

CISAC

GLOBAL COLLECTIONS REPORT 2019

FOR 2018 DATA



COM19-1146



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



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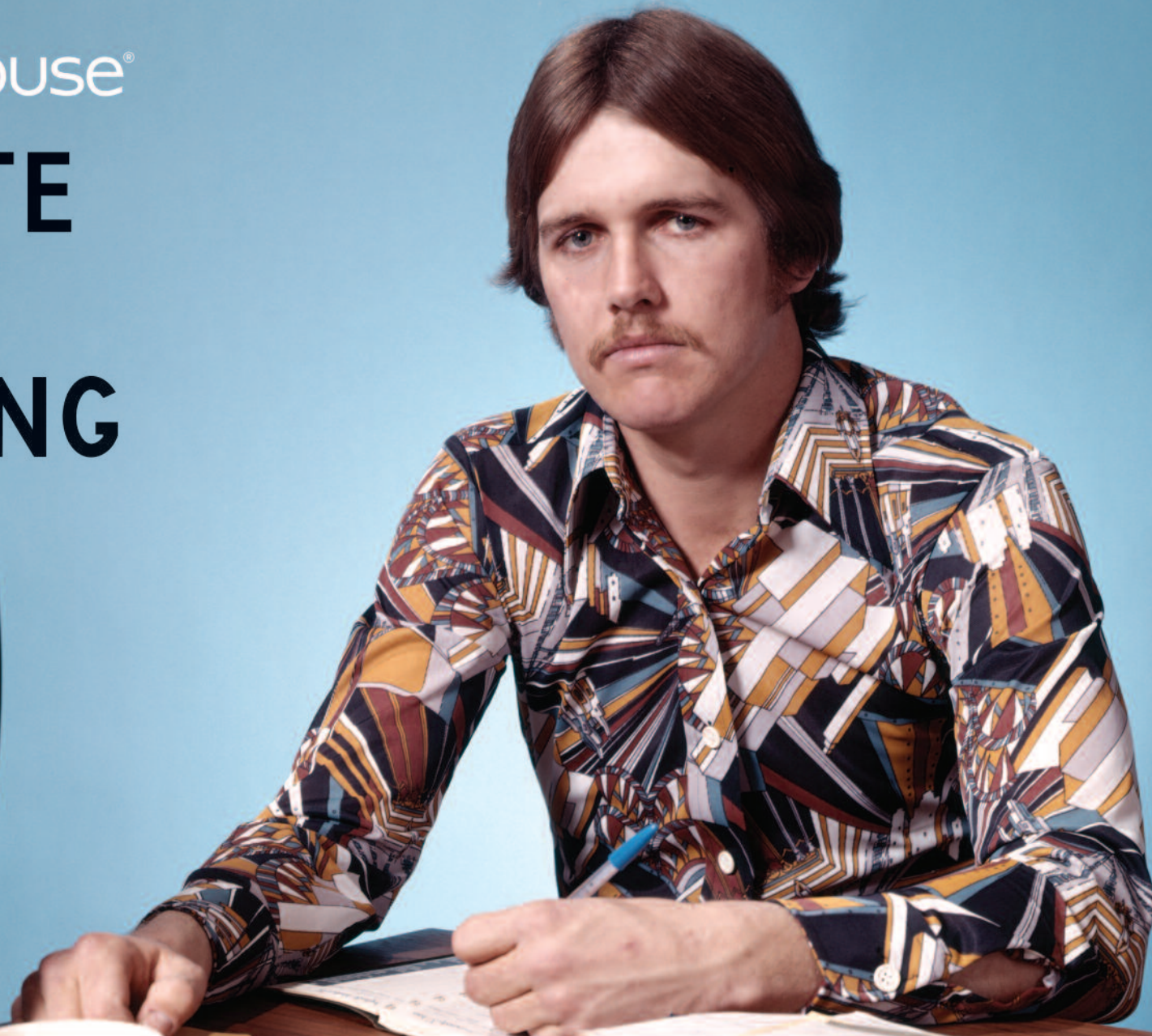
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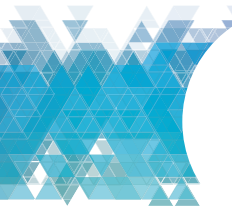
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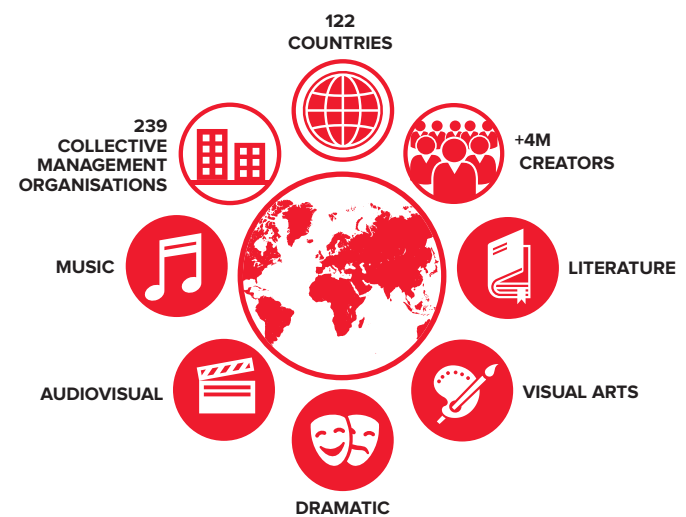
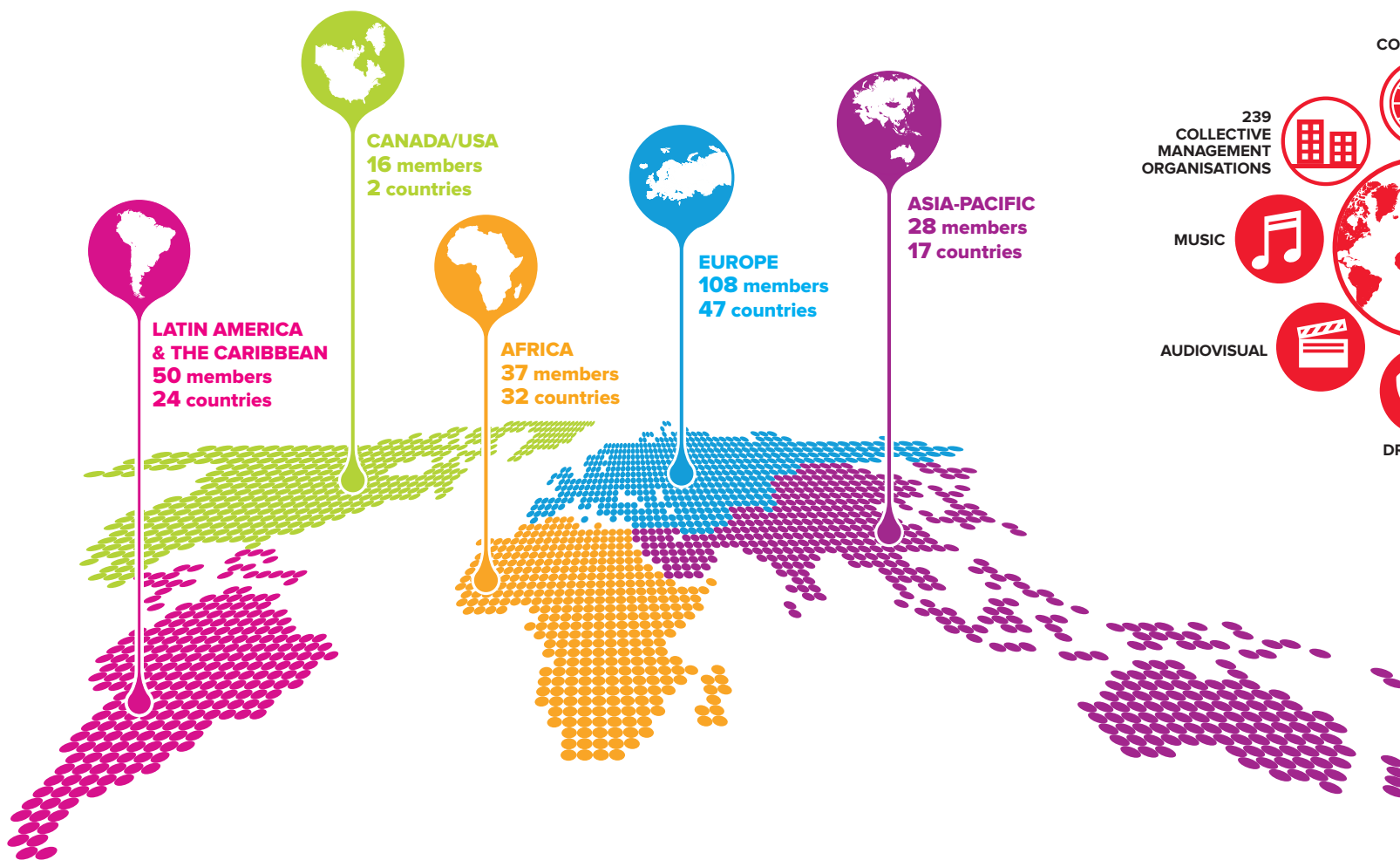


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ABOUT CISAC

The International Confederation of Societies of Authors and Composers (CISAC) brings together 239 collective management organisations in 122 countries and five regions. These collective management organisations represent over four million creators active in five major repertoires: audiovisual, dramatic, literature, music and visual arts.



