – makes clear that the UK now needs a modern system of personality rights: rights that protect a person's name, likeness, performance and distinctive creative identity from unauthorised commercial exploitation.

These protections do not need to be addressed solely through copyright law. New statutory personality rights, or reforms to existing performer and image rights, could sit alongside the copyright and performance rights framework[55] and be supported by related areas of law, including data protection and privacy law, consumer protection and misrepresentation law, contract law or competition law. All of these can operate within, and be strengthened by, the CLEAR Framework for AI, which provides the operational principles needed to make such rights effective: Consent, Licensing, Ethical use, Accountability and Remuneration.

There is evidence that stronger protections are both necessary and achievable. Performers are unequivocal: **93%** call for new legal protections to prevent their performances being reproduced by AI without consent, and **94%** want laws explicitly prohibiting deepfake use of their image and voice.[56] As Equity's General Secretary, Paul Fleming, warns, without stronger rules the future for performers' rights will be 'dystopian'.[57]

At the same time, progress in collective bargaining demonstrates what effective protections can look like in practice. Equity has made important advances in its negotiations with the Producers Alliance for Cinema and Television (Pact), securing stronger contractual safeguards against unauthorised and unremunerated digital replicas in film and television. These gains show that protections are possible where clear standards exist, but they also highlight the limits of relying on sector-by-sector negotiation in the absence of a comprehensive legal framework.

Musicians express the same urgency. Almost every respondent (**97%**) to the ISM's 2025 survey supports legal protection against the unauthorised digital cloning of voice, musical style, performance, name, image and likeness; forms of identity theft that fall outside traditional copyright but squarely within the remit of personality rights.

During an AI and Copyright session conducted by the House of Lords Communications and Digital Committee in 2025,[58] AOP's CEO, Isabelle Doran, underlined the issue facing photographers, noting that *'part of the displacement that is happening with their jobs is the fact that they have no opportunity to protect the style of their work'*, and called for the introduction of a UK personality right.

To prevent a cultural free-for-all, government must establish a modern legal framework for personality rights, ensuring people, not machines, retain control over their identity. The CLEAR Framework for AI provides the principles through which these rights can be implemented consistently, fairly and at scale.

SUPPORTING EVIDENCE

- **97%** of musicians across Australia and New Zealand want rights to stop AI appropriating their name, voice, likeness, style or image[59]
- The UK launch of AI-generated performer Tilly Norwood sparked union criticism over use of actor performances without consent[60]
- SAG-AFTRA revealed studios attempted to secure contracts allowing them to scan an actor once and reuse their digital body 'forever' without further consent or pay[61]
- Writers Guild of America raised concerns that studios might exploit AI to generate script drafts and rewrite existing material, warning that writers risk being reduced to 'polishers' of AI-generated material[62]
- Writers Guild of America[63] Minimum Basic Agreement prohibits:
  - AI writing or rewriting literary material
  - Treating AI-generated content as source material
  - Forcing writers to use AI
  - Providing AI-generated material without disclosure
- Late 2024, the WGA accused studios of failing to act against tech companies 'looting' creative works, urging them to take legal action as required under the Minimum Basic Agreement[64]
- SAG-AFTRA deals secured:[65]
  - Rights to refuse digital cloning
  - The requirement of explicit and informed consent
  - Fair compensation for authorised use

1 IN 6

performers (17%) have undertaken AI-related work

24.3%

of **performers** doing AI-related work were involved in voice synthesis or voice replica jobs, and worked on AI-generated avatar productions

80%

of **performers** did not fully understand their rights before signing contracts

2D WHY THIS MATTERS: A CLEAR CHOICE FOR OUR CULTURAL FUTURE

What is at stake is not just creators' income today, it is the authenticity, diversity and long-term value of our culture.

'Artistic outputs and activities are a fundamental part of what it is to be human. Automating this risks people losing an invaluable part of life, expression and socialisation.'

ISM SURVEY PARTICIPANT

If we fail to act now, we risk a world stripped of that humanity, lacking the beauty and cultural diversity that reflect both the imaginations of both our ancestors and future generations. The risk is a cultural landscape dominated by repetitive imitation, drowning out human expression and severing our connection to human-authored creativity.

GenAI is already eroding the foundations of cultural excellence; **86%** of authors commented that AI devalues human-created art and writing. Creators warn that unchecked automation will flood the market with homogenised, low-quality, derivative content, driving down prices for original creative work and devaluing creative endeavour. If two-thirds of performers already see GenAI outputs as a threat to their jobs, the cultural consequences are clear: fewer opportunities, less originality and long-term erosion of our cultural value.

Illustrators have warned that this is not just an economic crisis, but a cultural one:

'I'm concerned about... what impact this will have on the quality of our culture and the need to protect illustration as something culturally valuable.'

