

CISAC

GLOBAL COLLECTIONS REPORT 2018

FOR 2017 DATA



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About CISAC

The International Confederation of Societies of Authors and Composers (CISAC) brings together 239 collective management organisations in 121 countries and five regions. These collective management organisations represent over four million creators active in the five major repertoires: audiovisual, dramatic, literature, music and visual arts.



239
collective management
organisations



121
countries



+4M
creators



About the report/definitions

CISAC is the International Confederation of Societies of Authors and Composers and the world's leading network of authors' societies. Each year, it compiles the royalty income data registered by its 239 Collective Management Organisation members (CMOs) in 121 countries to produce a comprehensive global collections report.

This 2018 report features calculations that are based on the gross domestic collections of CISAC members in each of their respective countries. To avoid double-counting, only the final royalties collected for the use of creative works are compiled and international exchanges between CMOs are excluded.

The information is presented on a global basis, as regional data, and is also split into the five repertoires CISAC members represent: music, audiovisual, drama, literature and visual arts.

Types of Rights

There are two main types of rights that CISAC member societies manage on behalf of their affiliated authors and publishers.

Performing Rights

These rights allow creators to be remunerated when their works are performed in public either by means of a live performance or when a recording is played. Performing rights also apply when works are communicated to the public by radio or TV broadcast, or via digital platforms such as streaming services.

Reproduction Rights

These rights allow creators to be remunerated every time a copy of their creative work is made in any format, be it a physical copy such as a CD, or a digital download. The term "mechanical rights" is typically used to describe the right obtained by record producers in order to make a sound recording of a musical work, while "reprography" is used in the context of the copying of literature and printed works.

A "private copying exception" to the reproduction right exists in the law of some countries to allow consumers to copy works from one device to another. Creators of works can be compensated for this exemption by means of a "private copying levy" taking the form of a tax on blank digital media and electronic products with the facility for storage.

Other Rights

References to "other rights" throughout this report include all that do not fall under the "performing rights" or "reproduction rights" categories. These include royalties collected from private copying levy schemes, rental or public lending, educational use, synchronisation, exhibition and collections from auction houses and galleries for the artists' resale right.

Types of Use

Collection data is also broken down by types of use. These include the following:

TV and Radio

Collections from the use of creative works when transmitted to the public by TV or radio broadcasters and from satellite or cable operators, and certain broadcast-related online services such as "catch-up TV". TV and radio use may involve the exploitation of both performing and reproduction rights because a copy of the work is often made by the broadcaster before the actual transmission takes place.

Live and Background

Collections for the performance of creative works in front of a live audience, such as playing, reciting or singing in public. It also includes collections from the use of works performed by other sources, such as recorded media, TV or radio broadcasts, which are played in public places. These might be as background in hotel lobbies or restaurants, or as the main focus of a live audience at discotheques or karaoke bars.

Digital and Multimedia

Collections from the licensing of digital services such as download and streaming platforms, as well as use of creative works on digital recordable devices such as photographic images on CD-ROMs. The exploitation of creative works covered under the digital and multimedia category may involve both performing and reproduction rights.

Compact Discs (CDs)

Collections from the licensing of mechanical reproduction of musical works primarily on compact disc, but also on other types of sound carriers such as vinyl record or cassette.

Video

Collections from the licensing of musical works within audiovisual productions that are reproduced on DVDs.

Mechanical Reproduction

Collections from mechanical reproduction of works such as books, newspapers and brochures in the repertoires of drama, literature, and visual arts. In this report, the category excludes the reproduction of music on CDs or by other means as these have their own individual categories.

Reprography

Collections from the reproduction of graphic works through mechanical or electrical means such as photocopiers and printers. These are usually collected from the manufacturers, importers or operators of devices that permit works to be reproduced.

Private Copying

Collections from the manufacturers or distributors of blank media such as recordable CDs or electronic devices that have data storage capabilities such as audio and video recorders, smartphones and personal computers. Private copying levies compensate rights holders for acts of copying carried out by individuals for their own personal use.

Resale Right

A payment made to visual artists as a small percentage of the sale price when their works of art are re-sold by an auction house or gallery. The right applies to paintings, sculptures, drawings, photographs, and other visual art works.

Rental and Public Lending

Collections from the rental or lending of an original or a copy of a creative work to members of the public.

Synchronisation Right

Collections from the incorporation of a musical work within a soundtrack that is timed to accompany visual images. The work can be used either in full or in part, and the right typically refers to audiovisual works such as films, commercials or video games.

Exposition Right

Collections from the showing or exhibition of a work of art to a public, such as in museums.

Educational

Collections from educational establishments for the use of creative works in teaching. This might include the performance or display of a work by instructors as part of a course in a classroom.

FOREWORD

Jean-Michel Jarre



Jean-Michel Jarre, CISAC President

The EU parliament backed creators and sent a message to the world

I am delighted to introduce CISAC's Global Collections Report 2018.

This report shows the huge value the CISAC global network provides on two fronts – in helping secure the best remuneration for millions of creators to make a living today; and in helping shape the eco-system that creators critically need to survive into the next generation.

CISAC is at the heart of a battle for the future of over 4 million creators worldwide. It is a fight over whether legislation can continue to allow the value of creators' works to be taken from them to fund the business empires of global tech companies. As an artist and composer, I am passionately involved in this struggle.

It has fallen to Europe to be the beacon for this global issue and, in September 2018, the European Parliament took a momentous decision to support a new EU Copyright Directive on the digital market. It recognised that it is time

for change: it is not acceptable for the law to shield large tech monopolies and sustain a systemic injustice for creators.

The European Parliament's vote made me proud to be European - but now we must double our efforts! We need Europe to conclude this legislative process and we need this important precedent to be exported outside the EU. There is a message to get to the rest of the world: if Europe, after four years of debate, decides to fix the transfer of value, then it is time for other governments to sit up and follow, too.

As our report shows, CISAC member societies are working to maximise remuneration for creators worldwide. Without them, creators would be unable to make a living from their work. The fact remains, however, that the vast majority of creators are struggling to make a living in a world skewed against them.

That is why, while maximising collections today, we must fight so hard for the creators of tomorrow. Global legislative change and fairness for all creators is our mission - we must continue this fight, and never give up.

*It is not acceptable for the law
to shield large tech monopolies and sustain
a systemic injustice for creators*

FOREWORD

Eric Baptiste



Eric Baptiste, CISAC Chairperson of the Board

A positive report card for CISAC and its members

CISAC member societies can find a lot of positives in this Global Collections Report 2018. Overall collections are up for the fifth year in a row, at EUR9.6bn, up 6.2%. Moreover, the past two decades have seen a steady increase overall, with only a few down years.

In an environment profoundly impacted by globalisation and digital disruption, CISAC members have provided a lot of value to creators of all genres and to music publishers.

I would like to single out three main takeaways from this report. First, the macro economic trends are all pointing in the right direction. In the digital world, streaming is becoming the ubiquitous way of consuming creative works. Digital collections are starting to become a meaningful stream of income especially in countries like Sweden, Canada or the US. As long as more traditional sources like radio or TV keep holding their ground, this means additional revenues for our rights holders.

Second, we are starting to see a new dynamic in countries that, historically, were almost non-existent in terms of collections. In Africa, Latin America and, as far as Asia is concerned, in China and India, we are seeing new business practices, steadily improving copyright frameworks, increased digital consumption and a more efficient network of collective management organisations.

Third, as the business is getting much more complex, our member societies have stepped up their game with more creative licensing schemes, massive investments in technology, and greater efficiency and transparency overall. This has had a direct effect on collections and distributions to rights holders.

There is no room for complacency. We continue to be deeply dependent on a fair legal environment and are fighting for this for our members on many fronts. In some, such as audiovisual and visual arts, our campaigns face big challenges but are also seeing key successes.

Overall, this year's Global Collections Report makes a positive report card. Societies are delivering value and growth to their members, and I'm confident this will continue into the future.

In an environment profoundly impacted by globalisation and digital disruption, CISAC members have provided a lot of value to creators of all genres and to music publishers



Gadi Oron, Director General, CISAC

Growth in all repertoires and regions shows CISAC members delivering value to creators

CISAC's 2018 Global Collections Report shows encouraging data: collections are growing for all creative repertoires and in all regions; total collections are up for the fifth year in a row; and income from digital uses has passed the EUR 1bn mark for the first time. Further, collections in the largest traditional uses - TV and radio and live and background - remain stable.

This impressive performance proves that authors' societies are delivering value to the millions of creators they represent around the world.

In the face of extraordinary changes and challenges in our landscape, CISAC members are constantly adapting, innovating and improving their operations.

Digital hits €1 billion

Collections from digital services have more than doubled in the last five years, reaching a record EUR 1.27 bn in 2017. As digital becomes a dominant use, this positive trend is a vital barometer of the health of our sector.

Achieving this kind of growth does not happen by accident: it is the result of the skills, expertise and investments CMOs

deploy on behalf of creators. As we report on page 12, CMOs have responded to rapidly changing technology, licensing digital services in new flexible ways and handling trillions of data transactions. They are fighting for the best licensing terms and the highest royalties possible in a world where powerful users are determined to avoid, or minimise, paying a fair return to creators for their work. In that context, the constant increase in digital collections is an impressive, hard-won achievement.

Fighting for future collections

There is an enormous amount still to be done. Despite rising digital collections, these still only represent 13% of global collections. This percentage should be far higher.

As our report on page 31 explains, some of the world's largest digital users, of all repertoires, are siphoning off vast revenues rather than remunerating creators. The European Parliament's vote on the proposed EU Copyright Directive is an important step towards resolving this injustice. Its global ripple effect is good news for CISAC members worldwide.

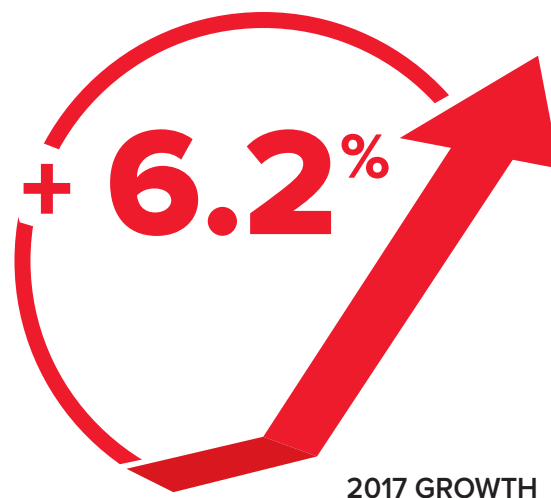
Global reach

With exclusive data from 239 CISAC member societies, this report provides the most comprehensive data and analysis of our sector. This year, we have introduced no fewer than 10 individual case studies and included pages of raw global data.

The Global Collections Report is a unique body of information and insight, improving understanding of our sector and its work. I hope you will find it a valuable and interesting resource.

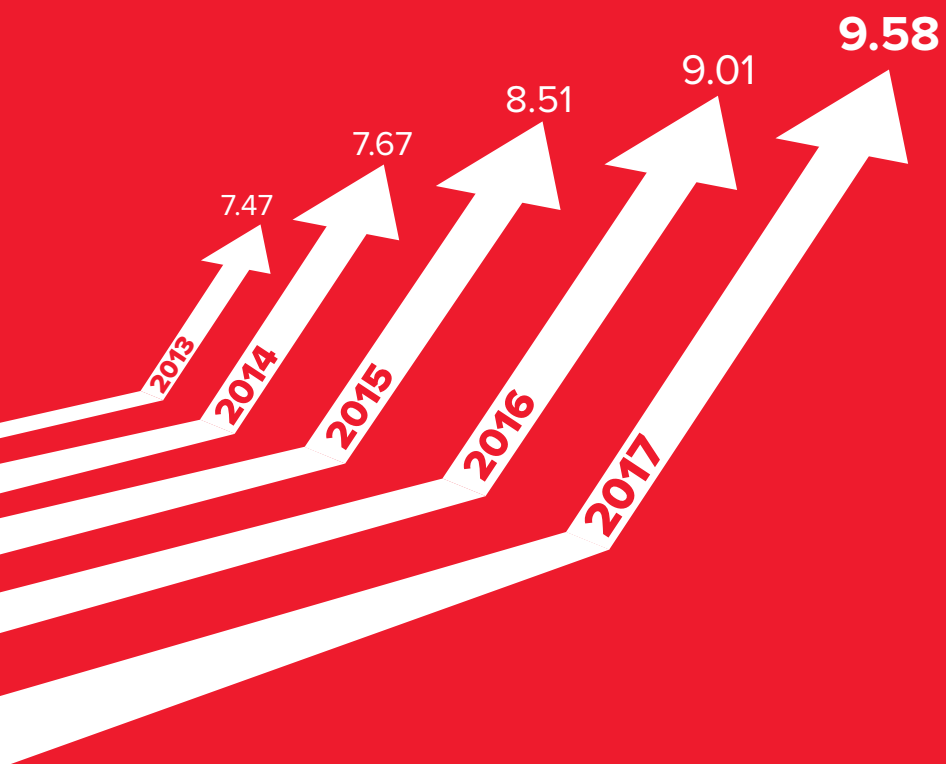
With exclusive data from 239 CISAC member societies, this report provides the most comprehensive data and analysis of our sector

Global collections in numbers

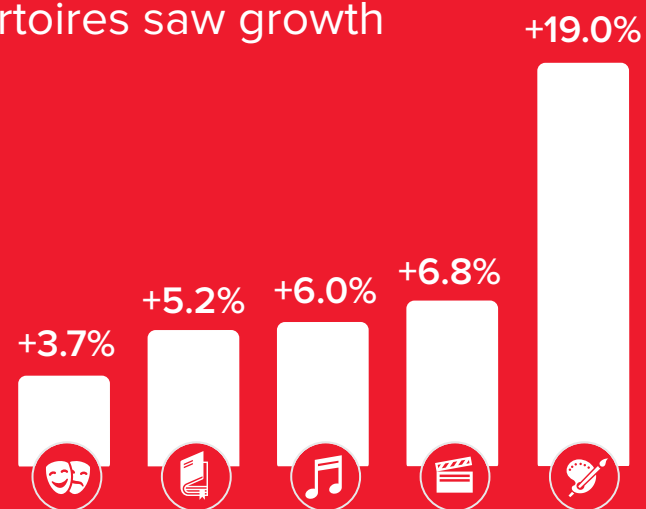


Global collections 2013-17

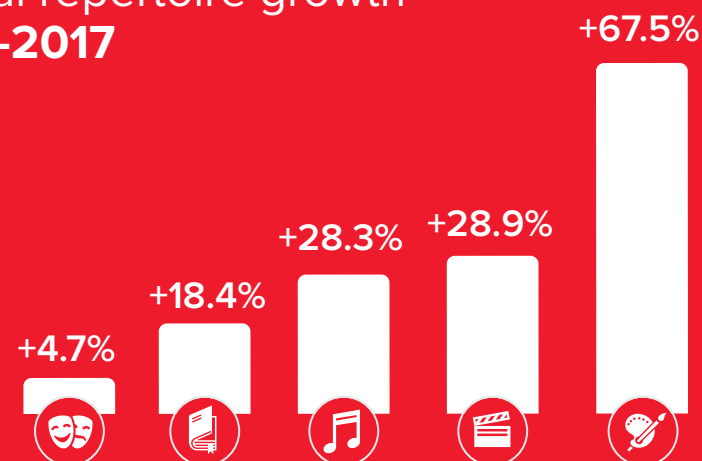
Collections up **28.2%** since 2013 and **6.2%** in 2017 (EUR billion)



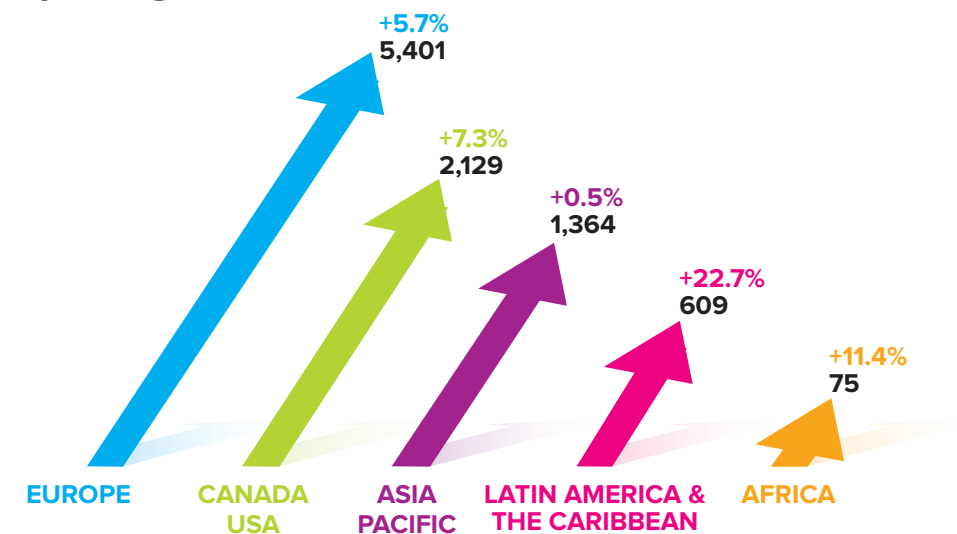
All repertoires saw growth in **2017**



Global repertoire growth **2013-2017**

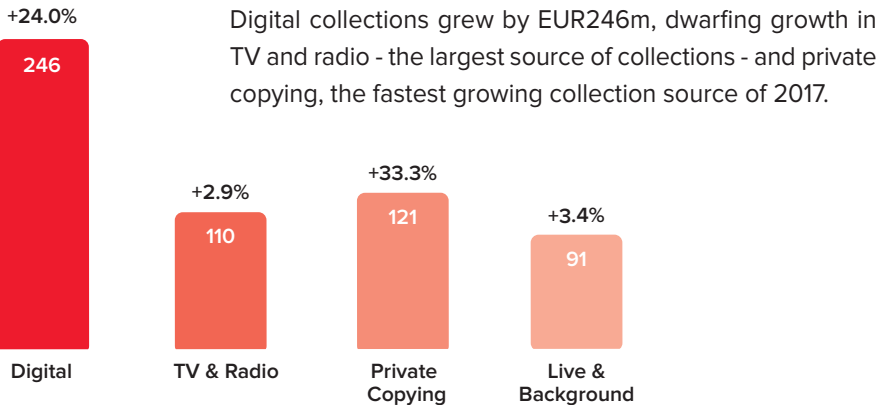


Collections and growth by region (EUR million)



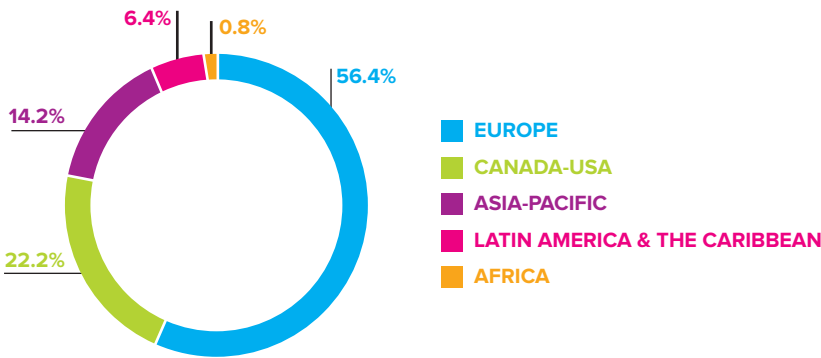
Europe accounted for the highest share of 2017 collections in value.
Latin America and the Caribbean saw the fastest year-on-year growth at 22.7%.

Digital leads growth in types of use (EUR million)



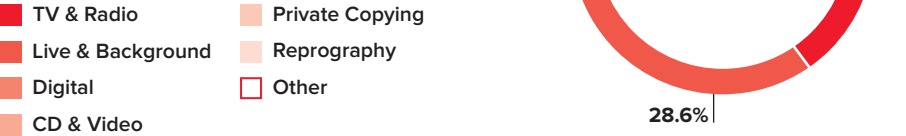
Digital collections grew by EUR246m, dwarfing growth in TV and radio - the largest source of collections - and private copying, the fastest growing collection source of 2017.

Share of global collections by region



Share of global collections by use

Despite growth in digital throughout the world, TV and radio remains the largest source of collections at 40.6%, followed by live and background at 28.6%.



The role of collective management organisations

CISAC's membership comprises 239 authors' societies, also known as Collective Management Organisations or CMOs. They cover all the main creative repertoires of audiovisual, dramatic works, literature, music and visual arts, and ensure that creators receive fair remuneration from the use or "exploitation" of their works. CMOs are usually not-for-profit bodies that are owned and controlled by their members, such as songwriters, composers, visual artists, writers, filmmakers or music publishers.

Ensuring remuneration for creators

Copyright laws give creators the right to authorise or prohibit the use of their works. This means that to perform or distribute works to the public, any user needs to identify the creator, get their authorisation, and pay them a royalty based upon the type and extent of the exploitation.

This process is complex, particularly in cases with multiple rights holders and a diverse range of uses. A song, for example, is commonly played on radio, in TV advertising, on a CD, in a film soundtrack, as a download, or via a streaming service. Attempting to obtain separate authorisations from each creator for each exploitation of every work would present an impossible challenge.

CMOs simplify this by operating on behalf of their members collectively. They exist to facilitate the process of bringing creative works to the public.

The collective management of rights

When creators join a CMO, they transfer their rights to them to manage collectively. CMOs negotiate licences with all the organisations that use these works and sign agreements with other CMOs so that they can also represent creators from other countries. This allows them to collect and distribute royalties back to the creator wherever their works are used or sold.

Via this network of CMOs, users are granted licences and are required to provide information about the use of the works so that CMOs can distribute royalties accurately to the relevant creators.

When works are distributed digitally, the platform or streaming service using the work can negotiate a licence on a national, regional or global basis. The CMO's task is to identify when its repertoires are used by the platform and to invoice accordingly. This process can involve billions of individual transactions. CMOs have invested heavily in infrastructure to manage this volume and guarantee the accurate and prompt distribution of royalties to creators and publishers.

Licences granted by CMOs involve a variety of different types of rights. The majority of revenues for music CMOs arise from public performance, when music is played in public spaces or broadcast by radio and TV channels. In audiovisual, the main type of use is TV and Radio and in the visual arts sector, a user that wishes to reproduce photographs or paintings is required to obtain a licence for this reprographic exploitation. Many countries such as the European union, have also introduced the artist resale right which entitles visual artists to a share in the sale price when their work is re-sold through an auction house or gallery.

Advocating on behalf of creators

CMOs promote creators' rights. They take an active role in lobbying governments to ensure that each country's legal framework contains the necessary legislation to effectively protect creators. They may also bring litigation on behalf of their members to enforce rights against unlicensed use.

Another important role that CMOs play in their own countries is to support their domestic creative sectors. They engage in cultural activities to help promote new talent and raise awareness of the importance of remunerating them.

CISAC supports CMOs globally

CISAC plays a pivotal role in supporting the activities of its CMO members. It provides tools and assistance that facilitate the sharing of information on creators and their works and harmonises practices in distribution of royalties for their use. It manages a set of professional rules and binding resolutions that incorporates governance, transparency and operational aspects. These drive the highest standards of excellence throughout the industry. And through its work on global policy and legal affairs, CISAC advocates in favour of the protection of authors' rights and brings the global voice of creators to the heart of international legislative decision-making.



Collective management allows CMOs to collect and distribute royalties back to the creator wherever their works are used or sold

GLOBAL COLLECTIONS BY REPERTOIRE AND USE

Global collections up for all five repertoires

Overall collections by CISAC member societies reached EUR9.6bn in 2017. There has been a steady increase in collections over the last five years, with income up 28.2% since 2013.

The largest repertoire is music, representing 87.0% of global collections. In Canada and the US, that proportion reached 99.7%; in Asia-Pacific 92.3%; Africa 91.5%; Latin America and the Caribbean 88.3%; and Europe 80.5%.

Music collections in 2017 totalled EUR8.3bn, up 6.0%, followed by audiovisual (EUR611m), literature (EUR227m), visual arts (EUR208m) and dramatic (EUR196m).

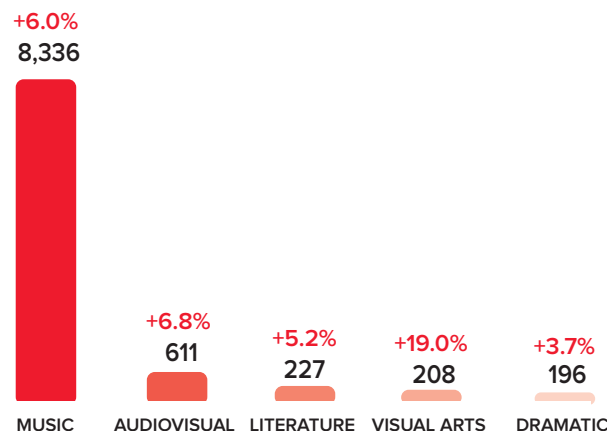
Steady growth

Global collections reported an overall increase of 6.2% in 2017. Visual arts saw the highest growth (+19.0%), thanks mainly to private copying payments in Germany.

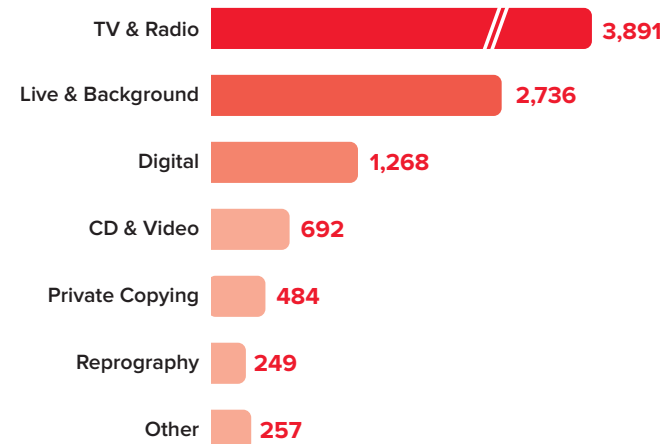
The audiovisual repertoire also grew 6.8%, helped by collections from France, growth in Argentina and a twelve-fold increase in private copying revenue in Germany.

Literature rose 5.2%, collecting EUR227m. Six countries account for almost 90% of all literature collections: Australia (42.0%), the UK (11.9%), Switzerland (11.6%), Austria (8.4%), Finland (8.4%), and the Netherlands (5.1%). Still the smallest repertoire for collections, dramatic grew by 3.7%, with Italy and France making up more than 50% of global collections.

Global collections and growth by repertoire (EUR million)

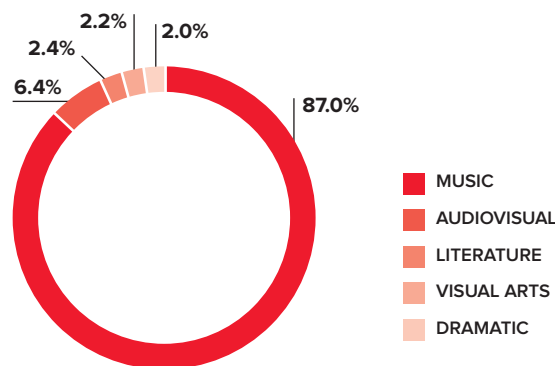


Collections by use (EUR million)



Music leads global collections

Share of global collections by repertoire



GLOBAL COLLECTIONS — TOP TEN MARKETS

Top collectors help drive growth

The US is the leading national market for collections, which increased by 7.0%, notably thanks to a rapidly expanding music streaming sector.

While Germany recorded the second highest growth globally in value (+EUR113m) after the US (+EUR124m) thanks to back payments from new private copying agreements, it's still France that holds the second place in terms of collections, with 12.6% of global collections.

In Asia-Pacific, following a 12.0% growth in 2016, Japan reported a 6.8% drop in euros, but was largely flat in local currency. Australian societies' collections grew 14.6% year-on-year, accounting for 3.4% of global collections. Reprography is the country's first source of income: national collections for the use represent almost 40% of the global total.

Evolving mix of collections

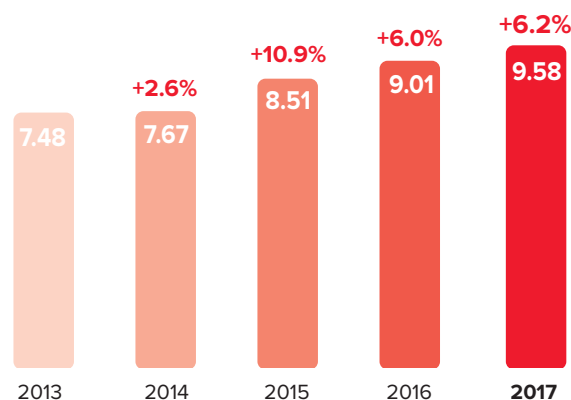
Italy reported a 2.7% decrease, partly due to a large back payment that inflated 2016 collections. Growth in the Netherlands remained flat: losses in its main source of income, TV and radio, were compensated by healthy growth in digital, CD and video and private copying.

Reflecting the evolving recalibration of income streams, Canada's growth was almost entirely driven by rapidly increasing digital collections.

Thanks to a 38.9% increase in collections, Brazil is the first country in Latin America and the Caribbean to become a top 10 collecting country (see p.58).

Global collections up 28.2% since 2013

Collections in EUR billion and annual growth



Top 10 markets (EUR million), % share and growth

	2017 collections	Global share	Growth
UNITED STATES	1,890	19.7%	+7.0%
FRANCE	1,203	12.6%	+2.6%
GERMANY	925	9.7%	+13.9%
JAPAN	800	8.4%	-6.8%
UNITED KINGDOM	743	7.8%	+4.9%
ITALY	591	6.2%	-2.7%
AUSTRALIA	323	3.4%	+14.6%
BRAZIL	253	2.6%	+38.9%
CANADA	239	2.5%	+9.4%
NETHERLANDS	235	2.5%	+0.5%

COLLECTIONS PER CAPITA AND AS % OF GDP

CISAC's calculation of collections per capita ranks the amount collected in relation to a country's population. Collections per GDP reflects income in relation to a country's economic position.

