



Copyright Collective Management in Global Perspective & Impact of AI to Creative Industry

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WHO WE ARE

- International Confederation of Societies of Authors and Composers
- Founded in 1926
- Non-governmental, not-for-profit organisation
- The leading worldwide network of authors' societies



228
societies

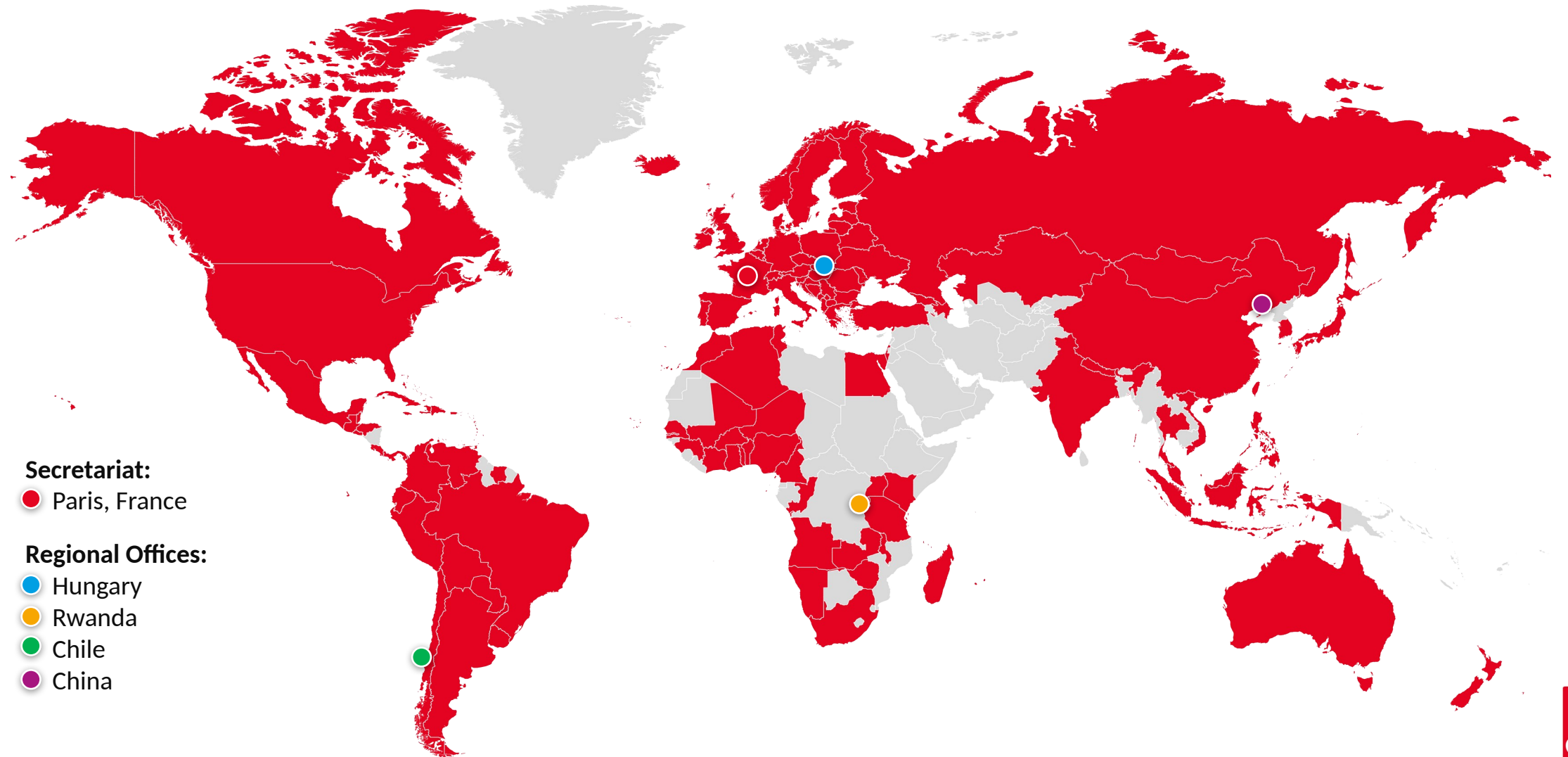


111
countries/
territories



Over 5 million
creators

OUR PRESENCE



REPRERTOIRE MANAGED BY OUR MEMBERS

5 repertoires



MUSIC



DRAMA



AUDIOVISUAL



LITERATURE



VISUAL ARTS

PRESIDENTS AND VICE PRESIDENT

©Urban Andersson, Zap PR - ©Initiative Urheberrecht



CISAC President Björn Ulvaeus
Singer-songwriter and co-founder of ABBA



© Chaka Chaka Promotions

Yvonne Chaka Chaka
South African singer-songwriter



©JASPAR

Kazuhiko Fukuoji
Japanese visual artist



©DAMAI

Ángeles González-Sinde Reig
Spanish iscreenwriter, film director, illustrator, and children's book author