AOI SURVEY PARTICIPANT

'The UK's creative sector is historically rich and innovative. Without protection, it becomes impossible for creatives to make a living – threatening the longevity and future of these industries.'

AOI SURVEY PARTICIPANT

86%

authors commented that GenAI devalues human-created art and writing

98%

musicians believe it is vital to protect the value of human-made music

Musicians echo this fear. The ISM's data shows **98%** of musicians believe it is vital to protect the value of human-made music.

'Human experience is the fundamental driving force behind all music creation. Replacing it with machine output means reducing a form of expression and creativity to lines of code – an endless feedback loop of recycled noise.'

ISM SURVEY PARTICIPANT

Professional photographers are concerned about the rapid advancement of GenAI, finding themselves competing for work against GenAI programs that can output synthetic images quickly and at low or zero cost.

'In this brave new world of AI, we are specifically concerned with generative AI, which for us mimics human originality, taking away the heart and soul of what it means to be a photographer or image maker.'

ISABELLE DORAN, CEO AOP

This is not just a fight for jobs; it is a fight for connection, curiosity and culture itself. If creative subjects disappear from education, we lose the foundation of critical thinking and imaginative learning. Without professional artists, photographers, designers, performers musicians and writers, there is no one to nurture the next generation or sustain the creative skills on which so many industries depend. Our collective wellbeing is weakened when we stop making, playing and imagining, and we risk a future in which human expression is reduced to data for machines. At stake is not only the survival of creative professions, but the values and experiences that make us human.

The UK has a long history of leading the world in copyright and creative protection. The Statute of Anne, enacted in 1710 during the advent of the printing press, itself a transformative innovation, established the foundational principle that copyright exists to protect authors and promote learning, not to privilege technology or intermediaries. Since then, the UK's copyright framework has repeatedly adapted to waves of technological change, from broadcasting and recorded sound to digital distribution, and has consistently been regarded as a global gold standard.

What makes the current moment different is not the emergence of new technology, but the approach taken by parts of the generative AI sector. Rather than working within the law, many AI developers have chosen to ignore it, scraping copyrighted works at scale without consent, transparency or remuneration. This is not innovation outpacing regulation; it is a deliberate bypassing of established legal and ethical norms.

Yet, as legal challenges mount and market pressure grows, AI developers are increasingly recognising that licensing is not only lawful but commercially and ethically necessary. The history of UK copyright shows that innovation and creative rights are not in conflict. The task now is to reaffirm that principle, ensuring that generative

AI develops within a framework that respects the law, values human creativity and rewards those whose work underpins these technologies.

The conclusion is clear. If we do not support human creativity, we lose it. This is not an abstract risk, but a foreseeable outcome of policy choices made today.

If government truly wants the UK's cultural excellence to remain a living asset rather than a relic, it must legislate a **CLEAR** Framework for GenAI – **C**onsent, **L**icensing, **E**thical use, **A**ccountability and **R**emuneration.

That is the guarantee of a better future, where innovation supports, rather than replaces, the human imagination, and a future where we can proudly say that our culture was made in the UK.

SUPPORTING EVIDENCE

Cultural loss and homogenisation: a cultural catastrophe

- Unbalanced training data and algorithmic personalisation 'reproduce stereotypes and foster monocultures'[66]
- The Authors Guild of America warns of a 'devastating loss of voices and unique perspectives' if creators are pushed out[67]
- Empirical research shows that when AI-generated art enters cultural marketplaces, human creators are displaced and exit at scale, as AI content floods supply and reshapes consumer choice, a dynamic that risks crowding out distinctive human expression over time[68]
- Ignoring cultural risks will 'streamline human expression' into overwhelmingly American patterns[69]
- AI models trained on US-dominant corpora risk drowning out:
  - British cultural output
  - Regional artforms
  - Dialect-based creativity
  - Local artistic traditions

Marginalisation of minority communities: UNESCO findings[70]

- AI systems 'reflect historical inequalities and dominant epistemologies'
- Midjourney was found to barely depict women or people of African descent compared with real-world demographics
- Minority and regional languages (Welsh, Gaelic and other low-resource languages) receive poor support from GenAI models
- UN High Commissioner for Human Rights, Volker Türk warns that AI propaganda could be weaponised to 'scapegoat already marginalised groups, including immigrants and members of the LGBTQ+ community'[71]
- AI-generated misinformation and hate content is rapidly increasing

3 ARE THE ECONOMIC CLAIMS ABOUT AI CORRECT?

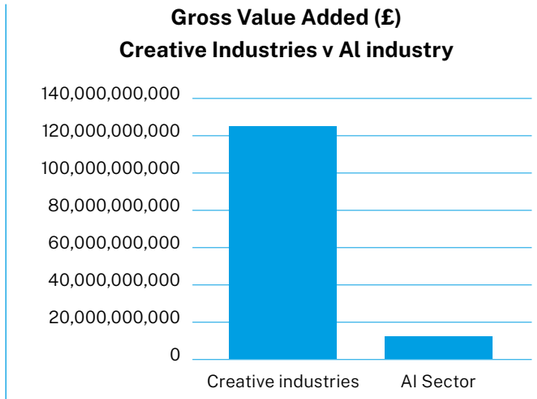
The creative industries: an established contributor to UK economic performance

Recent policy narratives have frequently presented GenAI as a central driver of the UK's future economic growth.

