



Is cultural value relevant in the AI Licensing economy? – an empirical assessment

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Copyright, Artificial Intelligence
and Cultural Heritage Institutions
European Copyright Society



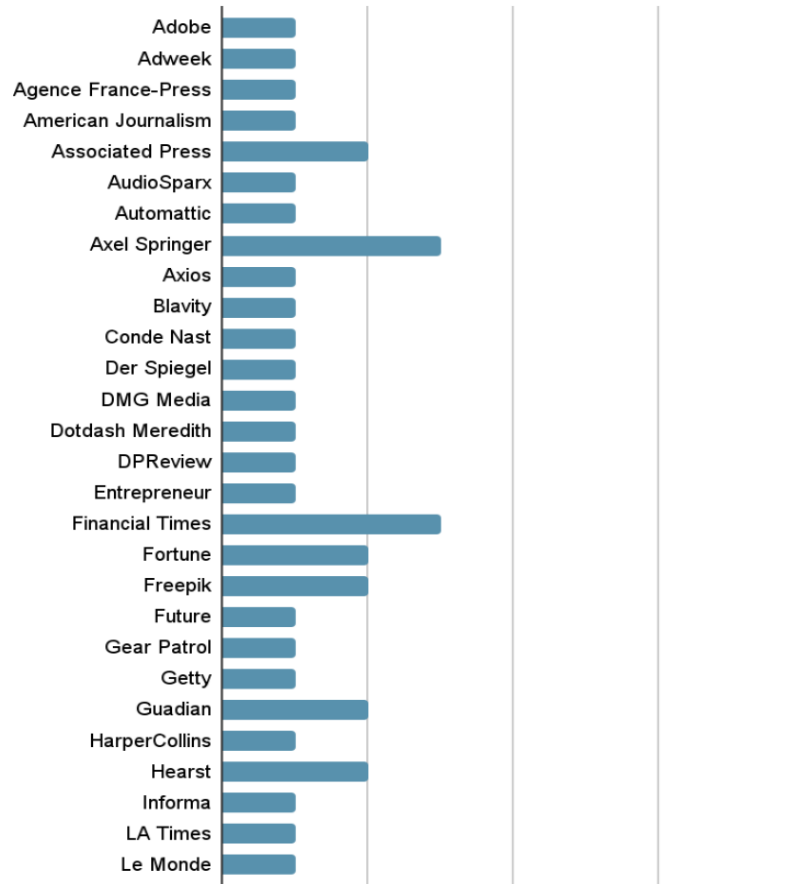


VARIOUS ARTISTS
IS THIS WHAT
WE
WANT?