The rankings are impacted by various factors: economic prosperity, the strength of the legal environment and enforcement, the maturity of authors' societies historically, and the effectiveness of current performance.

Collections per capita

The world average of collections per capita has climbed to EUR1.87 per person in 2017. Europe and Canada/USA have substantially the highest rates of collections per capita. Asia-Pacific's rate is increasing promisingly year-on-year but remains one tenth the level of Europe.

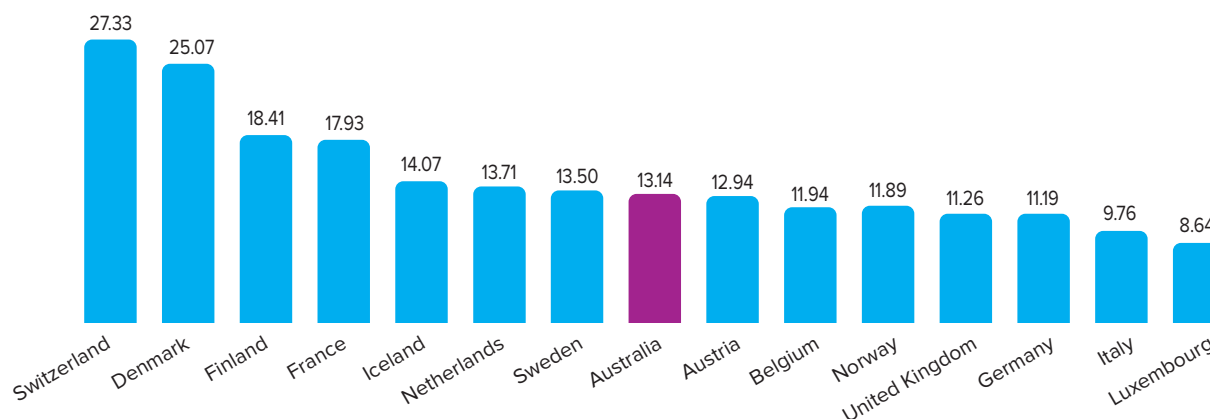
In the global ranking per country, Europe also accounts for 9 of the top 10 countries. In 2017, Australia is the first non-European country on the list. Switzerland, Denmark and Finland lead all countries.

Significant year-on-year percentage growth came from Iceland (38.9%), Norway (35.21%), Saint Lucia (34.25%), Denmark (25.55%), South Korea (20.7%), Estonia (18.92%), Finland (18.04%), Sweden (17.12%) and Argentina (17%).

Collections per capita by region (EUR)



Collections per capita by country (EUR)



Collections as % of GDP

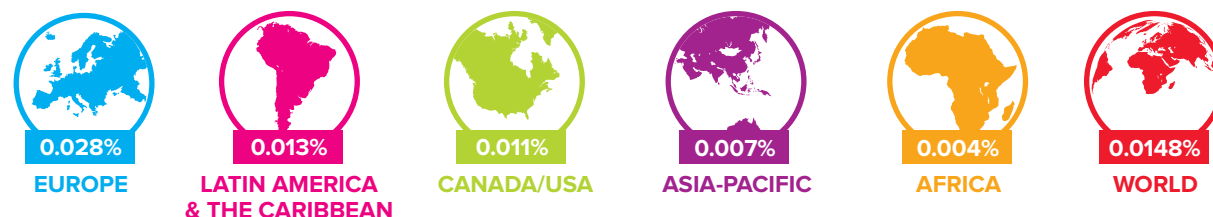
The world average of collections by GDP reached 0.0148%, up 5.9% in 2017. Europe leads in collections by GDP, reaching 0.0282%. Latin America and the Caribbean continues to surpass Canada/USA by providing 0.0131% collections by GDP compared to 0.0114% of their northern neighbours.

Asia-Pacific follows with 0.0067%, reinforcing prospects for growth with a 11.5% year-on-year increase when compared to 2016. Africa is just behind Asia-Pacific with 0.0044%, declining 11% year-on-year due in part to a decline in the overall African economy and Kenya's CMO no longer being part of CISAC.

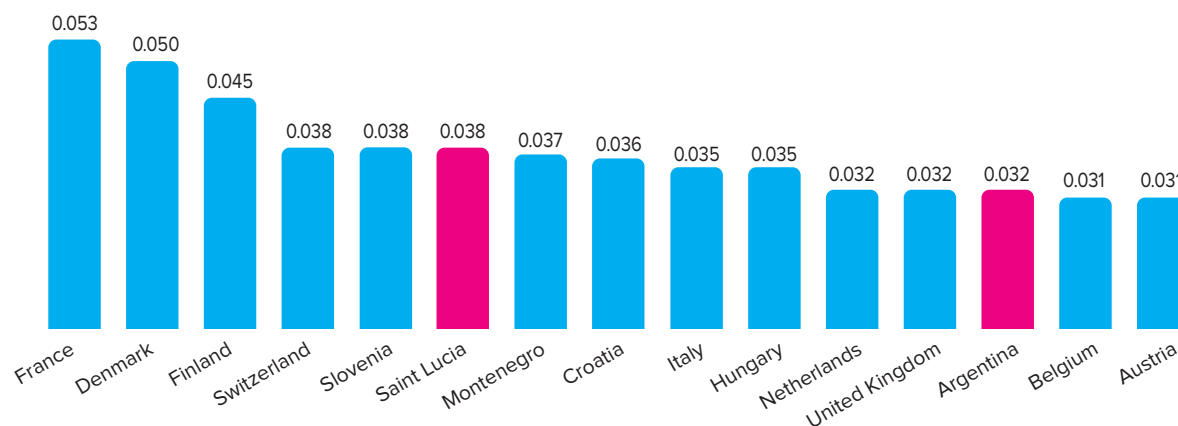
In terms of collections by GDP by country, Europe comprises most of the top 10 countries, except Saint Lucia. France, Denmark, Finland and Switzerland lead all countries. Collections in France account for 0.053% of GDP, remaining stable when compared to 2016.

Other non-European countries showing significant collections by GDP include Uruguay at 0.022% (+5.57%) and Australia at 0.028% (+6.13%). The first African country in terms of collections by GDP is Algeria, which collects 0.013% of GDP.

Collections as % of GDP by region



Collections as % of GDP by country





MUSIC REPERTOIRE – GLOBAL COLLECTIONS

Global growth for music

Music accounts for 87.0% of global collections. In 2017, collections for the musical repertoire reached EUR8bn, up 6.0% year-on-year from the previous year. Since 2013, music collections have risen by almost EUR2bn (+ 28.3%).

In terms of global share, thanks to large contributors such as France (10.6%), Germany (9.7%), the UK (8.1%), Italy (5.5%) and the Netherlands (2.3%), Europe accounts for 52.2% of the global total.

Canada/USA is the second largest collecting region. The US is the single highest contributor to collections for the musical repertoire, accounting for over one fifth of the global total.

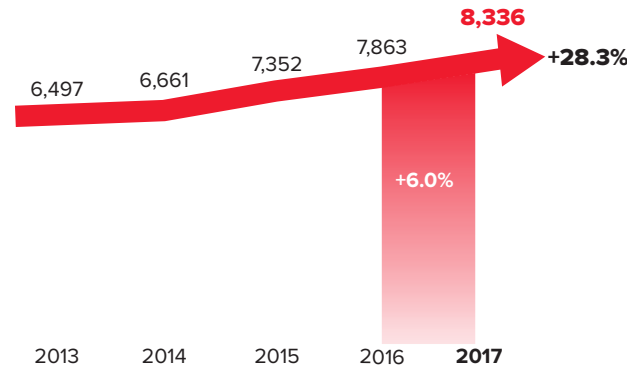
In Asia-Pacific, Japanese collections account for 63.5% of regional collections thanks to a strong local repertoire and exports.

Latin America and Africa on the rise

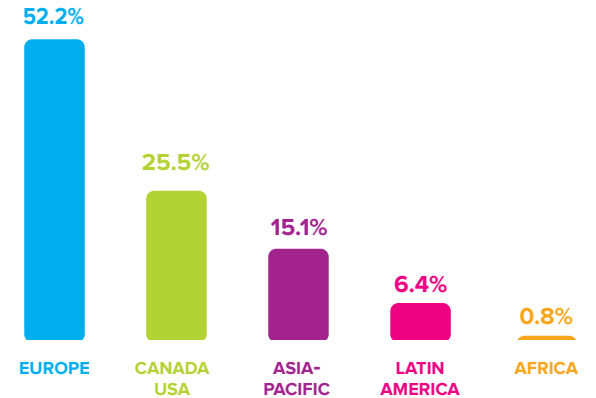
Latin America and the Caribbean represent 6.4% of global music collections. Brazil's 39.1% growth since 2016 has made the country the world's seventh largest contributor, mainly thanks to audiovisual uses of the musical repertoire.

91.5% of African collections are musical rights, but despite 15.7% growth, the region still only represents 0.8% of global collections for the repertoire. South Africa (50.3%), Algeria (24.8%), Morocco (7.8%) and Ivory Coast (5.3%) dominate collections in the region.

Music collections
(EUR million)



Music collections by region



Top 10 countries for music collections (EUR million)

	Collections	Share of world collections	Growth
UNITED STATES	1,884	22.6%	+7.0%
FRANCE	886	10.6%	+2.1%
GERMANY	806	9.7%	+7.2%
JAPAN	799	9.6%	-6.8%
UNITED KINGDOM	678	8.1%	+5.0%
ITALY	458	5.5%	+0.6%
BRAZIL	252	3.0%	+39.1%
CANADA	239	2.9%	+9.4%
AUSTRALIA	226	2.7%	+18.0%
NETHERLANDS	190	2.3%	+5.1%



TV and radio, live and background, digital and CD and video are the largest sources of collections for the musical repertoire. With the exception of CD and video, all types of music use saw growth in 2017.

Digital music tops EUR 1 billion

Of the four main uses, digital reported the sharpest increase, growing 23.1% in 2017 and 164% since 2013 to reach over EUR1bn. The sustained sharp growth in music streaming in recent years has driven digital growth. Despite this, digital still accounts for only 15% of CISAC music society collections.

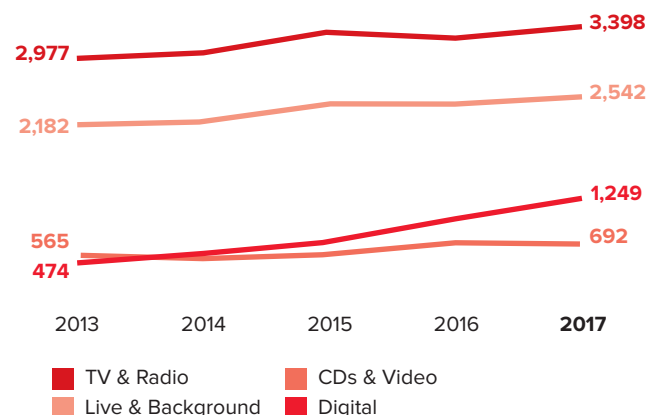
Private copying, accounting for 4.1% of music collections, saw the highest overall growth of 2017 (+28.4%), and the second highest since 2013 (+151%), helped by large back payments in Germany.

Traditional uses remain strong

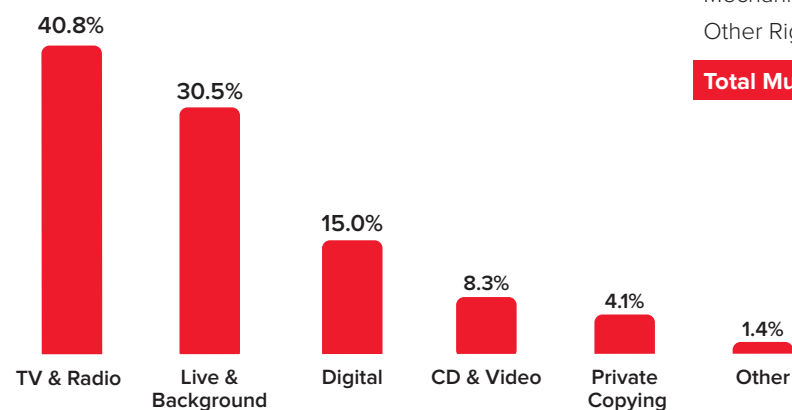
TV and radio and live and background still dominate collections for musical authors. TV and radio accounted for 40.8% of music collections, making them the leading source of revenue for the repertoire. Collections for TV and radio rose 3.2% despite resistance to licensing by major broadcasters in many countries.

Live and background represents almost a third of global music collections. Brazil saw collections grow 29.2% in 2017, now representing 3.2% of the global live and background collections thanks to its dynamic concert and festival scene.

TV and radio remains largest source Main music uses over 5 years (EUR million)



Digital music takes 15% share Share of music collections by use



Music collections grew 6.0% in 2017 Breakdown of music collections (EUR million)

	Collections	Growth	5 year Growth
Type of Use			
TV & Radio	3,398	+3.2%	+14.2%
Live & Background	2,542	+3.4%	+16.5%
Digital	1,248	+23.1%	+164%
CD & Video	692	-2.8%	+22.6%
Private Copying	342	+28.4%	+151%
Rental/Public Lending	25	-15.2%	-18.4%
Synchronisation	32	-8.7%	+65.3%
Publication	7	-13.2%	-17.1%
Other	50	+3.1%	-52.9%
Type of Right			
Performing Rights	6,608	+6.0%	+26.2%
Mechanical Rights	1,323	+2.6%	+24.3%
Other Rights	405	+19.7%	+108%
Total Music	8,336	+6.0%	+28.3%



AUDIOVISUAL REPERTOIRE – GLOBAL COLLECTIONS

Audiovisual collections grow by 6.8% to EUR611m

Europe accounts for more than 90% of collections for the audiovisual repertoire. The region saw growth of 6.3% in 2017 and income has increased by 30.7% over the past five years. France leads the field and, of the 38.3% share it represents, 84.5% comes from TV and radio.

In many countries, especially outside Europe, collections are stymied by the lack of a guaranteed remuneration right for audiovisual creators.

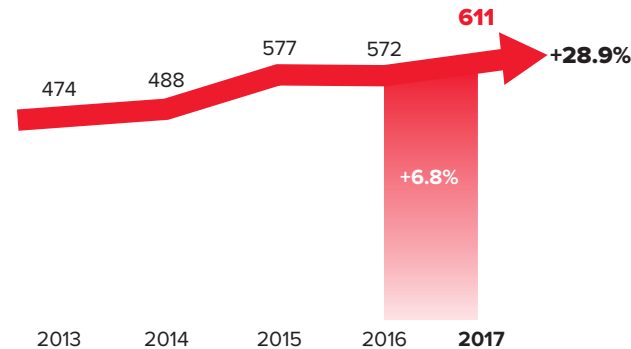
Latin America and the Caribbean, the second largest region for the audiovisual repertoire (8.3%), saw 13.6% growth. The sector currently depends on Argentina and Mexico, which respectively represent 88.8% and 10.7% of collections. There too, TV and radio is the dominant source of audiovisual collections.

In Africa, collections for the repertoire are generated by private copying levies from Algeria and Burkina Faso, and TV and radio income from Ivory Coast.

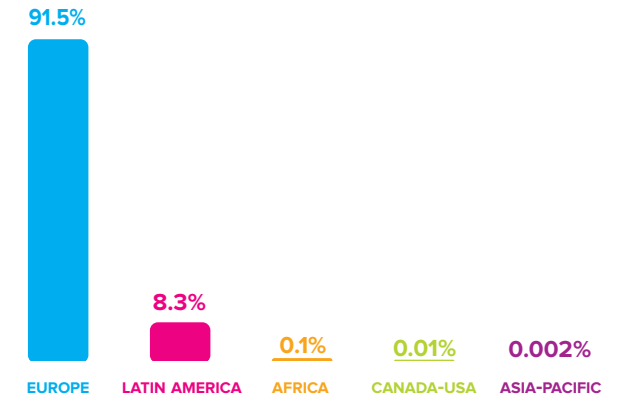
Canada and the US reported negligible collections to CISAC. In the US, royalties for the use of audiovisual repertoire are known as residuals which are negotiated and collected by unions and guilds on behalf of their members as a compensation for the distribution or exhibition of works beyond their initial use.

Asia-Pacific reported very small amounts, mainly from Australian societies in TV and radio.

Audiovisual grows 6.8% in 2017, 28.9% since 2013 Audiovisual collections (EUR million)



Audiovisual collections reported by region



France leads global audiovisual collections

Top 10 countries for audiovisual collections (EUR million)

	Collections	Share of world collections	Growth
FRANCE	234	38.3%	+4.5%
SWITZERLAND	68	11.1%	-11.2%
ITALY	48	7.9%	-31.8%
ARGENTINA	45	7.4%	+17.6%
GERMANY	42	6.9%	+1,184%
SPAIN	34	5.6%	+0.0%
POLAND	22	3.6%	+21.2%
NETHERLANDS	17	2.8%	-20.6%
UNITED KINGDOM	16	2.7%	-1.1%
BELGIUM	14	2.3%	+9.2%

Audiovisual led by TV and radio

45.1% of all TV and radio collections for the audiovisual repertoire came from France. Overall, European societies collected the most for the use: Switzerland represented 12.8%, Italy 8.0%, Poland 4.7% and Spain 4.7%.

Argentina collects significant income in the sector and is a notable exception to Europe's dominance, reporting a 9.8% share of global TV and radio collections for the repertoire. The audiovisual sector represents around one quarter of the country's total collections for authors.

Private copying collections up 52.5%

Collections from private copying were led by Germany (35.2%), which recorded the highest growth thanks to a new back payment agreement for smartphones, tablets and PCs, and France (18.0%). Italy (9.7%) and Switzerland (5.9%) both saw sharp declines in private copying collections.

Live and background

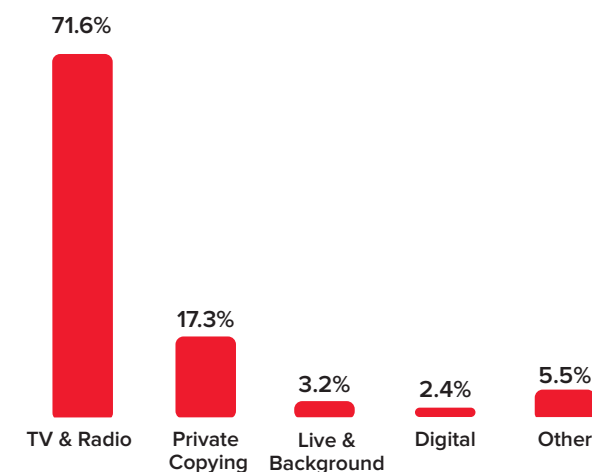
Live and background, which only represented 3.2% of audiovisual collections in 2017, saw 11.3% growth. Spain (59.4%), Switzerland (16.3%), Argentina (6.2%) and the Czech Republic (6.1%) account for over 90% of the world's live and background collections for the audiovisual repertoire.

Digital on the rise

Digital collections for the repertoire grew by 122% in 2017 and over twelvefold since 2013 - but still only represent 2.4% of audiovisual collections. Five European countries collect digital rights for the audiovisual repertoire, with France (83.4%), Italy (11.4%) and Spain (4.8%) totalling a little over EUR14m. All three saw growth in this sector in 2017.

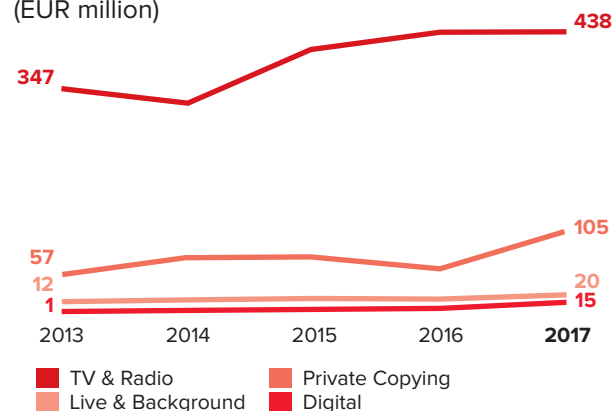
TV and radio account for over two thirds of audiovisual collections

Share of audiovisual collections by use



Private copying almost doubles over 5 years

Evolution of main audiovisual uses (EUR million)



EUR608m collected for audiovisual repertoire in 2017

Breakdown of audiovisual collections (EUR million)

	Collections	Growth	5 year Growth
Type of Use			
TV & Radio	438	-0.4%	+26.2%
Private Copying	105	+57.3%	+85.1%
Live & Background	20	+11.3%	+61.7%
Digital	15	+122%	+1,198%
Educational Use	5	-13.2%	+2.2%
Mechanical Reproduction	2	-26.3%	-91.2%
Rental/Public Lending	1.2	+25.4%	-5.9%
Reprography	0.5	+45.6%	+13.1%
Other	25	-21.7%	+9.3%
Type of Right			
Performing Rights	458	-2.7%	+25.8%
Mechanical Rights	153	+50.5%	+39.1%
Total Audiovisual	611	+6.8%	+28.9%



VISUAL ARTS REPERTOIRE – GLOBAL COLLECTIONS

Visual arts collections back to growth

CMOs collected EUR208m for visual arts in 2017. Following a decrease in collections in 2016 that reflected a wider decline in global arts markets, collections saw a 19.0% increase in 2017, the highest year-on-year growth for any repertoire over the same period. Since 2013, visual arts collections have jumped up by 67.5%.

The resale right for visual artists is a significant potential driver of growth, currently implemented in some 80 countries but absent in major markets including the US, Japan, Switzerland and China.

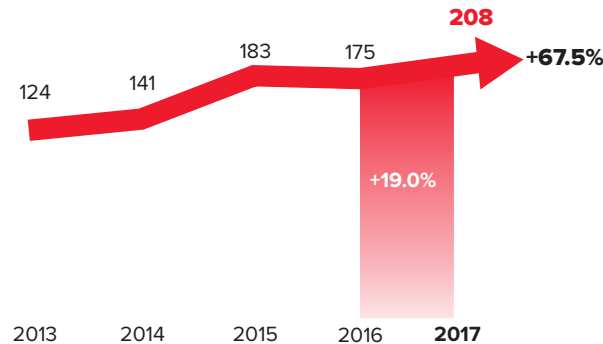
95.0% of visual arts collections come from Europe. Germany led collections, growing 34.6 % since 2016 thanks to back payments from previous years. Austria saw the highest growth (+81.4%) while the Netherlands and Belgium saw revenues decline.

The Canada/USA region accounts for 3.2% of visual arts collections. The US is the only non-European country to be among the top ten collecting countries for the repertoire.

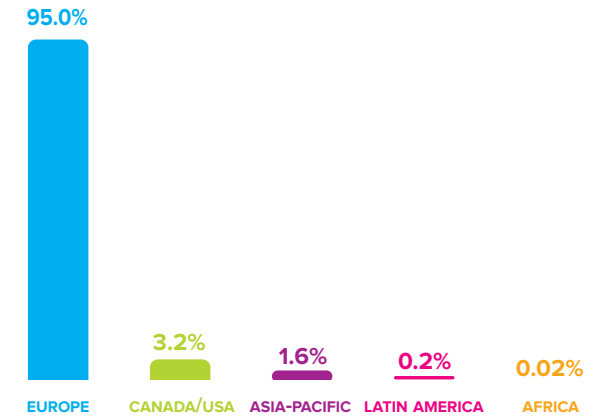
In Asia-Pacific, visual arts collections grew 8.0% despite a 21.5% decline in Korean collections, primary helped by a 16.0% increase in collections from Australian societies, which account for 65.2% of regional income for visual arts, followed by Japan (28.7%).

Visual arts collections increased over twelvefold in South Africa, which collects 74.7% of the African region's income for the repertoire.

Visual arts grow 19.0% in 2017, 67.5% since 2013 Visual arts collections (EUR million)



Visual arts collections by region



Germany dominates visual arts collections

Top 10 countries for visual arts collections (EUR million)

	Collections	Share of world collections	Growth
GERMANY	77	37.1%	+34.6%
FRANCE	32	15.2%	+16.8%
UNITED KINGDOM	21	10.2%	+15.3%
NETHERLANDS	16	7.7%	-9.6%
ITALY	10	4.8%	+1.2%
SWEDEN	9	4.3%	+0.2%
DENMARK	8	3.9%	+6.1%
UNITED STATES	6	2.9%	+15.5%
BELGIUM	5	2.6%	-3.2%
AUSTRIA	5	2.3%	+81.4%

Growth in reprography

At 42.0% of visual arts collections, reprography – the reproduction of visual arts works – is the most important source of collections. After a slight dip in 2016, collections in 2017 were double those reported in 2013. In 2017 alone, reprography grew by 24.1%.

Resale right supported by UK collections

The resale right is an important source of income, amounting to 21.6% of total collections in Europe. In the UK, resale right collections have risen 21.9% over the past five years and are the largest source of income (69.8%). Resale rights from the UK represent over a third of the total amount collected globally.

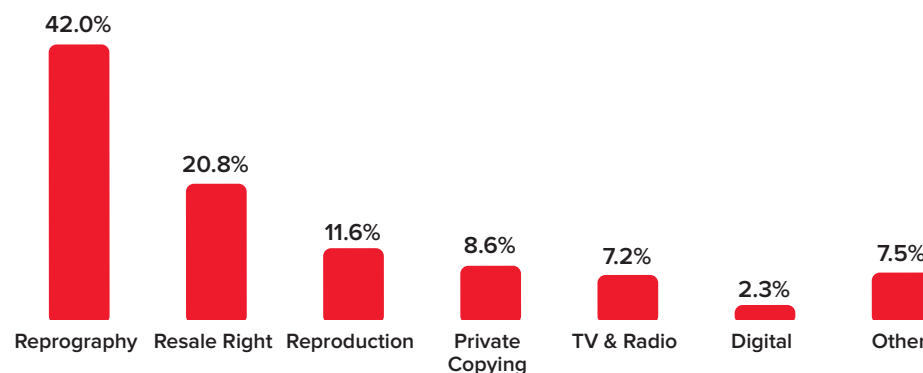
Other uses lag behind

Reproduction represents 11.6% of collections for visual artists. In the US, it is the only source of collections for the repertoire.

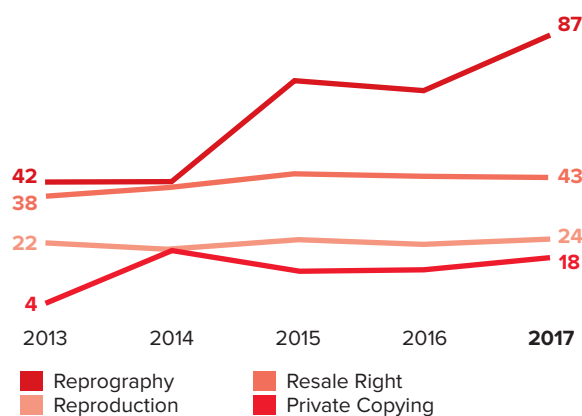
Over half the world's private copying collections come from France (54.9%), followed by the Netherlands (23.6%) and Italy (14.2%).

Despite strong growth for digital collections (+167%) they still only represent 2.3% of the visual arts income and are mostly limited to Germany and France.

Share of visual arts collections by use



Reprography collections double over 5 years (EUR million)



Breakdown of visual arts collections (EUR million)

	Collections	Growth	5 year Growth
Type of Use			
Reprography	87	+24.1%	+109%
Resale Right	43	+0.0%	+14.7%
Reproduction	24	+8.1%	+7.1%
Private Copying	18	+29.6%	+335%
TV & Radio	15	+9.7%	+137%
Digital	5	+167%	+89.9%
Rental/Public Lending	5	+82.9%	+151%
Live & Background	5	+9.5%	+12.0%
Educational Use	4	+1,620%	+1,328%
Other	2	-28.8%	-36.2%
Type of Right			
Performing Rights	19	+9.7%	+87.6%
Mechanical Rights	188	+20.0%	+65.7%
Total Visual Arts	208	+19.0%	+67.5%



DRAMATIC REPERTOIRE – GLOBAL COLLECTIONS

Dramatic collections up 3.7%, led by Europe

Collections for the dramatic repertoire grew 3.7% in 2017, with societies collecting a total of EUR196m for authors.

Five countries collected almost 90% of global income for the dramatic repertoire. All are in Europe with the exception of Argentina – the fourth highest collecting country (9.0%) behind Italy (34.1%), France (26.5%) and the Russian Federation (11.7%). Argentina also saw the highest growth for the repertoire in 2017: 26.9%.

Algeria accounted for two thirds of dramatic collections in Africa, with 80% of its income from private copying.

In Asia-Pacific, Japan was the only country to collect for the repertoire. All its dramatic collections came from live and background.

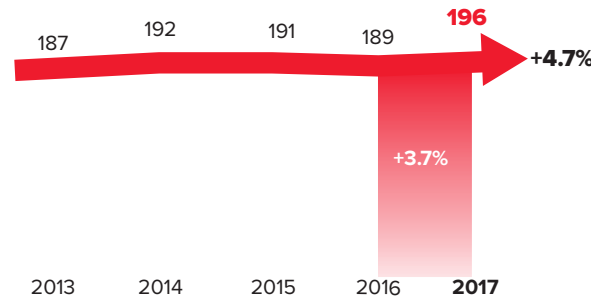
Canada and the US did not report any collections for the dramatic repertoire.

Live and background the largest use

Live and background was the largest source of income, representing 85.2% of collections: France collected the highest share of live and background collections (31.1%) followed by Italy (26.7%).

While globally, TV and radio only represented 10.9% of overall dramatic collections, in Italy, the use accounted for a quarter of the country's dramatic income.