©Jesus Morales

Arturo Márquez
Mexican composer

CISAC in Asia-Pacific :

22 Full Members, 4 Associate, 6 Provisional, 2 Client RME



APRA
AMCOS

asdaacs



FILSCAP

müST

社團法人中華音樂著作權協會
Music Copyright Society of Chinese Taipei

AWGACS
AWG AUTHORSHIP COLLECTING SOCIETY

SACK
Society of Artist's Copyright of KOREA

COPYRIGHTAGENCY



MRCN
Music Royalty Collection Society Nepal



deganz
directors and editors guild of aotearoa new zealand
ngā kaiwherewhera kiritata

사단법인 한국방송작가협회
KOREA TV & RADIO WRITERS ASSOCIATION



JASRAC



YOUR MUSIC PARTNER



日本映画監督協会



一般社団法人
日本美術著作権協会
JASPAR
Japanese Society for Protecting Artists' Rights

OMCT
MUSIC COPYRIGHT (THAILAND) LTD.



SACENC
Société des Auteurs Compositeurs Editeurs de Nouvelle-Calédonie



WGJ WRITERS GUILD OF JAPAN



MACP

KOSCAP
The Korean Society of
Composers, Authors and Publishers
(사)한국음악저작권협회

Korea Music
Copyright Association

Resale Royalties
Aotearoa
Toi Huarau

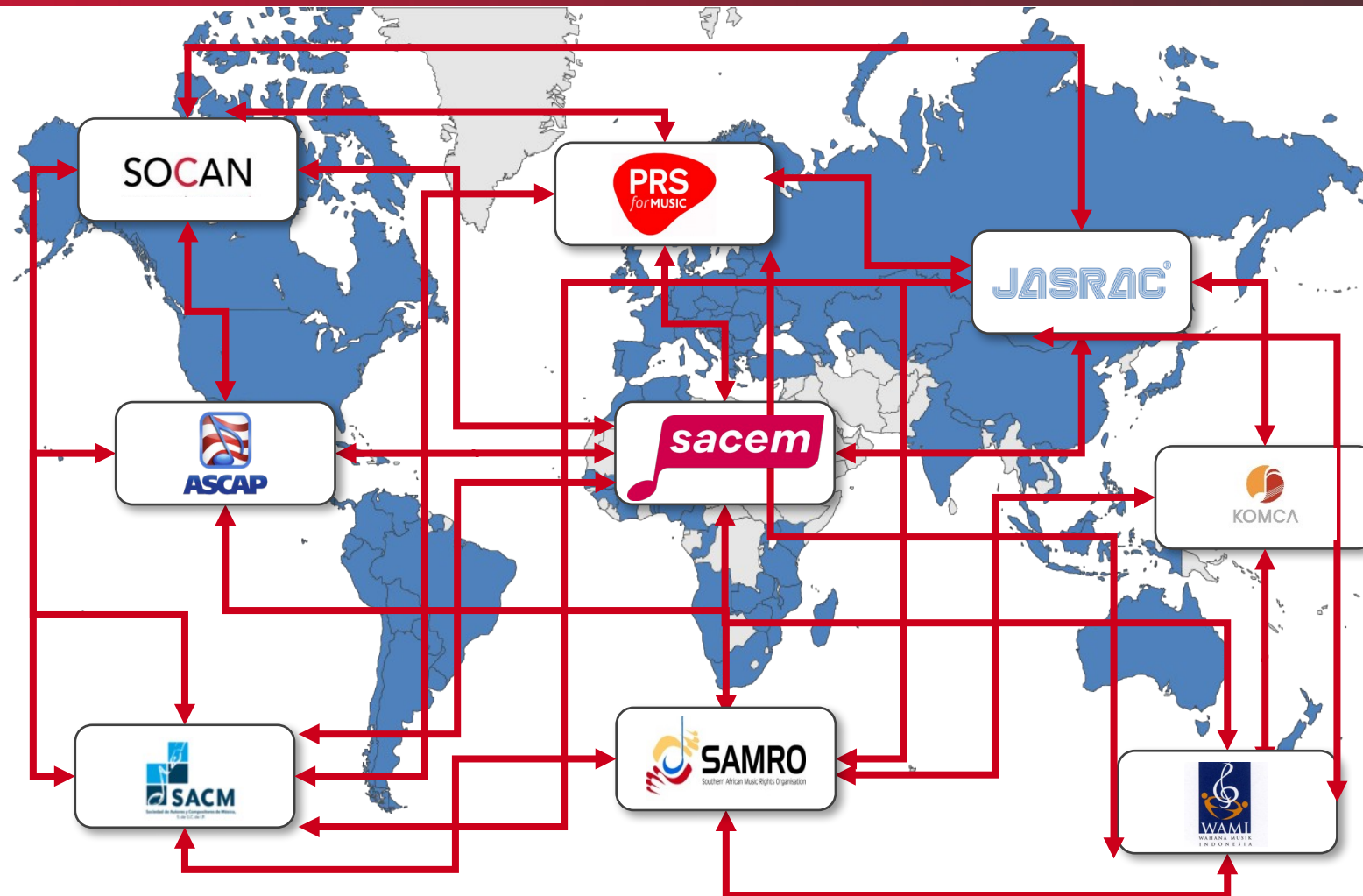
KOLAA
한국문학예술저작권협회
Korea Literature, Academic works
and Art Copyright Association