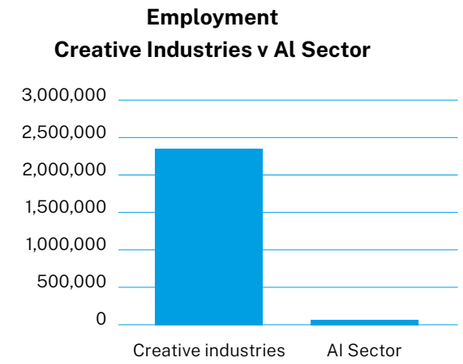
However, current economic data indicates that the UK's creative industries continue to play a significantly larger and more established role in the national economy.

In 2023, the UK's creative industries contributed £124.6 billion to the economy, accounting for **5.2%** of total GVA.[72] By comparison, the UK AI sector generated £11.8 billion in 2024 (see Fig. 2).[73] Employment levels reflect a similar disparity: the creative industries support approximately 2.4 million jobs; around **7%** of UK employment[74] whereas the AI sector employs approximately 86,000 people (see Fig. 3).[75]

Within this landscape, the music industry alone supports 216,000 jobs, illustrating the breadth and depth of the creative workforce.



Fig, 2: Gross Value Added (GVA) comparison between the UK's creative industries and AI sector, The creative industries contribute over ten times more GVA that the current AI sector.



Fig, 3: Employment comparison between the UK's creative industries and AI sector, Creative industries provide roughly 2.4 million jobs vs, tens of thousands in the AI sector.

Exports further evidence this strength. Creative goods and services generated **£54-55 billion** in export value in 2021, representing **8.3%** of all UK exports.[76] The sector has demonstrated sustained resilience and long-term expansion, growing by **35%** in real GVA since 2010,[77] and contributing to tourism, regional regeneration and the UK's international cultural reputation.

While GenAI may contribute to future economic growth, it is unlikely to offset the potential losses from creative sector contraction. Creative industries are geographically dispersed across the UK, ranging from London's West End to game development clusters in Dundee and music production hubs in Manchester, whereas AI investment is likely to concentrate within a limited number of technology clusters. For policymakers, the opportunity cost of prioritising speculative AI growth over an already successful creative sector is therefore considerable.

A common assumption behind claims of AI-driven growth is that productivity gains will compensate for displaced labour. In creative markets, this does not hold. GenAI productivity gains accrue primarily to technology firms, platform owners and large companies, not to the creators whose work is replaced. Where GenAI replaces human creative labour, the result is not increased income for those workers, but job loss, reduced commissions and downward pressure on wages, particularly for entry- and mid-career workers. In a sector dominated by freelancers and SMEs, lost income is not offset by downstream productivity gains but consolidated within a small number of multinational firms, many of which are headquartered outside the UK. Claims that AI productivity will replace creative income therefore confuse aggregate GDP effects with individual livelihoods and obscure a significant transfer of value from labour to capital.

A further structural point often absent from policy debate is that the AI sector is fundamentally dependent on creative industries for training data. GenAI systems require large volumes of copyrighted material, including images, books, journalism, music, film and performance, to function effectively. When this material is licensed rather than scraped without permission, its economic value becomes clear.

Globally, the market for licensing datasets for AI training is now valued at $2-3 billion per year, with forecasts of $8-17 billion by 2030-2033.[78] Creative works form one of the most commercially valuable categories within this emerging licensing economy. Where commercial arrangements are transparent, the financial implications are striking:

- Shutterstock earned $104 million in 2023 through licensing its library to AI developers, representing more than 10% of its annual revenue[79]
- Apple's licensing deal with Shutterstock for training data has been independently valued at $25-50 million[80]
- The proposed £3 billion merger between Getty Images and Shutterstock is similarly justified as a strategy to strengthen their position within the AI data licensing market[81]
- Major record labels and publishers are also beginning to negotiate 'safe training' agreements[82] as they respond to concerns about unlicensed data scraping

Taken together, these developments illustrate that licensed access to creative works already generates hundreds of millions of pounds globally, with strong indications of rapid growth in the coming decade. The UK's creative industries therefore represent both a significant current contributor to national economic performance and a key component of the emerging global AI licensing economy, provided that rights are protected, and licensing mechanisms are maintained.

Against this backdrop, policymakers must consider why a proven £124.6 billion sector[83] with substantial future licensing potential would be deprioritised in favour of an £11.8 billion AI sector[84] whose future benefits remain uncertain.