FOREWORD

Jean-Michel Jarre



Jean-Michel Jarre, CISAC President

It is a pleasure once again to introduce CISAC's Global Collections Report.

As this report shows, navigating the digital world is the most vital issue for creators today.

Digital is our future and revenues to creators are rising fast. The subscription model has brought wonderful benefits. As the report shows, in some territories, like Mexico, South Korea and Sweden, digital collections make up a large tranche of creators' income. These digital "champions" are a snapshot of future potential.

But there is a dark side to digital. Despite their growth, digital collections still make up less than one fifth of all the revenues collected for creators globally. This is a measure of the problem we have to fix, and it is caused by a fundamental flaw in the legal environment that continues to devalue creators and their works.

Creators' rights: fix the flaws and unlock digital's potential

Creators are fuelling the digital economy. Yet for too long this has gone unrecognised, and creators across all repertoires have seen the value of their work appropriated by the internet's commercial giants.

However, thanks to our community's tireless efforts, we are now seeing real signs of change. And it is the European Union that has now given us a beacon in the darkness.

For years we at CISAC, supporting our allies lobbying in Brussels, have called for a legal framework that allows authors a fair negotiating relationship with the tech platforms. And that is why, in April 2019, the adoption of the European Copyright Directive, is so momentous.

The Directive has sent an amazing, positive signal to creators around the world. It builds a fairer balance between creators and the tech platforms. But it does that in a way that does not in any way stigmatise the GAFA giants.

The work, of course, has not finished – in truth it has only just begun. Now we will support its implementation across the European Union while lobbying other territories to follow Europe's lead.

We have changed the game with the adoption of the EU Directive. Now it is up to everyone in the CISAC network to use this momentum, speak out all the more loudly, strengthen our eco-system and bring fairness for creators across the world.

“Digital collections still make up less than one fifth of all the revenues collected for creators globally. This is a measure of the problem we have to fix”



FOREWORD

Marcelo Castello Branco



Marcelo Castello Branco, Chair of the CISAC Board

A global CMO network allowing creators to do their magical job

Today's collective management organisations play a game-changing role for the member creators they represent. CMOs operate in an interactive and complex international network that increasingly brings tremendous value for creators who are a part of it.

It is empowering to belong to a global network. It gives societies a common mission, voice and forum for exchanging best practice. CMOs' activities, from songwriting camps to technical and strategic committees, from the use of professional tools to lobbying policy makers, are all happening across this global network, with CISAC at its hub.

I can see no better example of this coordination at work than our lobbying and leveraging of the European Copyright Directive, working with GESAC, SAA, EVA and our other allies in Brussels. The upcoming implementation of this legislation gives us the monumental opportunity to create and extend best practices around the globe, while at the same time taking local values and culture into consideration.

Societies across every discipline are working hard to better serve creators in every possible way – for example, by improving data efficiencies, speeding up distributions and achieving the best possible outcomes in negotiations. This allows creators to do their magical job. We need them to carry on doing that job: changing lives, building legacies and making history as part of their creative duties.

In the digital world more than ever before, we have to fight for the fair and tangible value of creative content. This requires CMOs to have expert skills, to constantly adapt and develop new revenue opportunities across all repertoires. We have to avoid false shortcuts and distractions. There is no easy path to the future.

Looking ahead, our mission is to leverage and license all sources of future growth, without giving up the traditional pillars of income. I firmly believe that we can drive collections to new records in the upcoming decade. Some territories are already showing spectacular digital growth, demonstrating the potential for others.

There are huge challenges too, however: CMOs in some markets are working hard to better organise themselves and serve the basic needs of their creators.

There is much work to be done – for example, continuing to improve the accuracy and efficiency of distributions. This will further increase confidence in the system we proudly rely on.

Our job as CMOs is to build a better future for creators, for users of their works and for our partners. We need to be part of an unbreakable cultural chain where everyone is a respectful protagonist, and no one is left behind.

“Societies across every discipline are working hard to better serve creators in every possible way”





Gadi Oron, Director General, CISAC

I am delighted to introduce the 2019 CISAC Global Collections Report. This publication, based on exclusive data from over 120 countries, provides a unique comprehensive overview of the key data and trends in the collective management of authors' rights.

The data reported for 2018 collections provides many reasons to be satisfied about the state of our sector and optimistic about its future.

First, collections continue to grow steadily. Total collections grew just under 1% in 2018; this comparatively modest growth rate would have been four times greater, at 4.4%, if not for the devaluing effect of the exceptionally strong Euro.

Digital collections are continuing to drive this increase—up 29% in 2018—reflecting the rapid expansion of streaming and subscription video services. Member societies' digital revenues have nearly tripled in the last five years and that growth shows no signs of letting up.

The large traditional revenue streams, meanwhile, remain stable overall. Despite the mass migration of users to digital channels, TV, radio and background music continue to be the backbone of royalties collections.

CISAC societies are continuing to deliver growth and value to creators

More than ever, societies are working in a landscape of fragmenting income sources. This calls for more versatility: protecting the large traditional collections streams of live, background and broadcast, while striking new deals to monetise creators' works on YouTube, Facebook and other digital platforms. The role of authors societies in generating monetary value for millions of creators has never been more vital. Leveraging our strength in collective effort matters even more in the digital market place.

Societies are transforming their own operations to play an enlarged role. This includes licensing more digital platforms, handling the massive spike in data processing and being at the heart of policy debates where the future copyright environment is being determined.

In addition to the figures, this Report shows creators speaking out powerfully on the legislative environment. The historic European Copyright Directive, adopted in April 2019 (see page 26), is a landmark legislation that has inspired creators across the world.

For authors societies, the fight continues on many other fronts: fair remuneration for audiovisual creators, a universal

artists' resale right, and tapping into the revenue stream of private copying levies.

Market growth, transformation and the struggle for a fair environment in which creators are protected and fairly remunerated—these are the unique strengths of the collective management system that make it robust and relevant in the 21st century. These are also the key themes underlying the numbers and analysis of this Global Collections Report.

“The role of authors societies in generating monetary value for millions of creators has never been more vital”



GLOBAL COLLECTIONS IN NUMBERS

€ **9.65** bn
2018 GLOBAL COLLECTIONS
(EUR billion)

+0.9%
2018 GROWTH

+25.4%
GROWTH SINCE 2014

€ **1.64** bn
2018 DIGITAL COLLECTIONS
(EUR billion)

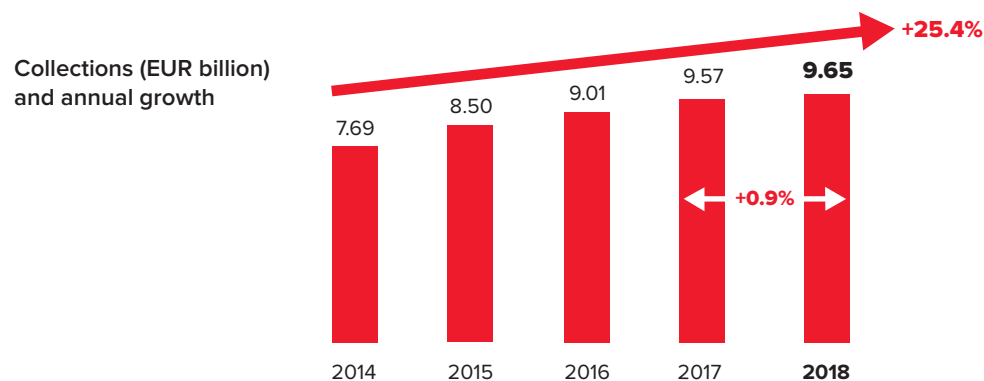
+29.0%
2018 DIGITAL INCOME GROWTH

17.0%
DIGITAL SHARE OF TOTAL COLLECTIONS



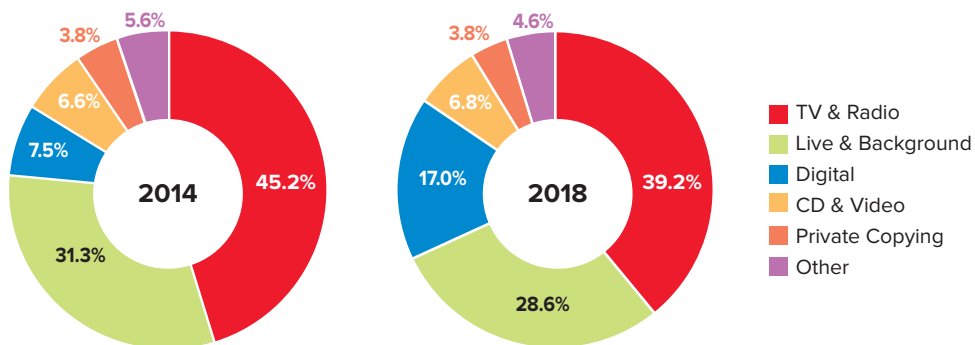
CISAC GLOBAL COLLECTIONS REPORT – HIGHLIGHTS AT A GLANCE

Global collections by CISAC member societies grew 0.9% to EUR9.65bn in 2018, spurred by strong digital growth across all repertoires and in all regions. The surge of digital income and resilience in the two other largest collections streams (TV and radio and live and background) continues to offset decline in income from physical media.