中国音乐著作权协会
Music Copyright Society of China

CPSN



GLOBAL NETWORK



Governance

- Developing and implementing standards and best practices
- Reinforcing legitimacy of collective management system
- Reflects our members' long-standing commitment to the highest standards of collective administration of rights
- Unique to CISAC

1 Professional Rules

2 Binding Resolutions

3 Compliance monitoring

4 Targeted support

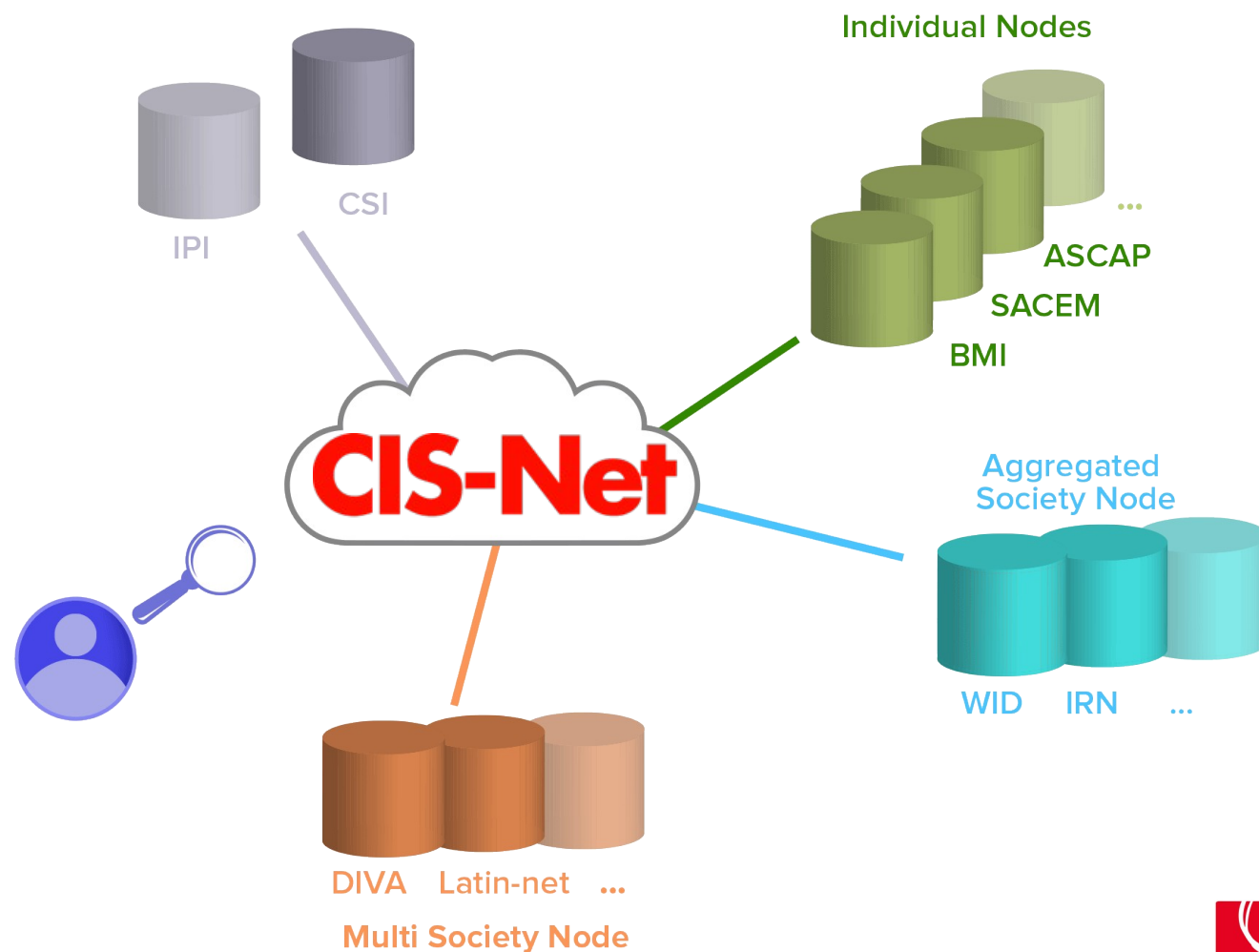
TECHNOLOGY

- **CIS-Net**

- Linking the music databases of members and RME
- Global works database

- **Standards and Identifiers**

- ISWC
- IPI



Music Licensing



- Broadcast Licensing : TV, Radio