Dramatic rights up over five years Dramatic collections (EUR million)



Breakdown of dramatic collections (EUR million)

	Collections	Growth	5 year Growth
Type of Use			
Live & Background	167	+3.3%	+3.6%
TV & Radio	21	+4.4%	-1.4%
Private Copying	6	+26.0%	+524%
Rental/Public Lending	0.7	-21.0%	+425%
Mechanical Reproduction	0.2	-46.1%	-45.4%
Other	0.9	-10.0%	-70.0%
Type of Right			
Performing Rights	189	+3.3%	+3.1%
Mechanical Rights	7	+15.2%	+87.9%
Total Dramatic	196	+3.7%	+4.7%

Top 5 countries for dramatic collections (EUR million)

	Collections	Share of world collections	Growth
ITALY	67	34.1%	+2.8%
FRANCE	52	26.5%	-4.5%
RUSSIAN FEDERATION	23	11.7%	+17.4%
ARGENTINA	18	9.0%	+26.9%
SPAIN	11	5.5%	+5.3%



LITERATURE REPERTOIRE – GLOBAL COLLECTIONS

Australia leads literature collections

CMOs collected EUR227m for literature authors in 2017. This represented a year-on-year growth of 5.2%.

Australia collected EUR95m, 42.0% of the global market, making it the leading collector for the literature repertoire. 100% of Australian literature collections came from reprography. This was also the case in the UK, the world's second largest market for literature collections (11.9%).

In Switzerland, reprography represents more than half of income, followed by TV and radio (30.5%). Its fastest growing use is private copying, up 225% since 2013.

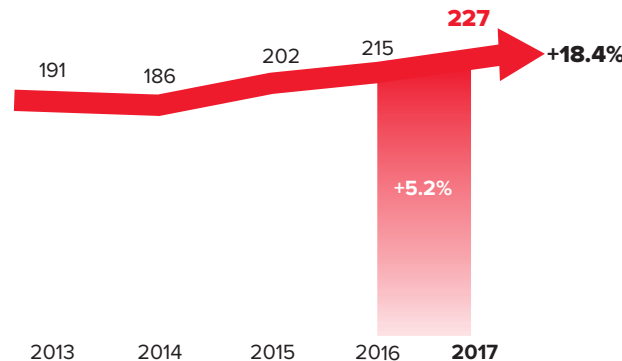
Finland recorded the highest growth for literature collections among the world's top five contributors (+32.3%). Collections are mainly supported by rental and public lending (62.4%). In Austria, 8.4% of literature collections, TV and radio narrowly lead collections (43.3%) ahead of reprography (42.8%).

Reprography leads uses

Reprography is the highest source of collections for the repertoire (71.3%), accounting for EUR162m. Collections related to the use have been broadly flat for the last five years. Other sources of revenue are seeing growth.

Rental and public lending grew 37.5%, supported by Finland and the Netherlands; TV and radio grew 18.8% bolstered by collections in Switzerland and Austria; and private copying collections quadrupled in Italy in just a year. Educational use became the fifth highest source of revenue.

Collections for literature repertoire (EUR million)



Reprography accounts for over two thirds of collections

Breakdown of literature collections (EUR million)

	Collections	Growth	5 year Growth
Type of Use			
Reprography	162	+3.0%	+3.1%
Rental/Public Lending	21	+37.5%	+132%
TV & Radio	19	+18.8%	+38.0%
Private Copying	13	+15.3%	+423%
Educational Use	13	-14.5%	-
Live & Background	3	-3.1%	+6.2%
Mechanical Reproduction	2	-57.9%	-58.5%
Other	1	-35.4%	-47.2%
Type of Right			
Performing Rights	19	+0.5%	+15.7%
Mechanical Rights	208	+5.6%	+18.6%
Total Literature	227	+5.2%	+18.4%

Top 5 countries for literature collections (EUR million)

	Collections	Share of world collections	Growth
AUSTRALIA	95	42.0%	+7.2%
UNITED KINGDOM	27	11.9%	-0.5%
SWITZERLAND	27	11.6%	+4.7%
FINLAND	19	8.4%	+32.3%
AUSTRIA	19	8.4%	+4.8%

Societies see growing premium video streaming

By David Sidebottom, Principal Analyst, Entertainment, Futuresource

Premium video streaming, particularly subscription video on demand (SVoD), has witnessed an explosion in recent years, growing from 143 million subscribers at the end of 2014, to 458 million subscribers at the end of 2017.

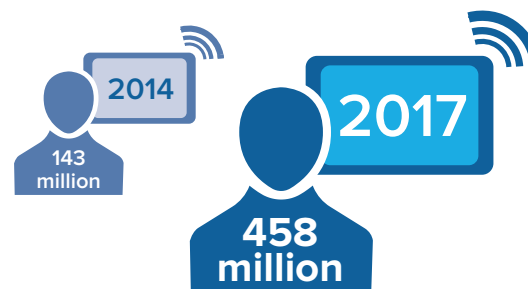
This movement was initially driven from the US, by Netflix, but is now a global phenomenon with multiple service operators active, providing a potentially significant revenue opportunity for content creators and rights holders.

Futuresource Consulting estimates that consumers spent USD20bn on SVoD services globally in 2017, compared to just USD11bn on streaming music.

Strong growth in VoD collections

Authors' societies worldwide are witnessing excellent revenue growth in VoD collections. For example, Australian society APRA AMCOS reported growth in total VoD revenues of 70% in 2017 (to AUD14.1m), and, in the UK, PRS For Music saw VoD revenues grow by 47% in 2017 (to GBP13.8m). SVoD was the key driver of this growth. Although this revenue is equivalent to less than 20% of the revenue collected from television for both these societies, this is higher than the typical proportion of viewing time allocated to SVoD.

Subscribers to premium video streaming services



Futuresource estimates that if similar agreements were universally implemented in every country worldwide, then the cumulative societies' SVoD revenue in 2018 would exceed USD1bn, which is equivalent to 11% of CISAC's total music collections revenue in 2017 (USD9.4bn).

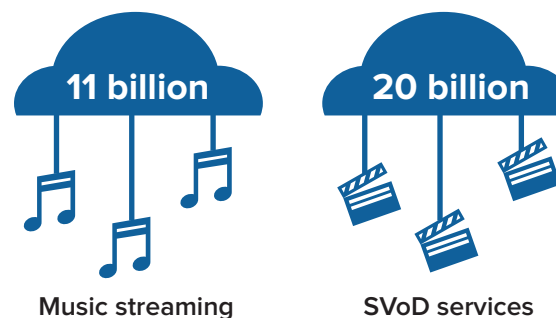
Surge in TV content

The emergence of SVoD as a staple part of many consumers' video consumption has fuelled a surge in premium, scripted TV content in particular. Services such as Netflix, Amazon Prime Video and Hulu are now major content producers of original series, with significant content budgets. Netflix alone has an USD8bn content budget with the vast majority of this dedicated to original, exclusive TV series and movie productions.

The increased production of these premium TV shows, the vast majority of which have global reach, has provided a major opportunity for creators, giving them a platform for soundtracks, compositions and synchronisation on a scale not witnessed before. Netflix alone has over 1,000 originals, including over 100 original movies, with an equally strong pipeline.

Typical VoD tariffs are approximately 2.5% of revenue with some societies actively targeting new services with bespoke tariffs, whilst others are adhering to published tariffs. German society GEMA has recently agreed a similar retrospective tariff of 20 cents per subscriber.

Estimated consumer spending, 2017 (USD)



Beyond Netflix

Netflix is the highest profile of all SVoD services, particularly for original content, but there is also a significant role for smaller, niche services and local players.

Many local services, particularly outside of Asia, have struggled largely due to lack of investment, but local joint ventures and partnerships can pool investment to create a compelling consumer offering. These will largely be driven by local broadcasters, such as “Salto” in France, a joint venture between the major French broadcasters TF1, M6 Group and France Televisions.

Amazon Channels is a platform that provides such third-party services with strong reach and now hosts approximately 150 services focussed on a wide range of genres. In the longer term, these smaller services will help drive the SVoD markets, as growth of the major services slows.

Collection challenges

Whilst the sector has provided a burgeoning revenue stream, it is not without its challenges, particularly for collection societies:

- Many smaller services in particular are not aware of the need for a licence and are not factoring the payments into their financial model.
- While Netflix is dominant in many countries, this is not the case everywhere. Local services dominate in Asia, typically within a dynamic and fragmented landscape, providing further royalty collection challenges.

- Business models also vary by service. Most commonly a flat monthly rate applies, although in some cases, such as Amazon Prime Video, bundling video streaming into a larger offering may require a tailored approach.

SVoD viewing is also starting to cannibalise traditional TV viewing in some countries, albeit at a minor level. Revenues from television will slow and likely decline in the longer term. However, SVoD services are expected to at least compensate for this in the foreseeable future even if potential saturation in TV series slows growth.

Positive outlook

Overall, SVoD services are set for strong growth in the years ahead, ultimately fuelled by continued consumer uptake. Global SVoD consumer spend is set to reach USD44bn in 2021, over double the 2017 level. This forecast in itself is a striking illustration of the level of opportunity in this sector.



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Digital licensing and managing data: key skills of CMOs in the streaming world – ANALYSIS – MUSIC

The rise and rise of digital consumption of all creative repertoires has been the strongest feature in global collections for more than a decade. In 2017, digital collections passed the EUR1bn mark for the first time. Digital accounted for 13.2% of total collections in 2017, leaving enormous room for further growth. However, in some countries the share is far greater – notably Sweden (32.8%), Mexico (32.3%) and South Korea (31.8%).

Music has led the digital revolution. Streaming has moved from a marginal to a mainstream, and finally to the dominant music format, and in doing so has returned the global music sector to sustained growth since 2014. It has also opened multiple new licensing opportunities and challenges for authors' societies.

Streaming's growth is driving the whole music sector. Figures covering the full year 2017, and 2018 mid-year figures from key markets such as the US, the UK and France show digital consumption is constantly on the rise. In the US, with 268 billion streams monitored during the first half of 2018, on-demand audio streaming volume was up 45% compared to the same period of 2017, according to Nielsen.

Subscription takes off

Services like Spotify and Apple Music have announced significant gains in subscribers so far for 2018, with a total of 86 million paid subscribers for Spotify (out of a 180 million total users) at the end of July and over 50 million for Apple Music. Streaming has also started unlocking huge potential in markets of low digital penetration and high piracy, such as Latin America, Africa and Asia.

For CISAC member societies, despite its sharp growth, digital remains an under-developed income stream. However, the rise in digital collections has largely not been detrimental to the traditional main source of revenue for CMOs: performing rights for the use of content on radio and TV. In 2017, collections from TV and radio accounted for EUR3.6bn up 2.7% compared to the previous year.

Licensing new digital players

CMOs have also responded to the arrival of new players searching for licences, such as Facebook, by adjusting their licensing processes. As more different business models are making their way in the digital eco-system, CMOs have answered with flexibility and creativity in their negotiations, taking into account the particular needs of each digital service provider (DSP) in drafting their licensing conditions.

The streaming world has also opened up new revenue models based on access to music, from connected to voice activated speakers. This new trend in consumption will benefit rights holders since the music streams accessed by smart speakers' users will be delivered by a DSP, either from the free tier, but most likely from a subscription.

Music rights holders are also sharply impacted by changes in consumer viewing of the TV screen. As they did for music, consumers want "films and TV whenever I want, wherever I want, as much as I want" and have embraced subscription video on demand (SVOD) services and "Over The Top" (OTT) platforms (see analysis by Futuresource, page 26).

Long term licences with services such as Netflix and Hulu (only in the US), and other OTT platforms have contributed significantly to some societies' rise in digital collections. As these platforms continue their global development, they will also contribute revenue to local CMOs. In Australia, for example, rights society APRA reported that VoD revenues grew 70% year-on-year. In Canada, SOCAN reported strong levels of collections from Netflix and YouTube.

CMOs manage the data explosion

In this new digital environment, the management of data has become a primary source of focus for CMOs that are now dealing with billions of micro-transactions. British society PRS for Music processed 6.6 trillion uses of music in 2017, a 50% increase over 2016. France's society Sacem processed 2.1 trillion uses of music in 2017 while US society BMI processed close to 1.4 trillion performances (of which 1.350 trillion were digital performances), a figure up 40% compared to the previous year.

Managing Music Data in 2017

PRS	6.6 trillion uses
Sacem	2.1 trillion uses
BMI	1.4 trillion performances

The rise of data volume has been met with increasing investments from CMOs to adapt their systems to the new market conditions and deliver better, quicker and more accurate distributions. Amid competition among CMOs, rights societies have looked at collaborations to improve systems.

In a rapidly changing world, CMOs have made the transition to digital and are now capable of dealing with the complexities of the new business models, consumption patterns and data challenges.



As different new business models are making their way in the digital eco-system, CMOs have answered with flexibility and creativity





Private Copying

A growing collections stream for creators – ANALYSIS – MUSIC

Private copying is a fair and equitable measure that, if properly implemented, could transform the lives of creators for the best

Angélique Kidjo,
CISAC Vice President

Private copying is an exception to the reproduction right that allows individuals to make a copy of a creative work for their own personal, non-commercial use. To remunerate the creator of the work, a levy is imposed on the blank media and devices with storage facilities that enable the copying.

Globally, private copying generates collections of EUR484m, a figure that has grown by 33.3% year-on-year and by 141% since 2013. Music, the largest sector at 70.6%, grew by 28.4%. The increases in audiovisual, visual arts and dramatic repertoires were at 57.3%, 29.6% and 26.0% respectively.

The private copying levy is an important source of income for creators able to receive it. This is especially true in countries where physical formats dominate but the copyright environment is weak. In some African countries, private copying constitutes more than half of the local society's income. It makes up 14.1% of the region's collections as a whole.

Private copying demonstrates huge growth potential

Countries where private copying is implemented effectively have seen strong collections growth in recent years.

In Germany, a retroactive agreement that extended the range of devices upon which the levy is made resulted in a near-doubling of private copying income. In Morocco, a legislative reform prompted a major increase in income for creators, which grew to more than EUR4m in 2017.

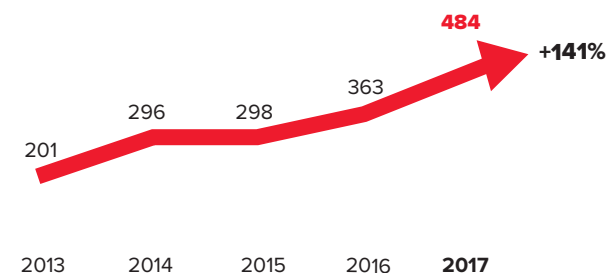
Despite this growth, private copying still makes up just 5.1% of global collections, largely because of inadequate legislation and implementation. In October 2017, CISAC released a comprehensive study of the sector. It revealed that only 74 countries have laws in place to recognise the private copying levy and among those, only 38 have implemented an effective collection system.

Distributions

In addition to direct payments to creators, more than EUR50m annually is used to help creators via cultural, educational and social projects. Small shares of distributions are used to invest in a myriad of activities, for example in France, Germany, Italy, the Netherlands and Switzerland.

Private copying levies have a key role to play in the digital world. The key to unlocking their potential is adequate legislation, proper application of the law and effective collection mechanisms.

Global private copying collection
(EUR million)





Addressing the “transfer of value”: Europe’s message to the world – ANALYSIS – MUSIC

In September 2018, a landmark vote in the EU Parliament took the creative industries a step closer towards addressing a fundamental flaw that is denying creators fair payment by some of the world’s largest digital platforms.

In the current digital market, user upload content (UUC) services such as YouTube are using creative works, making large advertising revenues and paying only a tiny fraction of the sums they generate to creators. They also pay significantly less for other streaming services which offer the exact same content.

The EU Copyright Directive addresses this by requiring UUC platforms to negotiate properly for copyright licences and use technical measures to prevent the availability of unauthorised works on their platforms. If adopted by EU governments, the directive will help bring a level playing field for creative content ensuring that the same rules apply to all digital platforms.

This report provides key evidence of the problem for creators: CISAC’s member societies, despite rapid growth in digital collections, are still seeing digital at only 13% of total global collections. Income from UUC services in turn represents a small fraction of that sum.

Beyond Europe: CISAC’s Liebowitz study

The “transfer of value” or “value gap” is a global, not merely European, problem. Europe’s legislative solution holds up important lessons to governments worldwide, albeit with different legislative conditions. Common to many jurisdictions is the existence of flawed legal frameworks that allow UUC services to abuse misapplied “safe harbour” rules.

Safe harbour rules are abused by UUC platforms to give them a competitive edge over services that pay copyright licences. YouTube alone boasts 1.8 billion logged-in viewers monthly, multiple times more than the largest global music streaming subscription service, Spotify, with 159 million monthly active users and 71 million premium users. However YouTube and similar UUC services pay significantly less.



1.8 billion:
YouTube logged
in viewers



13%:
Global digital share
of collections

Economic analysis of this issue has until recently been limited. However, in 2018, CISAC published a study by Ashbel Smith Professor Stan Liebowitz of the University of Texas at Dallas. The study is entitled “Economic Analysis of Safe Harbor Provisions”. It finds that safe harbour regimes, drawn up a quarter of a century ago to help nurture early online commerce, are distorting the digital market, profiting tech giants and leading to significant underpayment of copyright owners.

The study finds:

- Because of the safe harbours, UUC services such as YouTube have “an inefficient and unfair advantage” when they negotiate rates for permission to use copyrighted works on their platforms.
- As a result, UUCs either do not pay for copyright licences or, if they pay something, they pay less than the market rate.
- Other online services (such as subscription services, e.g. Spotify and Apple Music) are at a competitive disadvantage when competing with UUC platforms. These services generate lower revenues and have a reduced user base, because of the distorting impact of safe harbours.

***This important first step is a seminal
moment in the future of music creators
and creative people in the EU
and around the world***

Eddie Schwartz,
songwriter and President of CIAM
(International Council of Music
Creators)



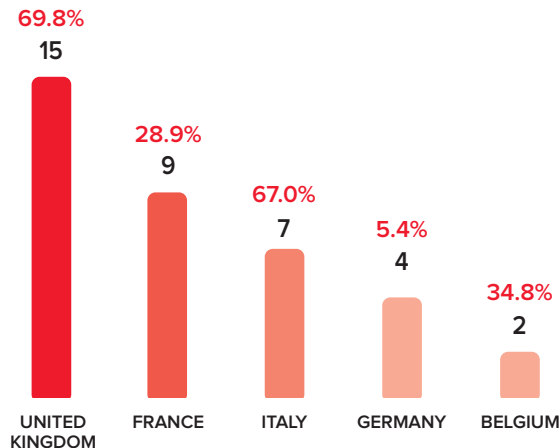
New study highlights benefits of resale right

ANALYSIS – VISUAL ARTS

Artists are overwhelmingly in favour of the resale right. Most believe artists should share in the profitability of their work, as do other creators

WIPO -
commissioned study

**Nurturing visual artists:
the resale right's share of collections
in the top 5 collection countries (EUR million)**



The resale right has grown in importance over the past decade and accounts now for over a fifth of the world's total collections for the visual arts repertoire at EUR43 m.

The resale right serves a fundamental purpose for visual artists, allowing them a small share of the proceeds when their works are re-sold by auction houses and galleries. More than 80 countries have now introduced the right and discussions are progressing in the World Intellectual Property Organisation (WIPO) to extend the right to benefit artists internationally.

A new study commissioned by WIPO has brought some important new insights into the benefits of the resale right. It is written by Joëlle Farchy, Professor at the University of Paris I, Panthéon-Sorbonne in Paris, with Kathryn Graddy, Dean of the Brandeis International Business School and the Fred and Rita Richman Distinguished Professor in Economics at Brandeis University in Boston. Titled "The Economic Implications of the Artist's Resale Right", it was presented first at WIPO'S Standing Committee on Copyright and Related Rights (SCCR) in November 2017.

Case studies observed

The study offers a detailed picture of the evolution of the global art market and analyses the economic consequences of the resale right, in particular on the prices of works. "The study focused on several areas," explains Graddy. "First, we looked at the economic theory and context of the resale right, next we provided a summary of academic work with data and econometric analysis, and finally we provided case

studies of the resale right in the UK, Africa and Australia. We did not collect new data, as we relied on data and analyses from our previous studies. In these studies, we could not find any price decreases after the implementation of the resale right."

The authors of the study noted that "the resale right, which associates the creator with the economic life of his work in time, appears as a specific right for graphic and visual artists who produce unique original works or works printed in a limited, numbered series."

The global art market is highly concentrated, with a few countries controlling most of the art business. The world's largest auction art markets are China (38% in 2016), the US (28%), the UK (17%) and France (5%), according to the study. Two of these countries, France and the UK, have a resale right provision in the law, as they are both members of the European Union, which adopted in 2001 the directive on the resale right for the benefit of the author of an original work of art (2001/84/EC).

France - resale right leader

France accounts for 21.1% of resale rights collections worldwide, making it the second largest collector for the use globally. The concept of resale right in France dates back to the late 1800s; the notion of *droit de suite* was first introduced into law in 1920. French visual arts society ADAGP continues this longstanding tradition as a pioneer for visual artists by being a vocal proponent of the campaign for the resale right on the global stage.

UK: EUR74m paid to 5,000 artists

In the UK, the resale right was introduced in 2006 and in 2012 its benefits were extended to heirs of artists. In total, since 2006, the UK's Design and Artists Copyright Society (DACS) has paid resale right royalties of over GBP65m (EUR74m) to almost 5,000 artists and estates. Farchy and Graddy looked at the evolution of the art market in the UK, through the business of auction houses and art dealers. "The study shows, especially in the UK, that the resale right does not seem to have had an impact on the art market. Items are unique, and buyers do not think about the resale right when they want to acquire a work of art," explains Graddy.

Australian market

In their analysis of the Australian market, which introduced the resale right in 2010, Farchy and Graddy showed that it had a significant impact on the livelihoods of Australian artists, in particular Aboriginal artists, who valued the benefits of the resale right. "Listening to the artists was very interesting," says Graddy. "They told us that the resale right is more than just payment. Artists care about tracking their works. It is very powerful for them to know what happens to their works, and tracking is costly in itself. For artists, [the resale right] is important and may increase their productivity through their commitment to their work."

In a market where the fastest growing segment is Post-War and contemporary works, the resale right has the potential to deliver significant royalties to visual artists, as shown by figures in the UK and Australia.

Farchy and Graddy conclude their report by stating that "overall, artists are overwhelmingly in favour of the artist's resale right. Most believe it is a moral issue; artists should share in the profitability of their work, as do other creators."



*The resale right works,
it is fair and it benefits thousands
and thousands of artists*

Joel Shapiro,
President, The International Council
of Creators of Graphic, Plastic and
Photographic Arts (CIAGP)





Audiovisual collections up 6.8%, but creators still need fair remuneration – ANALYSIS – AUDIOVISUAL

In the digital world our works can reach audiences around the world, but the film makers and screenwriters behind them are not being fairly compensated.

This is a matter of fairness for tomorrow's audiovisual creators around the world

Jia Zhang-ke,
filmmaker and CISAC Vice President

The audiovisual landscape is transforming and expanding, and with it opportunities for remunerating creators. According to the Motion Picture Association of America (MPAA), the global box office reached a record high of USD40.6bn (EUR35.9bn) in 2017, while home entertainment consumer spending for content released digitally and on disc increased globally to USD47.8bn (EUR42.9bn).

Collections for audiovisual creators reported to CISAC also saw a 6.8% increase in 2017, with CMOs collecting EUR611m worldwide, across all uses. TV continued to be the first source of audiovisual collections accounting for over 70%. Digital collections have grown over tenfold since 2013, reflecting the growing penetration of smartphones and tablets globally and the rise in consumption of audiovisual content online.

The challenge for audiovisual authors

Despite encouraging growth, in most countries, screenwriters and directors are still not fairly rewarded for their contribution to this booming sector.

Authors are largely dependent on the contracts they sign with audiovisual producers. As a result of this weak bargaining position, they often end up signing over their rights in exchange for lump sum payments. This means that, while operators, broadcasters and distributors' revenue thrives, authors are rarely able to secure pay that accurately reflects the success derived from the exploitation of their works.

The audiovisual campaign

In 2015, Writers & Directors Worldwide and CISAC launched the audiovisual campaign to support the right of screenwriters and directors to a universally applied, unassignable and unwaivable remuneration right to bring them level with other players in the sector.

This right provides creators with the means to thrive and create - it is also an economic lever stimulating a vibrant film sector, economic growth and jobs.

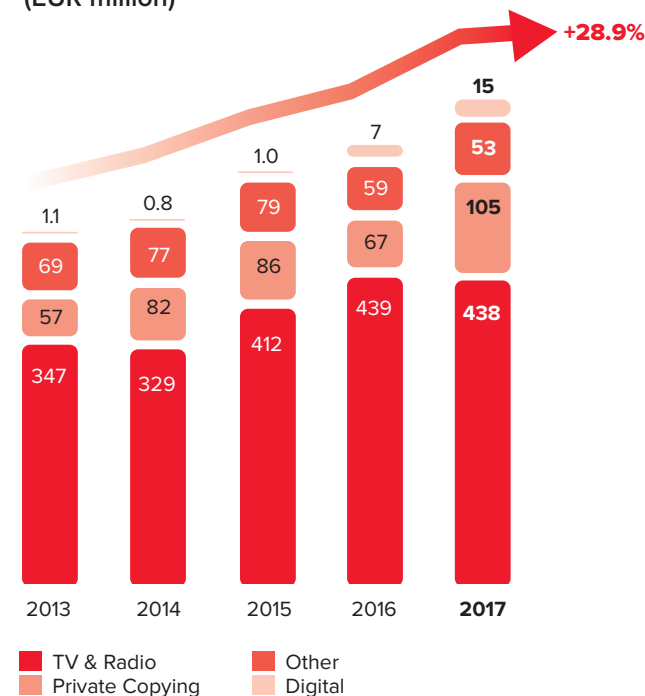
Momentum is building to introduce fair remuneration internationally. Belgium, France, Italy, Poland and Spain have successfully implemented various forms of remuneration rights, though not all unassignable and unwaivable. The campaign is prompting new markets to seek similar frameworks to support their authors - Chile adopted the Ricardo Larraín Law in 2016 and Colombia welcomed the Pepe Sánchez Act in May 2017.

Progress in Europe

Further support came from the EU when the European Parliament adopted the Copyright Directive in September 2018.

This is an important step forward and sends a signal to audiovisual creators and governments internationally. It establishes above all the principle of fair and proportionate remuneration for authors, and will be strongly supported by audiovisual creators as it moves to discussion by EU governments.

TV & Radio leads audiovisual collections (EUR million)





Study shows legal roadmap for audiovisual creators – ANALYSIS – AUDIOVISUAL

For the first time, we have a comprehensive global legal study showing the way to fair treatment of audiovisual creators

Gadi Oron,
Director General, CISAC

Legal reforms are needed on a global scale to help screenwriters and directors earn royalties for the use of their works, according to a new international legal study commissioned by CISAC and Writers & Directors Worldwide.

The study by Professor Raquel Xalabarder, Intellectual Property Chair at the Universitat Oberta de Catalunya in Spain, highlights the need for audiovisual authors to have a guaranteed right of equitable remuneration when their works are used by digital services and other users.

The new study, published in May 2018, provides a clear legislative blueprint for decision makers to ensure all audiovisual authors benefit equally, regardless of their country of origin or of audiovisual production. It benefits all parties involved in audiovisual production and exploitation, ensuring a constant flow of remuneration from users to authors without impinging on the commercial exploitation of the works by the producer, which retains full control over the exploitation. The framework proposed complies with international and EU copyright obligations.

Identifying local and regional solutions

The study found that there is no universally agreed upon definition of audiovisual authorship. Even when provisions for the remuneration of audiovisual authors exist, they vary greatly from country to country and depending on the type of use.

Nineteen out of the 28 EU Member States have implemented remuneration systems for audiovisual authors, mostly for cable retransmission and private copying. Worldwide, online exploitation is rarely covered by any type of remuneration. To be properly implemented and managed, mandatory remuneration schemes rely on the existence of strong trade unions, CMOs or guilds, as is the case in the US.

Fine-tuning a future-proof fix for policy makers

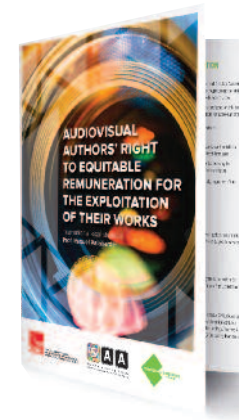
Based on her assessment of existing laws and best practices around the world, Professor Xalabarder notes that the most effective way of ensuring authors receive equitable remuneration is by creating an unwaivable and inalienable right and entrusting its collection to CMOs.

This right is not a compensation but a payment made by users in exchange for the exploitation of works. It is regarded as equitable remuneration if proportionally based on the revenues of the licensee. Unless unwaivable and inalienable, the remuneration right tends to be transferred or waived under pressure from the producer.

Universal implementation needs to be mandatory to ensure that all audiovisual authors benefit equally, regardless of their country of origin or of audiovisual production.