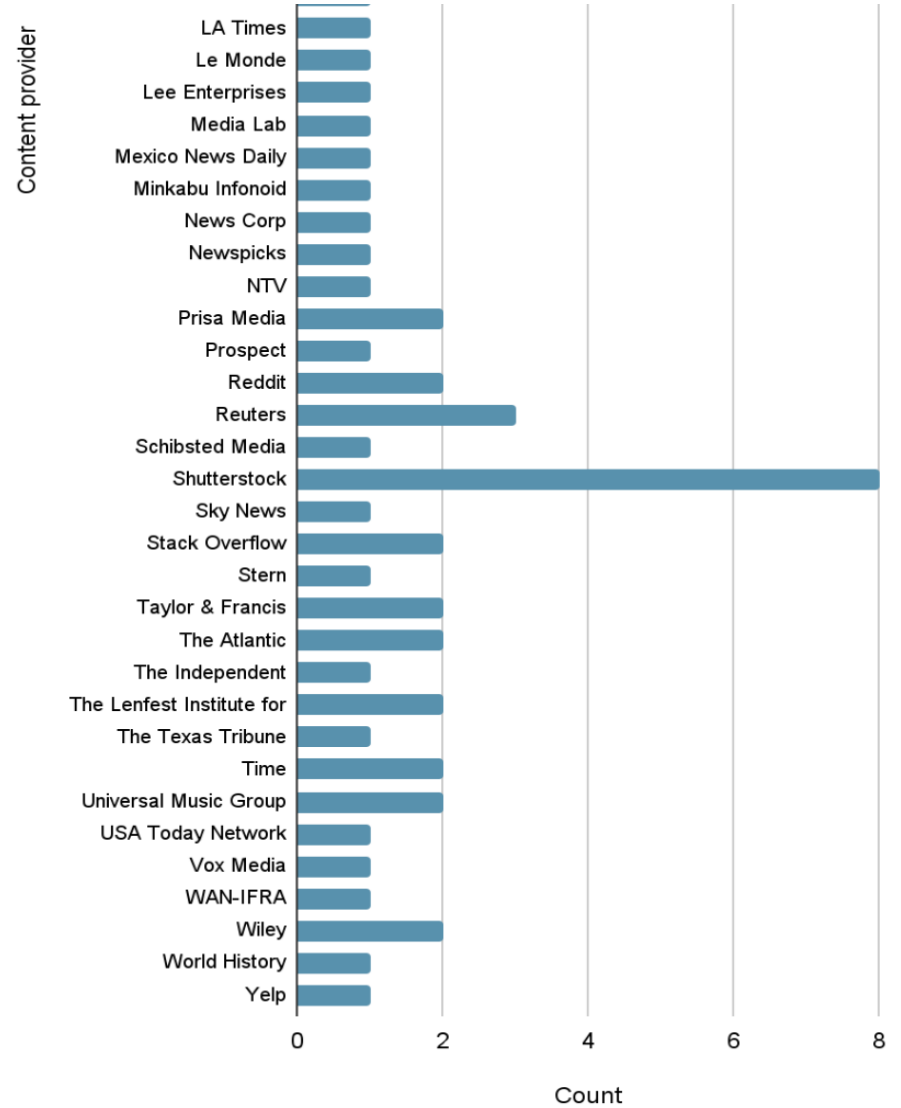
Is This What We Want? Courtesy Photo

Number of known commercial agreements, by licensor

(Feb 25 data, Thomas & Kretschmer)



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Licensing terms

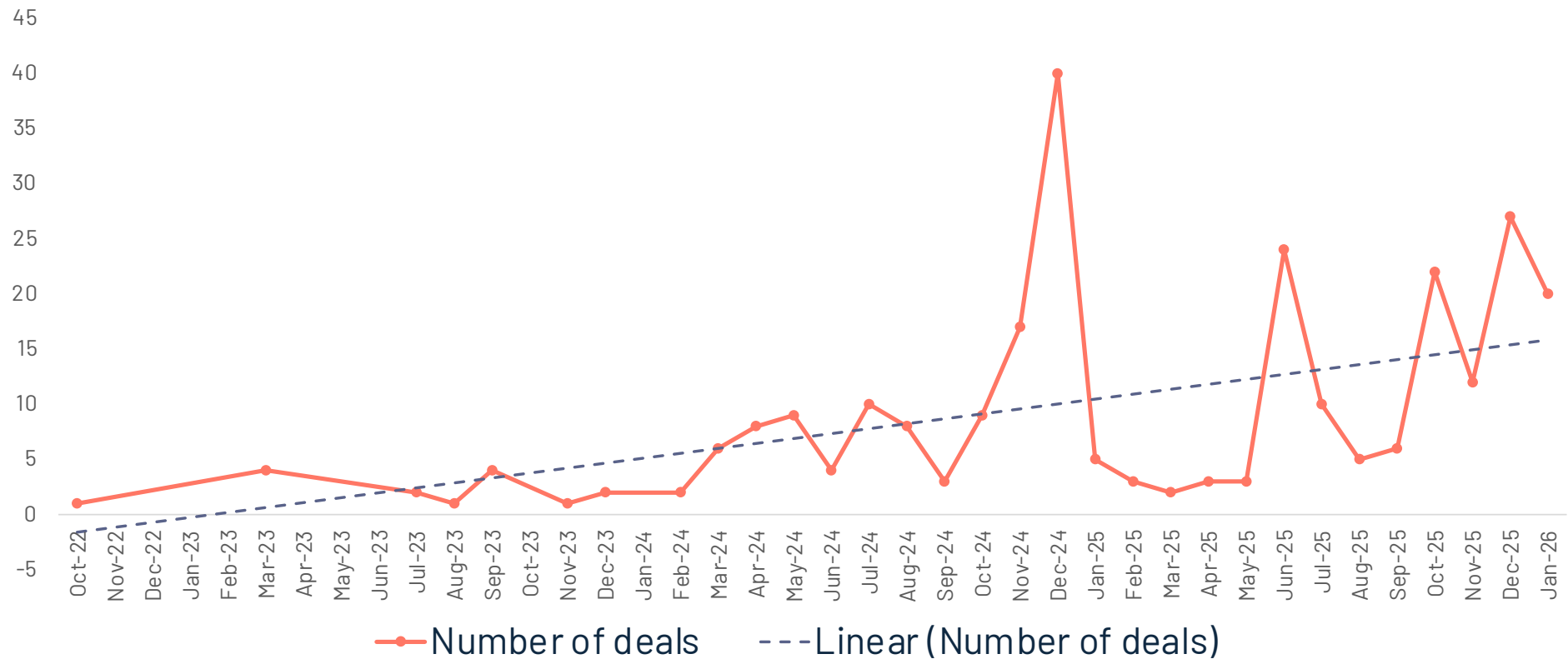
- Reasons for licensing: legal risk, technical convenience (API), quality data
- Types of deals: data access agreements, copyright licences, assurances not to sue, access to compute, comprehensive partnerships, equity stakes
- AI Coverage: training activities, output activities, technologies (such as augmented retrieval)
- Other terms coded: jurisdiction, exclusivity, time period
- Process: e.g. out-of-court settlement of litigation
- Effects: e.g. establish anchor price