Digital is growing its share of income. In 2018, 17.0% of global collections came from digital sources, up from 7.5% in 2014, driven by rapid expansion of subscription streaming and video services. This leads to growing fragmentation of collections sources.

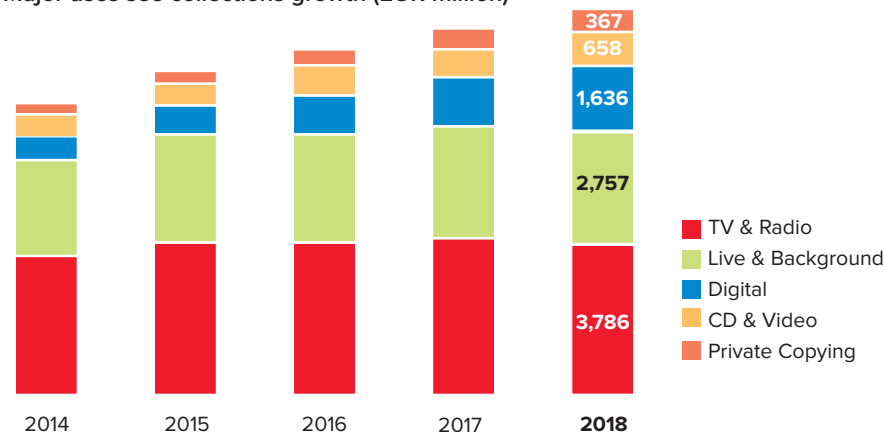
The changing mix of creators' income streams, 2018 vs 2014



Digital up 29%, traditional income streams stay strong.

Digital collections have grown by more than EUR1 billion over the last five years, from EUR580 million to EUR1.64 billion. TV and radio declined 2.4% and live and background rose 0.5% in 2018. Combined income from these traditional uses remains strong, and is EUR653 million higher in 2018 than in 2014.

Major uses see collections growth (EUR million)



Big collectors are driving growth.

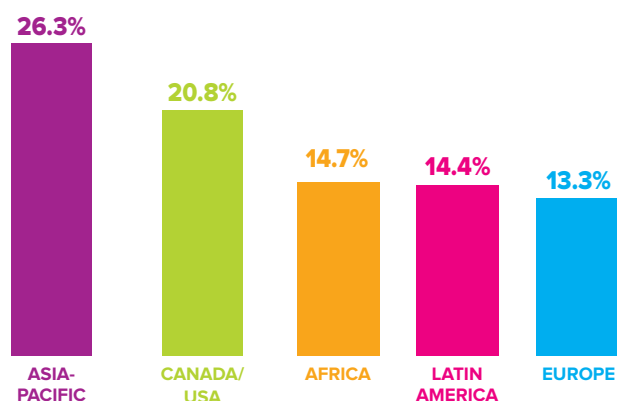
A small number of major markets are helping drive the global growth of collections. Key factors were: a doubling of digital income in France; strong digital growth in the US alongside resilient traditional collections streams of TV, radio and live and background; and digital licensing deals in Japan, a relative "latecomer" to the digital market.

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

Country	Collections 2018	Global share	Growth	Country	Collections 2018	Global share	Growth
UNITED STATES	1,938	20.1%	+2.6%	ITALY	583	6.0%	-1.3%
FRANCE	1,314	13.6%	+9.2%	AUSTRALASIA	325	3.4%	+0.9%
JAPAN	821	8.5%	+2.6%	SPAIN	285	3.0%	+27.1%
GERMANY	806	8.4%	-12.9%	CANADA	238	2.5%	-0.5%
UNITED KINGDOM	740	7.7%	-0.4%	NETHERLANDS	236	2.4%	+0.4%

Asia-Pacific is leading in digital. The migration to digital is happening at markedly different rates per country and region, with Asia claiming the largest digital share. Japan, China, Korea and Australasia are seeing rapid growth, taking Asia-Pacific's digital share (26.3%) to twice that of Europe. Europe, with well-established broadcast, live and other income streams, has the lowest digital share, at 13.3%.

Digital shares per region



Digital champions lead the way. Of the 20 top markets for collections, five countries lead the way in terms of their digital share, collecting more than a quarter of income from digital sources. Many other markets outside the world top 20, such as China, Indonesia and Mexico, have significantly higher digital shares.

Major markets with the highest digital shares

Country	Digital share	5-Year Growth
SWEDEN	39.8%	+83.1%
SOUTH KOREA	33.4%	+102%
CANADA	30.8%	+139%
DENMARK	27.0%	+192%
UNITED KINGDOM	26.1%	+146%

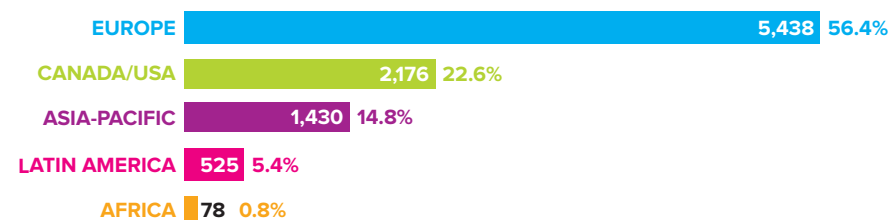
Music repertoire drives growth. Music accounts for 88.0% of total collections and grew 1.8% in 2018. All other repertoires except drama have seen strong 5-year growth. Back payments made in 2017 led to downward adjustments in 2018.

Collections by repertoire, annual growth and five-year growth (EUR million)

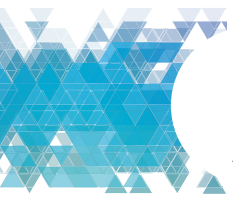
Type of Use	Collections	Annual Growth	5-Year Growth
Music	8,490	+1.8%	+26.8%
Audiovisual	605	-2.4%	+22.0%
Literary	199	-3.1%	+17.7%
Dramatic	186	-5.1%	-3.3%
Visual Arts	168	-18.4%	+19.9%

Europe leads the regions. Europe remains the largest region for collections, followed by Canada/USA and Asia-Pacific. All regions saw growth in 2018 except Latin America, impacted by declines in Brazil and Argentina.