Creators need proper bargaining tools that enable them to continue making their voices heard and share their stories worldwide for generations to come

Horacio Maldonado,
President, Writers & Directors Worldwide

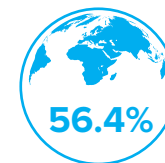
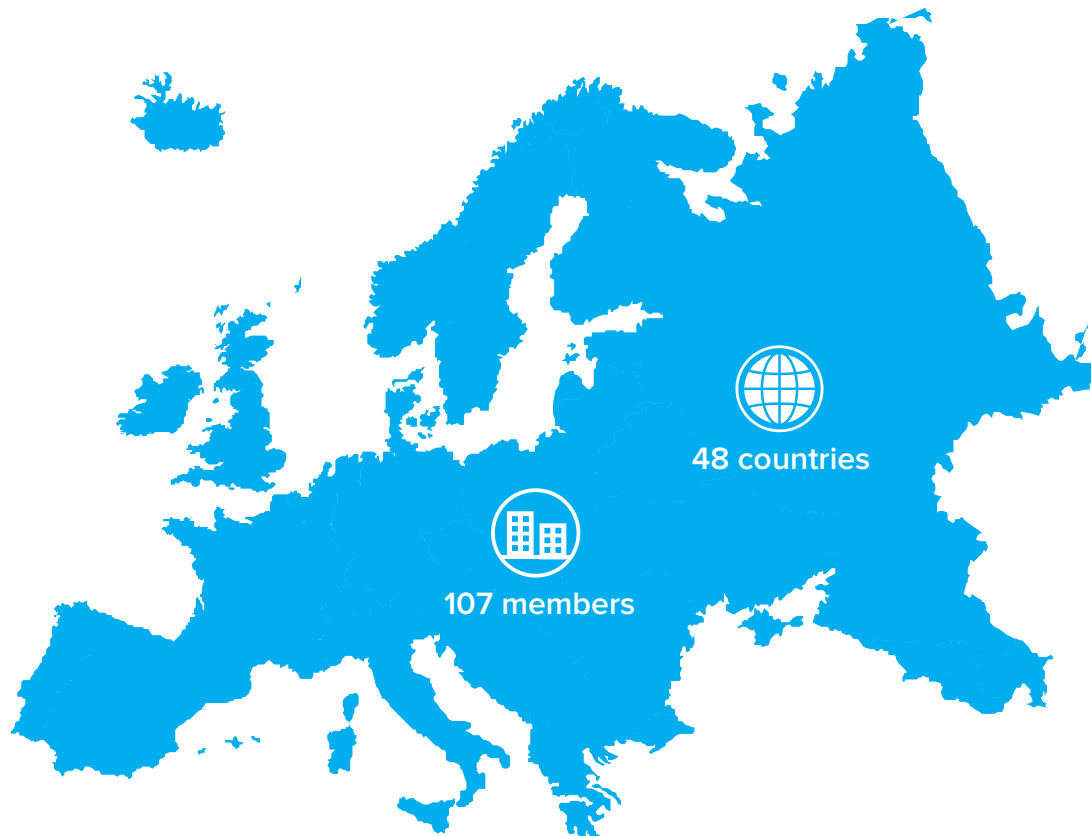


REGION EUROPE

Total 2017 collections
(EUR million)

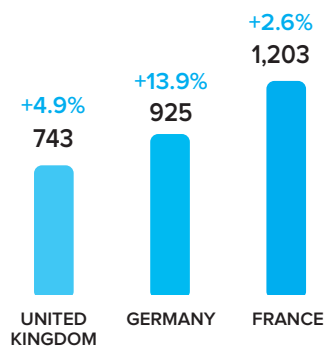
+5.7%
2017
5,401

2016
5,109



European share
of global collections

Largest collecting countries
and annual growth (EUR million)



REGIONAL COLLECTIONS INCREASE BY EUR292 MILLION

Europe remains the world's largest region for collections with its share constant at 56.4% of the worldwide total. CISAC's society members in the region collected EUR5.4bn on behalf of their members, an increase of 5.7% over the previous year.

Almost 40% of this growth was generated by Germany. Following were the UK at 11.9% and France at 10.5%. In absolute value terms, these three countries also made up more than half of the region's total, with France taking the lead and collecting EUR1.2bn.

Almost all of the growth in Germany was attributable to a EUR91m back payment from new private copying agreements for smartphones, tablets and PCs. Live music collections in the country also rose due to the increasing demand for large concerts.

In 2016, exchange rates turned a 9.2% increase in UK collections into a 3.1% deficit when converted to euros. The exchange effect was reduced in the 2017 figures and UK digital growth of 30.6% year-on-year led overall collections to rise 4.9%.

EUROPE

TYPES OF USE

Digital drives nearly one third of Europe's growth

Digital accounts for 31.2% of Europe's EUR292m increase in collections, driven by streaming and video on demand. The total value of the digital sector in Europe rose by 20.5% but, despite this encouraging increase, it still only accounts for less than a tenth of the region's total collections. Growth in digital slowed compared to 2016, which was boosted by the settlement of a retroactive agreement with YouTube in Germany.

Digital in Nordics doubles in five years

The digital boom of Nordic countries continues with Denmark growing by 65.8% and Norway by 52.8%. In Sweden, growth of 19.5% saw digital become the country's largest income sector for the first time with 32.8% of the total. Finland, the smallest Nordic market, saw digital growth of 14.8%. This trend is driven by the widescale adoption of premium music streaming services: an average of 40% of Nordic people have subscriptions, according to a 2017 study by Polaris. Additionally, video on demand use among fixed broadband homes now exceeds 75%¹ whereas a comparable figure for the UK market is 56%.

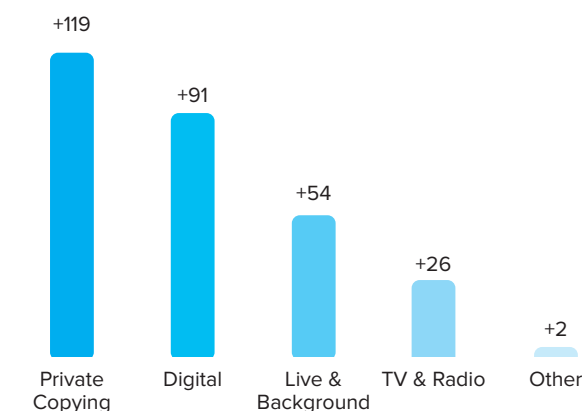
TV & radio remains a tough market for royalty rates

Broadcasters in several European countries, including France, Italy and the Netherlands, continue to aggressively seek royalty decreases and thus reduce collections. Despite this, the sector still saw growth in 2017, helped by the conclusion of copyright tribunal proceedings and new licence negotiations in the UK, and by the resolution of an agreement with the Copydan alliance in Denmark.

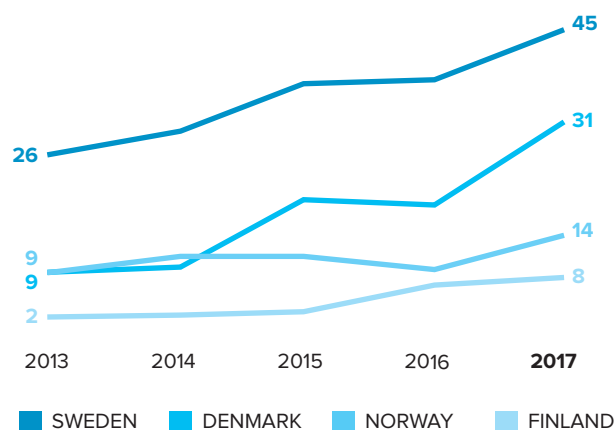
Sources

1. 2018 report by Kagan, a media research group within S&P Global Market Intelligence.

Main contributors to growth (EUR million)



Strong digital growth in Nordic countries (EUR million)



Breakdown of regional collections (EUR million)

	Collections	Growth	5 year growth
Repertoire			
Music	4,349	+5.2%	+19.5%
Audiovisual	559	+6.3%	+30.7%
Visual Arts	197	+19.3%	+73.8%
Dramatic	175	+2.1%	+3.5%
Literature	121	+5.8%	+23.8%
Type of Use			
TV & Radio	1,987	+1.3%	+11.6%
Live & Background	1,855	+3.0%	+10.6%
Digital	535	+20.5%	+157%
Private Copying	471	+33.6%	+146%
CD & Video	242	-6.7%	-14.2%
Reprography	150	+11.3%	+40.8%
Resale Right	43	+0.0%	+14.2%
Rental/Public Lending	33	+34.2%	+95.3%
Reproduction	16	+5.7%	+12.1%
Synchronisation	12	-17.8%	+91.8%
Educational Use	10	+58.1%	+83.0%
Mechanical Reproduction	4	-43.1%	-86.8%
Publication	0	-86.3%	-88.9%
Other	45	-6.7%	-49.8%
Type of Right			
Performing Rights	3,968	+3.7%	+17.3%
Mechanical Rights	1,086	+7.9%	+17.5%
Other Rights	347	+25.3%	+148%
Total	5,401	+5.7%	+21.5%

EUROPE REPERTOIRES

Music collections grow as efficiency improves

Of the five repertoires, music saw the strongest growth in value, expanding by EUR216m. This reflects the largely streaming-driven recovery of Europe's music market as well as stable royalties from the largest non-digital uses.

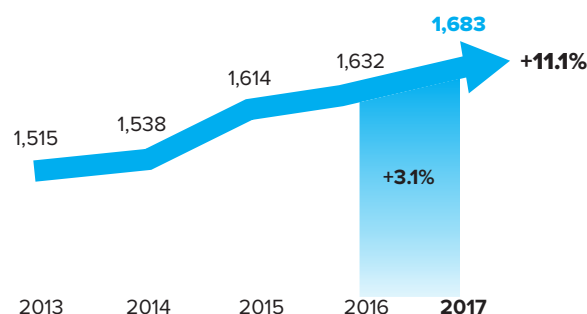
Live and background remains the largest type of music use, and growth was visible in 19 of the top 20 countries. Part of this is driven by a shift towards larger concerts and music festivals where higher and multi-day ticket prices have fed more money back to music authors.

Additionally, CMOs have been evolving their business models to make it easier for venue and store owners. Licences are being combined into single, one-stop solutions. An example was the collaboration between CISAC member SUIA and a European for-profit competitor that simplified background music licensing in Switzerland.

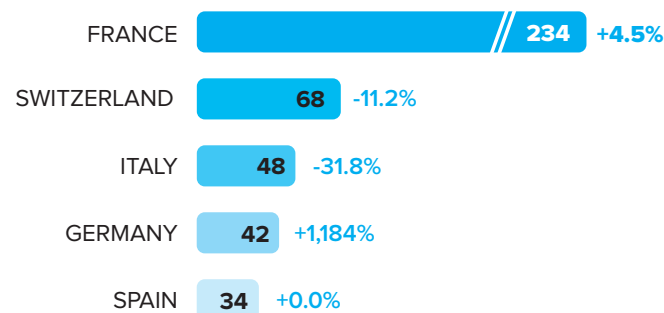
Audiovisual growth offset by Italy

Audiovisual, the second largest repertoire, grew by 6.3% but this was largely attributable to an additional EUR37m in private copying in Germany that offset a EUR22m drop in Italian collections. This decrease in Italy is explained by a large back payment that inflated the 2016 figure and by a dispute involving an important TV operator that resulted in the suspension of payments in 2017. ▶

Live & background leads music use (EUR million)



France leads audiovisual collections (EUR million)



Top uses by repertoire (EUR million)

	Collections	Growth	5 year Growth
MUSIC			
Live & Background	1,683	+3.1%	+11.1%
TV & Radio	1,544	+1.9%	+7.7%
Digital	515	+18.4%	+152%
Music all uses	4,349	+5.2%	+19.5%
AUDIOVISUAL			
TV & Radio	389	-2.0%	+26.7%
Private Copying	105	+58.8%	+87.7%
Live & Background	18	+11.8%	+65.0%
Audiovisual all uses	559	+6.3%	+30.7%
VISUAL ARTS			
Reprography	86	+24.3%	+113%
Resale Right	43	+0.0%	+14.2%
Private Copying	18	+29.3%	+335%
Visual Arts all uses	197	+19.3%	+73.8%
DRAMATIC			
Live & Background	147	+0.9%	+2.0%
TV & Radio	21	+5.3%	-1.6%
Private Copying	5	+39.9%	+1,324%
Dramatic all uses	175	+2.1%	+3.5%
LITERATURE			
Reprography	63	-2.8%	-3.7%
Rental/Public Lending	21	+37.5%	+132%
TV & Radio	18	+23.6%	+39.2%
Literature all uses	121	+5.8%	+23.8%

EUROPE

REPERTOIRES

► The European audiovisual sector outside of Italy expanded by 12.2% with the strongest growth after Germany seen in France, where private copying netted an additional EUR6.7m. Video on demand subscriptions also drove collections growth with the number of French subscribers increasing by 40% year-on-year¹.

Resale right and private copying remain vital for creators

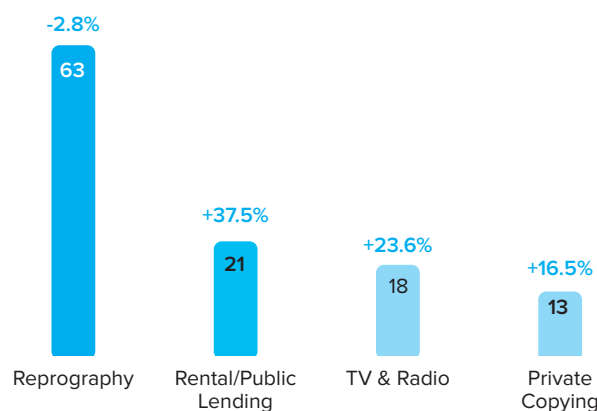
In visual arts, collections grew 19.3%, again driven mainly by back payments in Germany. This country, France, the UK and the Netherlands make up almost three-quarters of the total. The resale right remains a crucial source of income, amounting to 21.6% of total collections in Europe and second only to reprography at 43.7%. In the UK, resale right collections have risen 21.9% over the past five years and are the largest source of income at 69.8% of total.

In the literature repertoire, by far the largest area of growth was in rental and public lending which expanded by 37.5% to compensate for falls in reprography and mechanical reproduction. In drama, the amount for regional collections was constant, with Italy responsible for 38.0% of the European total.

Resale right key for visual artists (EUR million)

	Collections	Share
Reprography	86	43.7%
Resale Right	43	21.6%
Private Copying	18	9.0%
Reproduction	16	7.9%
TV & Radio	15	7.5%
Other	20	10.3%

Reprography leads literature collections (EUR million)



Sources

1. Report by Mediametrie, 2017.

FRANCE

WORLD LEADER SEES CONTINUED GROWTH

France is Europe's leading country for authors' society collections, and the second biggest contributor to global income behind the US, accounting for 12.6% of the global total.

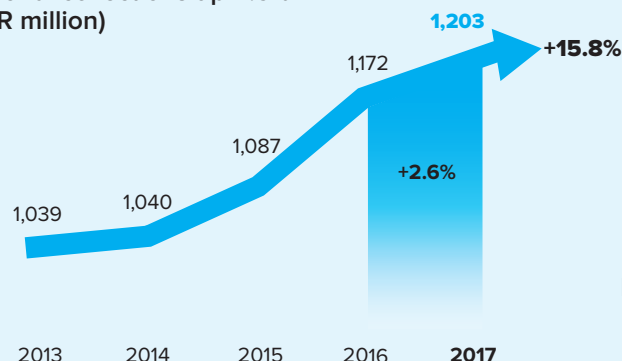
With a history of authors' rights pre-dating the French Revolution, the country boasts some of the world's oldest CMOs and strongest laws protecting creators. French societies are influential players on the European and international stage.

In 2017, French societies collected EUR1,203m across all repertoires, up 2.6% from 2016 and 15.8% over the past five years. Music is the largest repertoire (73.6%), followed by audiovisual (19.4%), dramatic (4.3%) and visual arts (2.6%).

TV and radio still ranks as France's highest use (43.5%), despite a slight drop in collections in 2017. Live and background remain stable at around 29.7%. Private copying is the country's third highest use, growing 21.1% since 2016. In France, private copying levies for all repertoires are collected by a single entity, Copie France, which allocates its collections among member societies and those who have given it a mandate to collect on their behalf.

Reported digital collections have nearly quadrupled in five years and rose by 15.5% in 2017. This reflects France's expanding multi-territorial licensing approach and the growing presence of French repertoire on digital platforms. Digital has overtaken CDs and video as the fourth largest revenue category.

National collections up 2.6% (EUR million)



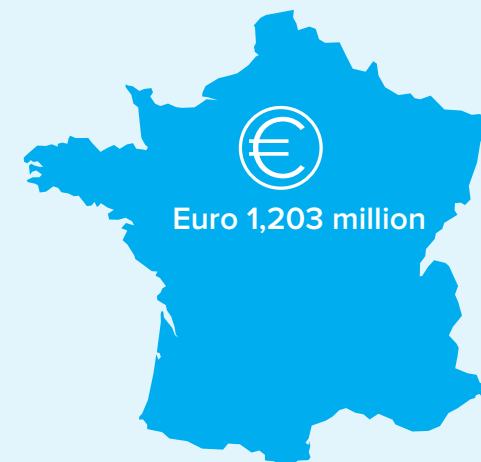
France ranks high in most repertoires

Repertoire	Share of world collections	Rank
Music	10.6%	2
Audiovisual	38.3%	1
Dramatic	26.5%	2
Visual Arts	15.2%	2

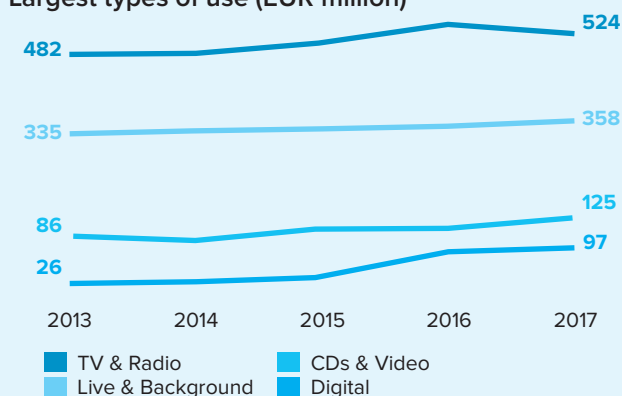
Music accounts for 74% of collections

Music revenues grew 2.1% in 2017, reaching a record EUR886m for Sacem. TV and radio accounted for over 36% of collections, remaining stable overall.

Live and background, the second source of revenue for the musical repertoire, rose by 4.8% thanks to a healthy festival scene and strong concert programming. Collections were bolstered by new contracts, tariff increases and more regular payments by users.



Largest types of use (EUR million)



Private copying collections for Sacem's repertoire increased by EUR13m reaching EUR96m, mainly due to a dynamic smartphone market and to several back payments for previous years.

Digital collections grew 7.9% for the musical repertoire. Growth was driven by audio streaming and video sharing services. Multi-territorial licensing deals with Facebook and new partnerships with international music publishers were signed in 2018. ▶

FRANCE

WORLD LEADER SEES CONTINUED GROWTH

► Audiovisual collections rise

France is the world leader for audiovisual collections, with almost 85% coming from TV and radio. Collections for audiovisual creators rose 4.5% to EUR234m in 2017.

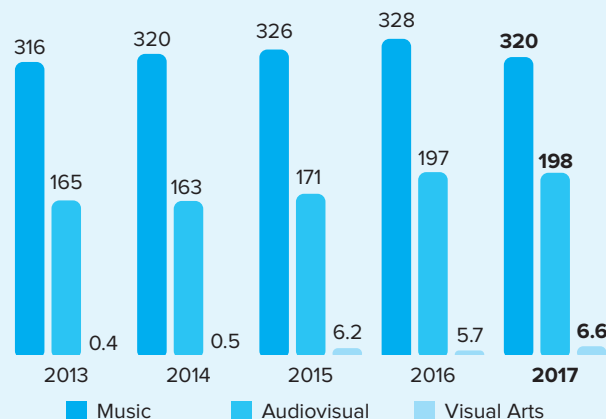
SACD, which draws over 78% of its collections from TV and radio, reached new agreements with digital platforms, thematic channels, and national operators. SCAM, which represents multimedia authors, saw TV and radio collections remain stable overall (+5.9% over 5 years), with a slight increase attributed to the settling of outstanding royalties and more regular payments from high definition DTT channels. There are concerns the overhaul of the public audiovisual sector and planned budget cuts could impact authors in the future.

Private copying remuneration has grown significantly. According to a 2017 CREDOC study, over 73% of the French population owns a smartphone, against 17% in 2011, with 44% using their device to watch videos, up 10 points from last year. A settlement between Copie France and several carrier makers and importers unlocked previously unpaid amounts for private copying for societies and rights holders.

Performance slump hampers dramatic collections

Collections for the dramatic repertoire are almost all sourced from live and background. A drop in the number of big performances and tour dates resulted in a decline in SACD collections to EUR52m. The society has concluded new agreements with several federations, venues and festivals.

TV & radio collections 5-year growth (EUR million)



Number 2 in the world for visual arts collections

France is the second highest collector for visual arts behind Germany and before the UK. Visual arts societies ADAGP and SAIF respectively collected EUR29m and EUR3m.

ADAGP plays a leading role in the global campaign for an international resale right to benefit visual artists (see page 33). The resale right represented 28.9% of visual arts income in France in 2017. The top use was private copying, which saw collections of EUR10m, accounting for 30.9% of visual arts income in 2017. Successful market penetration of hard drives, smartphones, decoders and tablets, which account for 87% of private copying income, has contributed to collections growing over 178% over 5 years.

Breakdown of national collections (EUR million)

	Collections	Growth	5 year Growth
Repertoire			
Music	886	+2.1%	+17.3%
Audiovisual	234	+4.5%	+10.1%
Dramatic	52	-4.5%	-2.6%
Visual Arts	32	+16.8%	+79.8%
Type of Use			
TV & Radio	524	-1.3%	+8.8%
Live & Background	358	+3.3%	+6.8%
Private Copying	125	+21.1%	+44.1%
Digital	97	+15.5%	+275%
CD & Video	81	-7.0%	+23.6%
Resale Right	9	+14.6%	+9.8%
Reproduction	3	-13.6%	-28.8%
Reprography	2	+55.5%	+19.4%
Educational Use	0.4		
Rental/Public Lending	0.1	-14.2%	+649%
Other	5	-49.3%	-33.2%
Type of Right			
Performing Rights	840	-0.5%	+10.1%
Mechanical Rights	267	+9.1%	+27.9%
Other Rights	96	+15.8%	+42.4%
Total	1,203	+2.6%	+15.8%

CENTRAL & EASTERN EUROPE

A DIVERSE COLLECTIONS LANDSCAPE

The sub-region of Central and Eastern Europe, including Turkey, Caucasus and Central Asian countries, makes up a diverse landscape for authors' collections. For example, Hungary, with a slightly lower GDP than Kazakhstan, collected 30 times more than the strongest economy in Central Asia.

Collections for the region as a whole have grown steadily over the last five years, up 11.4% to EUR424m. Poland leads regional collections with EUR106m: Polish societies account for one quarter of total regional collections. Collections rose 29.6 % (15.1% in local currency) in Russia, the second largest market, namely thanks to improved licensing efficiency and a rise of the ruble.

Resistance to authors' rights still strong

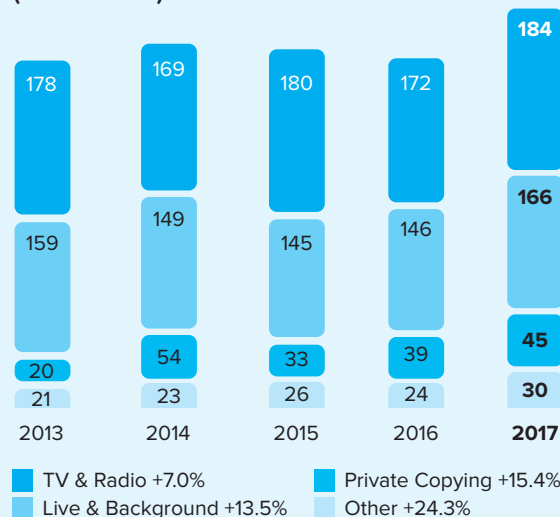
In many countries of the region, weaker economies and relatively low consumer sales often see performing rights and collective management comprising a large share of local music market revenues. Resistance to authors' rights and legal challenges by large repertoire users is strong and widespread. Intellectual property is often regarded as an obstacle to economic development, including by governments.

Music dominates regional collections

Collections are dominated by music, 77.0% of the regional total. TV and radio is the leading source throughout the region (43.3%), but has been slowly caught up by live and background (39.1%) as broadcasters deal with a shift of advertising revenue to online and consumers move to digital.

Digital collections grew 61.5% in 2017 for all repertoires, remaining a very small share of total collections in the region.

Region shows growth in 2017
(EUR million)



This is mainly due to the carve out international repertoire - for which collections are made by multi-territorial licensing hubs rather than local societies - and relatively weak local offerings. Turkey accounts for over 50% of online collections in the region.

Private copying largely untapped

Private copying is an important stream but regional collections still represent a small fraction (7.5%) of the European total for the use. Growth is limited by a lack of legal implementation even in EU countries like Slovenia and Bulgaria, an outdated carrier list and resistance by powerful users. Hungary (see p. 43) is the regional exception thanks to historically successful collection schemes.

Highest collections per GDP rates
in Europe

Collection as a % of GDP	
FRANCE	0.0526%
DENMARK	0.0503%
FINLAND	0.0455%
SWITZERLAND	0.0385%
SLOVENIA	0.0378%
MONTENEGRO	0.0373%
CROATIA	0.0360%
ITALY	0.0345%
HUNGARY	0.0345%

Breakdown of regional collections (EUR million)

	Collections	Growth	5 year Growth
Repertoire			
Music	327	+8.2%	+5.8%
Audiovisual	57	+29.1%	+96.3%
Dramatic	30	+13.2%	-9.1%
Literature	6	+3.8%	+23.3%
Visual Arts	4	+120%	+158%
Type of Use			
TV & Radio	184	+7.0%	+3.3%
Live & Background	166	+13.5%	+4.2%
Private Copying	45	+15.4%	+126%
Digital	11	+61.5%	+90.8%
CD & Video	8	-0.6%	+0.9%
Reprography	2.1	+15.7%	+47.4%
Rental/Public Lending	1.7	+13.3%	+37.5%
Reproduction	1.1	+88.4%	+65.4%
Resale Right	1.0	+11.2%	+32.9%
Mechanical Reproduction	0.5	-37.1%	+35.6%
Synchronisation	0.1	+39.3%	-7.1%
Other	4	+8.6%	+35.1%
Type of Right			
Performing Rights	355	+10.9%	+4.8%
Mechanical Rights	44	+14.4%	+99.9%
Other Rights	25	+14.6%	+48.6%
Total	424	+11.4%	+12.3%

HUNGARY

LEVERAGING OLD AND NEW COLLECTION STREAMS

Hungary has the third highest collections in Central and Eastern Europe. With a century-long history of authors' rights collections, it also has the world's seventh highest collections in relation to GDP. Collections are roughly evenly divided between live and background, TV and radio and private copying.

Private copying a key income source

With almost 90% of all carriers imported, efficient data collections, monitoring and customs cooperation have been key to the success of the private copying levy. Music is the largest category, helping total levies rise 1.5%, however audiovisual society Filmjus saw audiovisual private copying collections decline by 27.0% in 2017.

Licensing strategies pay off

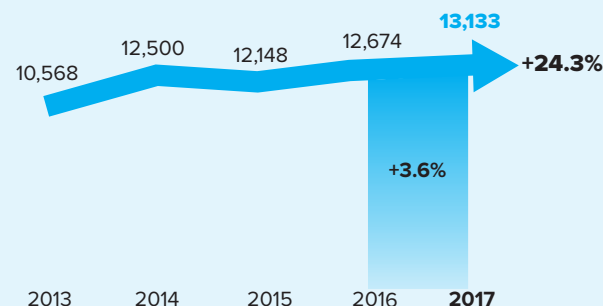
The live and background music sector is relatively saturated. Musical society Artisjus has a contractual mandate, updated every 5-10 years, to collect for both authors and neighbouring rights. Tariffs cannot be raised higher than the yearly average inflation by law. The society has successfully encouraged new venues to license music, helping drive growth since 2012.

TV and radio grew 8.1% but collections are held back by licensing challenges, such as the refusal of one major private broadcaster to renew its licence in 2017.

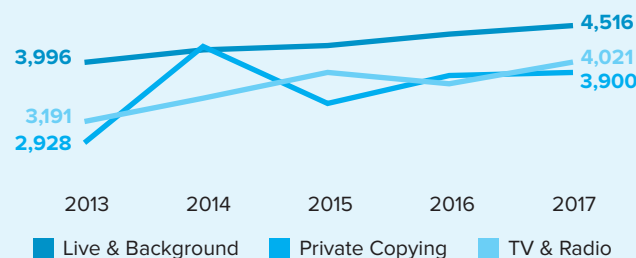
Digital challenges

Digital collections dropped 19.9% in 2017, despite the licensing of two local video on demand services. The digital sector represents a mere 2.2% of income for national societies, which only collect for the Hungarian repertoire. The main reasons include the direct licensing of international

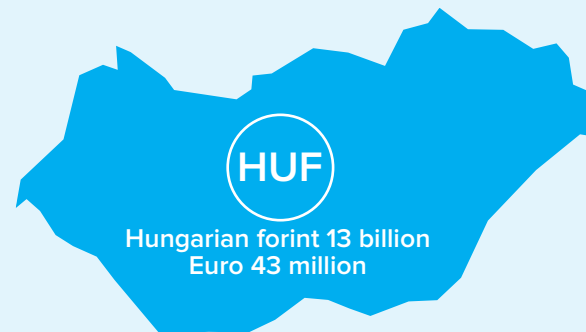
Collections increase by 24.3% in five years (HUF million)



Top three uses all show growth (HUF million)



repertoire, for which income is not collected by Artisjus; low streaming subscription fees; and logistical complications in identifying works in the local language. To address this situation, Artisjus joined regional licensing hub Armonia to start the multi-territorial licensing of its musical repertoire.