- General Public Performance Licensing
 - Use of music is an integral part of
 - Karaoke, Gym Classes, Disco
 - Live Music – in concerts and events
 - Background music – enhance the business operations and user experience
e.g. restaurants and shopping outlets
- Digital Licensing

2023 GLOBAL COLLECTIONS

TOTAL COLLECTIONS

€13.1bn

+7.6%

ASIA-PACIFIC

€1.9bn

-0.8%

Top three collecting countries/territories
(EUR million)

Country/ Territory	Collections	Growth
JAPAN	895	-3.0% (+ 6.8%)*
AUSTRALASIA	427	+0.1% (+7.5%)*
KOREA, REPUBLIC OF	279	+9.3% (+11.7%)*

*in local currency

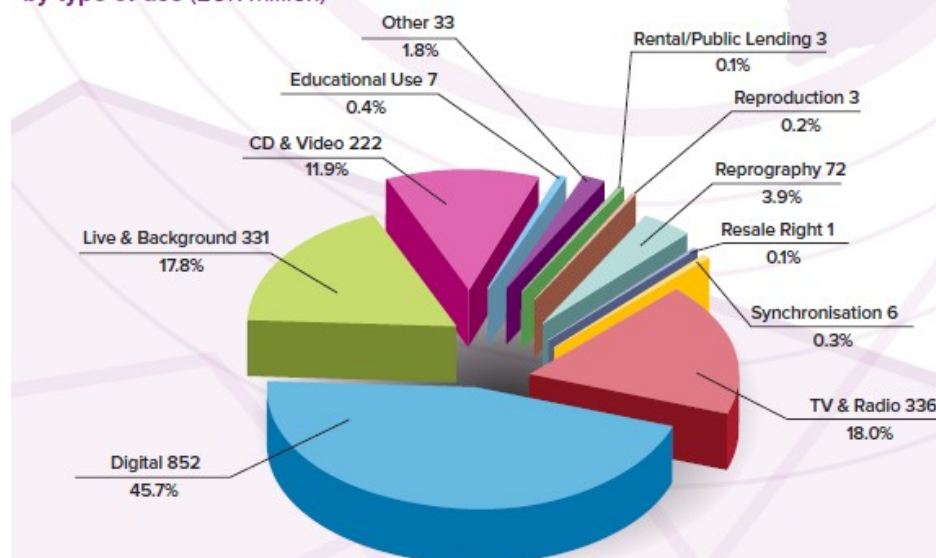
Collections by repertoire
(EUR million)