Parliamentarians have raised similar concerns. In the House of Lords, Baroness Kidron has challenged the claim that weakening creators' protections would improve productivity or public services. She has argued that allowing companies to exploit creative works without consent or payment cannot plausibly be justified by speculative promises of an AI-driven economic boom, questioning how such an approach would meaningfully contribute to medical breakthroughs or more effective public services.[85]

Tech hype versus economic reality

Forecasts about AI's economic potential have often relied on highly optimistic assumptions. For example, PwC[86] projected that AI could increase UK GDP by 10% by 2030, equating to £232 billion.[87] More recent government rhetoric has further expanded these claims, with the 2025 AI Opportunities Action Plan suggesting possible gains of up to £400 billion by 2030.[88]

> ***'The Prime Minister cited an IMG report that claimed that, if fully realised, the gains from AI could be worth up to an average of £47 billion to the UK each year over a decade. He did not say that the very same report suggested that unemployment would increase by 5.5% over the same period... The creative industries contribute £126 billion per year to the economy. I do not understand the excitement about £47 billion when you are giving up £126 billion.'***
>
> BARONESS KIDRON[89]

However, these projections assume ideal market conditions and do not reflect current sector dynamics. The UK's AI industry remains relatively small compared to its creative industries, and much of the investment in AI is dominated by foreign multinational firms, such as Google, OpenAI and Anthropic.[90] While such investment is welcome, profits generated by these firms are largely repatriated overseas rather than reinvested into UK public services or domestic labour markets.

Inflated economic projections also play a role in shaping regulatory pressure. Sir Nick Clegg, former president of global affairs at Meta, recently argued that requiring AI companies to obtain permission before scraping copyrighted content would 'kill the AI industry in this country'.[91] This narrative has been used to discourage the UK from implementing stronger copyright, labour, or competition protections. Yet, as Glenster et al. caution, 'the unregulated use of GenAI in the UK economy will not necessarily lead to economic growth, and risks damaging the UK's thriving creative sector'.[92]

Given that the UK is unlikely to match the scale of AI investment in the US or China,[93] its comparative advantage remains firmly rooted in its creative industries. The evidence therefore suggests that a balanced and rights-respecting AI strategy, rather than deregulation, is required to preserve both cultural and economic resilience.

3 THE HIDDEN COSTS OF UNCHECKED GENAI

The environmental footprint of large-scale AI systems

The rapid expansion of GenAI is accompanied by substantial environmental and infrastructural impacts that remain insufficiently addressed in current policy discussions. By 2026, AI data centres are projected to consume **4%** of global electricity, a demand comparable to the entire power consumption of Japan.[94] This level of energy use contributes directly to carbon emissions unless fully matched by renewable generation. Training a single state-of-the-art model can generate CO_2 emissions equivalent to 125 flights from New York to Beijing.[95] Routine usage is also energy-intensive: generating text through an AI overview or chatbot uses around 30 times more energy than retrieving information from a source,[96] and a large language model can emit greenhouse gases comparable to driving 49 miles in an average petrol car per day.[97] Producing two AI-generated images uses roughly the same amount of energy as charging the average mobile phone.[98]

AI systems also require significant volumes of water for cooling. Training OpenAI's GPT-3 model at Microsoft's US facilities consumed approximately 5.4 million litres of water.[99] A typical large data centre uses 11-19 million litres per day, equivalent to the daily water needs of a town of 30,000 to 50,000 people.[100] Studies also estimate that each AI chatbot query requires five to ten times more electricity than a standard Google search,[101] and at scale this translates into a significant cumulative burden on energy and water systems.

As the UK expands its AI compute capacity, including high-density, water-intensive data centres, policymakers face important sustainability considerations. Parts of southern England are already experiencing water stress, and officials warn that increased server-farm activity could exacerbate shortages.[102] UNESCO similarly supports the development of 'low-impact AI' and the integration of green computing principles into cultural and technological policy.[103]