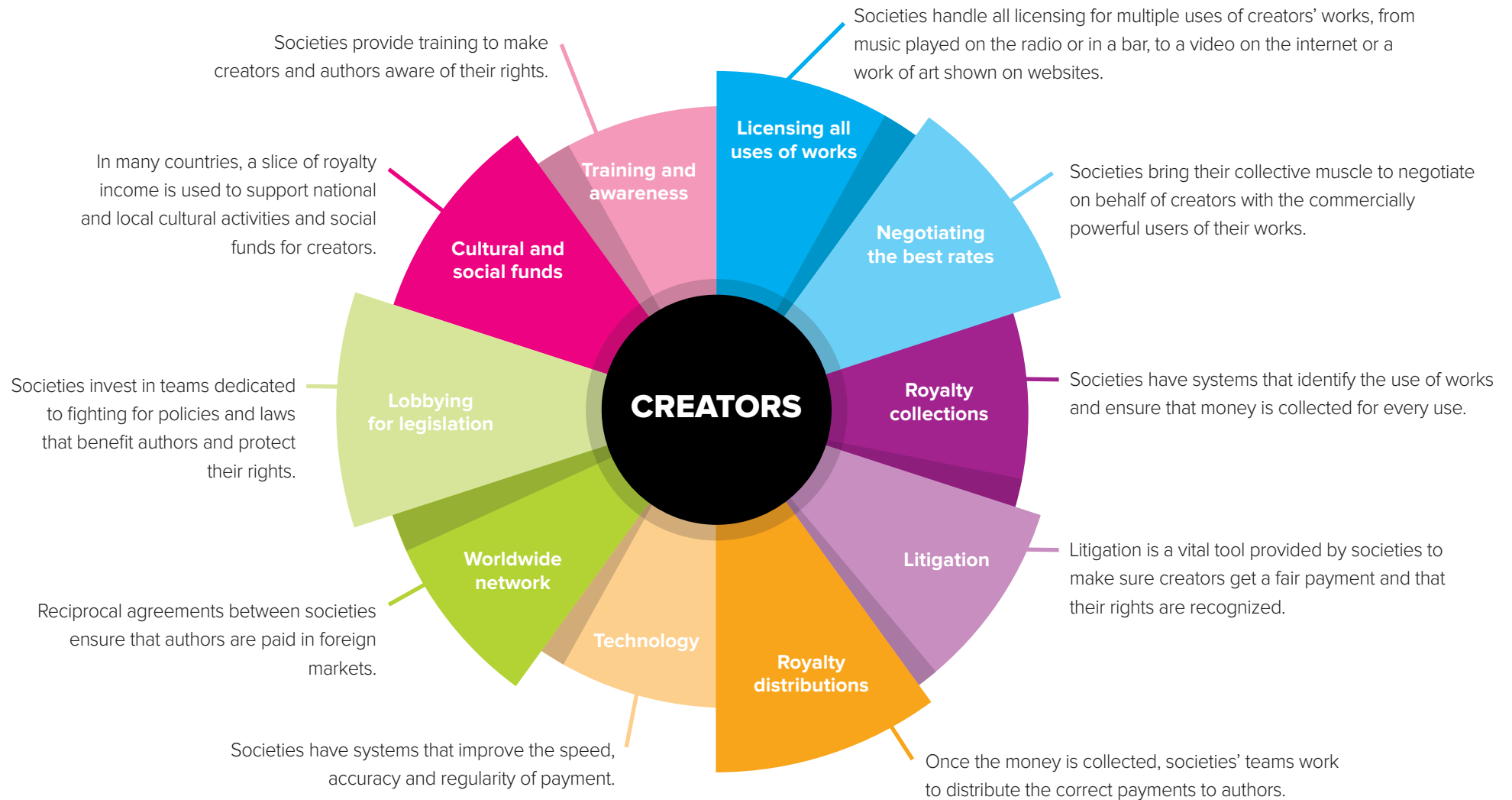
Share of global collections by region (EUR million)

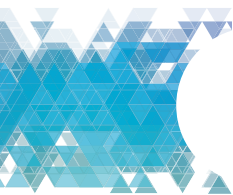


Strong euro in 2018 impacts growth. CISAC publishes collections in euros at current currency levels (i.e. taking into account the impact of annual currency fluctuations). This has reduced the growth significantly in 2018. In constant currency terms, (i.e. stripping out the impact of the strengthening euro), global collections growth would have been 4.4% in 2018.



HOW AUTHORS SOCIETIES SERVE AND EMPOWER CREATORS





AUTHORS SOCIETIES: SERVING AND EMPOWERING CREATORS

Authors societies have a single overarching mission: to serve the needs of authors and creators. They are the means by which the vast majority of authors get paid for their work. They also fight for the legal rights of authors.

These organisations are built into the fabric of national cultures and economies, and they have never been more vital and relevant than in the digital age of the 21st century.

The vast majority of authors do not have the means to license their rights for the many diverse ways in which their works are used. They need to be part of a collective structure, a role played by the authors societies.

How societies bring value

Societies license and monetise creators' works. They act as intermediaries between thousands of individual creators and users of their works.

An author's royalty payment results from hundreds of licensing agreements with different users. In the digital world, societies are proactively monetising new uses for authors. In 2018/19 many societies licensed Facebook, creating revenues for authors for the first time.

Societies negotiate the best rates. They bring their size and collective strength to match the power of large users. The digital world has helped create giant international users of creative works with huge negotiating power. Societies help authors to get value for their creations by acting on behalf of a large community of authors.

Royalty collections and distributions are enabled by investment in systems to ensure that money is collected for all forms of use of works and for accurate distribution to authors.

Many societies support cultural and social funds. They distribute a share of their collections to cultural, educational and social programmes and activities to support local talent.

Litigation driven by societies often delivers big back payments to authors. Each year large sums are secured for payment to creators as a result of settlements and court judgments. Litigation is also often an important way of ensuring authors' rights are recognized in different jurisdictions.

Lobbying for legislation is a key function of societies. In 2018 authors societies in Europe and the US successfully lobbied for historic new legislation that strengthen the rights of creators and will lead to better remuneration from digital services.

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 represents 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, and the effectiveness of current performance.

Collections per capita

The global average of collections per capita was EUR1.51 per person in 2018. As regions Europe and Canada/USA have the highest rates of collections per capita. Both regions increased year-on-year.

Europe continues to account for the majority of countries with the only non-European country being Australasia in the top 15 list. Denmark topped the global ranking per country followed by Switzerland and France.

Collections per capita by region (EUR)



2018 saw significant year-on-year percentage growth coming from several African countries including Cape Verde (+496%), Djibouti (+280%), Rwanda (+93.9%), Malawi (+84.3%), Burkina Faso (+79.6%) and Seychelles (+64.1%). Compared to 2017, additional countries that saw important growth also include Malaysia (+50.4%), Greece (+48.1%), El Salvador (+46.9%) and China (+37.2%).

Collections per capita by country (EUR)

DENMARK	24.54
SWITZERLAND	23.72
FRANCE	19.61
FINLAND	17.74
AUSTRIA	14.25
ICELAND	13.83
NETHERLANDS	13.68
SWEDEN	13.34
NORWAY	12.32
BELGIUM	11.46
UNITED KINGDOM	11.13
AUSTRALASIA	10.89
GERMANY	9.72
ITALY	9.65
LUXEMBOURG	9.13

Collections as % of GDP

The global average of collections as a percentage of GDP amounted to 0.0141% in 2018. Europe continued to lead at 0.0276%. Latin America and the Caribbean are on a par with Canada/USA..

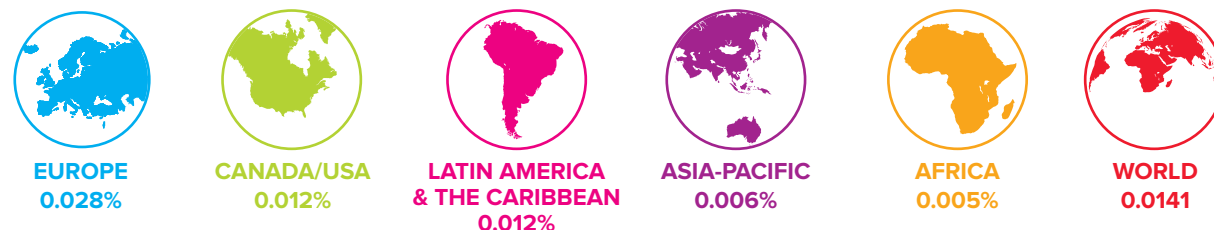
Asia-Pacific reached 0.006%, followed by Africa at 0.005%. The readmission of IPRS and India has influenced global and Asia-Pacific numbers when compared year-on-year.

In terms of countries, Europe accounts for all but one of the top 10 countries by percentage of GDP. France, Denmark and Finland remain the top countries compared to the prior year.

Argentina and Saint Lucia are the first non-European countries with 0.032% and 0.031% respectively, close to the United Kingdom. The first Asia-Pacific market, Australasia, comes in at 21st.

Other non-European countries with significant collections by GDP include Uruguay (0.021%), Japan (0.019%) and Burkina Faso (0.019%). 8 countries in Africa saw year-on-year rises, reaffirming the region's positive potential for future growth.

Collections as % of GDP by region



Collections as % of GDP by country

FRANCE	0.056%
DENMARK	0.048%
FINLAND	0.042%
SLOVENIA	0.038%
CROATIA	0.037%
SWITZERLAND	0.034%
ITALY	0.033%
AUSTRIA	0.033%
ARGENTINA	0.032%
HUNGARY	0.032%
UNITED KINGDOM	0.031%
SAINT LUCIA	0.031%
NETHERLANDS	0.031%
SWEDEN	0.029%
BELGIUM	0.029%

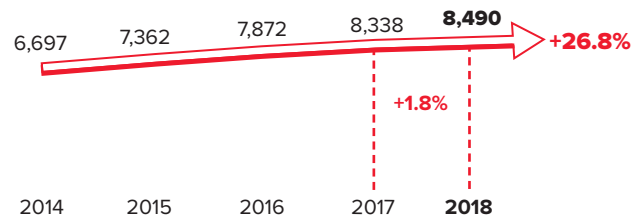


MUSIC REPERTOIRE – GLOBAL COLLECTIONS

MUSIC COLLECTIONS UP 1.8%

Collections for the musical repertoire in 2018 reached EUR8.49bn, up 1.8% from the previous year, and accounted for 88.0% of total collections. Over the past five years, music collections have experienced a continuous growth trend, with global income rising by 26.8% between 2014 and 2018.