Breakdown of national collections (HUF million)

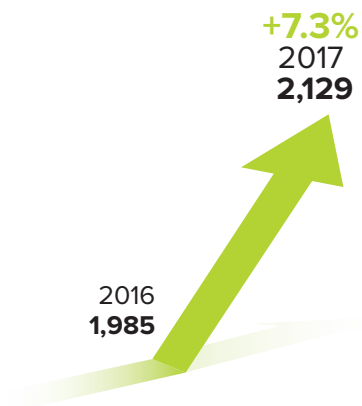
	Collections	Growth	5 year Growth
Repertoire			
Music	11,978	+4.5%	+26.6%
Audiovisual	500	-18.7%	-19.5%
Literature	457	+13.5%	+37.0%
Visual Arts	199	+4.2%	+32.8%
Type of Use			
Live & Background	4,516	+2.2%	+13.0%
TV & Radio	4,021	+8.1%	+26.0%
Private Copying	3,900	+1.5%	+33.2%
Digital	292	-19.9%	+57.7%
CD & Video	249	+38.0%	+54.3%
Resale Right	90	+4.9%	+53.0%
Reprography	27	-19.9%	-2.0%
Reproduction	15	+7.0%	+73.4%
Mech. Reproduction	2	-53.9%	-60.7%
Other	20	+137%	+254%
Type of Right			
Performing Rights	8,309	+4.0%	+19.8%
Mechanical Rights	1,554	+1.7%	+20.0%
Other Rights	3,269	+3.5%	+39.8%
Total	13,133	+3.6%	+24.3%

Hungarian visual artists benefit from resale right

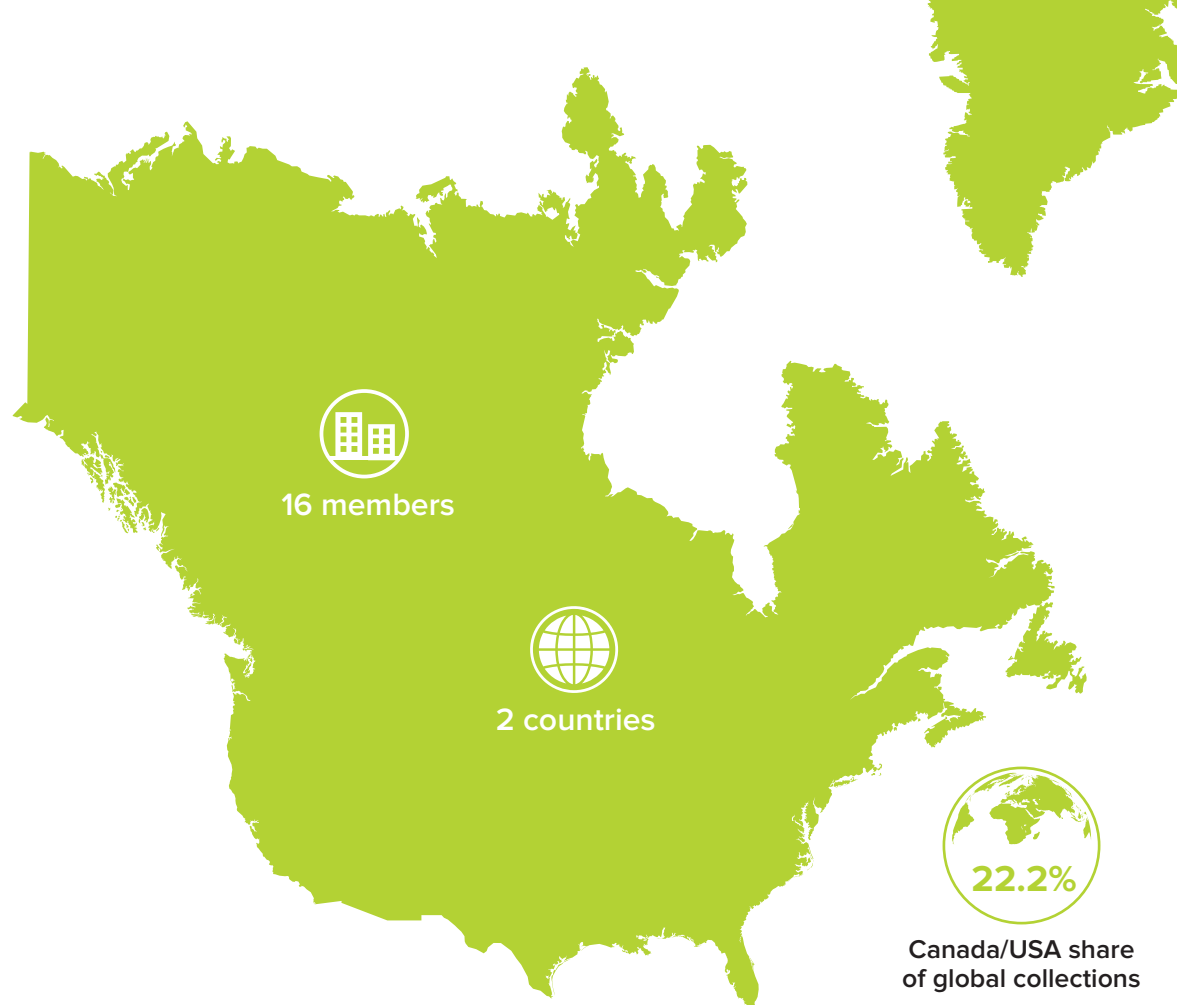
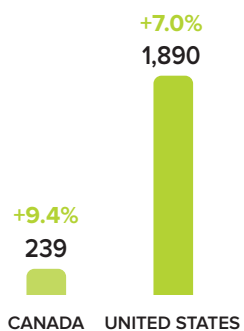
A 2012 amendment of the Hungarian Copyright Act cut the resale right remuneration by 20%, which, coupled with the financial crisis, resulted in a significant loss in royalties. However, visual arts society HUNGART has noted renewed interest in Hungarian artists, new records at auctions and a general increase in price levels and collections since 2013.

REGION CANADA/USA

Total 2017 collections
(EUR million)



Collections and annual growth
(EUR million)



LEADERS IN DIGITAL COLLECTIONS

Collections in the Canada/USA region represented 22.2% of global collections in 2017. It is the second largest region in volume, after Europe. The US market accounts for 88.8% of total collections in the region, with Canada representing 11.2%. Collections in the region have experienced five consecutive years of growth. In 2017, income rose 7.3% thanks to solid growth in the music and visual arts repertoires.

This growth pattern reflects the good standing of North America's local economies and the ability of rights societies in the region to consolidate revenues from traditional streams such as performing rights on radio and TV as well as from live and background. It also reflects North America's leading role in the digital world, and societies' ability to extract increasing revenues from the digital use of creative works.

TYPES OF USE

Digital hits 17% of regional collections

The rise in music streaming consumption partly explains the growth in overall music collections, as digital now represents 17.1% of total income in the region, up 27.5% at EUR363m. Over the past five years, digital collections have increased more than four-fold. For the first time, digital collections have overtaken live and background to become the second largest source of revenue in the region.

TV and radio continue to dominate

TV and radio remains the largest income source, with a 54.7% share. Rights societies have forged new partnerships with media and audiovisual companies such as Netflix, Hulu or YouTube that are starting to pay dividends.

On the radio side, societies registered a rise in revenues from terrestrial radio, cable and satellite radio. However, the growth rate in the TV and radio sector has been modest at 1.7% in 2017, reflecting the increasing pressure on advertising revenues from traditional media outlets.

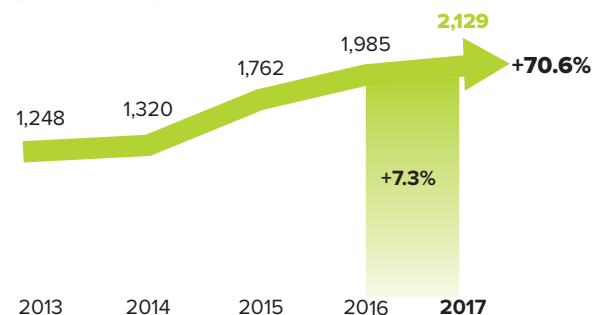
Live and background

Live and background remains a steady source of income, at EUR338m, with a 3.3% growth rate between 2016 and 2017, reflecting the efforts made by performing rights societies to collect the proceeds from the use of music in small businesses, bars, hotels, shopping centers and fitness facilities, among others.

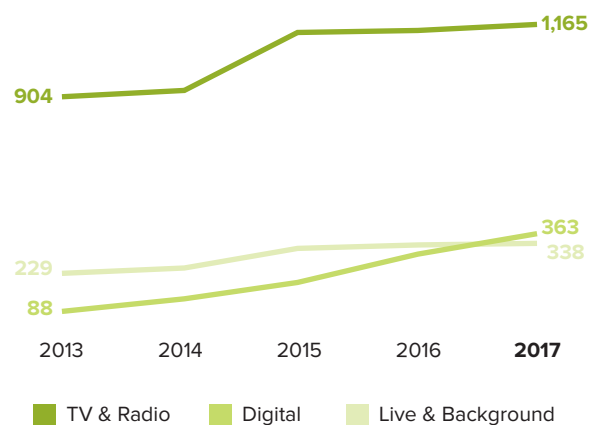
Revenues from the sale of CD and video rose to EUR251m, up 18.9% year-on-year. The increase in CD and video collections is partially due to the addition of data from HFA and CMRRA.

By contrast with Europe, only a small share of collections in the region come from private copying – less than 0.1% or EUR1.3m. This income comes exclusively from Canada.

Regional collections five year growth (EUR million)



Largest types of use (EUR million)



Breakdown of regional collections (EUR million)

	Collections	Growth	5 year Growth
Repertoire			
Music	2,123	+7.2%	+71.3%
Visual Arts	7	+16.0%	-9.5%
Audiovisual	0.03	-26.4%	-97.8%
Type of Use			
TV & Radio	1,165	+1.7%	+29.0%
Digital	363	+27.5%	+314%
Live & Background	338	+3.3%	+47.1%
CD & Video	251	+18.9%	+1,935%
Reproduction	6	+16.3%	-5.2%
Synchronisation	4	-53.0%	+584%
Private Copying	1.3	-4.1%	-61.1%
Reprography	0.1	-21.6%	-73.5%
Other	1.1	-44.6%	-74.9%
Type of Right			
Performing Rights	1,818	+5.1%	+52.4%
Mechanical Rights	306	+24.1%	+494%
Other Rights	5	-46.0%	+27.3%
Total	2,129	+7.3%	+70.6%

CANADA/USA REPERTOIRES

Collections almost exclusively musical

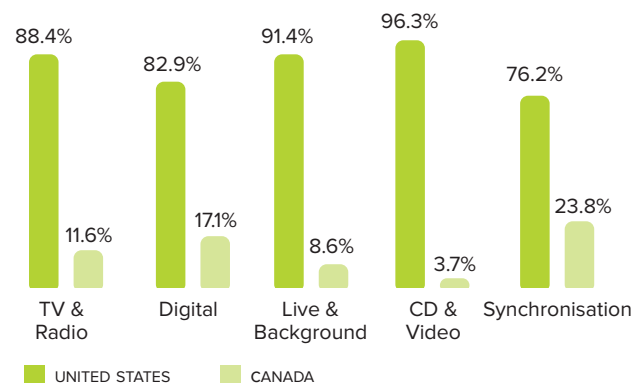
Music accounted for 99.7% of total collections in the region, up 7.2% from 2016. The vast majority of collections (85.4%) come from performing rights, which grew 5.1% to EUR1,817m in 2017, while mechanical rights accounted for 14.4% of collections at EUR306m. Mechanical rights in the region saw an increase, mostly due to the ongoing integration into CISAC data of numbers from US mechanical society HFA, part of the SESAC group of companies, and from CMRRA in Canada.

Visual arts made up for the remaining 0.3%, growing 16% at EUR7m. The bulk of visual arts collections came from reproduction.

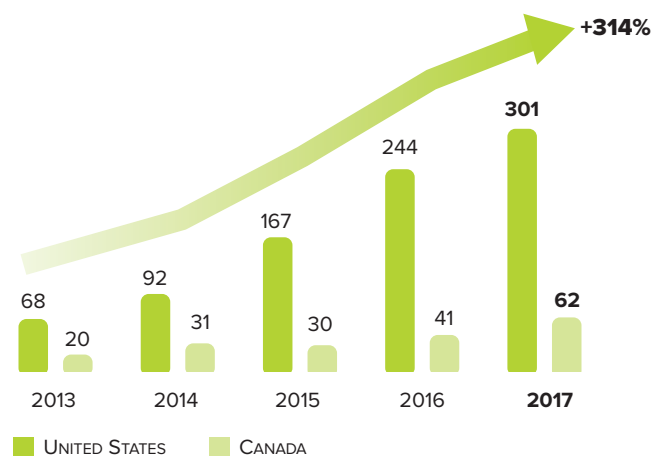
Virtually no collections in the drama and literature repertoires are reported in the region.

In the audiovisual sector, payments for the secondary use of works (residuals) are collected directly by the studios and distributed to the Directors Guild of America (DGA) and the Writers Guild of America (WGA). Together, the DGA and WGA received over USD830m in residuals for 2017, but these payments are not aggregated into CISAC's report. A very small amount of audiovisual rights are collected in Canada by CSCS.

Music uses by country



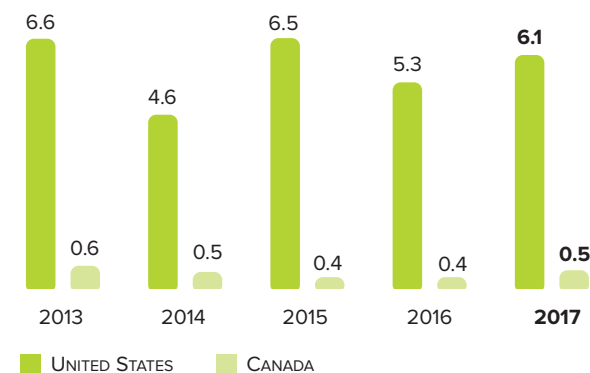
Digital music collections grow fourfold since 2013 (EUR million)



Top three uses by repertoire (EUR million)

	Collections	Growth	5 year Growth
MUSIC			
TV & Radio	1,165	+1.7%	+29.0%
Digital	363	+27.5%	+314%
Live & Background	338	+3.2%	+47.1%
Music all uses	2,123	+7.2%	+71.3%
VISUAL ARTS			
Reproduction	6.4	+16.3%	-5.2%
Reprography	0.07	-21.6%	-73.5%
Private Copying	0.03		
Visual Arts all uses	6.6	+16.0%	-9.5%
AUDIOVISUAL			
Other	0.03	-26.4%	-97.8%
Audiovisual all uses	0.03	-26.4%	-97.8%

Visual arts collections over 5 years by country (EUR million)



US STREAMING AND ECONOMY DRIVE GROWTH

The US music market has finally turned a corner with two years of consecutive growth following over a decade of decline. A rapidly expanding music streaming sector has led the increase. Total collections reported to CISAC rose 9.2% in 2017, to USD2,135m.

In the music sector, ASCAP reported USD840m in domestic revenues last year, while BMI had revenues of USD836m in its 2017 fiscal year. SESAC, as a privately-owned for-profit company, does not disclose its annual figures. Collections from traditional media, digital platforms and general licensing (restaurants, bars, hotels, shopping centres and fitness facilities) all posted robust growth.

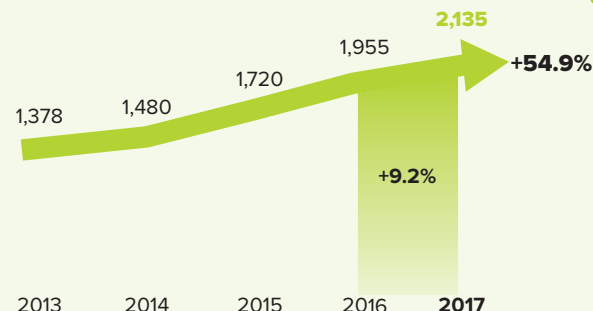
Digital collections saw double-digit growth, led by video streaming. Societies are maximising revenue opportunities, such as ASCAP's deal with YouTube, which includes public performance rights and data collaboration, and BMI's long term agreements with Netflix and Hulu.

Progress on legal issues

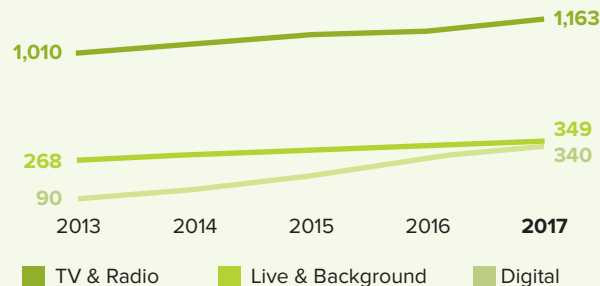
The legal framework is rapidly evolving with significant victories. A US Appeals Court ruled in favour of BMI in its challenge of the Department of Justice's interpretation of the consent decrees on fractional licensing (societies can only license for the share they represent in a song). On the mechanical rate setting side, the US Copyright Royalty Board allowed for a 44% rate increase over a five-year term.

The Music Modernization Act (MMA) is also an important agent of change passed in September 2018, radically changing music licensing rules and rate setting procedures. The MMA calls for the creation of a new collective licensing organisation that will collect and administer mechanical rights on behalf of music publishers and songwriters.

Collections grow by 54.9% in five years (USD million)

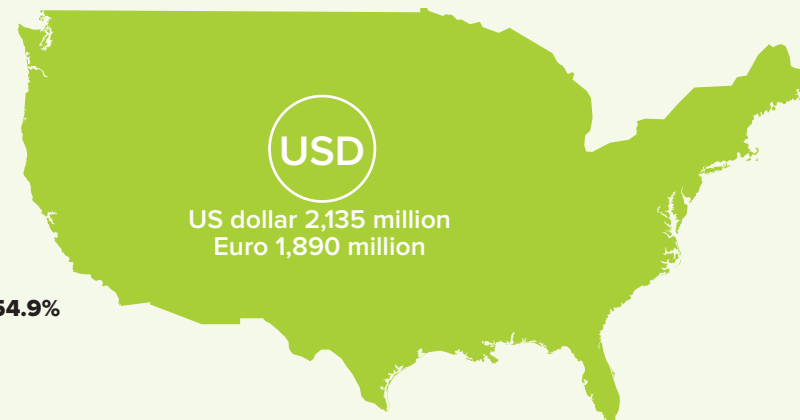


Top three uses account for 87% of collections (USD million)



The visual arts sector has seen strong revenues (+17.8% to USD7m) from the licensing of rights to use images of visual art works in advertising, motion pictures and TV shows. Revenues for US visual artists are limited because they still do not include the resale right.

In the US, royalties for the use of audiovisual repertoire are known as residuals. They are negotiated and collected by unions and guilds – mainly the Directors Guild of America (DGA) and the Writers Guild of America (WGA) – on behalf



Breakdown of national collections (USD million)

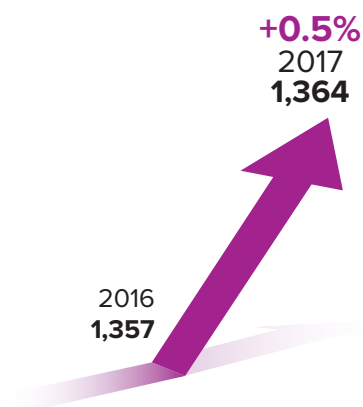
	Collections	Growth	5 year Growth
Repertoire			
Music	2,128	+9.2%	+55.6%
Visual Arts	7	+17.8%	-22.2%
Type of Use			
TV & Radio	1,163	+4.1%	+15.2%
Live & Background	349	+4.9%	+30.2%
Digital	340	+26.0%	+277%
CD & Video	273	+23.0%	+566,770%
Synchronisation	3	-59.7%	+125,459%
Reproduction	7	+17.8%	-20.1%
Type of Right			
Performing Rights	1,841	+7.3%	+34.7%
Mechanical Rights	291	+25.3%	+2,536%
Other Rights	3	-59.7%	+125,459%
Total	2,135	+9.2%	+54.9%

of their members as a compensation for the distribution or exhibition of works beyond their initial use.

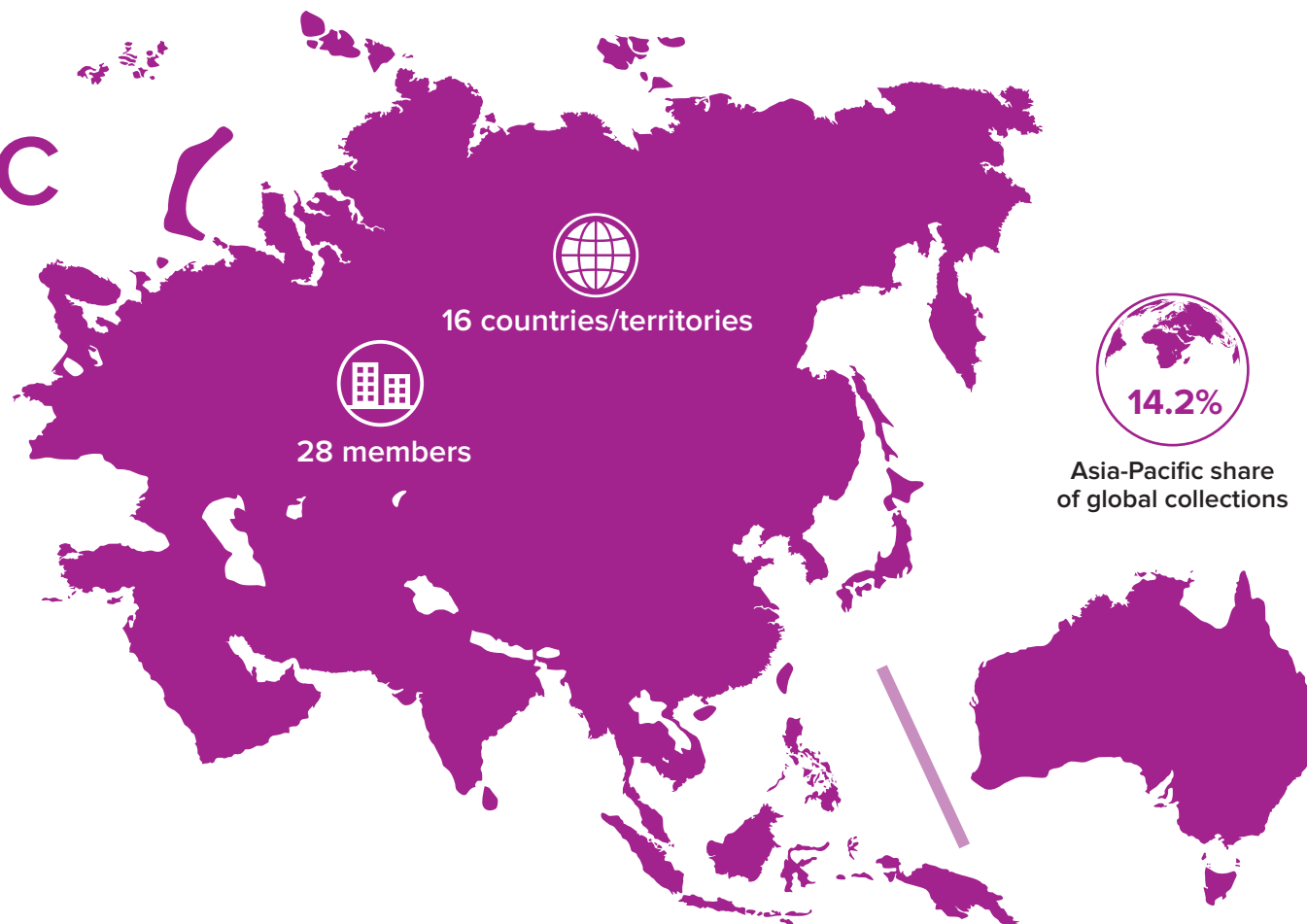
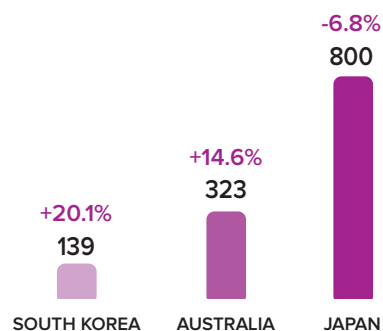
For 2017, the DGA collected nearly USD400m, split between TV (USD237m), feature film (USD149m) and made-for new media (USD8m). Residuals collected by the WGA in 2017 reached a record high of USD431m, an 11.8% increase over 2016.

REGION ASIA-PACIFIC

Total 2017 collections
(EUR million)



Largest collecting countries/territories
and annual growth (EUR million)



STRONG GROWTH IN AUSTRALIA AND KOREA

Collections remained stable in Asia-Pacific in 2017, rising just 0.5% to EUR1.3bn making this the world's third largest collecting region. Japan, Australia and South Korea are the key economic drivers with more than 90% of collections originating from these three countries alone.

Australian and South Korean growth added EUR41m and EUR23m to the regional total respectively. Japan's slight domestic decline turned into a more significant fall when converted to euros.

Other noteworthy increases in collections came from Hong Kong, which grew by 8.1%, Indonesia by 87.4% and Taiwan 21.8%.

In many of Asia's smaller territories and countries, authors' societies are working to grow collections in markets challenged by powerful broadcasters and an undeveloped copyright environment. In addition, government-backed "one-stop shop" initiatives in territories and countries such as Malaysia and Indonesia have been introduced to streamline collections for authors and producers. However, it is too early to evaluate the effectiveness of these initiatives.

ASIA-PACIFIC

TYPES OF USE

Digital overtakes live and background

Collections from digital in Asia-Pacific grew by EUR58.7m or 23.6% to become the second largest sector in the region. Digital has overtaken live and background for the first time and is now second only to TV and radio which remained stable with a 29.9% share of total.

The major contributors of this digital expansion are Japan, South Korea and Australia where the sector grew by 9.4%, 19.9% and 64.3% respectively. In South Korea, digital continues to be the leading sector for collections, outpacing all other uses for the third consecutive year.

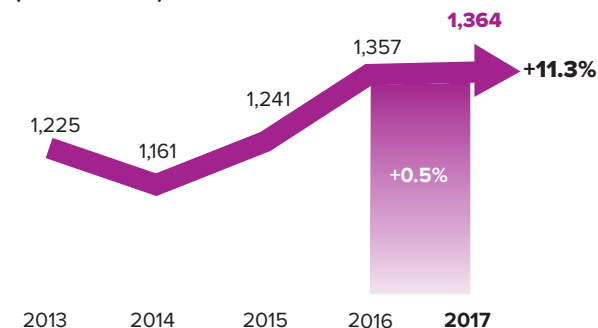
Digital collections are also contributing to growth in China. The vast Internet population is dominated by a handful of powerful digital services led by global giant Tencent.

Physical formats edge down

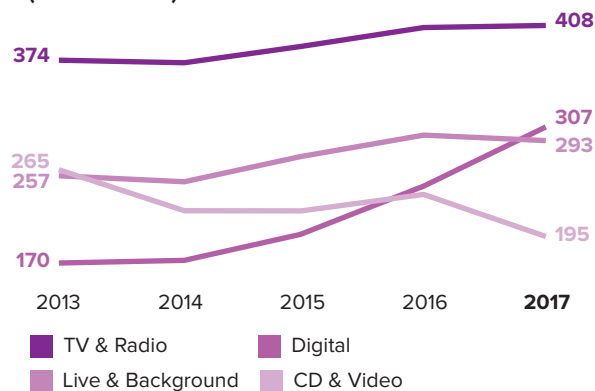
Collections from CD and video fell by EUR43.6m to record a five-year decrease of 26.3%. This trend is beginning to mirror that seen in other regions but has begun later due to the traditionally strong market for physical music products in Japan.

Live and background fell by 3.4% in Japan due to a back payment from major service providers in the previous year. Some territories and countries have seen solid growth. China turned a 20.1% decrease in the previous year into growth of 23.9% while Thailand saw a rise of 39.1%.

Collections grow by 11.3% in five years (EUR million)



Digital overtakes live & background (EUR million)



Breakdown of regional collections (EUR million)

	Collections	Growth	5 year Growth
Repertoire			
Music	1,258	+0.1%	+11.1%
Literature	101	+5.2%	+13.1%
Visual Arts	3	+8.0%	+26.0%
Dramatic	0.4	-17.7%	+4.4%
Audiovisual	0.01	-6.8%	
Type of Use			
TV & Radio	408	+0.1%	+9.1%
Digital	307	+23.6%	+80.3%
Live & Background	293	-2.0%	+13.9%
CD & Video	195	-18.3%	-26.3%
Reprography	96	+7.3%	+7.9%
Rental/Public Lending	20	-19.4%	-23.5%
Publication	7	-12.9%	-16.8%
Educational Use	5	-18.8%	
Synchronisation	3	+1.8%	+84.8%
Reproduction	1.7	+2.8%	+22.8%
Resale Right	0.6	+8.7%	+72.3%
Private Copying	0.1	-35.6%	-85.2%
Other	27	-8.6%	-15.1%
Type of Right			
Performing Rights	875	+3.4%	+21.9%
Mechanical Rights	460	-3.5%	-2.6%
Other Rights	29	-16.4%	-18.4%
Total	1,364	+0.5%	+11.3%

ASIA-PACIFIC REPERTOIRES

Legislative influences impact collections

From a modest base, collections in China have more than doubled in five years and now account for EUR27m, an increase of 18.4% year-on-year. However, it remains a challenging country for authors' rights collections. Its new Copyright Amendment Bill has been pending for six years and introduces the concept of a resale right, an unwaivable remuneration right for audiovisual authors, and a regulatory framework for CMOs.

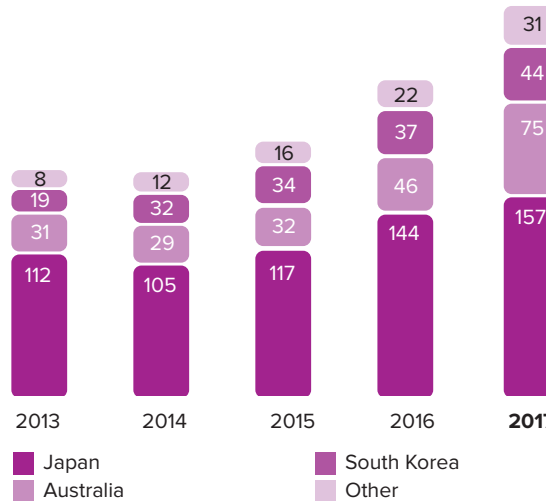
Elsewhere in the region, collections for visual arts, drama and literature are also relatively undeveloped and together bring in EUR105m. The artists' resale right is relatively well established in Australia, generating half a million euros. Momentum to address this issue is growing, with Japan a key focus of discussions to extend the global adoption of the right.

Audiovisual royalties

Audiovisual creators continue to campaign for an unwaivable right to remuneration in the region where collections are negligible.