Repertoire	Collections	Growth
Music	1,784	-0.3%
Audiovisual	0.2	-23.1%
Literary	75	-10.1%
Drama	-	-
Visual Arts	7	-3.6%
GRAND TOTAL	1,867	-0.8%



ASIA-PACIFIC

Share of collections
by type of use (EUR million)



Leading smaller markets by digital share (2023)
and growth 2019–2023

Country/ Territory	Market Share 2023	Growth 2019–2023
VIETNAM	84.3%	+270.4%
INDONESIA	83.3%	+111.6%
PHILIPPINES	80.3%	+325.8%
INDIA	74.2%	+493.6%
HONG KONG	68.7%	+43.1%
THAILAND	66.2%	+181.0%
MEXICO	65.6%	+242.1%

Legal Requirement/Regulatory framework for the establishment of CMO

- Approval system
 - Statutory requirement
 - Accreditation regime
- Registration system
 - Mandatory requirement
 - Voluntary regime
- Class Licensing Scheme : requires CMOs to comply with all licence conditions of the class licence that applies to them
- Code of Conduct
 - Mandatory requirement
 - Voluntary requirement
- No specific approval, but registration requirement under civil law/corporate law

Joint Licensing Practice in Music Industry

- Voluntary Arrangement is preferable
 - ◉ Thailand – MPC
 - ◉ Australia – One Music Australia
 - ◉ New Zealand – One Music New Zealand
- Government Policy
 - ◉ Korea – Integrated Collection regime
 - ◉ China – Karaoke by CAVCA
- Other Joint Licensing entity
 - ◉ Malaysia – MRM (terminated – failure to reach a consensus amongst the stakeholders)
 - ◉ Indonesia – LMKN
- Joint licensing between musical works society AND neighboring right society, limit the application to specific type of usage:
 - ◉ digital licensing should be excluded
 - By policy : limited scope of collection : Karaoke – China & Taiwan
 - PP collection only: Australia, New Zealand, South Korea
 - Concert licensing : excluding neighbouring right collection : Thailand

Message from Björn



“AI can be a wonderful tool, but this must never be at the expense of creators’ rights. The concept of copyright has had and has immense impact on culture and economy and must not be watered down by AI.”

“The message now to AI Providers is clear: play fair; collaborate with us, in a way that benefits us all. Respect the creators who are fueling the AI revolution.”

Artificial Intelligence

- AI is not new to the music industry : it has been used as tools to help compose music, write scripts, mix music.
- Mis-use of AI could be threats to the society:
 - Mis-use of personal data for AI training
 - AI could be threat to national security
 - Deep fake : replacing human face in a photo or video; imitate the voice of some famous singers – could be used for criminal activities
- Policy should be introduced to safeguard the Creative Industry

Artificial Intelligence

- In July 2023, CISAC published an Open Letter to governments which was co-signed by an alliance of international rightsholders organisation
- The first principle is about **CONSENT**
 - The use of copyrighted works requires the authorisation of the creator.
 - Governments should avoid creating new exceptions that would allow AI platforms to exploit copyright works without authorisation.
- The second principle deals with **REMUNERATION**
 - Licensing of copyright works for use (e.g, training of Ai) by AI services should be enabled and supported
 - Creators must be compensated for the use of their creations.
- The third principle deals with **TRANSPARENCY**
 - Only AI operators would be capable to identify the copyright works that they are using to “train” the AI, and how exactly they are using them. AI operators should be able to provide data transparency under the current technology level. AI operators should have an obligation to report about their use of copyright works.



OPEN LETTER

Global Creators and Performers Demand Creative Rights in AI Proliferation

20th July 2023

With the proliferation of Artificial Intelligence (AI), artists, creators and performers must be respected, human creativity protected, copyright principles remain robust and fair licensing practices developed and implemented. At the same time, global solutions should be adopted to ensure AI companies remunerate human creators whose works are exploited.

The advancement of AI has been rapid and unprecedented. Globally, governments recognize the scale and potential impacts of the use of AI on our daily lives, and as such have prioritized measures to safeguard the interests of the public at large, while also seeking to preserve innovation and technological progress.