Steady growth over five years
Collections for music repertoire 2014-2018
(EUR million)



Increasing subscription revenues drove digital growth in France (+146%), Germany (+45.2%), USA (+25.6%), and Japan (+19.6%). Two top 10 markets saw music collections fall significantly. Brazil adjusted from a 2017 result boosted by back payments.

Germany saw a downward adjustment after a large retroactive private copying payment in 2017.

Solid performances in Asia-Pacific and North America

With a 25.6% share of total music collections, Canada/USA is the second largest region for the repertoire, with the leading market – the USA – capturing 22.8% of global collections.

Collections in Asia-Pacific grew year-over-year from 15.1% of total collections to 15.7% in 2018, while Latin America and the Caribbean was down from 6.4% in 2017 to 5.4% in 2018 and Africa remained stable at 0.8%.

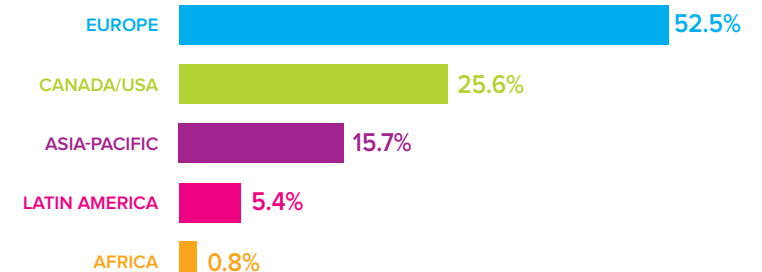
Asia-Pacific's two main markets – Japan and Australasia – account for close to 80% of collections in the region, and saw steady growth. There were steep increases in collections in other countries. The Philippines experienced 371% growth, Taiwan 33.3%, India 27.5%, Vietnam 18% and Indonesia 7.6%.

Top 10 countries for music collections (EUR million)

Country	Collections	Share of world collections	Growth
UNITED STATES	1,932	22.8%	+2.5%
FRANCE	1,006	11.9%	+13.6%
JAPAN	819	9.7%	+2.6%
GERMANY	758	8.9%	-5.9%
UNITED KINGDOM	671	7.9%	-1.2%
ITALY	450	5.3%	-1.8%
CANADA	238	2.8%	-0.5%
AUSTRALASIA	232	2.7%	+2.9%
SPAIN	227	2.7%	+29.4%
BRAZIL	194	2.3%	-23.1%

Europe collects more than half of global music revenues

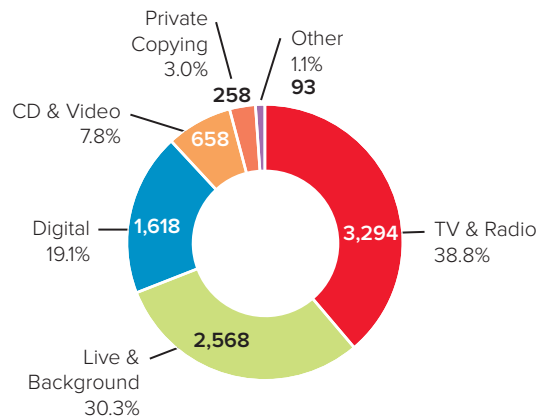
Music collections reported by region



Digital drives growth

At EUR1.6bn, digital income continues to be the driving force behind the growth of music collections, accounting now for 19.1% of the total, up from 15.0% the year before. Over the past five years, digital music revenues have increased by 185%.

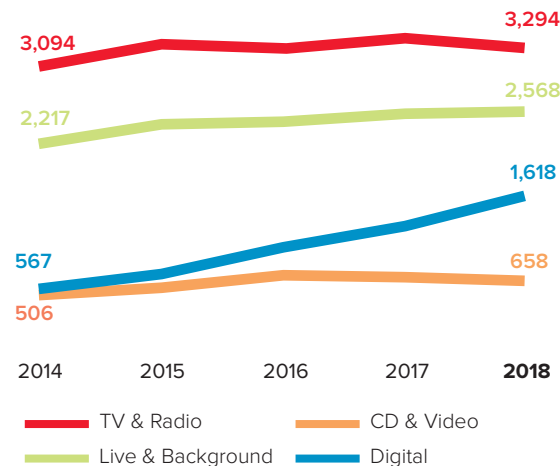
Share of music collections by use (EUR million)



However, traditional sources of revenues such as TV and radio and live and background have continued to perform well, despite a slight decline in collections from TV & radio, due to advertising revenues shifting to digital. The overall share of income from TV & radio has dropped from 40.8% of music collections to 38.8% in 2018.

Digital VS traditional to grow

Five-year trends in main music uses (EUR million)



Digital music champions

Five top 20 markets, led by Mexico, have the highest % share accounted for by digital music.

Country	Digital music share
MEXICO	48.9%
SWEDEN	42.8%
AUSTRALASIA	36.6%
SOUTH KOREA	34.8%
CANADA	30.9%

Breakdown of music collections (EUR million)

	Collections	Growth	5 year Growth
Type of Use			
TV & Radio	3,294	-3.1%	+6.5%
Live & Background	2,568	+0.8%	+15.8%
Digital	1,618	+29.6%	+185%
CD & Video	658	-5.0%	+30.0%
Private Copying	258	-24.7%	+37.2%
Synchronisation	26	-18.7%	+23.2%
Rental/Public Lending	16	-33.7%	-39.9%
Publication	6.5	-3.2%	-15.5%
Other	44	+0.5%	-35.6%
Type of Right			
Performing	6,785	+2.7%	+24.7%
Mechanical	1,398	+5.7%	+38.4%
Other	307	-24.4%	+25.3%
Total	8,490	+1.8%	+26.8%



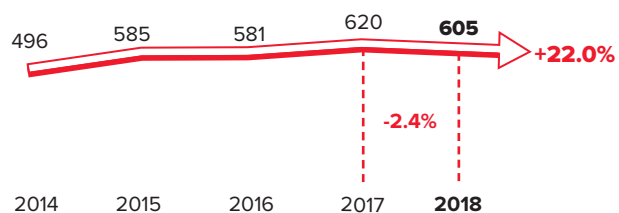
AUDIOVISUAL REPERTOIRE – GLOBAL COLLECTIONS

GLOBAL COLLECTIONS SEE STEADY FIVE-YEAR GROWTH

Global collections for audiovisual authors (such as screenwriters and directors) are generated mainly from TV and radio broadcasts and a sizeable sum from private copying levies. Total global collections declined by 2.4% to EUR605m in 2018, but have grown 22.0% from 2014 to 2018, driven by large increases in Italy, Argentina, Austria and Netherlands. Audiovisual collections now provide 6.3% of the total collected by CISAC societies globally.

Audiovisual grows more than 20% over five years

Collections for audiovisual repertoire 2014-2018 (EUR million)



The annual decline in 2018 results mainly from the impact of a large German private copying back payment in 2017. Audiovisual collections are split between a relatively small number of markets, the shares of each varying according to the legal situation in each country.

Collections for audiovisual creators are determined most importantly by the strength of their legal rights in different jurisdictions. The highest payments arise in countries and territories that have implemented an unwaivable right to remuneration, which secures the right for creators to receive a continuous royalty stream for their works (see analysis pages 32-33).

Europe leads the way

Western Europe provides the lion's share of audiovisual collections, with almost 80% of the total in 2018. Central and Eastern Europe saw particularly strong growth, with collections rising 29.6%.

Latin America, where audiovisual creators' rights are strengthening due to recent legislation in Colombia and Chile, accounts for 8.2% of the global collections total. Latin America saw substantial growth in local currency terms: applying a constant currency instead of conversion to current euros, the region saw collections leap by 61.8%.

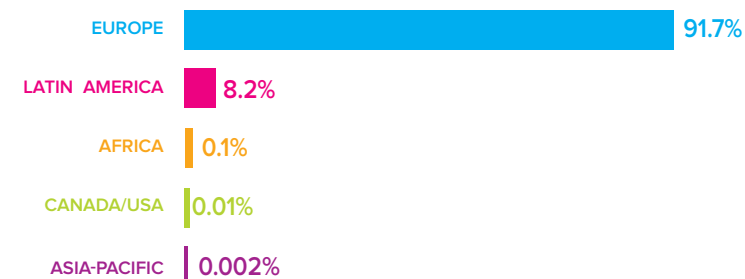
France remains by far the largest contributor for audiovisual creators, providing 36.6% of all global collections. This was followed by Switzerland (9.3%) and Italy (9.0%). Austria saw exceptional growth of 70.7% due to an additional EUR 8.4m private copying payment.