The private copying levy is functioning in some regions but is nowhere near reaching its potential. In Japan, one issue is that many common electronic devices are currently excluded from the levy. Japanese authors' society JASRAC is working with its government to revitalise the discussion and incorporate devices such as personal computers and car navigation. In South Korea, KOMCA is working with CISAC to lobby for the introduction of a private copying levy scheme.

Japan and Australia drive digital music growth (EUR million)



Broadcast tariffs provide opportunity for further growth

Authors' societies across the region are negotiating with powerful broadcasters to raise historically poor tariff rates. In China, most broadcasters resist paying any licence despite the existence of an official tariff. In Indonesia, the government-set tariff had to start at a low level to encourage payments.

In Hong Kong, a low TV tariff was inherited from the 1970s. Despite strong resistance from broadcasters, CISAC members are working to bring rates closer into line with international standards. The revision and proper enforcement of these tariffs would provide great benefits for creators' remuneration throughout Asia-Pacific.

Top three uses by repertoire (EUR million)

	Collections	Growth	5 year Growth
MUSIC			
TV & Radio	408	+0.1%	+9.1%
Digital	307	+23.7%	+80.3%
Live & Background	293	-2.0%	+13.9%
Music all uses	1,258	+0.1%	+11.1%
LITERATURE			
Reprography	95	+7.2%	+7.9%
Educational Use	5	-19.2%	
Other	0.6	-16.6%	-44.2%
Literature all uses	101	+5.2%	+13.1%
VISUAL ARTS			
Reproduction	2	+2.8%	+22.8%
Reprography	0.9	+17.0%	+7.2%
Resale Right	0.6	+8.7%	+72.3%
Visual Arts all uses	3.4	+8.0%	+26.0%
DRAMATIC			
Live & Background	0.4	-17.7%	+4.4%
Dramatic all uses	0.4	-17.7%	+4.4%
AUDIOVISUAL			
TV & Radio	0.01	-2.7%	
Private Copying	0.001	-25.9%	
Audiovisual all uses	0.01	-6.8%	

JAPAN

CONTINUES TO LEAD ASIA-PACIFIC COLLECTIONS

Collections in Asia-Pacific are economically dominated by Japan, a market driven overwhelmingly by local repertoire. Following solid growth in 2016, collections were flat in 2017, accounting for JPY101bn (EUR800m) or 58.7% of the regional total. Japan is the world's fourth largest collecting country behind the US, France and Germany, providing 8.4% of the global total.

Exporting culture is a big government priority. Japanese animation film exports are an important source of music income. J-Pop is also another valuable export, mainly in Asia.

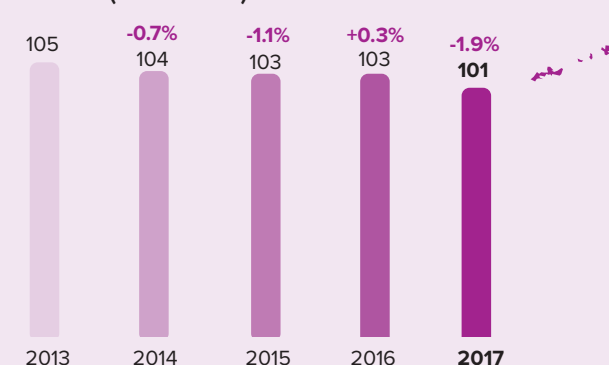
TV and radio leads collections

With more than 200 active TV, radio, cable and satellite stations, this sector makes up almost one third of the country's collections total. Growth has been supported by incremental increases built into the long-term tariff agreements with commercial broadcasters.

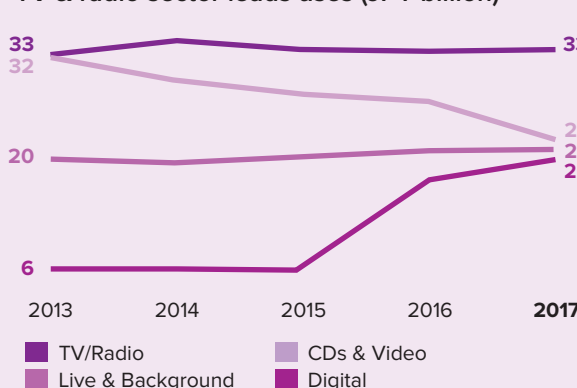
Live and background use grew by 1.7% in 2017, helped in particular by a healthy live and concert sector. Background music income is low (less than 1% of total collections) due to inadequate awareness among outlets and venues, and historically low licensing tariffs. The music authors' society, JASRAC, has launched an awareness campaign to help address this potential.

Cinema licensing is an area of potential growth for music in foreign films. The sector is looking to improve the tariff rate, which is currently a small lump-sum that gives no consideration to the success of the film.

Annual collections 2013 to 2017 (JPY billion)



TV & radio sector leads uses (JPY billion)



Digital still behind physical media

Japan has seen an enduring consumer demand for physical formats. Many domestic artists still aggressively promote their physical catalogue, using special campaigns and offers to keep sales buoyant. Digital collections in 2017 grew by more than 15% due mainly to music streaming, led by Apple and a number of large local services. Unlike many regions, digital has yet to overtake packaged media.



Breakdown of national collections (JPY billion)

	Collections	Growth	5 year Growth
Repertoire			
Music	101	-1.9%	-3.5%
Dramatic	0.1	-13.4%	+2.0%
Visual Arts	0.1	+0.0%	+25.4%
Type of Use			
TV & Radio	33	+0.3%	+2.0%
Live & Background	21	+1.7%	+7.7%
CD & Video	22	-17.3%	-30.7%
Digital	20	+15.1%	+37.3%
Rental/Public Lending	2	-15.1%	-25.3%
Publication	0.8	-8.3%	-18.7%
Reproduction	0.1	+0.0%	+21.3%
Synchronisation	0.1	+63.6%	+38.5%
Private Copying	0.0	-32.3%	-85.7%
Other	1.3	+10.1%	-15.6%
Type of Right			
Performing Rights	64	+2.8%	+8.2%
Mechanical Rights	34	-8.8%	-18.0%
Other Rights	3.4	-12.7%	-23.9%
Total	101	-1.9%	-3.5%

Copyright extension nears completion

Top of the legislative priorities for authors in Japan is the bill to extend the copyright protection term from 50 to 70 years plus life of the authors. This was originally linked to the stalled Trans-Pacific Partnership (TPP) but has since been promoted in connection with a renegotiated TPP11 agreement. The bill passed the Diet in July 2018, and will take effect when TPP11 comes into force.

INDONESIA

COLLECTIONS GROW TENFOLD IN FIVE YEARS

Indonesia is a rapidly-growing market for creative content, with Asia's third largest smartphone user base (after China and India), a fast-growing smartphone and broadband penetration and a growing live sector.

Collections to creators reported to CISAC in Indonesia grew by 92.7% to IDR40.6bn (EUR2.7m) in 2017 and have increased tenfold since 2013. This makes Indonesia, rising from a small base, the fastest percentage growth country in the region. CISAC member society Wahana Musik Indonesia (WAMI) collects alongside two other non-member societies.

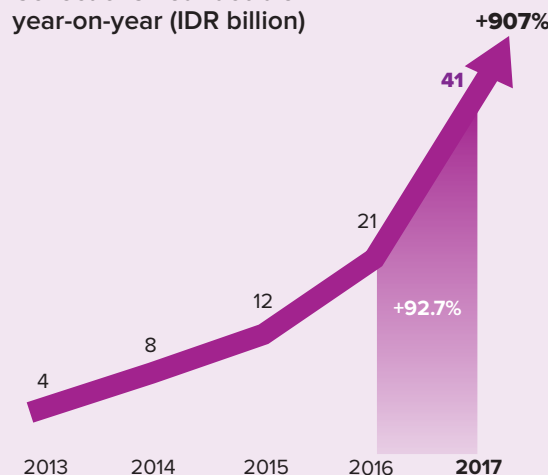
Digital income is the key driver of this growth for WAMI, increasing 171.6%. Digital now makes up nearly three quarters of all collections in the country.

Licensing deals are in place with Apple, Spotify, Deezer and some local music streaming platforms, the majority of which are bundled with telecom company products. The telecom market is dominated by three major players which are increasingly moving into added value content services. In the video on demand sector, Netflix and Amazon are already well established. Income to authors from YouTube has grown significantly after an enhanced agreement signed in 2014 and a large back payment boosted numbers in 2017.

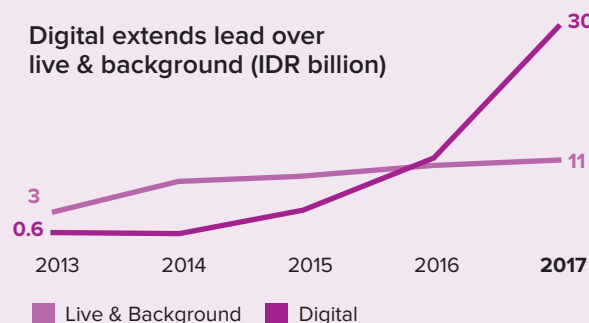
Improved collection efficiency

The live and background sector grew 7.4% from a small base, popular Karaoke accounting for a large share. With many users such as The Body Shop and McDonald's being part of larger chains, local CMOs have been efficient in driving wider licensing agreements. Music in cinemas also increased following negotiations with the largest provider which operates 80% of the country's movie theatres.

Collections near double year-on-year (IDR billion)



Digital extends lead over live & background (IDR billion)



Broadcast collections expected to return to growth

TV and radio was the only sector to significantly decrease, falling by more than half. There are 12 national and 50 local terrestrial TV stations, as well as 12 cable companies, and all have been involved in longstanding negotiations.

These are now complete and collections are expected to rise in the future. There are no collections from radio in the country although discussions are well under way to correct this.

IDR

Indonesian rupiah 41 billion
Euro 2.7 million

Breakdown of national collections (IDR billion)

	Collections	Growth	5 year Growth
Repertoire			
Music	41	+92.7%	+907%
Type of Use			
Digital	30	+172%	+5,016%
Live & Background	11	+7.4%	+219%
TV & Radio	0.1	-59.5%	-40.9%
Type of Right			
Performing Rights	41	+92.7%	+907%
Total	41	+92.7%	+907%

Collections in Indonesia have substantial growth potential, with 80% of all collections currently coming from Java island, while other islands hold more than 40% of the population. In addition, the government had set many low public performance tariffs via their national CMOs to acclimatise users to paying for creative works. WAMI is now campaigning to increase rates to internationally competitive levels.

AUSTRALIA

VIDEO ON DEMAND HELPS GROWTH

Collections for all creative repertoires in Australia grew by 13.4% in local currency to reach AUD476m and have risen by 29.1% over five years. Aside from a slight decline in TV and radio collections, Australia saw growth in every type of use and in both performing and mechanical rights categories in 2017.

Digital collections more than double in five years

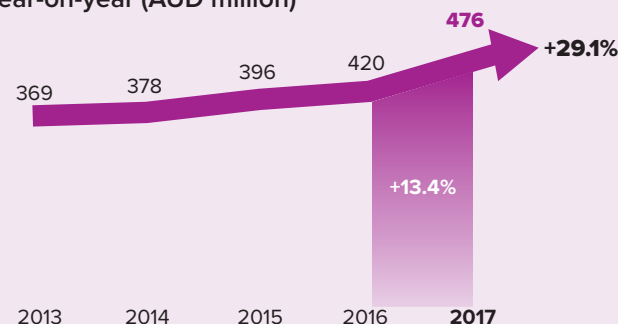
Digital music collections are the predominant driver of growth in Australia and New Zealand, leaping by 62.6%. Over five years, this sector has more than doubled to account for 23.2% of the total for these countries, around twice the percentage share of digital globally. Australia is seeing a spectacular music streaming boom, with four million paid subscribers according to national music society, APRA AMCOS.

Music collections for the video on demand sector are a notable highlight and generated substantial income for music creators. A 2017 study from Roy Morgan Research estimates that more than one in three Australians now have a Netflix subscription. Additionally, local music society revenue from the video on demand sector alone rose 69.9% to AUD14.1m for Australia/New Zealand.

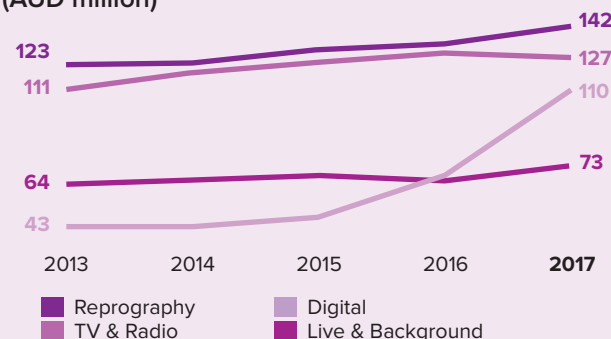
TV and radio collections steady

Collections for all repertoires from TV and radio declined 1.6%, accounting for 26.7% of Australia's total collections. The gradual shift from terrestrial to pay TV is continuing. While there was a significant cut in revenue caused by a write-off of licence fees from one of the commercial television networks entering administration, it was more than compensated for by a sharp increase in video on demand which falls under digital revenue.

Collections grow by 13.4% year-on-year (AUD million)



Digital more than doubles in five years (AUD million)



New copyright amendments

A rise in the number of big concerts helped to stimulate live and background collections by 9.6% to make up 15.2% of Australia's total.

Visual arts society Viscopy merged with literary society the Copyright Agency, which already manages reprography, Australia's largest collecting sector, perhaps paving the way for future visual arts collections. In 2017, reprography grew by 6.1% to reach 29.7% of total.



Breakdown of national collections (AUD million)

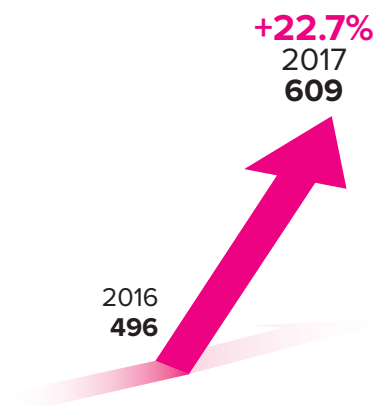
	Collections	Growth	5 year Growth
Repertoire			
Music	333	+16.7%	+36.1%
Literature	140	+6.1%	+15.2%
Visual Arts	3	+14.8%	+32.7%
Type of Use			
Reprography	142	+6.1%	+15.2%
TV & Radio	127	-1.6%	+14.6%
Digital	110	+62.6%	+156%
Live & Background	73	+9.6%	+12.7%
CD & Video	5	+4.2%	-51.1%
Reproduction	1.1	+19.6%	+32.5%
Resale Right	0.8	+7.6%	+84.2%
Synchronisation	0.5	+48.2%	+147%
Other	17	+4.1%	+10.9%
Type of Right			
Performing Rights	243	+13.6%	+37.5%
Mechanical Rights	233	+13.1%	+21.3%
Other Rights	0.5	+48.2%	+147%
Total	476	+13.4%	+29.1%

At the end of 2017, the Australian government introduced a new copyright amendment following consultation with authors' rights campaigners. The bill ensures that search engines and social media platforms are exempt from safe harbour protection, an important outcome for the creative sector.

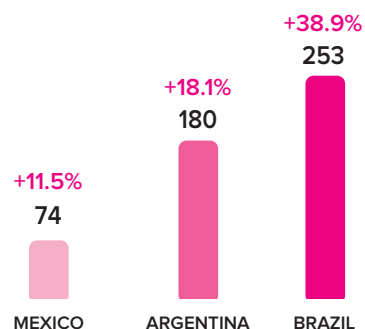
REGION

LATIN AMERICA & THE CARIBBEAN

Total 2017 collections
(EUR million)



Largest collecting countries
and annual growth (EUR million)



51 members

24 countries



Latin American share
of global collections

THE WORLD'S FASTEST-GROWING REGION

Collections on behalf of authors in Latin America and the Caribbean grew faster than any other region, increasing by 22.7% to EUR609m. This represents a significant turnaround from the 6.4% decrease seen the previous year. It remains the fourth largest region for collections, with 6.4% of the global share.

Brazil is the largest and the second fastest-growing country in the region (see p.58). Collections here rose by 38.9%, followed by Argentina and Mexico, which grew by 18.1% and 11.5% respectively. Together, these three countries make up more than 80% of total regional collections.

TV and radio remains the region's largest sector for collections with 49.7% of the total. It increased by 25.4% to reach EUR303m with growth registered in the majority of countries.

Mexico TV payments

In Mexico, a 23.2% increase in TV and radio collections was driven by the regularisation of payments for cable TV and satellite systems. In Chile, negotiations to launch a new rate for national TV faced some challenges that held up payments for the first quarter of the year. Monthly payments have resumed following ongoing discussions with regional TV broadcasters.

LATIN AMERICA & THE CARIBBEAN

USES AND REPERTOIRES

Live and background returns to growth

Collections from live and background make up 38.5% of the regional total and grew by 16.4%. Brazil and Argentina remain the two largest contributing countries in this sector. Brazil has grown by 29.1% to extend its lead this year and provides 35.3% of the region's collections against Argentina's 30.6%.

Many smaller countries also saw rapid expansion with live and background collections growing by more than 50% in both Ecuador and Barbados and by over 340% in Saint Lucia.

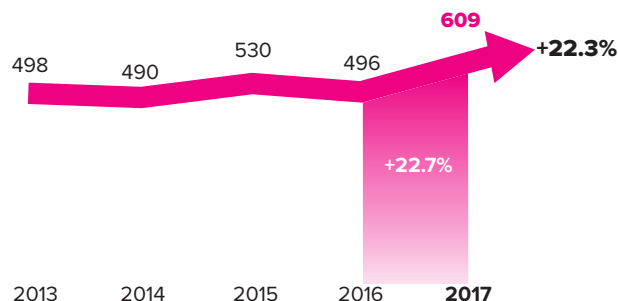
Colombia increased by 8.2% as local society SAYCO worked to reduce the number of unidentified performances, for which royalties cannot be paid. In Mexico, stepped-up infringement measures from authors' society SACM and the Mexican Institute of Industrial Property helped collections grow by 16.0%.

In Peru, the effects of severe weather caused by natural phenomena, such as "La Niña" in the early part of the year, affected live events and contributed to a 4.6% decline in live and background collections.

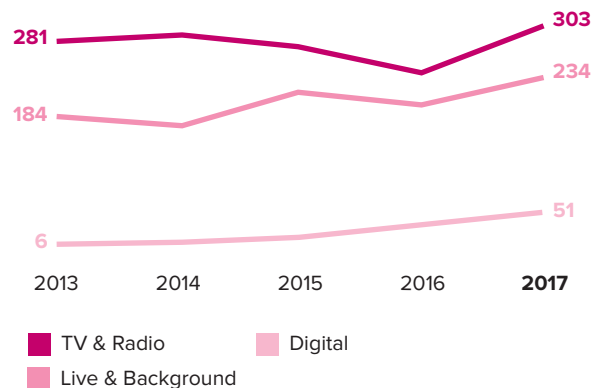
Synchronisation collections on the rise

Income from the use of music used as a soundtrack in films, commercials and games is a small but growing sector. Collections grew by 34.0% to reach EUR14m. This represents an increase of 24% since 2013. More than 90% of these collections were made in Argentina which expanded by 36.6%. Brazil and Uruguay were other strong performers in the region.

Collections grow by 22.7% year-on-year (EUR million)



Strong growth in top three uses (EUR million)



Breakdown of regional collections (EUR million)

	Collections	Growth	5 year Growth
Repertoire			
Music	538	+23.6%	+22.9%
Audiovisual	51	+13.6%	+18.7%
Dramatic	20	+25.4%	+17.3%
Visual Arts	0.4	-8.4%	-21.6%
Literature	0.003	-82.3%	-74.8%
Type of Use			
TV & Radio	303	+25.4%	+7.8%
Live & Background	234	+16.4%	+27.2%
Digital	51	+47.5%	+759.8%
Synchronisation	14	+34.0%	+23.9%
CD & Video	2.1	-20.6%	-58.1%
Private Copying	1.0	+38.8%	+460%
Reproduction	0.4	-0.2%	-14.9%
Resale Right	0.02	-64.9%	
Other	3.5	-20.3%	-64.5%
Type of Right			
Performing Rights	586	+22.2%	+22.1%
Mechanical Rights	8.2	+49.0	+21.2%
Other Rights	15	+32.0%	+30.4%
Total	609	+22.7%	+22.3%

LATIN AMERICA & THE CARIBBEAN

USES AND REPERTOIRES

Private copying shows potential

Private copying is an important potential income stream allowing authors to receive a small remuneration from the sale of digital devices and media that facilitate the copying of their works. In Latin America, this right only exists in the legislation of two countries and is not working effectively. Societies in the region are working to address this.

In Paraguay, the only country in which collections are made, private copying increased by 38.8% to just under EUR1m. All of these collections were in the musical repertoire. There is similar potential in other countries, such as the Dominican Republic, where the law exists but is not yet functioning.

Colombia gains audiovisual remuneration right

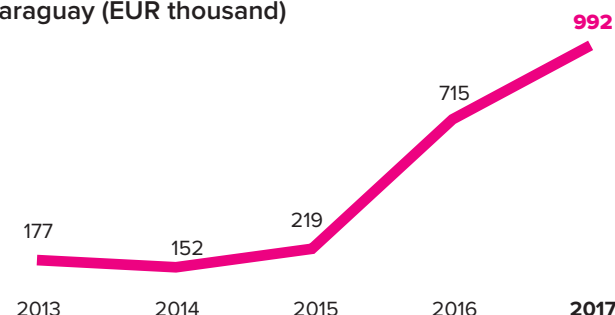
Collections from the audiovisual repertoire grew by 13.6% in the region to reach EUR51m. The majority of this growth came from Argentina.

In Mexico, collections declined by 11.1%, a fall largely attributed to the economic downturn in the country.

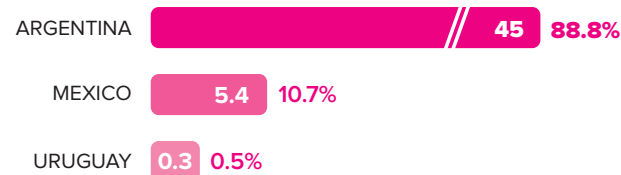
Legislative progress means the outlook for audiovisual collections in Latin America and the Caribbean is positive. In June 2017, the Colombian Senate passed the Pepe Sánchez Law.

This modified the author's rights law of 1982 by

Private copying case study: Paraguay (EUR thousand)



Argentina leads audiovisual collections (EUR million)



adding a right to remuneration for screenwriters and directors from the public broadcast of their works.

The new legislation was based upon that already successfully operating in France, Spain, Chile and India. It follows the successful adoption of the similar Ricardo Larraín law in Chile the previous year.

Top three uses by repertoire (EUR million)

	Collections	Growth	5 year Growth
MUSIC			
TV & Radio	255	+27.5%	+5.5%
Live & Background	213	+15.6%	+28.0%
Digital	51	+47.3%	+759%
Music all uses	538	+23.6%	+22.9%
AUDIOVISUAL			
TV & Radio	48	+15.2%	+22.3%
Live & Background	1.6	+5.0%	+31.4%
Digital	0.07		
Audiovisual all uses	51	+13.6%	+18.7%
DRAMATIC			
Live & Background	20	+27.0%	+17.3%
TV & Radio	0.2	+16.4%	+19.1%
Dramatic all uses	20	+25.4%	+17.3%
VISUAL ARTS			
Reproduction	0.4	-0.2%	-14.9%
Resale Right	0.02	-64.9%	
TV & Radio	0.01		+983%
Visual Arts all uses	0.4	-8.4%	-21.6%

LATIN AMERICA & THE CARIBBEAN

USES AND REPERTOIRES

Music growth boosted by digital

Music collections grew by 23.6% in this region in 2017. The growth of Latin American music in the last five years has been one of the most striking features of the global music sector. This growth has reversed nearly two decades of decline in a market historically blighted by piracy.

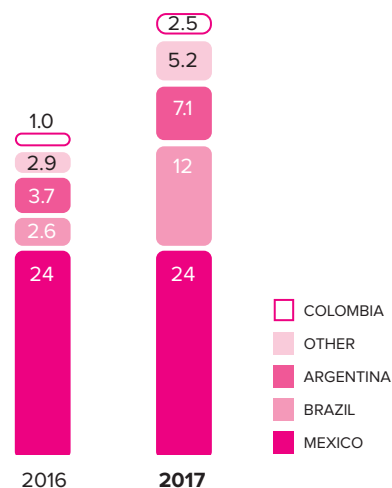
Digital collections have been a small but fast-growing contributor to this growth, increasing faster than in other regions in 2017. Digital grew by 47.3% to reach EUR51m, with Brazil, Colombia, Panama, Peru and Uruguay all more than doubling their collections. This helped to more evenly distribute the share of digital in the region. Mexico's digital income remained stable despite having previously been boosted by a YouTube agreement that triggered a significant retroactive payment in 2016.

Visual arts under-represented

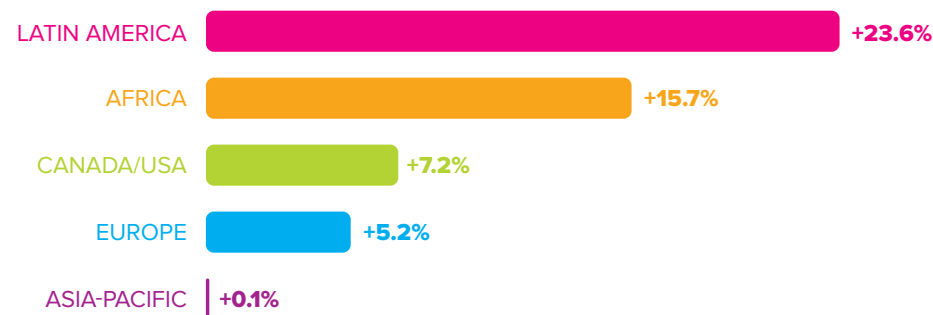
While collections in the dramatic repertoire grew by 25.4% to EUR20m, visual arts and literature collections both decreased in Latin America, albeit from a very small base. This was caused by absence of a functioning resale right in most countries and a weak legal framework under which CMOs need to operate.

Another factor is the general lack of cooperation from many users of works. By way of example, Mexican visual arts authors' society SOMAAP estimates that up to 80% of its licensing activity requires legal action for collections to be made.

Digital collections more evenly distributed (EUR million)



Latin America leads growth in the music sector in 2017



BRAZIL

SURGING AUDIOVISUAL CONSUMPTION HELPS GROWTH

Brazil is the largest collecting country in Latin America and the Caribbean, making up more than 40% of the regional total. In local currency, Brazil grew by 29.8% with collections reaching BRL911m. Audiovisual uses of music are the country's main driver of growth.

Digital growth

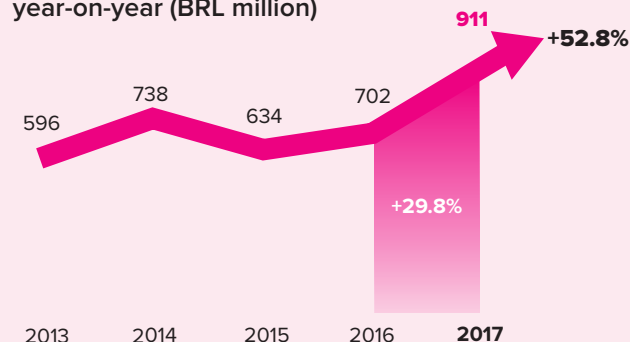
Digital collections are rising sharply, growing more than threefold but still accounting for only 4.8% of all collections. All the major international digital music service providers are now licensed in Brazil with the market now switching to streaming via platforms such as Spotify, Apple Music, Deezer.

Opportunities for digital growth continue to increase following a landmark retroactive licence with YouTube and a new licence agreement with Netflix. Around 25 Brazilian Netflix series are reportedly in production and the service is estimated to have over eight million subscribers in the country. Negotiations are also underway with Facebook and Amazon, and local authors' societies ABRAMUS and UBC expect to see the share of digital collections driven closer to European levels.

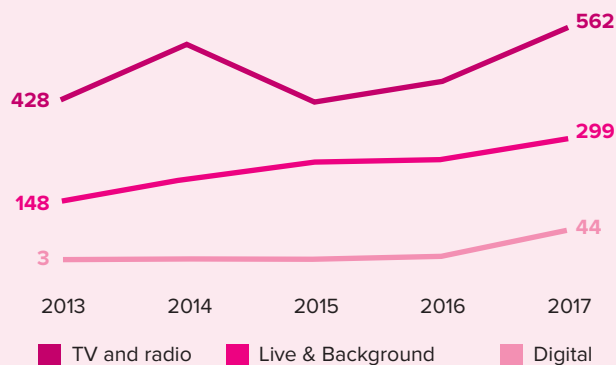
Broadcast and cable TV

TV and radio collections for all repertoires rose 28.5%, with consumers shifting from traditional broadcast channels to pay TV and video on demand. Around 250 local production companies are supported by government incentives, and cable operators are required to dedicate 20% of their prime-time schedule to Brazilian-produced content. Much of this local programming also features Brazilian music, further increasing the benefit to domestic authors.

Collections grow by 29.8% year-on-year (BRL million)



Largest types of use (BRL million)



Cinema licensing agreement ends two decades of discussion

Following a 20-year court case, a new settlement with movie theatres will extend music licensing to virtually all cinemas in Brazil. Previously, it was estimated that only half of them were licensed as no agreements were in place.

Live and background makes up almost one-third of Brazilian collections and grew 20.6% in 2017. This sector was driven by a buoyant music concert and festival economy.