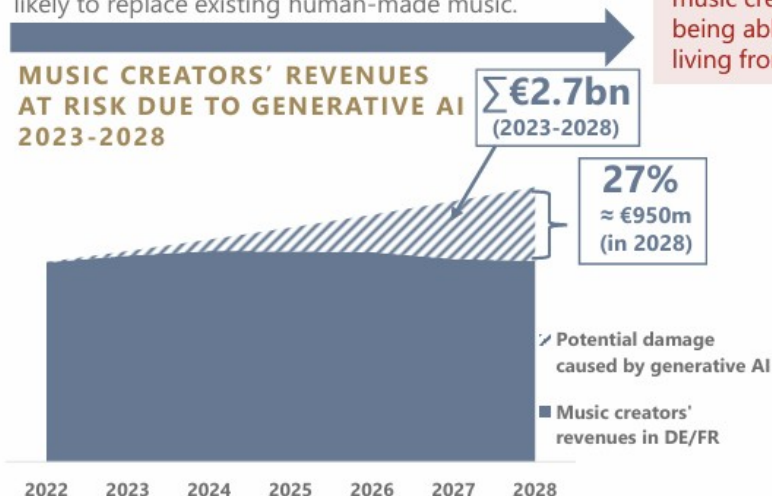
The cultural sector and international creative community will be among those most impacted by unbridled development and open use of generative AI models. Policymakers around the world have heard from creators and performers whose works and performances are being used to train AI without their authorisation, remuneration, or even recognition, often under the guise of “research”. There is furthermore a general, societal sense of unease around AI-generated works and the deception of passing off AI works as works of human creativity.

Artificial Intelligence : AI Study in Europe

AN AI-GENERATED GAP OF UP TO 27% FOR MUSIC CREATORS' REVENUES WHILE THERE IS NO REMUNERATION FOR HUMAN-MADE INPUT TO DATE

Traditional revenue streams are under severe pressure from generative AI for many music creators. **It can be assumed that by 2028, 27% of music creators' revenues will be at risk due to generative AI. This corresponds to an estimated potential damage of €950m in 2028 alone and a cumulative total damage for the period 2023-2028 of around €2.7bn.**

An increasingly predatory competition is to be expected for creators, especially in areas where AI is particularly likely to replace existing human-made music.

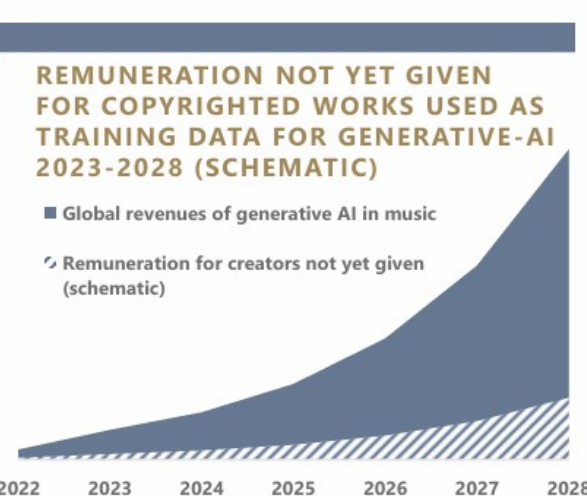


71%

of music authors and creators in France and Germany surveyed are afraid that the use of AI for music could lead to music creators no longer being able to make a living from their work.

Despite the fact that copyrighted works are used as training data for generative-AI models and therefore form the fundamental basis for the origin and development of the market, authors and creators do not participate in the immense growth prospects.

So far, there is no remuneration system that closes the AI-generated financial gap for creators.



27% of music creators' revenue is at risk in the medium term which represents a cumulative revenue loss of EUR 2.7 billion by 2028.

71% Music Creators believe that AI will deprive them of their income and threaten their future.

<https://www.gema.de/en/news/ai-study>

Source: Goldmedia survey on behalf of GEMA and SACEM October/November 2023, n=14,795 (DE: 5,689, FR: 9,106);
Basis: GEMA and SACEM members. Goldmedia analysis based on internal data by GEMA and SACEM and from expert interviews.

Litigation in Germany – Open AI

- In November 2024, GEMA filed a lawsuit against Open AI for the unlicensed use of protected musical works
 - The lawsuit's subject is the chatbot's unlicensed reproduction of song lyrics.
 - German authors without having acquired licenses or paid the authors in question. The aim is to prove that OpenAI systematically uses GEMA's repertoire to train its systems.
 - Legislation does authorise text and data mining, i.e. the systematic internet searching to obtain information about patterns, trends and correlations. However, whether the training of AI models and systems is permitted on this basis alone is highly controversial.
 - In addition, the authors have the option of so-called opting out so that they can declare that their works may only be used to train AI systems under licence. GEMA has declared this opt-out on behalf of its members. This is intended to ensure that authors receive an appropriate share of the income generated by AI systems. The systems can only produce music recordings because they have been trained with protected works.