Top 10 countries for audiovisual collections (EUR million)

Country	Collections	Share of world collections	Growth
FRANCE	222	36.6%	-5.2%
SWITZERLAND	56	9.3%	-17.2%
ITALY	54	9.0%	+12.6%
ARGENTINA	44	7.2%	-3.7%
SPAIN	42	6.9%	+21.6%
POLAND	23	3.9%	+7.2%
AUSTRIA	22	3.6%	+70.7%
RUSSIAN FEDERATION	21	3.4%	+30.0%
NETHERLANDS	19	3.2%	+11.8%
UNITED KINGDOM	16	2.7%	+0.3%

Europe collects more than 90% of global audiovisual collections

Audiovisual collections reported by region



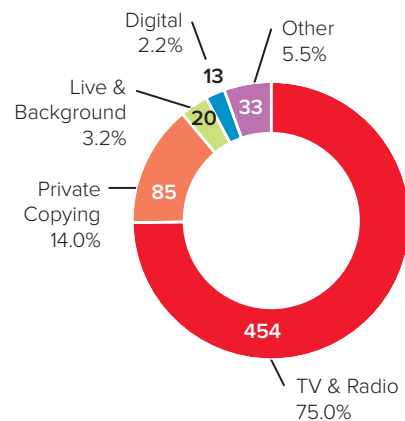
TV and radio dominate audiovisual collections

Audiovisual revenues from TV and radio grew by 2.2% in 2018. The increase means that the sector now provides 75.0% of all collections.

All of this growth came from Europe with strong increases in particular in Central and Eastern Europe.

TV & radio provides almost three-quarters of audiovisual collections

Share of audiovisual collections by use (EUR million)

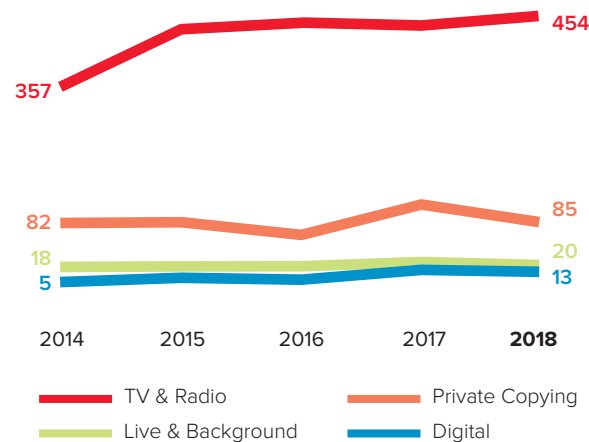


Digital collections slow in 2018

For the first time since 2014, collections from the digital use of audiovisual works slowed, falling by 8.2% to reach EUR13m. This was caused by the impact of an exceptional large back payment from YouTube in France that inflated the 2017 figure.

France provides more than two-thirds of the revenue from digital, while the remaining countries leaped 68.9%. The huge impact that a single country can make on total digital collections highlights the disparity between markets such as France, where creators benefit from a proportional right of remuneration, and those which do not.

Five-year trends in main audiovisual uses (EUR million)



Smaller markets boost live and background sector

Audiovisual live and background collections decreased slightly in 2018 but still show a 11.2% increase on 2014. There was strong growth in Romania, Mexico and Greece which increased by 52.9%, 46.6% and 31.7% respectively.

Breakdown of audiovisual collections (EUR million)

	Collections	Growth	5 year Growth
Type of Use			
TV & Radio	454	+2.2%	+27.4%
Private Copying	85	-20.8%	+3.5%
Live & Background	20	-7.3%	+11.2%
Digital	13	-8.2%	+148%
Educational Use	5.3	+5.2%	+2.4%
Mechanical Reproduction	2.7	+8.3%	-50.5%
Rental/Public Lending	1.4	+24.0%	+37.4%
Reprography	0.2	-67.0%	-59.1%
Other	23	+1.6%	+4.5%
Type of Right			
Performing	470	+1.4%	+28.4%
Mechanical	27	-36.3%	-34.9%
Other	108	-4.8%	+22.2%
Total	605	-2.4%	+22.0%



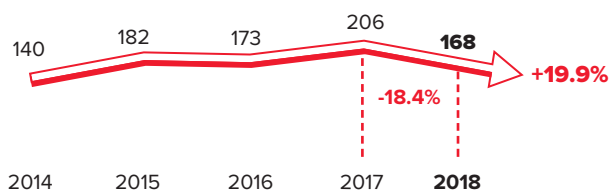
VISUAL ARTS REPERTOIRE – GLOBAL COLLECTIONS

EUROPE LEADS SECTOR

Global collections for visual artists amounted to EUR168m in 2018, an increase of 19.9% versus 2014. The repertoire now constitutes 1.7% of total global collections.

In 2017, visual artists' reprography royalties in Germany had more than doubled following a significant back payment. Their return to normal levels in 2018 led to a 18.4% decrease in the annual figure. With Germany excluded however, the visual arts repertoire saw growth of 4.2% during this period.

Visual arts grow almost 20% over five years
Visual arts collections 2014-2018 (EUR million)



Reprography and resale right lead collections

Of the different income streams, reprography remained the largest source of income in 2018, at 28.9% of visual arts collections. There was a substantial increase in Portugal due to back payments going to back to 2013, but this did not offset the larger decline in Germany.

The resale right is the number 2 collections stream for visual artists, with a share of 25.9%. The resale right is a vital income source for artists but is limited by lack of implementation of the right in many countries. CISAC and societies are campaigning to address this (see pages 29).

The live and background sector grew by 25.0% to reach EUR6.1m, the bulk coming from a Swedish state grant paid by the local society to artists who have sold works to the public.

Reproduction made up 14.0% of the total with collections from TV and radio and from private copying amounting to around 9.0% each.

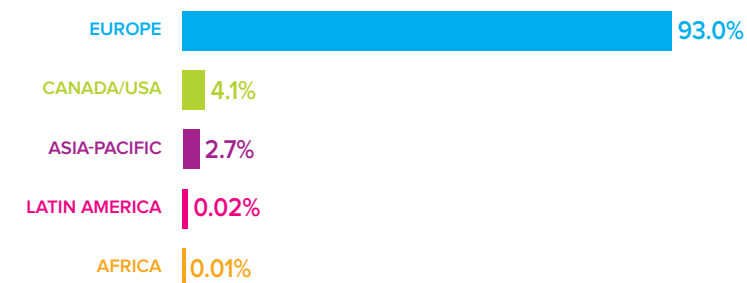
Germany remains the largest source of collections

Top 10 countries for visual arts collections (EUR million)

Country	Collections	Share of world collections	Growth
GERMANY	34	20.2%	-56.1%
FRANCE	30	18.1%	-3.9%
UNITED KINGDOM	25	14.8%	+16.7%
NETHERLANDS	15	8.8%	-7.0%
ITALY	9.5	5.7%	-5.3%
SWEDEN	9.3	5.5%	+5.2%
DENMARK	8.0	4.8%	-2.0%
UNITED STATES	6.5	3.9%	+6.7%
FINLAND	6.2	3.7%	+43.5%
SPAIN	5.0	2.9%	+44.2%

Europe collects more than 90% of global visual arts collections

Visual arts collections reported by region

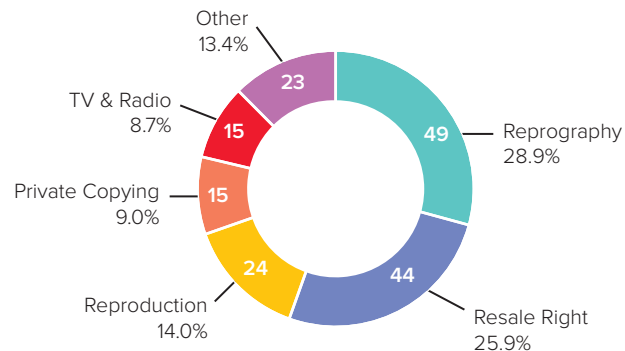


Europe leads

More than 90% of visual arts revenues are generated in Western Europe. In 2018, Germany, France and the United Kingdom were the largest contributing countries. Of those, only the UK saw growth with UK artists' revenue rising 14.9% to reach EUR24.8m. The largest percentage increases however were in Portugal and South Korea – both of which more than trebled – and in Uruguay which doubled its revenue, driven entirely by the resale right.

Resale right is a major source of collections for visual artists

Share of visual arts collections by use (EUR million)



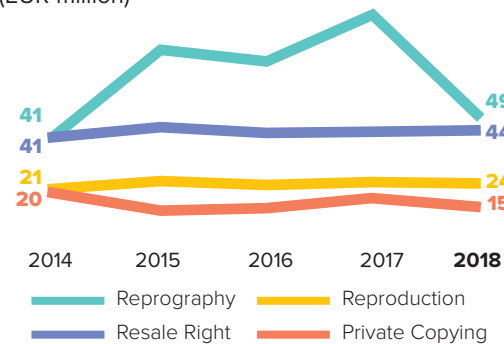
Digital sector provides greatest growth potential

Digital has great growth potential, where online exploitation of artists' works remains largely untapped. Digital revenues make up just 2.3% of the total and visual arts' five-year digital growth rate is far behind that of other repertoires at a relatively modest 18.1%.