Human costs: job displacement and economic instability

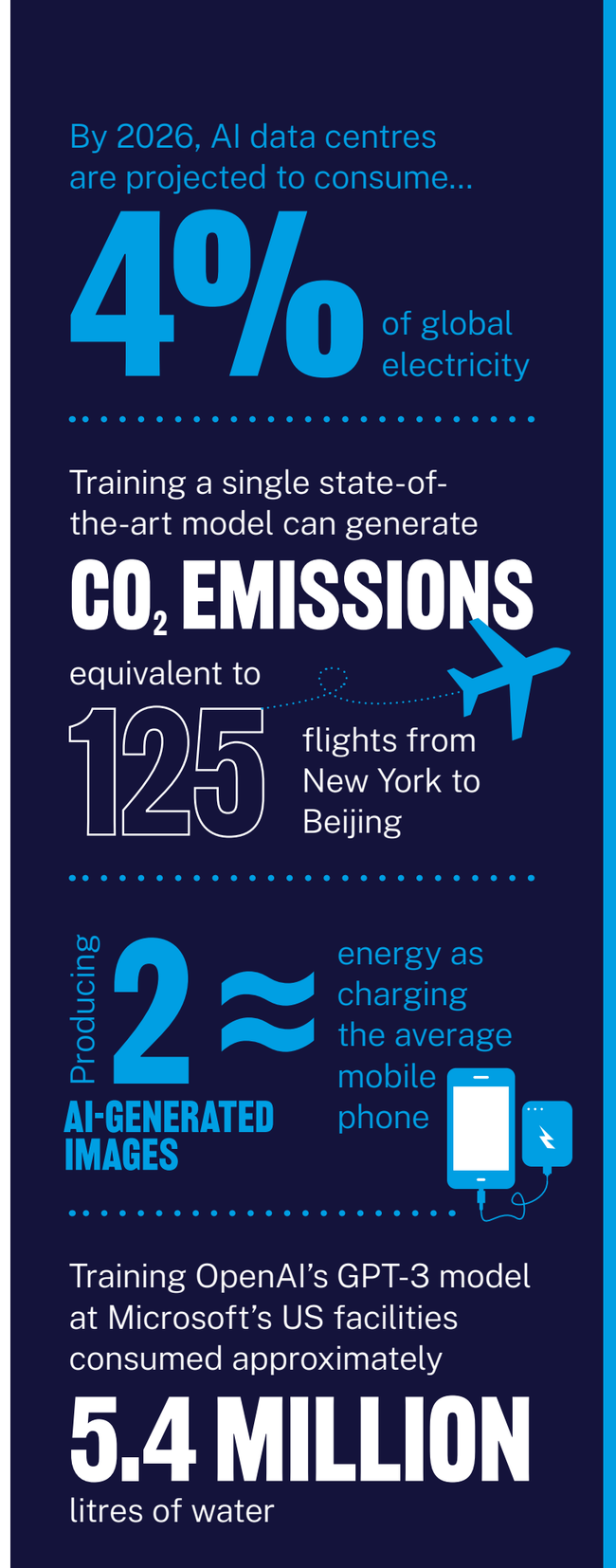
The labour implications of GenAI adoption present significant social and economic risks, as this report has evidenced. A substantial proportion of the UK's creative workforce consists of freelancers, sole traders and SMEs, which renders the sector particularly vulnerable to sudden income volatility. Where GenAI replaces human creative work, the effects extend beyond individual earnings: reductions in freelance income and contract availability have consequences for local creative ecosystems, associated supply chains and regional economies.

Furthermore, despite frequent claims about AI-driven job creation, current evidence provides limited support for the emergence of new roles at the scale, pace or geographic distribution necessary to compensate for losses in creative occupations. As a result, AI-driven displacement may widen existing labour market inequalities.

Distributional injustice

While GenAI may contribute headline GDP figures, the distribution of benefits is unlikely to be even. Much of the UK's AI activity is dominated by multinational firms, such as Google, OpenAI and Anthropic, meaning it is likely a significant proportion of economic gains will accrue to overseas parent companies rather than to domestic workers or the UK public purse.

By contrast, the costs associated with AI expansion, including job insecurity, reduced incomes for creative professionals, lost tax revenue, and increased demand for public infrastructure, such as energy and water, are likely to fall primarily on UK citizens and public institutions. Weakening copyright or permitting unlicensed scraping would further disadvantage UK creators by excluding them from the rapidly growing global market for licensed training data. This would risk diverting future revenue streams to foreign tech companies and undermining the UK's position in the emerging AI licensing economy.



The UK's soft power at risk: implications for national influence

The UK's creative industries form a central pillar of the nation's soft power, enabling the UK to exert international influence through cultural attraction rather than coercive means.[104] As Naughton notes, 'the impact of these industries on Britain's cultural reach and soft power is immeasurable'.[105] Unlicensed GenAI practices that replicate the UK's creative works, divert revenue, or replace original content with automated outputs therefore present risks that extend beyond the creative economy.

Soft power indices consistently place the UK among the world's leading cultural nations, third worldwide in 2025,[106] reflecting the international appeal of British music, film, literature, design, theatre and games. However, the increasing volume of AI-generated content dilutes the visibility and distinctiveness of UK-origin works in global digital markets.

AI systems developed by a small number of multinational companies have the potential to 'subtly reshape global norms, posing a threat to local cultural traditions and intellectual sovereignty'.[107] If these systems disproportionately shape global cultural outputs, UK creative perspectives may be marginalised and the international circulation of British cultural work reduced. These risks would be heightened by domestic policy decisions that prioritise speculative AI growth without adequate protections for creative rights.