Towards a licensing economy?

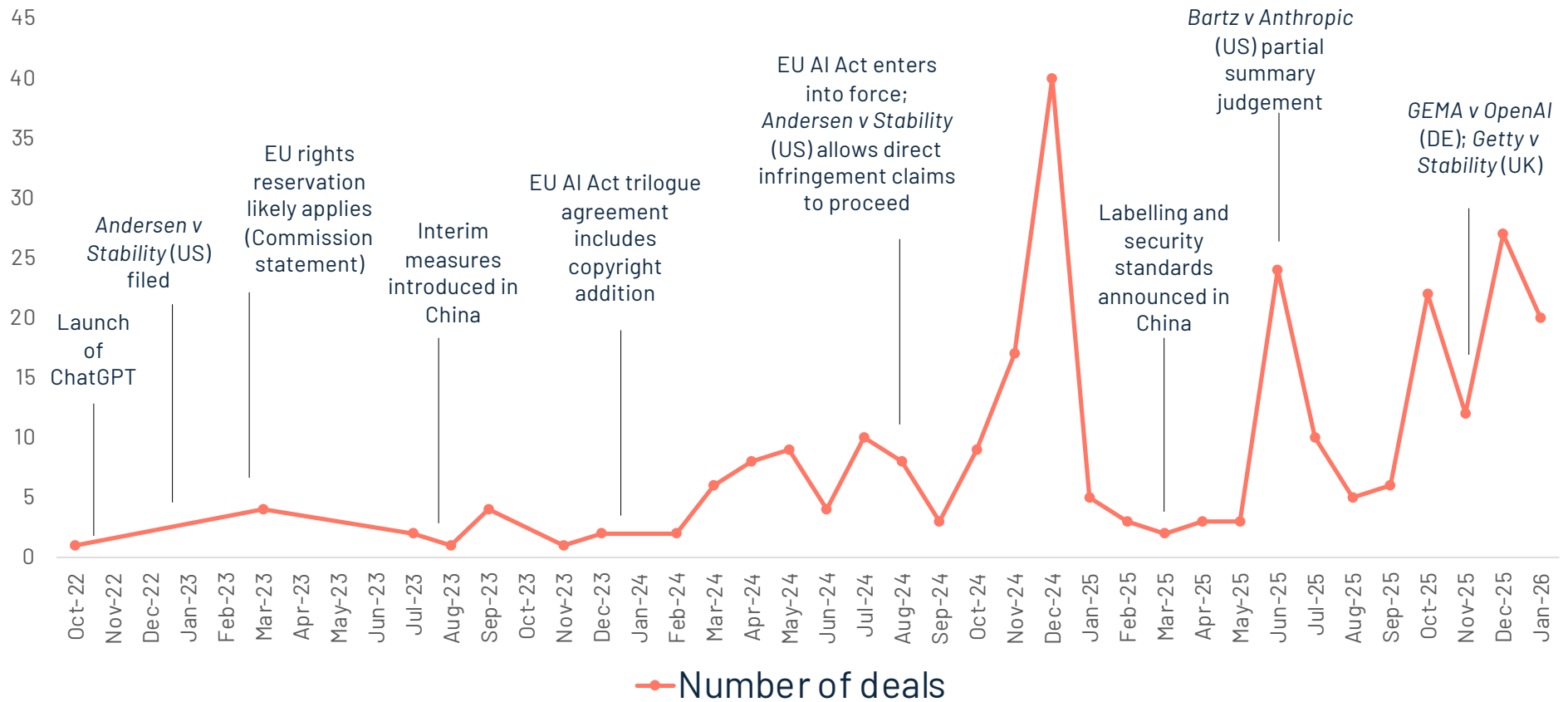


n=274 (October 2022 - January 2026)

Towards a licensing economy?