CISAC has been supporting a game-changing technology called Automated Image Recognition (AIR) which uses visual recognition software to help

One-off back-payments strongly affect total collections

Five-year trends in main visual arts uses (EUR million)



manage the rights of visual arts in the digital domain. This project is now approaching the end of its development cycle and will become operational for the first testing societies in 2019. It is expected to become a major driver of digital revenues for visual artists in the coming years.

Breakdown of visual arts collections (EUR million)

Type of Use	Collections	Growth	5 year Growth
Reprography	49	-44.2%	+19.0%
Resale Right	44	+0.6%	+7.5%
Reproduction	24	-2.0%	+13.7%
Private Copying	15	-15.3%	-24.8%
TV & Radio	15	+2.0%	+129%
Educational Use	6.6	+56.0%	+2,909%
Live & Background	6.1	+25.0%	+45.1%
Rental/Public Lending	4.2	-16.2%	+109%
Digital	3.8	-20.8%	+18.1%
Other	1.8	+351%	-5.8%
Type of Right			
Performing	21	+7.8%	+95.9%
Mechanical	3.8	-20.8%	+18.1%
Other	143	-21.2%	+13.6%
Total	168	-18.4%	+19.9%

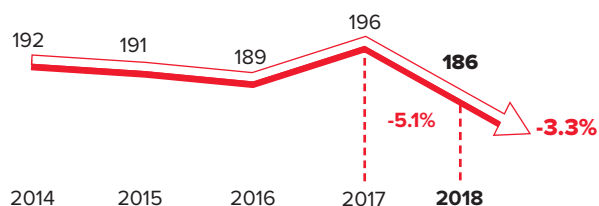


DRAMATIC REPERTOIRE – GLOBAL COLLECTIONS

LIVE THEATRE LEADS COLLECTIONS

In 2018, collections for authors of dramatic repertoire saw 85.8% of revenue coming from the live and background sector. Live theatre remains by far the most important source of remuneration for dramatic authors with TV and radio providing another 11.3% of the total.

Dramatic collections 2014-2018 (EUR million)



Overall collections in the repertoire declined by 5.1% to reach EUR186m. More than half of this decrease arises from currency conversion in Argentina, turning a 18.8% growth in local currency into a 32.5% drop when converted to euros. Similar issues affected collections in the Russian Federation.

In Italy, a four-fold increase in private copying revenue in 2017 led to an exceptional decline in the country's 2018 data, in addition to some major cultural foundations using fewer repertoire than before. This was coupled with direct deals between choreography and producers that prevent SIAE from collecting.

French revenues increase by 4.8%

In France, dramatic authors' collections grew by 4.8%, adding EUR2.5m to the sector total and benefitting from a series of world-renowned theatre festivals and an increase in higher-value productions, particularly in Paris.

France now provides 29.3% of the world's dramatic collections and has slightly closed the gap on Italy, which still leads at 33.7% of the total.

Top 5 countries for dramatic collections (EUR million)

Country	Collections	Share of world collections	Growth
ITALY	63	33.7%	-6.0%
FRANCE	55	29.3%	+4.8%
RUSSIAN FEDERATION	20	10.6%	-14.0%
ARGENTINA	12	6.4%	-32.5%
SPAIN	11	5.9%	+2.8%

Breakdown of dramatic collections (EUR million)

	Collections	Growth	5 year Growth
Type of Use			
Live & Background	160	-4.4%	-4.5%
TV & Radio	21	-1.2%	-3.2%
Private Copying	3.3	-45.4%	+43.6%
Rental/Public Lending	0.8	+19.0%	+797%
Digital	0.2	+29.3%	+3,592%
Mechanical Reproduction	0.1	-61.9%	-57.0%
Other	0.9	+28.7%	+34.6%
Type of Right			
Performing	182	-4.0%	-4.2%
Mechanical	0.1	-53.6%	-53.5%
Other	4.2	-37.0%	+77.1%
Total	186	-5.1%	-3.3%

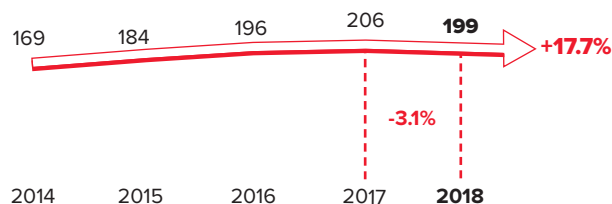


LITERARY REPERTOIRE – GLOBAL COLLECTIONS

Australia maintains lead

Collections for literary authors in 2018 amounted to EUR199m or 2.1% of the total for all repertoires. The high base created by a private copying back payment in 2017 led to a slight decrease of 3.1% in the annual growth figure. Royalties have increased 17.7% from 2014 to 2018.

Collections for literature repertoire 2014-2018 (EUR million)



Virtually (94.9%) of all collections in this repertoire come from Asia-Pacific and Western Europe with Australia standing out as the largest single contributor at 46.1% of total. Collections here saw a slight decrease in 2018, driven primarily by a fall in the Australian Dollar. In local currency, the sector saw a 3.6% increase with virtually all coming from reprography.

Cross-border public lending settlement in France

The UK was the second largest country at 14.2% share of the total with Finland at 9.8%. The largest growth comes from France, where a substantial one-off settlement for public lending fees from the Belgian government helped add EUR1m to the sector's revenue.

In Belgium, this same settlement was received in 2017 and created a high base figure, hence the apparent fall in collections to EUR1.2m. Elsewhere, Portugal saw strong growth with revenues increasing by one-half to just over EUR2.0m.

Top 5 countries for literature collections (EUR million)

Country	Collections	Share of world collections	Growth
AUSTRALIA	92	46.1%	-3.5%
UNITED KINGDOM	28	14.2%	+4.4%
FINLAND	20	9.8%	+2.3%
SWITZERLAND	15	7.4%	-3.6%
NETHERLANDS	11	5.4%	-8.4%

Reprography leads literature uses

Breakdown of literature collections (EUR million)

Type of Use	Collections	Growth	5 year Growth
Reprography	160	-0.9%	+9.5%
Rental/Public Lending	22	+2.8%	+83.9%
Private Copying	5.7	-31.9%	+189%
Educational Use	3.3	-42.3%	
Live & Background	3.2	+12.0%	+13.8%
Mechanical Reproduction	2.3	-18.5%	+6.1%
TV & Radio	1.5	-10.2%	-10.1%
Other	1.2	-9.9%	-54.0%
Type of Right			
Performing	5.3	-3.3%	+7.1%
Mechanical	1.7	-28.6%	-59.6%
Other	192	-2.8%	+20.1%
Total	199	-3.1%	+17.7%

CISAC SOCIETIES ADOPT NEW STRATEGIES AND TOOLS FOR THE DIGITAL AGE

As collective management of authors' rights transitions to new consumption patterns, authors societies are innovating and investing to serve creators in these new market conditions.

Streaming services today cover the globe, with Spotify and Apple Music available in almost 100 countries and absent in only a handful of major markets. In 2018 India effectively joined the streaming boom, with local society IPRS signing licensing deals with new platforms and growing digital revenues. Japan, a slow starter, has also caught up, with Amazon Prime and Spotify competing with local platforms such as Line Music or AWA.

In pioneer markets, sustained quarterly double-digit growth is starting to plateau only because of market saturation. In later-developing creative content markets across the world, from Eastern Europe to Africa, the challenge is to convert the smartphone-driven explosion in streaming usage to a paying subscriber base.

Investing in efficiency

Digital collections by CISAC member societies rose 29% to EUR1.64 billion in 2018. Societies are planning for an overwhelmingly digital future, driven by continuous streaming growth.

According to Beth Matthews, CEO of US society ASCAP: "Collective management organisations have been on the cutting edge of providing new data tools and technology

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Beth Matthews,
CEO, ASCAP

Collective management organisations have been on the cutting edge of providing new data tools and technology solutions to address the changing needs of our members

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solutions to address the changing needs of our members. Investing in those solutions has resulted in greater efficiency and accuracy of composition performance identification, matching and royalty payments to our members.”

In the audiovisual sector, video-on-demand is in many ways replicating the effect that streaming subscription has had on music. Netflix has 160 million subscribers globally, and its competitors such as Amazon Prime, and local services like Hulu in the US, and Roku, Pluto TV and Tubi in Asia, are also growing. Disney will launch a global service, Disney Plus, by the end of 2019.

Societies are proactively embracing change, through innovation in licensing; increased cross-border collaboration; and revolutionising their use of data and information.