Protecting human creativity in the context of GenAI is therefore a matter of geopolitical importance. The UK's cultural heritage and contemporary creative output play a direct role in shaping international perceptions of the UK and supporting diplomatic, trade and cultural relations. A sustained erosion of the UK's creative industries would weaken these assets and, in turn, reduce the UK's ability to project soft power and influence global discourse.

Conclusion: sacrificing creativity for AI is an economic mistake

The UK's creative industries constitute a central pillar of national economic performance, employment, soft power and international competitiveness. Policy decisions that weaken this sector in favour of short-term or speculative gains in the AI market carry significant economic risk. Given the sector's proven contribution to GVA, exports and regional development, any regulatory approach that facilitates widespread unlicensed AI training or accelerates creative sector displacement could undermine one of the UK's most productive and globally recognised industries.

A sustainable national AI strategy must *'value creativity as much as computation'*,[108] ensuring that innovation in AI develops in parallel with, rather than in substitution for, the creative economy. A policy framework that protects creators' rights, supports licensing markets and incentivises responsible AI deployment is therefore essential to maintaining both economic resilience and cultural leadership.

4 EVIDENCE BEHIND THE CLEAR FRAMEWORK FOR AI

We have listened to thousands of creators – writers, literary translators, musicians, illustrators, photographers and performers – and the message is clear.

This is what works:

A CLEAR FRAMEWORK FOR AI

- **C** **Consent** first
- **L** **Licensing** not scraping
- **E** **Ethical use** of training data
- **A** **Accountability** and transparency
- **R** **Remuneration** and rights

CLEAR is not a slogan; it's a solution grounded in lived experience and hard evidence from across the UK's creative industries.

Consent and licensing

Creators are united on this: ask before you take.

They do not want to be told after the fact that their work has been fed into a machine that will later produce derivative versions of their work that will then compete with them in the creative marketplace. Creators want the choice to say *yes* or *no* to their intellectual property being used to train GenAI models.

This position is now reflected in the government's own evidence. In its 2025 *Copyright and Artificial Intelligence: Progress Report*,[109] the government confirmed that **95%** of the 11,500 respondents to the consultation supported licensing as the appropriate mechanism for the use of copyright-protected works in AI training, (**88%** supported licensing in all cases, **7%** supported no changes to copyright law), demonstrating overwhelming cross-sector support for consent-based, paid access rather than unlicensed extraction.

The SoA found that **95%** of authors want consent before their work is used to train GenAI, and **94%** want credit and payment when it is.

Among illustrators, **99%** of demand retrospective compensation for past scraping. Only one in five would license their work *if* offered fair pay and control.

'I would be happy for AI to pay me a fee to license my work, but I would want to be able to choose which images I am happy for them to use.'

AOI SURVEY PARTICIPANT

The AOP agrees: if images fuel commercial systems, creators should share in the proceeds, not just the risk, with **97.4%** wanting compensation and **92.8%** wanting the right to opt-in for AI training and refining purposes.

Musicians say the same: **93%** believe consent must come through licences, with payment when their work trains AI.

'I don't think anyone should be used in dataset models against their wishes or consent.'

ISM SURVEY PARTICIPANT

'The blatant disregard for copyright law is abysmal.'

ISM SURVEY PARTICIPANT

95%

authors want consent before their work is used to train GenAI

1/5

illustrators would license their work *if* offered fair pay and control

Licensing: a sector-specific approach

Because GenAI interacts differently with text, visual art, photography, music, sound recordings, performance, design and news media, there is no one-size-fits-all licensing model. Each sector has its own rights framework, market structure and economic risks, meaning any national approach must be developed in consultation with relevant trade unions and representative bodies to ensure that creators' interests are reflected through established collective bargaining processes and robust contracts rather than determined solely by market power.

Direct licensing is rapidly emerging as an effective pathway for lawful AI development. Anthropic's 2024 settlement with major book publishers,[110] news organisations striking deals with AI companies,[111] Universal Music Group's (UMG) partnership with Udio,[112] Warner Music Group's agreement with Suno,[113] and ElevenLabs' deals with Merlin and Kobalt Music Group,[114] all demonstrate that licensing markets are viable and already expanding.

However, direct licensing deals are not always suitable for individual creators. Most agreements between AI companies and major rights holders are partnerships rather than wholesale data-licence deals, and their terms are almost always confidential. As a result, creators cannot see what rights have been granted, how their works are being used or how compensation is determined. In many cases, creators have no contractual entitlement to share in the value generated. Direct licensing therefore plays an important role, but it cannot be the sole mechanism for AI training, as it centralises decision-making and rewards among major intermediaries while leaving most creators without transparency, bargaining power or guaranteed remuneration.