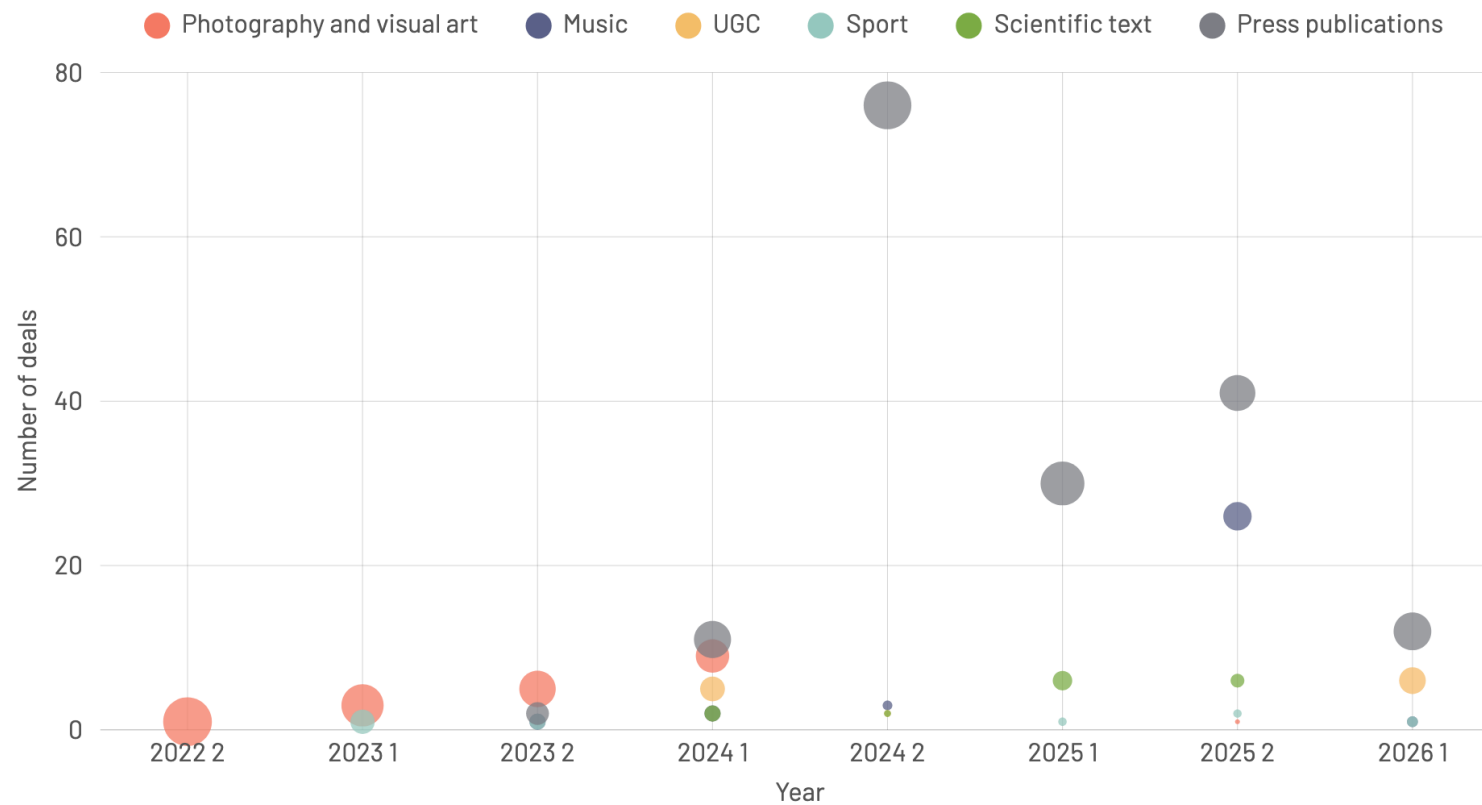


Towards a licensing economy?