BRL

Brazilian Real 911 million
Euro 253 million

Breakdown of national collections (BRL million)

	Collections	Growth	5 year Growth
Repertoire			
Music	909	+29.9%	+53.2%
Dramatic	1.3	-6.1%	-23.8%
Visual Arts	0.7	-8.9%	-11.1%
Type of Use			
TV & Radio	562	+28.5%	+31.2%
Live & Background	299	+20.6%	+102%
Digital	44	+341%	+1,472%
Synchronisation	1.0	+211%	-29.9%
Reproduction	0.7	-8.9%	-11.1%
CDs & Video	0.3	-31.0%	-67.2%
Other	5	-11.0%	-64.0%
Type of Right			
Performing Rights	907	+29.7%	+53.1%
Mechanical Rights	3.1	+26.1%	+31.0%
Other Rights	1.0	+211%	-29.7%
Total	911	+29.8%	+52.8%

For audiovisual authors, their efforts to introduce a right to remuneration have advanced with the formation of two new CMOs. Diretores Brasileiros de Cinema e do Audiovisual (DBCA) and Gestão de Direitos de Autores Roteiristas (GEDAR) represent directors and screenwriters respectively.

ARGENTINA

GROWTH IN CHALLENGING ECONOMIC CLIMATE

Argentina is Latin America's second largest country in terms of collections, accounting for 29.6% of the regional total. Collections grew by 35.7% in local currency to reach ARS3.4bn (EUR180m).

This growth has been driven by steady improvements in collection policies among domestic CMOs. When converted to euros however, the growth rate nearly halves to 18.1%, reflecting the impact of high inflation, currency depreciation and a challenging economic environment.

Digital music up strongly

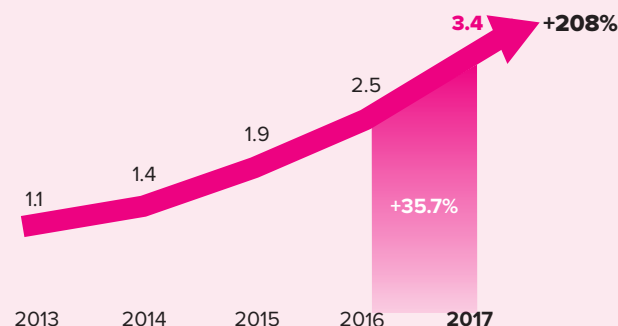
Collections from digital use of creative works more than doubled to ARS133m. This amount has risen exponentially over the last five years, virtually all accounted for by digital music, with collections by SADAIC. Although the major digital service providers were licensed from the outset, digital still makes up just 3.9% of Argentina's total collections. Digital overtook CD and video for the first time in 2015 and that sector fell a further 15.1% this year. It now constitutes just 0.7% of total collections.

TV and radio is the largest sector, making up 47.4% of Argentina's total. It is followed by live and background at 39.8% with both growing strongly and increasing 33.3% and 32.0% respectively. The only other significant contributor is synchronisation at 7.4% of the total and up more than half in 2017 with increased licensing of repertoire for advertising.

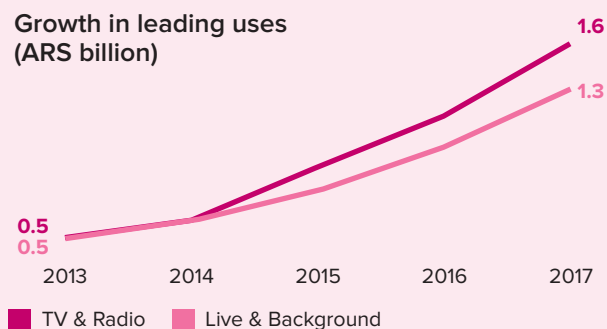
Visual artists' resale right

Pressure is mounting for Congress to introduce the resale right which allows artists to obtain a small percentage of the resale price of their works. Local authors' society SAVA has arranged artist events and panel discussions where international experts have added their voice to this campaign.

Collections grow by 35.7% year-on-year (ARS billion)



Growth in leading uses (ARS billion)



Argentine Pesos 3,370 million
Euro 180 million

Breakdown of national collections (ARS billion)

	Collections	Growth	5 year Growth
Repertoire			
Music	2,192	+34.5%	+203%
Audiovisual	848	+35.1%	+223%
Dramatic	330	+45.7%	+210%
Visual Arts	0.5	+371%	+168%
Type of Use			
TV & radio	1,599	+33.3%	+237%
Live & Background	1,341	+32.0%	+171%
Synchronisation	248	+56.9%	+238%
Digital	133	+122%	+1,469%
CDs & Video	25	-15.1%	+8.5%
Reproduction	0.3	+2.4%	+144%
Other	24	+13.8%	+37.2%
Type of Right			
Performing Rights	3,025	+32.4%	+205%
Mechanical Rights	97	+134%	+251%
Other Rights	248	+56.9%	+238%
Total	3,370	+35.7%	+208%

A new bill is currently being prepared to present to the government by SAVA with the support of CISAC.

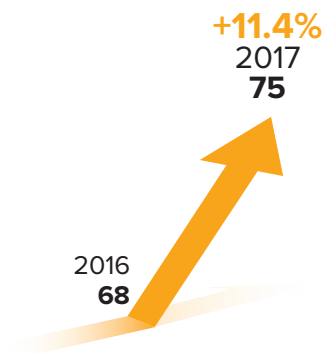
Audiovisual growth continues

The audiovisual sector makes up 25.2% of Argentina's collections and 88.8% of audiovisual collections in the region. Income grew by 35.1% in 2017, collected by local

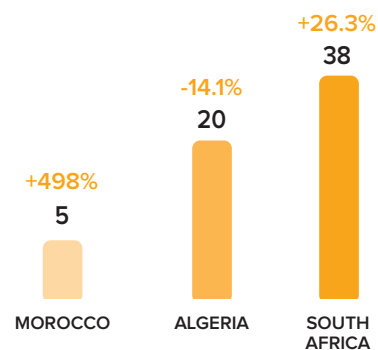
societies ARGENTORES and DAC. Collections have more than tripled in 5 years, helped by identification of new users, increasing tariff rates and collecting outstanding back payments.

REGION AFRICA

Total 2017 collections
(EUR million)



Largest collecting countries
and annual growth (EUR million)



Overall African share
of global collections

AFRICA SEES PROGRESS

Africa is a vast hub of the world's creative repertoire, yet there is an enormous mismatch between the output and influence of its creators, and the income they derive from their works.

African societies achieved EUR75m in reported collections in 2017, continuing a steady increase but still less than 1% of total global collections. Music accounts for the overwhelming majority of collections (91.5%).

Societies are making key progress with new countries increasing collections for digital (Senegal) and private copying (Morocco), and striking new licensing deals with major users. The Cape Verdean Society of Music (SCM)

distributed payments to its artists for the first time in April 2018.

The dramatic increase in mobile and smartphone penetration in Africa promises access to a fast-growing consumer base. However weak copyright enforcement, endemic piracy and highly dominant regional telecom operators continue to limit collections, and depress royalty rates for creators.

Of the 31 African countries whose societies report collections to CISAC, the top three make up more than 80% of the continent's total collections - South Africa (50.5%), Algeria (26.0%) and Morocco (7.2%).

AFRICA

TYPES OF USE

TV and radio leads collections

TV and radio accounts for 38.2% of collections at EUR29m in 2017. This is despite strong resistance from broadcasters and high levels of unlicensed use by radio stations. A 2017 survey covering CISAC societies in 22 countries found that of 2,580 radio stations, only around 40% were licensed to broadcast music.

Live and background, 21.2% of collections, is the second largest source of income in the region at EUR16m. One exception to this pattern is Algeria, where digital accounts for 43.8% of all collections, followed by private copying at 27.2%. Another is Ivory Coast, where live and background accounts for over two thirds of collections (see p. 65).

When collected, digital drives growth

South Africa is by far the largest collector of digital income (see p.64). In total, 17 countries collect for digital in the region, mainly representing small amounts from ring back tones.

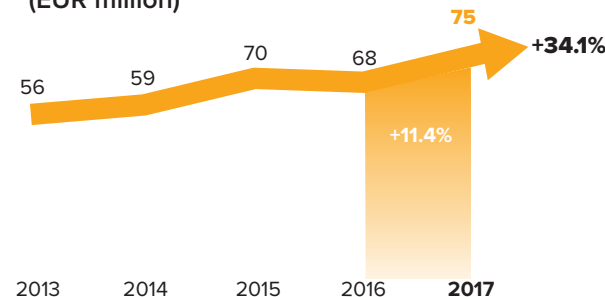
In Senegal, the shift in collective management operations from state-managed BSDA to the autonomous SODAV caused income to drop sharply in 2016. In 2017, growth in digital collections helped Senegal increase its overall total by more than fivefold. Collections under the newly established society were even one third higher than in 2015, mainly thanks to digital, their largest and fastest growing source of collections.

Training and infrastructure

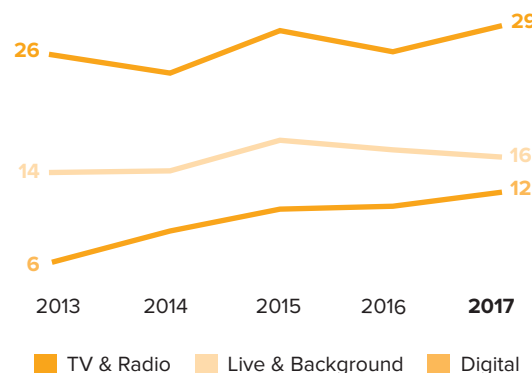
CISAC's 37 authors' societies in Africa are building partnerships with the African Regional Intellectual Property Organisation (ARIPO) and l'Organisation Africaine de la Propriété Intellectuelle (OAPI) to develop training programmes focused on capacity building and advocacy at policy level.

Societies are exploring a common database and digital licence platform, drawing expertise from a scheme carried out by their Latin American counterparts.

Collections grow by 11.4% year-on-year (EUR million)



Largest types of use (EUR million)



Breakdown of regional collections (EUR million)

	Collections	Growth	5 year Growth
Repertoire			
Music	69	+15.7%	+40.2%
Literature	4	-8.6%	+4.9%
Dramatic	1.1	-35.6%	+5.7%
Audiovisual	0.8	-44.4%	-53.6%
Visual Arts	0.03	+284%	+159%
Type of Use			
TV & Radio	29	+9.6%	+10.5%
Live & Background	16	-4.7%	+11.7%
Digital	12	+11.1%	+122%
Private Copying	11	+27.6%	+103%
Reprography	3.2	+2.9%	+9.8%
CD & Video	2.6	+166%	+190%
Mechanical Reproduction	0.2	-17.3%	-50.4%
Rental/Public Lending	0.1	-0.8%	+3.2%
Reproduction	0.0	+1,171%	+158%
Other	1.5	+103%	+94.8%
Type of Right			
Performing Rights	48	+4.8%	+17.4%
Mechanical Rights	18	+18.2%	+51.5%
Other Rights	9	+41.0%	+170%
Total	75	+11.4%	+34.1%

AFRICA

REPERTOIRES

Music dominates African collections

Music income collected continues to grow year-on-year. In 2017, it saw 15.7% growth. Music now represents 91.5% of total regional collections.

The second highest repertoire is literature, which represents 5.9% of African collections: collections have dropped 8.6% to EUR4m. Two thirds of literature collections come from South Africa and a little under a third from Algeria (25.6%). The main sources of income are reprography (72.2%) and TV and radio (21.8%).

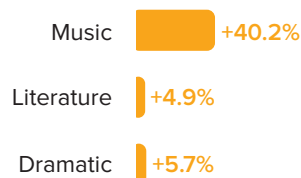
Other repertoires

Collections for visual arts, dramatic and audiovisual repertoires account for less than 3% of regional collections. Societies collected EUR35k for visual arts, up 284% from 2016 figures, helped by South African collections for reprography.

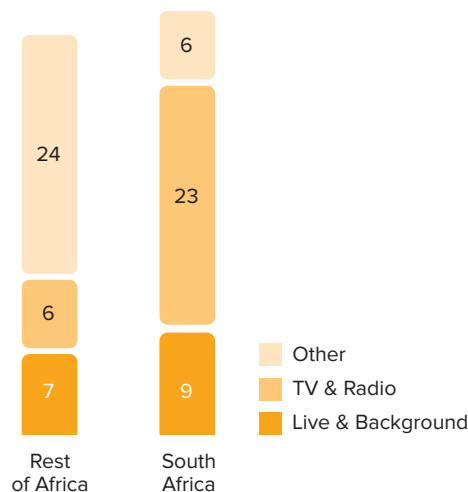
Dramatic and audiovisual collections both declined. The dramatic repertoire is supported by collections in Algeria (72.2%), South Africa (14.5%) and Burkina Faso (9.9%).

Audiovisual collections primarily come from Algeria (63.4%), Burkina Faso (19.9%) and Ivory Coast (13.0%).

Growth in leading repertoires 2013-2017



South Africa leads 2017 TV & Radio collections (EUR million)



Top uses by repertoire (EUR million)

	Collections	Growth	5 year Growth
MUSIC			
TV & Radio	28	+13.4%	+10.9%
Live & Background	16	-4.0%	+11.8%
Digital	12	+11.1%	+122%
Music all uses	69	+15.7%	+40.2%
LITERATURE			
Reprography	3	+2.9%	+9.7%
TV & Radio	1	-30.7%	+26.1%
Private Copying	0.2	-30.9%	+12.8%
Literature all uses	4.5	-8.6%	+4.9%
DRAMATIC			
Private Copying	0.7	-30.5%	+11.7%
TV & Radio	0.2	-47.9%	-9.7%
Live & Background	0.2	-42.7%	+1.2%
Dramatic all uses	1.1	-35.6%	+5.7%
AUDIOVISUAL			
Private Copying	0.5	-50.9%	-56.4%
TV & Radio	0.1	-44.3%	-56.4%
Mechanical Reproduction	0.1	-34.2%	-59.6%
Audiovisual all uses	0.8	-44.4%	-53.6%
VISUAL ARTS			
Reproduction	0.03	+1,171%	+158%
TV & Radio	0.01	+9.4%	+70.5%
Reprography	0.003	+120%	
Visual Arts all uses	0.03	+284%	+159%

AFRICA

REPERTOIRES

Private copying: potential for all repertoires

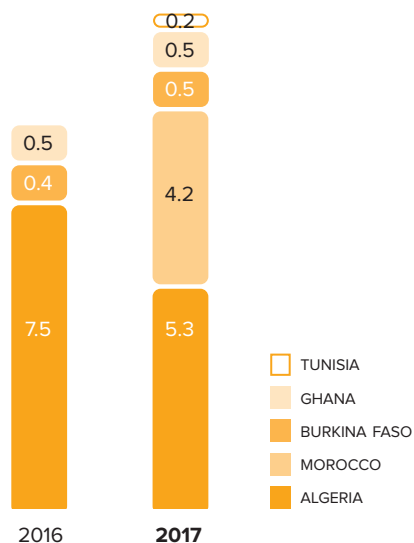
In Africa, private copying has the potential to sharply increase the income of creators. It is already the highest source of collections for the audiovisual and dramatic repertoires.

Only a few countries - Algeria, Burkina Faso, Ghana, Morocco and Tunisia - have working private copying schemes enforceable by law. Morocco joined the list in 2017: private copying not only became the country's leading source of income (78.2%), it saw collections grow sixfold in under a year.

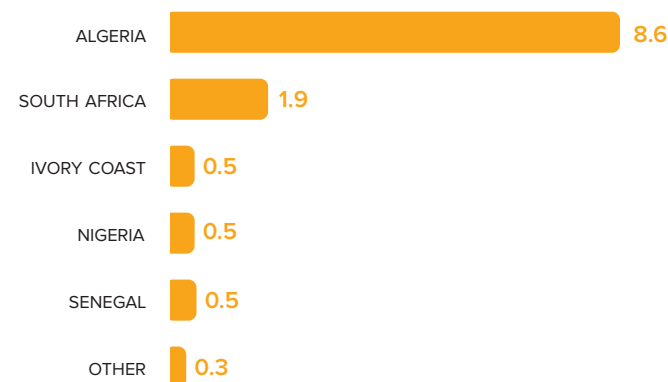
Algeria and Ivory Coast are leading advocates of strong private copying legal regimes, working with CISAC to promote the issue at conferences at the MASA festival in Abidjan and at the Salon de la Créativité in Algeria.

In 2018, Madagascar and Niger were set to start collecting for private copying and authorities in Senegal and Ivory Coast have committed to further improving private copying levy legislation.

Leading countries for private copying collections (EUR million)



Digital collections in 2017 (EUR million)



SOUTH AFRICA

ADVANCES IN DIGITAL

South Africa is the largest source of collections in Africa, with 50.5% of the regional total. In 2017, societies collected ZAR573m, up 16.6% on 2016. Total reported income collected for creators has grown 41.2% over the last five years.

Music leads collections

TV and radio are the largest sources of income, making up more than half of South African collections. Music is the leading repertoire, representing an overwhelming 91.1% of collections. Local repertoire has historically been promoted in the broadcast sector, but a key change in August 2017 saw the country's public broadcaster, the South African Broadcasting Corporation, end a short-lived policy that made the use of 90% local content mandatory. This does not appear to have had a significant impact on the market, partly because of improved local production.

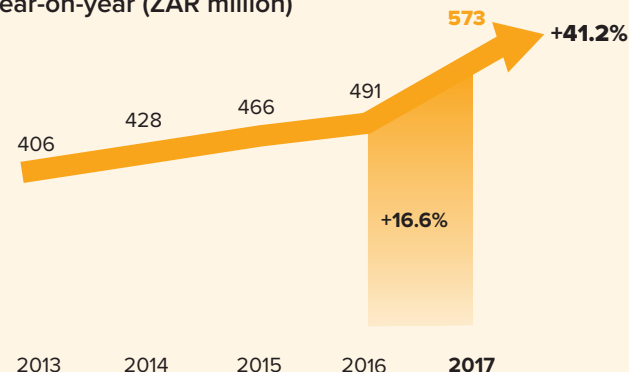
Live and background on the rise

Live and background continues to be South Africa's second highest revenue stream. Despite experiencing the effects of the economic dip, the successful licensing of big music providers, such as chain stores, helped collections grow an additional ZAR5.4m in 2017.

Digital shows promise

Digital, reported to CISAC for the first time for this report by new CISAC member CAPASSO, amounted to ZAR29m, accounting for 5.1% of the country's collections. The mechanical rights licensing agency, which has a mandate from SAMRO to offer a joint performance rights licence for, among other uses, online, brings new insight into South Africa's previously unmeasured online collections. CAPASSO licenses all digital platforms and video on demand services. In addition to major international DSPs, local

Collections grow by 16.6% year-on-year (ZAR million)



Share of collections by use (ZAR million)

Use	Collections	Share
TV & Radio	338	59.0%
Live & Background	139	24.3%
Reprography	48	8.4%
Digital	29	5.1%
CD & Video	18	3.1%
Reproduction	0.4	0.1%
Other	0.4	0.1%

streaming music services, such as Simfy Africa, are growing. Telecommunication companies remain strong players with the leverage to hold down licensing rates.

Copyright changes could impact creators

Revenue collected by DALRO for the visual arts, literature and dramatic repertoires remains small. Over 90% of the CMO's collections come from reprographic licensing in higher education institutions.



Breakdown of national collections (ZAR million)

	Collections	Growth	5 year Growth
Repertoire			
Music	522	+19.7%	+44.1%
Literature	48	-4.6%	+16.8%
Dramatic	2	-46.7%	+10.6%
Visual Arts	0.4	+1,073%	+201%
Type of Use			
TV & Radio	338	+10.2%	+28.8%
Live & Background	139	+4.0%	+38.3%
Reprography	48	-3.8%	+30.0%
Digital	29		
CD & Video	18		
Reproduction	0.4		
Other	0.4	-54.9%	-91.4%
Type of Right			
Performing Rights	454	+3.1%	+27.2%
Mechanical Rights	119	+134%	+144%
Total	573	+16.6%	+41.2%

South Africa's Copyright Alliance, including all authors' societies, has been raising concerns on proposed changes to copyright legislation that would significantly weaken creators' rights and further empower large users of content in the guise of a misguided "fair use" provision. In 2017, it was estimated that the impact on educational uses could potentially reduce DALRO'S revenue by two thirds.

IVORY COAST

NEW INCOME STREAMS FOR CREATORS

Ivory Coast is the fourth highest collector in the African region. Income has risen more than 60% since 2013, reaching XOF2.5bn in 2017 thanks to growing live and background and digital collections. Music represents the vast majority of collections.

Laying the groundwork for success

In July 2016, Ivorian law was amended to extend collective management to include neighbouring rights. Capitalising on this key legislative change, in January 2018, Ivorian society BURIDA signed an agreement with music monitoring service BMAT making it easier for BURIDA to monitor uses and collect for authors. The national society is now pressing the government to implement an effective private copying scheme to counteract the effects of piracy and provide a new source of income for creators.

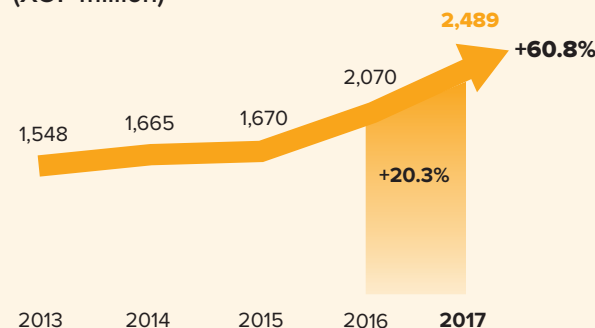
Awareness campaigns impact collections

Live and background represents more than two thirds of total collections. New payments have been secured thanks to negotiations with major users such as bars and improvements in contracts. Communication agencies, which tended to overuse music due to a very low blanket licence fee, have seen their tariffs triple. As part of a BURIDA campaign, venues have been urging event organisers to pay for the music they use. Despite growing awareness, attempts to license movie theatre operators for music use have so far been unsuccessful.

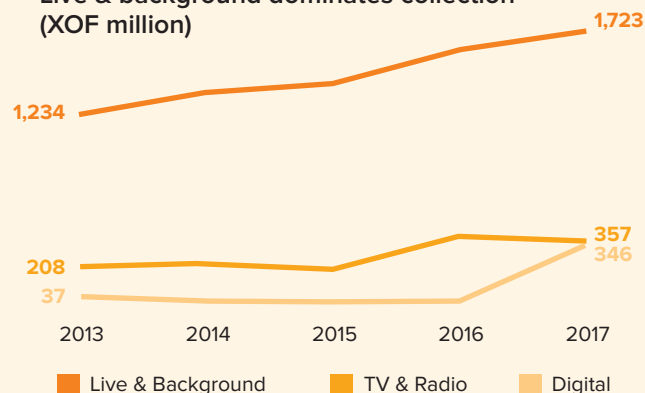
TV and radio stifled by negotiations

TV and radio collections have fallen in recent years with strong resistance from operators and broadcasters: satellite broadcasters, who claim not to operate in the country, currently refuse to pay licence fees. The switch to digital terrestrial television in 2018 is expected to bring

Collections grow by 60.8% in five years (XOF million)



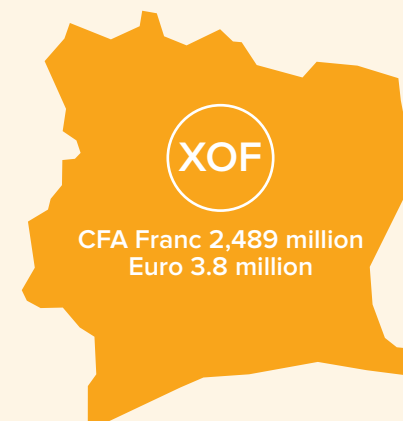
Live & background dominates collection (XOF million)



new income, coinciding with the launch of 10 channels and a tariff rise for the national broadcaster. Several new commercial radios have agreed to a licence based on their income.

Ring back tones driving digital

Digital is a small but fast-growing sector, driven by ring back tones. New agreements were secured with mobile phone operators in 2017 and successful litigation resulted



Breakdown of national collections (XOF million)

	Collections	Growth	5 year Growth
Type of Use			
Live & Background	1,723	+7.3%	+39.7%
TV & Radio	357	-9.1%	+71.3%
Digital	346	+4,476%	+837%
CD & Video	63	-0.4%	-8.3%
Type of Right			
Performing Rights	2,426	+20.9%	+64.0%
Mechanical Rights	63	-0.4%	-8.3%
Total	2,489	+20.3%	+60.8%

in the collection of back payments dating back to 2012. However, telecommunication companies' hold on music streaming tends to keep revenues low. Streaming services based outside the country have yet to generate collections for local creators.

TABLES OF COLLECTIONS

ALL REPERTOIRES



COLLECTIONS FOR ALL REPERTOIRES IN EUR MILLION

RANK	COUNTRY/TERRITORY	COLLECTIONS	GROWTH	GLOBAL SHARE
1	UNITED STATES	1,890	+7.0%	19.7%
2	FRANCE	1,203	+2.6%	12.6%
3	GERMANY	925	+13.9%	9.7%
4	JAPAN	800	-6.8%	8.4%
5	UNITED KINGDOM	743	+4.9%	7.8%
6	ITALY	591	-2.7%	6.2%
7	AUSTRALIA	323	+14.6%	3.4%
8	BRAZIL	253	+38.9%	2.6%
9	CANADA	239	+9.4%	2.5%
10	NETHERLANDS	235	+0.5%	2.5%
11	SWITZERLAND	231	-2.9%	2.4%
12	SPAIN	224	+3.1%	2.3%
13	ARGENTINA	180	+18.1%	1.9%
14	DENMARK	145	+26.5%	1.5%
15	KOREA, REPUBLIC OF	139	+20.1%	1.4%
16	SWEDEN	136	+18.8%	1.4%
17	BELGIUM	136	+3.9%	1.4%
18	AUSTRIA	114	+15.1%	1.2%
19	POLAND	106	+2.1%	1.1%
20	FINLAND	101	+18.4%	1.1%
21	RUSSIAN FEDERATION	98	+29.6%	1.0%
22	MEXICO	74	+11.5%	0.8%
23	NORWAY	63	+36.4%	0.7%
24	PORTUGAL	44	+5.0%	0.5%
25	ISRAEL	43	+5.8%	0.5%

RANK	COUNTRY/TERRITORY	COLLECTIONS	GROWTH	GLOBAL SHARE
26	HUNGARY	43	+4.3%	0.4%
27	CZECH REPUBLIC	41	+11.8%	0.4%
28	SOUTH AFRICA	38	+26.3%	0.4%
29	CHINA	27	+18.4%	0.3%
30	ROMANIA	27	+30.0%	0.3%
31	IRELAND	27	+7.6%	0.3%
32	HONG KONG	26	+8.1%	0.3%
33	CHILE	26	-2.2%	0.3%
34	COLOMBIA	25	+7.9%	0.3%
35	TURKEY	21	+0.5%	0.2%
36	ALGERIA	20	-14.1%	0.2%
37	PERU	18	+7.4%	0.2%
38	CROATIA	17	+3.5%	0.2%
39	SLOVENIA	16	+8.6%	0.2%
40	SINGAPORE	15	+1.1%	0.2%
41	TAIWAN, CHINESE TAIPEI	13	+21.8%	0.1%
42	URUGUAY	11	+9.2%	0.1%
43	SLOVAKIA	10	+2.9%	0.1%
44	SERBIA	9.6	+8.4%	0.1%
45	MALAYSIA	6.7	-43.8%	0.1%
46	LITHUANIA	6.4	-7.2%	0.1%
47	LATVIA	6.3	+15.7%	0.1%
48	ESTONIA	6.1	+18.9%	0.1%
49	MOROCCO	5.4	+498%	0.1%
50	LUXEMBOURG	5.2	+2.0%	0.1%



TABLES OF COLLECTIONS

MUSIC

COLLECTIONS IN EUR MILLION

RANK	COUNTRY/TERRITORY	COLLECTIONS	GROWTH	GLOBAL SHARE
1	UNITED STATES	1,884	+7.0%	22.6%
2	FRANCE	886	+2.1%	10.6%
3	GERMANY	806	+7.2%	9.7%
4	JAPAN	799	-6.8%	9.6%
5	UNITED KINGDOM	678	+5.0%	8.1%
6	ITALY	458	+0.6%	5.5%
7	BRAZIL	252	+39.1%	3.0%
8	CANADA	239	+9.4%	2.9%
9	AUSTRALIA	226	+18.0%	2.7%
10	NETHERLANDS	190	+5.1%	2.3%
11	SPAIN	175	+3.6%	2.1%
12	DENMARK	136	+27.9%	1.6%
13	KOREA, REPUBLIC OF	132	+23.0%	1.6%
14	SWEDEN	127	+20.4%	1.5%
15	SWITZERLAND	127	+0.3%	1.5%
16	ARGENTINA	117	+17.1%	1.4%
17	BELGIUM	111	+3.7%	1.3%
18	AUSTRIA	87	+15.2%	1.0%
19	POLAND	79	-2.2%	1.0%
20	MEXICO	68	+13.8%	0.8%
21	FINLAND	67	+8.3%	0.8%
22	NORWAY	62	+37.2%	0.7%
23	RUSSIAN FEDERATION	58	+33.9%	0.7%
24	PORTUGAL	39	+5.5%	0.5%
25	HUNGARY	39	+5.2%	0.5%

RANK	COUNTRY/TERRITORY	COLLECTIONS	GROWTH	GLOBAL SHARE
26	ISRAEL	35	+3.5%	0.4%
27	SOUTH AFRICA	35	+29.6%	0.4%
28	CZECH REPUBLIC	34	+8.7%	0.4%
29	CHINA	27	+18.4%	0.3%
30	IRELAND	27	+7.6%	0.3%
31	HONG KONG	26	+8.1%	0.3%
32	CHILE	25	-2.4%	0.3%
33	COLOMBIA	25	+8.7%	0.3%
34	ROMANIA	21	+4.1%	0.3%
35	TURKEY	21	+0.5%	0.2%
36	PERU	18	+7.4%	0.2%
37	ALGERIA	17	-8.8%	0.2%
38	CROATIA	16	+3.2%	0.2%
39	SINGAPORE	15	+1.1%	0.2%
40	TAIWAN, CHINESE TAIPEI	13	+21.8%	0.2%
41	SLOVENIA	12	+11.2%	0.1%
42	URUGUAY	9.4	+5.9%	0.1%
43	SERBIA	9.4	+8.1%	0.1%
44	SLOVAKIA	7.5	+2.4%	0.1%
45	MALAYSIA	6.7	-43.8%	0.1%
46	MOROCCO	5.4	+567%	0.1%
47	ESTONIA	5.2	+19.2%	0.1%
48	LITHUANIA	5.2	-3.1%	0.1%
49	LATVIA	5.1	+19.4%	0.1%
50	ICELAND	4.8	+41.3%	0.1%