The music sector demonstrates that voluntary, market-led licensing does not guarantee fair or sustainable outcomes. Parliament's *Economics of Music Streaming Inquiry*[115] found that streaming revenues are distributed through a system structurally tilted towards large intermediaries rather than the musicians, composers and songwriters who create the value. The Competition and Markets Authority (CMA) reached similar conclusions: even when new licensing models emerge, market power rests overwhelmingly with major labels and platforms, not with creators.[116]

The streaming era illustrated the consequences of regulatory absence. Major labels negotiated confidential agreements with Spotify and other digital service providers (DSPs), including equity stakes acquired at a time when artists had no contractual mechanisms through which to benefit. The long-term effects are well documented:

- Many artists still lack clarity over their digital royalty entitlements
- Contractual definitions developed for the CD and download eras remain unfit for streaming
- Creators had no visibility into the terms or value of label-Spotify agreements
- When labels later sold their Spotify shares, most artists received no direct benefit

These outcomes reflected a system in which powerful intermediaries negotiated privately, while creators lacked transparency, bargaining power, and enforceable minimum standards. Many musicians now fear a comparable outcome in relation to AI: high-value, top-level licensing arrangements that concentrate revenue upstream, leaving creators to receive micropayments for the use of their work in AI training.

Market-led licensing alone cannot address these structural imbalances. To avoid repeating the failures of the streaming era, statutory

intervention may be required, not to mandate access to creative works, but to ensure that where licensing occurs, creators receive fair, transparent and enforceable remuneration. Such intervention should apply across all licensing models, including direct licensing, by establishing minimum enforceable standards on transparency, consent and remuneration for creators. These standards should not interfere with commercial negotiations or bespoke agreements, nor prescribe a single licensing route, but ensure that licensing mechanisms cannot operate to the detriment of creators.

Statutory oversight may also be necessary in relation to collective management organisations (CMOs), to ensure that revenues generated from AI-related uses are distributed effectively to the individuals whose works underpin AI systems. Many creators are not members of CMOs (e.g., only **35.9%** of eligible AOP members currently claim visual art CMO revenues), highlighting the limits of relying on existing collective structures alone. Regulation should therefore focus on outcomes: that money flows to creators, regardless of the licensing pathway used.

In this context, the creative sector and the AI industry may also require a neutral, trusted infrastructure to operationalise lawful licensing, transparency and remuneration across multiple models, supporting compliance with statutory standards, without mandating participation or replacing commercial negotiation.

If the UK relies solely on private AI licensing deals, it risks embedding a new generation of inequity into the creative economy, with serious consequences for income, employment, cultural diversity and long-term sustainability. By introducing statutory standards and oversight, the UK can support innovation while ensuring that AI partnerships operate on a fair, transparent and enforceable foundation that recognises and rewards creative labour.

E Ethical use

Ethical practice means recognising that creative works are not free raw materials.

GenAI datasets must be built from lawfully licensed works, not scraped from the internet. Creators pour years of skill, study and lived experience into what they make. Treating it as free data is not innovation: it is theft and exploitation.

A Accountability and transparency

Without transparency, there can be no consent, no licensing and no fair pay. Across all sectors, the demand for transparency is overwhelming. In 2025, **81%** of authors called for a public tool to check whether their work had trained an AI model, and more than **80%** wanted attribution built into AI metadata. The AOI found **99%** of illustrators want full dataset disclosure and **94%** of musicians demand the same clarity.

'The problem isn't the technology; it's the big companies making decisions without our consent.'

ISM SURVEY PARTICIPANT

Transparency must also reach consumers. Over **90%** of authors say publishers and clients should clearly label any content where GenAI has been used, and **99%** of illustrators, **95.9%** of photographers and **98%** of musicians support mandatory labelling for consumers.

Transparency is essential because only the developer currently knows what works have been ingested, how they were acquired and on what legal basis. It is unreasonable and unrealistic to expect creators to prove infringement by analysing outputs or litigating case-by-case. Transparency provides the direct

IN 2025

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98%

musicians support mandatory labelling for consumers

evidence that rights holders need to enforce their rights and without it, creative output and the wider sector will suffer.

Transparency does not require revealing trade secrets. As in the food and drink sector, provenance disclosure can ensure accountability without exposing commercial processes. Creators do not need to know *how* a model learns, only which copyright-protected works were used, how they were obtained and whether they influenced outputs.

To ensure that AI develops on a lawful and sustainable footing, minimum transparency standards are essential. At a high level, these standards must require AI developers to:

- Disclose what data was used to train and fine-tune their models, including the weights, source, method of acquisition and legal basis
- Provide simple, accessible tools allowing creators to check whether their work is included and how it has been used
- Publish high-level information about training data sources, licensing status and the presence of synthetic or user-uploaded material
- Explain whether outputs rely on identifiable creative styles, voices or performances
- Maintain adequate, searchable records for rights holders, without placing burdens on individual creators or performers

Transparency also builds public trust, prevents discriminatory or unsafe outputs and supports the UK's Industrial Strategy by safeguarding employment in one of the country's most productive sectors.