<https://www.gema.de/en/w/gema-files-lawsuit-against-openai>

Litigation in Germany - Suno

- In January 2025, GEMA filed a lawsuit against Suno for the unlicensed use of protected musical works
 - The music tool, Suno, makes it possible to generate playable audio content using simple prompts.
 - GEMA was able to document that the system outputs content that obviously infringes copyrights. In terms of melody, harmony and rhythm, this content largely corresponds to world-famous works whose authors GEMA represents. The songs affected include those by Alphaville (Forever Young), Kristina Bach (Atemlos), Lou Bega (Mambo No. 5), Frank Farian (Daddy Cool) and Modern Talking (Cheri Cheri Lady).
 - The results clearly show that Suno has systematically used GEMA's repertoire for the training of its music tool and is now exploiting it commercially without giving the authors of the works a financial share. Users of the premium version of the AI tool, on the other hand, have to pay a subscription fee to Suno Inc.

<https://www.gema.de/en/w/press-release-lawsuit-against-suno>

Artificial Intelligence : AI Study in Australia

- **Revenue risk:** By 2028, 23% of music creators' revenues will be at risk due to generative AI, an estimated cumulative total damage of half a billion (AUD\$519m)
- **AI adoption:** Over half (54%) of those surveyed agree that AI technology can assist the human creative process. AU/NZ songwriters and composers are early adopters
- **Income impact:** 82% of music creators are concerned that the use of AI in music could lead to them no longer being able to make a living from their work
- **Cultural concerns:** 89% of Aboriginal and Torres Strait Island music creators believe that AI will lead to an increase in cultural appropriation
- **Policy demands:** 97% demand that policymakers should pay more attention to the challenges related to AI and copyright



Study on the economic impact of Generative **AI** in the **Music** and **Audiovisual** industries

Complete study

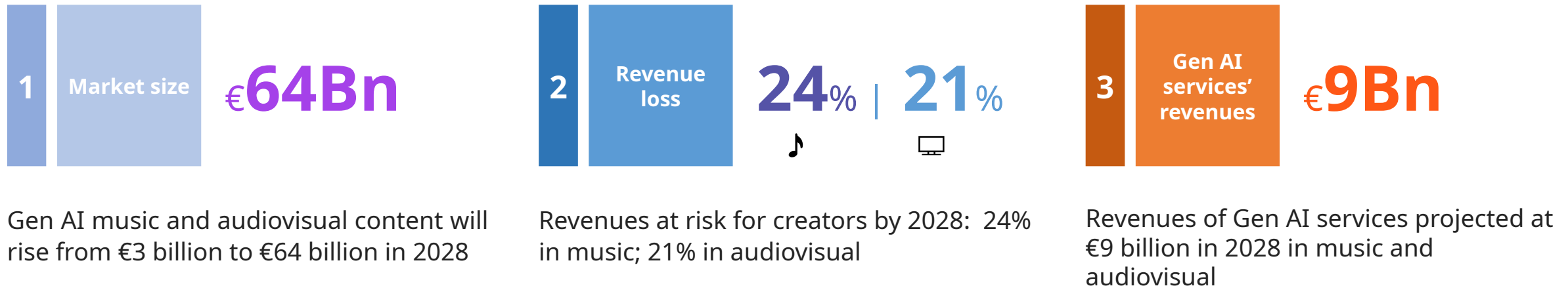
Current situation and 5-year perspective

November 2024



<https://www.cisac.org/Newsroom/news-releases/global-economic-study-shows-human-creators-future-risk-generative-ai>





In an unchanged regulatory framework, creators will not benefit from the Gen AI revolution, but will actually suffer losses on two fronts: first, the **loss of revenues due to the unauthorised use of their works for training** by Gen AI services without any remuneration; and second, the **“cannibalisation” or overtaking of their traditional revenue streams** due to the flooding and substitution effect of AI-generated works competing against human-made works

Thank you



SERVING AUTHORS WORLDWIDE
AU SERVICE DES AUTEURS DANS LE MONDE
AL SERVICIO DE LOS AUTORES EN EL MUNDO