TABLES OF COLLECTIONS

AUDIOVISUAL

COLLECTIONS IN EUR MILLION

RANK	COUNTRY/TERRITORY	COLLECTIONS	GROWTH	GLOBAL SHARE
1	FRANCE	234	+4.5%	38.3%
2	SWITZERLAND	68	-11.2%	11.1%
3	ITALY	48	-31.8%	7.9%
4	ARGENTINA	45	+17.6%	7.4%
5	GERMANY	42	+1,184%	6.9%
6	SPAIN	34	+0.0%	5.6%
7	POLAND	22	+21.2%	3.6%
8	NETHERLANDS	17	-20.6%	2.8%
9	UNITED KINGDOM	16	-1.1%	2.7%
10	RUSSIAN FEDERATION	16	+25.6%	2.6%
11	BELGIUM	14	+9.2%	2.3%
12	FINLAND	11	+53.4%	1.9%
13	ISRAEL	7.7	+17.7%	1.3%
14	MEXICO	5.4	-11.1%	0.9%
15	ROMANIA	5.3		0.9%
16	SLOVENIA	4.0	+5.8%	0.7%
17	CZECH REPUBLIC	3.3	+19.4%	0.5%
18	GREECE	3.1	-1.3%	0.5%
19	AUSTRIA	2.9	+17.6%	0.5%
20	PORTUGAL	2.1	+6.8%	0.3%



TABLES OF COLLECTIONS

DRAMA

COLLECTIONS IN EUR MILLION

RANK	COUNTRY/TERRITORY	COLLECTIONS	GROWTH	GLOBAL SHARE
1	ITALY	67	+2.8%	34.1%
2	FRANCE	52	-4.5%	26.5%
3	RUSSIAN FEDERATION	23	+17.4%	11.7%
4	ARGENTINA	18	+26.9%	9.0%
5	SPAIN	11	+5.3%	5.5%
6	SWITZERLAND	9.2	+3.2%	4.7%
7	POLAND	4.7	+5.0%	2.4%
8	BELGIUM	3.6	-0.3%	1.8%
9	URUGUAY	1.3	+44.3%	0.7%
10	PORTUGAL	1.1	-3.2%	0.6%
11	ALGERIA	0.8	-32.9%	0.4%
12	UKRAINE	0.8	+7.9%	0.4%
13	LUXEMBOURG	0.5	+10.5%	0.3%
14	BELARUS	0.5	-8.2%	0.2%
15	JAPAN	0.4	-17.7%	0.2%
16	LITHUANIA	0.4	+1.3%	0.2%
17	BRAZIL	0.4	+0.5%	0.2%
18	GREECE	0.4	-19.8%	0.2%
19	CHILE	0.3	+3.6%	0.2%
20	LATVIA	0.3	-37.4%	0.1%



TABLES OF COLLECTIONS

VISUAL ARTS

COLLECTIONS IN EUR MILLION

RANK	COUNTRY/TERRITORY	COLLECTIONS	GROWTH	GLOBAL SHARE
1	GERMANY	77	+34.6%	37.1%
2	FRANCE	32	+16.8%	15.2%
3	UNITED KINGDOM	21	+15.3%	10.2%
4	NETHERLANDS	16	-9.6%	7.7%
5	ITALY	10	+1.2%	4.8%
6	SWEDEN	8.8	+0.2%	4.3%
7	DENMARK	8.2	+6.1%	3.9%
8	UNITED STATES	6.1	+15.5%	2.9%
9	BELGIUM	5.4	-3.2%	2.6%
10	AUSTRIA	4.7	+81.4%	2.3%
11	FINLAND	4.3	+85.5%	2.1%
12	SPAIN	3.4	+1.0%	1.7%
13	AUSTRALIA	2.2	+16.0%	1.1%
14	CZECH REPUBLIC	1.6	+183%	0.8%
15	RUSSIAN FEDERATION	1.0	+4,898%	0.5%
16	NORWAY	1.0	+1.5%	0.5%
17	JAPAN	1.0	+0.0%	0.5%
18	SWITZERLAND	1.0	-19.5%	0.5%
19	HUNGARY	0.6	+5.0%	0.3%
20	CANADA	0.5	+23.2%	0.2%



TABLES OF COLLECTIONS

LITERATURE

COLLECTIONS IN EUR MILLION

RANK	COUNTRY/TERRITORY	COLLECTIONS	GROWTH	GLOBAL SHARE
1	AUSTRALIA	95	+7.2%	42.0%
2	UNITED KINGDOM	27	-0.5%	11.9%
3	SWITZERLAND	26	+4.7%	11.6%
4	FINLAND	19	+32.3%	8.4%
5	AUSTRIA	19	+4.8%	8.4%
6	NETHERLANDS	12	-13.9%	5.1%
7	ITALY	7.7	+24.8%	3.4%
8	KOREA, REPUBLIC OF	6.2	-18.6%	2.7%
9	SOUTH AFRICA	3.2	+3.3%	1.4%
10	CZECH REPUBLIC	2.2	+1.0%	1.0%
11	BELGIUM	2.1	+6.5%	0.9%
12	HUNGARY	1.5	+14.2%	0.7%
13	PORTUGAL	1.3	+3.6%	0.6%
14	ALGERIA	1.2	-29.9%	0.5%
15	SLOVAKIA	1.1	+1.6%	0.5%
16	SLOVENIA	0.6	-15.3%	0.2%
17	LATVIA	0.5	+27.5%	0.2%
18	ISRAEL	0.4	+5.7%	0.2%
19	LITHUANIA	0.3	+10.8%	0.1%
20	BURKINA FASO	0.1	+10.0%	0.0%

TABLES OF COLLECTIONS

COLLECTIONS PER CAPITA BY COUNTRY/TERRITORY (EUR)

WORLD AVERAGE: 1.87

RANK	COUNTRY/TERRITORY	COLLECTIONS PER CAPITA	REGION
1	SWITZERLAND	27.33	EUROPE
2	DENMARK	25.07	EUROPE
3	FINLAND	18.41	EUROPE
4	FRANCE	17.93	EUROPE
5	ICELAND	14.07	EUROPE
6	NETHERLANDS	13.71	EUROPE
7	SWEDEN	13.50	EUROPE
8	AUSTRALIA	13.14	ASIA-PACIFIC
9	AUSTRIA	12.94	EUROPE
10	BELGIUM	11.94	EUROPE
11	NORWAY	11.89	EUROPE
12	UNITED KINGDOM	11.26	EUROPE
13	GERMANY	11.19	EUROPE
14	ITALY	9.76	EUROPE
15	LUXEMBOURG	8.64	EUROPE
16	SLOVENIA	7.90	EUROPE
17	NEW CALEDONIA (FRANCE)	7.19	ASIA-PACIFIC
18	ANDORRA	6.59	EUROPE
19	CANADA	6.52	CANADA/USA
20	JAPAN	6.31	ASIA-PACIFIC
21	UNITED STATES	5.80	CANADA/USA
22	IRELAND	5.51	EUROPE
23	ISRAEL	4.96	EUROPE
24	SPAIN	4.81	EUROPE
25	ESTONIA	4.60	EUROPE

RANK	COUNTRY/TERRITORY	COLLECTIONS PER CAPITA	REGION
26	HUNGARY	4.35	EUROPE
27	PORTUGAL	4.30	EUROPE
28	CROATIA	4.24	EUROPE
29	ARGENTINA	4.07	LATIN AMERICA AND THE CARIBBEAN
30	CZECH REPUBLIC	3.89	EUROPE
31	HONG KONG	3.47	ASIA-PACIFIC
32	LATVIA	3.24	EUROPE
33	SAINT LUCIA	3.20	LATIN AMERICA AND THE CARIBBEAN
34	URUGUAY	3.19	LATIN AMERICA AND THE CARIBBEAN
35	POLAND	2.79	EUROPE
36	KOREA, REPUBLIC OF	2.69	ASIA-PACIFIC
37	SINGAPORE	2.62	ASIA-PACIFIC
38	MONTENEGRO	2.53	EUROPE
39	LITHUANIA	2.25	EUROPE
40	SLOVAKIA	1.91	EUROPE
41	MACAU	1.83	ASIA-PACIFIC
42	BARBADOS	1.79	LATIN AMERICA AND THE CARIBBEAN
43	TRINIDAD AND TOBAGO	1.63	LATIN AMERICA AND THE CARIBBEAN
44	CHILE	1.42	LATIN AMERICA AND THE CARIBBEAN
45	SERBIA	1.36	EUROPE
46	ROMANIA	1.36	EUROPE
47	BRAZIL	1.21	LATIN AMERICA AND THE CARIBBEAN
48	MACEDONIA, THE FORMER YUGOSLAV REPUBLIC OF	0.79	EUROPE
49	RUSSIAN FEDERATION	0.68	EUROPE
50	SOUTH AFRICA	0.67	AFRICA

TABLES OF COLLECTIONS

COLLECTIONS AS % OF GDP BY COUNTRY/TERRITORY

WORLD AVERAGE: 0.015%

RANK	COUNTRY/TERRITORY	COLLECTIONS AS % OF GDP	REGION
1	FRANCE	0.053%	EUROPE
2	DENMARK	0.050%	EUROPE
3	FINLAND	0.045%	EUROPE
4	SWITZERLAND	0.038%	EUROPE
5	SLOVENIA	0.038%	EUROPE
6	SAINT LUCIA	0.038%	LATIN AMERICA AND THE CARIBBEAN
7	MONTENEGRO	0.037%	EUROPE
8	CROATIA	0.036%	EUROPE
9	ITALY	0.035%	EUROPE
10	HUNGARY	0.035%	EUROPE
11	NETHERLANDS	0.032%	EUROPE
12	UNITED KINGDOM	0.032%	EUROPE
13	ARGENTINA	0.032%	LATIN AMERICA AND THE CARIBBEAN
14	BELGIUM	0.031%	EUROPE
15	AUSTRIA	0.031%	EUROPE
16	SWEDEN	0.029%	EUROPE
17	GERMANY	0.028%	EUROPE
18	AUSTRALIA	0.028%	ASIA-PACIFIC
19	ESTONIA	0.026%	EUROPE
20	SERBIA	0.026%	EUROPE
21	LATVIA	0.024%	EUROPE
22	PORTUGAL	0.023%	EUROPE
23	POLAND	0.023%	EUROPE
24	ICELAND	0.023%	EUROPE
25	URUGUAY	0.022%	LATIN AMERICA AND THE CARIBBEAN

RANK	COUNTRY/TERRITORY	COLLECTIONS AS % OF GDP	REGION
26	CZECH REPUBLIC	0.022%	EUROPE
27	SPAIN	0.019%	EUROPE
28	ANDORRA	0.019%	EUROPE
29	JAPAN	0.019%	ASIA-PACIFIC
30	NORWAY	0.018%	EUROPE
31	MACEDONIA, THE FORMER YUGOSLAV REPUBLIC OF	0.016%	EUROPE
32	CANADA	0.016%	CANADA/USA
33	LITHUANIA	0.015%	EUROPE
34	PARAGUAY	0.014%	LATIN AMERICA AND THE CARIBBEAN
35	ROMANIA	0.014%	EUROPE
36	BOSNIA AND HERZEGOVINA	0.014%	EUROPE
37	ISRAEL	0.014%	EUROPE
38	BRAZIL	0.014%	LATIN AMERICA AND THE CARIBBEAN
39	ALGERIA	0.013%	AFRICA
40	SOUTH AFRICA	0.012%	AFRICA
41	SLOVAKIA	0.012%	EUROPE
42	BARBADOS	0.012%	LATIN AMERICA AND THE CARIBBEAN
43	TRINIDAD AND TOBAGO	0.011%	LATIN AMERICA AND THE CARIBBEAN
44	BURKINA FASO	0.011%	AFRICA
45	UNITED STATES	0.011%	CANADA/USA
46	IVORY COAST	0.011%	AFRICA
47	CHILE	0.010%	LATIN AMERICA AND THE CARIBBEAN
48	KOREA, REPUBLIC OF	0.010%	ASIA-PACIFIC
49	GEORGIA	0.010%	EUROPE
50	PERU	0.010%	LATIN AMERICA AND THE CARIBBEAN



Membership by region

121 countries - 239 members



EUROPE

48 countries
107 members

SOCIETY	STATUS	REPERTOIRE	COUNTRY/TERRITORY
AAS	M	M, D, AGP	AZERBAIJAN
ABYROY	P	M, AV, AGP	KAZAKSTAN
ACS	M	AGP	UNITED KINGDOM
ACUM	M	M, L	ISRAEL
ADAGP	M	AGP	FRANCE
AIPA	P	AV	SLOVENIA
AKKA-LAA	M	M, AV, D, L, AGP	LATVIA
AKM	M	M	AUSTRIA
ALBAUTOR	P	M, AV	ALBANIA
ALCS	M	AV, L	UNITED KINGDOM
AMUS	M	M	BOSNIA AND HERZEGOVINA
ARMAUTHOR NGO	M	M, D	ARMENIA
ARTISJUS	M	M, AV, L, AGP	HUNGARY
ASDAC	M	M, AV, D, L, AGP	MOLDOVA, REPUBLIC OF
ATHINA-SADA	P	AV, D	GREECE
AUPO CINEMA	P	AV	UKRAINE
AUTODIA	M	M	GREECE
AZDG	P	AV	AZERBAIJAN
BILDRECHT GMBH	M	AGP	AUSTRIA
BILDUPPHOVSRÄTT	M	AGP	SWEDEN
BONO	M	AGP	NORWAY
BUMA	M	M	NETHERLANDS
DACIN SARA	P	AV	ROMANIA
DACS	M	AGP	UNITED KINGDOM
DAMA	M	AV	SPAIN
DHFR	M	AV	CROATIA
DILIA	M	AV, L	CZECH REPUBLIC
DIRECTORS UK	M	AV	UNITED KINGDOM
EAU	M	M, AV, D, AGP	ESTONIA
EVA	A	AGP	BELGIUM
FILMAUTOR	M	AV	BULGARIA
FILMJUS	M	AV	HUNGARY
GAI UZ	M	M, AV, D	UZBEKISTAN
GCA	M	M, AV, D, L, AGP	GEORGIA
GEMA	M	M	GERMANY
GESAC	A	NR	BELGIUM



CANADA/USA

2 countries
16 members

SOCIETY	STATUS	REPERTOIRE	COUNTRY/TERRITORY
AMRA	M	M	UNITED STATES
ARS	M	AGP	UNITED STATES
ASCAP	M	M	UNITED STATES
BMI	M	M	UNITED STATES
CARCC	M	AGP	CANADA
CMRRA	M	M	CANADA
CSCS	M	AV	CANADA
DGA	A	AV	UNITED STATES
DRCC	M	AV	CANADA
SARTEC	A	M, AV	CANADA
SESAC INC.	M	M	UNITED STATES
SOCAN	M	M	CANADA
SODRAC	M	M, AGP	CANADA
SPACQ	A	M	CANADA
VAGA	M	AGP	UNITED STATES
WGA	A	AV, D	UNITED STATES

SOCIETY	STATUS	REPERTOIRE	COUNTRY/TERRITORY
GESTOR	M	AGP	CZECH REPUBLIC
HDS-ZAMP	M	M	CROATIA
HUNGART	M	AGP	HUNGARY
IMRO	M	M	IRELAND
IVARO	M	AGP	IRELAND
KAZAK	M	M, D, L	KAZAKSTAN
KODA	M	M	DENMARK
KOPIOSTO	M	M, AV, L, AGP	FINLAND
KUVASTO	M	AGP	FINLAND
KYRGYZPATENT	M	M, D	KYRGYZSTAN
LATGA	M	M, AV, D, L, AGP	LITHUANIA
LIRA	M	AV, D, L	NETHERLANDS
LITA	M	AV, D, L, AGP	SLOVAKIA
LITERAR-MECHANA	M	AV, L	AUSTRIA
MCPS	M	M, AV	UNITED KINGDOM
MESAM	M	M	TURKEY
MSG	M	M	TURKEY
MUSICAUTOR	M	M	BULGARIA
NCB	M	M	DENMARK
NCIP	M	M, D	BELARUS
OFA	P	AGP	SERBIA
OOA-S	P	AV, AGP	CZECH REPUBLIC
OSA	M	M	CZECH REPUBLIC
PAM CG	M	M	MONTENEGRO
PICTORIGHT	M	AGP	NETHERLANDS
PROLITTERIS	M	L, AGP	SWITZERLAND
PRS	M	M	UNITED KINGDOM
RAO	M	M, D, AGP	RUSSIAN FEDERATION
RUR	P	M, AV	RUSSIAN FEDERATION
SABAM	M	M, AV, D, L, AGP	BELGIUM
SACD	M	AV, D	FRANCE
SACEM	M	M	FRANCE
SACEMLUXEMBOURG	M	M	LUXEMBOURG
SAIF	M	AGP	FRANCE
SANASTO	M	L	FINLAND
SAZAS	M	M	SLOVENIA

SOCIETY	STATUS	REPERTOIRE	COUNTRY/TERRITORY
SCAM	M	AV, L, AGP	FRANCE
SDADV	P	M, AV	ANDORRA
SETEM	M	AV	TURKEY
SGAE	M	M, AV, D, L	SPAIN
SGDL	A	L	FRANCE
SIAE	M	M, AV, D, L, AGP	ITALY
SOFAM	M	AGP	BELGIUM
SOKOJ	M	M	SERBIA
SOPE	M	D	GREECE
SOZA	M	M	SLOVAKIA
SPA	M	M, AV, D, L, AGP	PORTUGAL
SSA	M	AV, D	SWITZERLAND
STEF	M	M	ICELAND
STEMRA	M	M	NETHERLANDS
STIM	M	M	SWEDEN
SUISA	M	M	SWITZERLAND
SUISSIMAGE	M	AV	SWITZERLAND
TALI	M	AV	ISRAEL
TEOSTO	M	M	FINLAND
TONO	M	M	NORWAY
UACRR	M	M, D	UKRAINE
UCMR-ADA	M	M	ROMANIA
UFFICIO GIURIDICO	A	M	HOLY SEE (VATICAN CITY STATE)
UFW	A	L, D	FINLAND
UPRAVIS	P	AGP	RUSSIAN FEDERATION
VDFS	M	AV	AUSTRIA
VEGAP	M	AGP	SPAIN
VEVAM	M	AV	NETHERLANDS
VG BILD-KUNST	M	AV, AGP	GERMANY
VISDA	M	AGP	DENMARK
ZAIS	M	M, D, L	POLAND
ZAMP - MACÉDOINE	M	M	MACEDONIA, THE FORMER YUGOSLAV REPUBLIC OF
ZAMP ASS. OF SLOVENIA	M	L	SLOVENIA
ZAPA	M	AV	POLAND
ZPAP	P	AGP	POLAND

STATUS WITHIN CISAC

M = Member A = Associate P = Provisional

REPERTOIRES



MU = Music



D = Drama



AV = Audiovisual



L = Literature



AGP = Visual Arts

NR = No Repertoire



Membership by region

121 countries - 239 members



ASIA-PACIFIC

16 countries/territories
28 members

SOCIETY	STATUS	REPERTOIRE	COUNTRY/TERRITORY
AMCOS	A	M	AUSTRALIA
APG-JAPAN	A	AGP	JAPAN
APRA	M	M	AUSTRALIA
ASDACS	M	AV	AUSTRALIA
AWGACS	M	AV	AUSTRALIA
CA	P	L, AGP	AUSTRALIA
CASH	M	M	HONG KONG
COMPASS	M	M	SINGAPORE
CPSN	A	M	NEPAL
FILSCAP	M	M	PHILIPPINES

SOCIETY	STATUS	REPERTOIRE	COUNTRY/TERRITORY
JASPAR	P	AGP	JAPAN
JASRAC	M	M, D	JAPAN
KOMCA	M	M	KOREA, REPUBLIC OF
KORRA	P	L, AGP	KOREA, REPUBLIC OF
KOSA	M	L, AGP	KOREA, REPUBLIC OF
MACA	M	M	MACAU
MACP	M	M	MALAYSIA
MCSC	M	M	CHINA
MCT	M	M	THAILAND
MOSCAP	P	M, AV	MONGOLIA

SOCIETY	STATUS	REPERTOIRE	COUNTRY/TERRITORY
MRCNS	P	M	NEPAL
MÜST	M	M	TAIWAN, CHINESE TAIPEI
PAPPRI	A	M	INDONESIA
SACENC	M	M	NEW CALEDONIA (FRANCE)
SACK	M	AGP	KOREA, REPUBLIC OF
VCPMC	M	M	VIETNAM
VISCOPY	M	AGP	AUSTRALIA
WAMI	P	M	INDONESIA



LATIN AMERICA & THE CARIBBEAN

24 countries
51 members

SOCIETY	STATUS	REPERTOIRE	COUNTRY/TERRITORY
AACIMH	M	M	HONDURAS
ABRAMUS	M	M, D	BRAZIL
ACAM	M	M	COSTA RICA
ACCS	A	M	TRINIDAD AND TOBAGO
ACDAM	M	M	CUBA
ADAVIS	A	AGP	CUBA
ADDAF	M	M	BRAZIL
AEI-GUATEMALA	M	M	GUATEMALA
AGADU	M	M, AV, D, AGP	URUGUAY
AMAR	M	M	BRAZIL
APA	M	M, D	PARAGUAY
APDAYC	M	M, D	PERU
APSAV	M	AGP	PERU
ARGENTORES	M	AV, D	ARGENTINA
ARTEGESTION	A	AGP	ECUADOR
ASSIM	M	M	BRAZIL
ATN	M	D	CHILE

SOCIETY	STATUS	REPERTOIRE	COUNTRY/TERRITORY
AUTORARTE	A	AGP	VENEZUELA
AUTVIS	M	AGP	BRAZIL
BSCAP	M	M	BELIZE
COSCAP	M	M	BARBADOS
COTT	M	M	TRINIDAD AND TOBAGO
CREAIMAGEN	M	AGP	CHILE
DAC	M	AV	ARGENTINA
DASC	P	AV	COLOMBIA
DBCA	P	AV	BRAZIL
DIRECTORES	M	AV	MEXICO
ECCO	M	M	SAINT LUCIA
GEDAR	P	AV	BRAZIL
JACAP	M	M	JAMAICA
LATINAUTOR	A	NR	URUGUAY
REDES	P	AV	COLOMBIA
SACIM, EGC	M	M	EL SALVADOR
SACM	M	M	MEXICO

SOCIETY	STATUS	REPERTOIRE	COUNTRY/TERRITORY
SACVEN	M	M, D	VENEZUELA
SADAIC	M	M	ARGENTINA
SAGCRYT	P	AV	MEXICO
SASUR	M	M	SURINAME
SAVA	M	AGP	ARGENTINA
SAYCE	M	M	ECUADOR
SAYCO	M	M, D	COLOMBIA
SBACEM	M	M	BRAZIL
SCD	M	M	CHILE
SGACEDOM	M	M	DOMINICAN REPUBLIC
SICAM	M	M	BRAZIL
SOBODAYCOM	M	M	BOLIVIA
SOCINPRO	M	M	BRAZIL
SOGEM	M	AV, D, L	MEXICO
SOMAAP	M	AGP	MEXICO
SPAC	M	M	PANAMA
UBC	M	M	BRAZIL



AFRICA

31 countries
37 members

SOCIETY	STATUS	REPERTOIRE	COUNTRY/TERRITORY
BBDA	M	M, AV, D, L, AGP	BURKINA FASO
BCDA	M	M	CONGO
BGDA	M	M, AV, L	GUINEA
BMDA	M	M, AV, D, L, AGP	MOROCCO
BNDA	M	M, D, L	NIGER
BUBEDRA	M	M, AV, D, L	BENIN
BUMDA	M	M, AV, D, L, AGP	MALI
BURIDA	M	M, AV, L, AGP	IVORY COAST
BUTODRA	M	M, AV, D, L, AGP	TOGO
CAPASSO	P	M	SOUTH AFRICA
CMC	M	M	CAMEROON
COSOMA	M	M, L	MALAWI
COSON	M	M	NIGERIA

SOCIETY	STATUS	REPERTOIRE	COUNTRY/TERRITORY
COSOTA	M	M	TANZANIA, UNITED REPUBLIC OF
COSOZA	P	M	TANZANIA, UNITED REPUBLIC OF
DALRO	M	D, L, AGP	SOUTH AFRICA
GHAMRO	P	M	GHANA
MASA	M	M	MAURITIUS
MCSN	M	M	NIGERIA
NASCAM	M	M	NAMIBIA
ODDA	P	M	DJIBOUTI
OMDA	M	M, AV, D, L	MADAGASCAR
ONDA	M	M, AV, D, L	ALGERIA
OTDAV	M	M, D, L	TUNISIA
RSAU	P	M, AV, D, L, AGP	RWANDA
SACERAU	M	M	EGYPT

SOCIETY	STATUS	REPERTOIRE	COUNTRY/TERRITORY
SACS	M	M	SEYCHELLES
SADIA	M	M, AV	ANGOLA
SAMRO	M	M	SOUTH AFRICA
SCM-COOPERATIVA	P	M	CAPE VERDE
SOCILADRA	M	D, L	CAMEROON
SODAV	P	M, AV, D, L, AGP	SENEGAL
SOMAS	M	M	MOZAMBIQUE
UNAC-SA	P	M, AV, D	ANGOLA
UPRS	M	M	UGANDA
ZAMCOPS	M	M	ZAMBIA
ZIMURA	M	M	ZIMBABWE

New CISAC members as of June 2018

SOCIETY	STATUS	REPERTOIRE	COUNTRY	REGION
ANCO	P	M, AV	MOLDOVA, REPUBLIC OF	EUROPE
CNRCMSE	P	M, AV, D, L, AGP	ETHIOPIA	AFRICA
CRSEA	A	NR	RUSSIAN FEDERATION	EUROPE
IMPF	A	M	BELGIUM	EUROPE
NGO-UACRR	M	M	UKRAINE	EUROPE
OAZA	P	AV	CZECH REPUBLIC	EUROPE
SAA	A	AV	BELGIUM	EUROPE

Societies having changed membership status as of June 2018: MASA is now a provisional member.

Societies no longer CISAC members as of June 2018:

LATINAUTOR (URUGUAY, NO REPERTOIRE), UFW (FINLAND, L, D), GAI UZ (UZBEKISTAN, MU, AV, D), UACRR (UKRAINE, MU, D), VISCOPY (AUSTRALIA, AGP), SADIA (ANGOLA, MU), ASDAC (REPUBLIC OF MOLDOVA, MU, AV, D, L, AGP), SETEM (TURKEY, AV).

Methodology

The CISAC Global Collections Report is based on domestic collections reported to CISAC by its member societies i.e. revenues collected by every society for the use of the repertoires it represents within its own country, or on a multi-territorial basis in some cases (e.g. digital licensing in Europe).

Figures shown in this report exclude revenues received from sister societies to avoid any double counting. Collections are gross collections i.e. before any deduction for administrative, cultural or social purposes.

In this 2018 edition, collection data from 2013 to 2017 may partially differ from previous reports. This restatement is due to a revised methodology in the declaration to clarify some income flows, specifically when a society is mandated to collect revenues on behalf of other societies in the same country for a specific type of use.

Collection trends are also impacted by the fluctuating number of CISAC members. When societies join CISAC and declare their income, it will automatically increase revenues in their countries.

The following tables show amounts and growth rates as like-for-like comparisons before and after restatement.

PREVIOUSLY REPORTED DATA (EUR million)

Year	Music	Audiovisual	Visual Arts	Dramatic	Literature	Total
2013	6,746	475	122	187	191	7,721
2014	6,909	499	142	195	190	7,934
2015	7,497	574	181	191	198	8,642
2016	8,006	578	174	190	208	9,156
2017	8,336	611	208	196	227	9,578
Annual growth	+4.1%	+5.7%	+19.5%	+3.2%	+9.0%	+4.6%
5yr growth	+23.6%	+28.6%	+70.4%	+4.9%	+18.7%	+24.1%

RESTATED DATA (EUR million)

Year	Music	Audiovisual	Visual Arts	Dramatic	Literature	Total
2013	6,497	474	124	187	191	7,473
2014	6,661	488	141	192	186	7,668
2015	7,352	577	183	191	202	8,505
2016	7,863	572	175	189	215	9,015
2017	8,336	611	208	196	227	9,578
Annual growth	+6.0%	+6.8%	+19.0%	+3.7%	+5.2%	+6.2%
5yr growth	+28.3%	+28.9%	+67.5%	+4.7%	+18.4%	+28.2%

The currency used throughout the report is the euro. This is for consistency and comparison purposes with previous years, as well as because almost 40% of global collections declared to CISAC are reported in euros, twice as many as collections reported in US dollars.

The exchange rate of the euro is taken at its average 2017 rate. All figures for previous years are converted into euros using the rate of the year in question. Year-on-year comparisons are therefore made on a floating currency basis. Taking into account the variations of value between different currencies shows author's right collections in the context of the evolving international economic situation. It may in certain cases give a different picture from reporting on a constant currency basis, where only volume variations would be reflected.

The focuses on specific countries are expressed in local currency to show the evolution of collections in that country, independent of variations of the currency compared to euro. In this case, currency is expressed with its three-letter ISO code (ex: USD for the US dollar).

For the sake of clarity, collections figures have been rounded up to the nearest million or thousand, except when said figures are too small to be significant, in which case one decimal has been added. Percentages are calculated using the actual unrounded figures.

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