With each day that passes without transparency, creators lose income, market visibility and professional stability. Government must act to ensure AI develops in a way that respects the legal and cultural rights of creators and performers, rather than undermining the industries that power the UK's global cultural influence.

R Remuneration

'They are stealing some of the UK's most valuable cultural and economic assets – Harry Potter, the entire back catalogue of every music publisher in the UK, the voice of Hugh Grant, the design of an iconic handbag and the IP of our universities, great museums and library collections. Even the news is stolen in real time, all without payment, with economic benefits being taken offshore. It costs UK corporations and individuals their hard-earned wealth and the Treasury much needed revenue. It also denudes the opportunities of the next generation because, whether you are a corporation or an individual, if work is stolen at every turn, you cannot survive.'

BARONESS KIDRON[117]

Consent without payment is not consent; it is coercion. Licensing without fair value is not progress; it is exploitation.

Across every discipline, the message is the same: creators are not anti-AI. They want to participate in its economy, not be erased by it. Fair pay is the line between a sustainable creative future and a race to redundancy.

'What is at stake is the basic principle that creators own their creations, and no amount of obfuscation can hide it... This is about how working people and UK businesses protect themselves from theft to earn an honest wage.'

LORD STEVENSON OF BALMACARA[118]

Together, these findings form a single, powerful demand: a CLEAR framework for AI:

- **C** **Consent** first
- **L** **Licensing** not scraping
- **E** **Ethical use** of training data
- **A** **Accountability** and transparency
- **R** **Remuneration** and rights

This is not a wish list; this is the *minimum standard* for a functioning, fair and ethical creative economy.

CLEAR offers a roadmap for reform, one that restores balance, protects creators and supports the industries that make the UK a cultural world leader. Without it, GenAI remains a one-way pipeline for the theft of copyright materials extracted to reward multinational monopolies while riding roughshod over the rights, incomes and trust that keep our creative sector alive.

RECOMMENDATIONS

We call for urgent action from government, regulators and the creative sector to prevent GenAI causing irreversible damage to the UK's creative economy and cultural identity.

Government: a C L E A R Framework for AI

We urge government to adopt the CLEAR Framework as the foundation for responsible, safe, ethical and economically fair regulation of GenAI.

C Consent first

- **Clarify the *Copyright, Designs and Patents Act 1988* (CDPA)** to ensure creators' works cannot be used to train GenAI models without explicit, prior consent

L Licensing, not scraping

- **Support a statutory licensing scheme** for AI training that provides a lawful, transparent route for AI developers to access creative works, ensuring fair payment and attribution to creators

E Ethical use of training data

- **Create enforceable ethical standards** for the sourcing, curation and application of training data, including a ban on non-consensual scraping and misrepresentation of authorship
- **Require impact assessments** for large-scale GenAI systems, including evaluation of cultural, social and employment effects

A Accountability

- **Mandate registration and reporting of datasets** used for AI training, creating a public, auditable records of licensing arrangements overseen by the UK Intellectual Property Office (IPO)
- **Require labelling of AI-generated works**, ensuring audiences and consumers can distinguish synthetic content from human creativity
- **Impose transparency duties** on AI tech companies to disclose the use of creative works to creators, and to be truthful about carbon footprint data

R Remuneration and Rights

- **Support fair pay and attribution** for creators whose works are used in GenAI training or derivative production of outputs
- **Fund new rights infrastructure**, including metadata standards, attribution systems and collective management mechanisms, to ensure creators are paid when their works are used in the training of GenAI systems
- **Embed human rights protections**, including the right to work, to fair remuneration and to data protection and identity protection within the UK's AI governance framework, aligning with Article 23 of the Universal Declaration of Human Rights
- **Introduce a *sui generis* Personality Right for creators** to protect their performance or style as an additional protection measure

The creative sector

We urge the creative sector to:

1. **Adopt the C L E A R Framework for AI.** Collecting societies, trade bodies and industry companies should embed the CLEAR principles:
   - **C Consent**
   - **L Licensing**
   - **E Ethical use**
   - **A Accountability**
   - **R Remuneration**

   across their operations and contracts

2. **Implement GenAI disclosure policies.** Require all commissioned, distributed or broadcast creative works to state when GenAI has been used

3. **Champion ethical GenAI partnerships.** Prioritise GenAI tools that enhance human creativity rather than replace it, ensuring equitable benefit-sharing

4. **Build cross-sector solidarity.** Collaborate with writers, translators, musicians, artists, photographers and performers to create shared standards for consent, licensing and attribution

5. **Educate and empower.** Deliver training to help creators understand GenAI technologies, rights management and how to protect their work in the digital environment

WE STAND READY TO WORK WITH GOVERNMENT, REGULATORS AND INDUSTRY TO ENSURE THAT GENAI POLICY SUPPORTS BOTH INNOVATION AND CREATIVITY WHILE SAFEGUARDING THE FUTURE OF UK CREATORS.

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