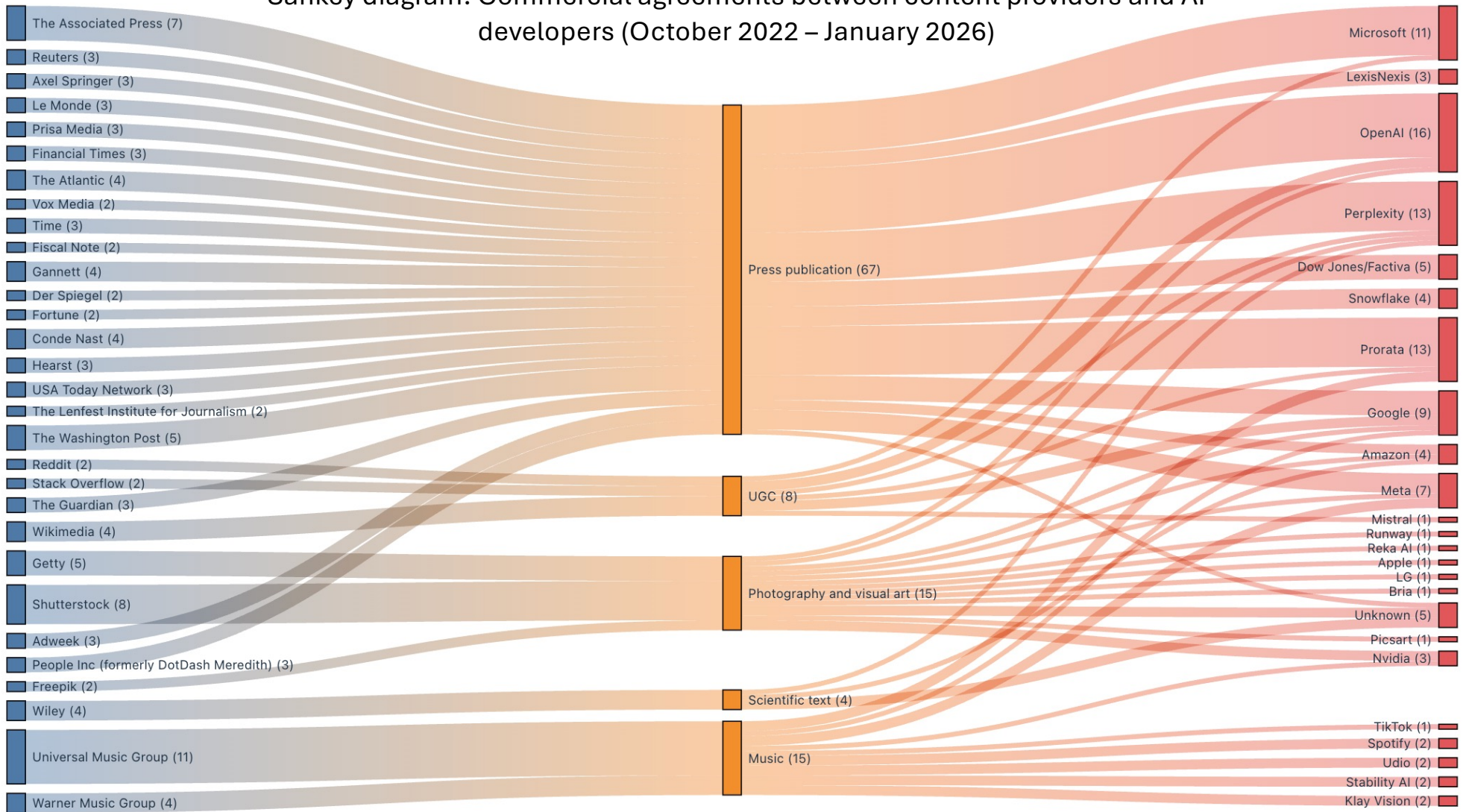
n=274 (October 2022 - January 2026)

Over time, by sub-sector



*NB - Bubble size corresponds to percentage share of deals agreed within the time period

Sankey diagram: Commercial agreements between content providers and AI developers (October 2022 – January 2026)



Data for top 30 providers (=101 of 274 agreements); Source: Thomas & Kretschmer (CREATe 2026); Visualisation: Felix Rodriguez-Perez

Cultural heritage licensing?

- CHI missing from the tracker data. Reasons:
 - no publicly listed company involved
 - no share price implications
 - commercially sensitive
 - politically sensitive
 - not articulated as AI agreements (does not trigger keywords)
- Examples of anecdotally known CHI agreements:
 - Agreements with press publishers for training 'low resource' language LLMs (NL, Norway)
 - Negotiations by major collections (UK examples include Natural History Museum, BFI)
- Licensing infrastructure:
 - Creative content exchange model
 - Secure research environment (APIs) [Bart Meletti, CREATE ESRC smart data fellow]



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