PRS for Music processed over 11.2 trillion digital music performances, up from 6.6 trillion the year before, a 70% growth in data volume

Licensing pays authors

In the digital world, licensing deals embrace different business models. “The changes in how music is used, and in particular the growth of streaming services as a strategic and rapidly growing market have been key drivers as we adapt and modernise”, says Jean-Noël Tronc, director general of SACEM.

Many societies broke new ground in 2018 with unprecedented licensing deals with Facebook and its various platforms (Facebook, Instagram, Messenger and Oculus). These deals have worldwide reach.

The Facebook deal opens the door to a new revenue channel for creators worldwide, monetising a previously unlicensed platform.



Jean-Noël Tronc,
CEO, SACEM

We have changed considerably over the last few years in order to meet the challenges of an evolving and increasingly competitive world



Breaking down borders

Cross-border licensing hubs have been a key tool in the borderless digital world. ICE is one of several such one-stop-shops that allocate licences for combined repertoires on a multi-territorial basis. In continental Europe, societies from many countries have created Armonia, a multi-repertoire licensing hub, which also handles pan-European licensing for Universal Music Publishing Group. Australasia's APRA-AMCOS is creating a licensing hub covering Asia, while Uruguay-based LATINAUTOR was set up by Latin American authors' societies and more recently

by English Caribbean societies. Currently LATINAUTOR licenses the repertoire for online uses from 17 collective management entities in the region.

Managing the data explosion

Societies have also responded proactively to the explosion of data, investing in new systems that can handle the vast scale of activity. In 2018 alone, PRS for Music processed over 11.2 trillion digital music performances, up from 6.6 trillion the year before, a 70% growth in data volume.

This trend is replicated across the collective management world as societies dramatically improve their ability to process data for a vastly larger community of members. "Nowadays we never say if you're earning less than \$150, you don't count – we can reach the long tail of creators much better", says one society's head of licensing. Tronc adds: "Thousands of billions of pieces of data are now processed by our systems every year".

Forward-looking societies know the importance of evangelizing the idea of digital value. KOMCA's "Stop Dumping Music" campaign, run jointly with other parties, promoted the value of musical works and fair compensation for creators.

Major upgrade to CISAC identifier

CISAC announced a major investment in January 2019 to modernise its global identifier system, the ISWC, and



Giseob You,
Secretary General, KOMCA

We have seen rates gradually increase, enhancing the value of music for creators. We've also improved transparency of royalty calculations by introducing a new usage-based pricing model and amending our collections rules



support societies efforts to enhance data processing. CISAC's strategy is to make ISWC the industry-wide identifier of musical works and a cornerstone in data exchanges between societies, right holders and digital music providers. The new system will help speed up the assignment of ISWC codes and develop services for all players of the music value chain.

THE FUTURE OF BROADCAST TELEVISION AND HOW IT AFFECTS SOCIETIES

By David Sidebottom, Principal Analyst, Entertainment, Futuresource

Over the last 20 years, the broadcast television industry has evolved considerably, managing not one transition but several: the shift from analogue to digital; the roll out of time-shifting; and, more recently, incorporating on-demand and linear/live propositions across both Internet distribution and traditional broadcast.

This cocktail of factors has fuelled steady revenue growth. Total consumer spend on all broadcast and video reached over EUR220 billion globally in 2018, growing by almost 4% annually in recent years. Broadcast and video advertising revenues are equally significant and remain key in driving broadcast innovation, although growth is typically now at less than 2% per year.



These shifts and innovations together create a more proliferated consumer viewing landscape, and in turn an increasingly fragmented landscape for industry revenue subscription video-on-demand streams.

Today's television broadcasters are having to be ever more agile and open to new business models in order to sustain their overall revenues. This has enormous implications for the strategies, and future collections, of authors' societies.

TV advertising revenues remain robust

Overall broadcast industry revenues have yet to see any dramatic impact from these changes. Broadcast advertising revenues – a key barometer for the overall health of the commercial broadcaster sector - are flat in most established markets. But there are strong indicators of what will drive future revenues.

One of these is BVoD (Broadcast Video on Demand). This has been introduced in the last 10 years by most local broadcasters, allowing consumers to access a range of a broadcaster's content, often for 7 to 30 days after original broadcast, on demand. Live online streaming has also become part of many of these broadcasters' services.

BVoD provides a new advertising revenue stream and in recent years, this has typically compensated for any small decline in traditional linear broadcast advertising revenues.

Advances in advertising technologies, allowing targeted advertising, active ad insertion and programmatic advertising, have resulted in the ability to charge higher rates per view than for traditional broadcast, driving revenues.

Subscription VOD grows

Another key development and competitive threat to broadcasters, is the subscription video-on-demand sector, led by Netflix. By contrast with BVoD, Netflix is ad-free and claims it will remain so for the foreseeable future. This provides some respite for broadcasters: if Netflix were to begin carrying advertising, it would provide further direct competition for advertisers' budgets.

For advertisers looking to justify how to allocate budgets, diversification has introduced greater complexity to the task of comparing audience measurement across traditional broadcast and BVoD/streaming.

Broadcasters continue to evaluate diversification options

Traditional television broadcasters continue to evaluate further service diversification. A handful of broadcasters have launched low-cost streaming subscription (SVoD) services. These are positioned as an extension of their BVoD services, offering a wider range of content, sometimes ad-free and often content outside of the typical "catch-up" window. They also complement and compete with Netflix and other leading services.

However, such services rely on their own broadcast content rights. Since many broadcasters lack depth of content on their services, consumer uptake has been limited. To address this, local broadcaster joint ventures are emerging (e.g. Britbox in the UK and Salto in France), pooling content for a more comprehensive offering.

In this way, the rise in global demand for original and exclusive content, driven by streaming subscriptions, has helped local broadcasters, providing them with increased opportunities to distribute their content internationally.

Distribution of this unprecedented supply of content varies widely by country and broadcaster. Some broadcaster-created content is highly localised, whilst those that focus on premium scripted content (e.g. dramas) are finding international distribution revenue becoming an

increasingly important part of their overall revenue mix. Societies need to consider this changing mix of BVoD, SVoD and international distribution, versus traditional revenues, when dealing with local broadcasters. In particular, leading broadcasters continue to invest heavily in related ad-tech to maximise return on this rising revenue stream.

Whilst free-to-air broadcast remains comparatively robust, many Pay-TV services are struggling to manage subscriber churn. Total traditional Pay-TV subscriptions in the USA fell by over 4% in 2018, as more consumers are attracted to SVoD services. Many Pay-TV operators have launched lower cost “Pay-TV lite” services to help counter this, although this has not been widely replicated worldwide.

Youth viewing points to the future

Stats showing TV and video viewing amongst a younger demographic provide a telling insight into future trends in this sector.

Futuresource’s “Living With Digital” consumer survey from December 2018 highlights that only around one-third of 16-25 year olds’ viewing time (in the key EU countries and USA combined) is from a broadcast source. This compares to two-thirds across all ages.

More than half of viewing time in the 16-25 age group is instead through SVoD and free online video sites such as YouTube. In 10 years’ time, when this same age group are 26-35 year olds, will they still display the same behaviour, becoming “cord-nevers” (someone who has never taken Pay-TV) with less reliance on traditional broadcasters and their schedules?

These are questions that are difficult to predict, as lifestyle is as much an influence as age. But it is clear that young people’s reliance on broadcaster-sourced content will be much less than their older peers moving forwards.

Fragmentation defining the future of broadcast

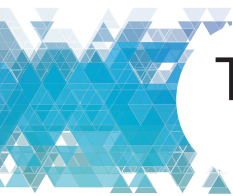
Fragmentation is the key watchword for authors societies in the TV broadcast landscape. Fragmenting business models, revenue streams, licensee landscapes and even programme genres (e.g. the emergence of eSports).

Futuresource believes the overall pie in the broadcast sector will increase. However the source of royalties will become more fragmented, and therefore more complex.



David Sidebottom,
Principal Analyst, Entertainment,
Futuresource

“Futuresource believes the overall pie in broadcast sector will increase. However the source of royalties will become more fragmented, and therefore more complex”



THE EU COPYRIGHT DIRECTIVE: CREATORS SEE A GLOBAL ANSWER TO THE TRANSFER OF VALUE

The appropriation of the value of creators' works on digital platforms has been the pre-eminent issue for CISAC member societies for the last decade. In April 2019, however, after a five-year debate, the European Union adopted world-leading legislation which sets new, better conditions for fairer deals between digital services and creators.

If 2019 was about securing the Directive's adoption in the EU, 2020 will be about the critical campaign for correct implementation, as well as the opportunities Europe's action presents for legislators globally. The EU Directive is not a simple legal template for other markets, but it lays down principles with important global implications. These affect discussions and reviews including in the US, Japan, Australia, New Zealand and China.

Relationship with platforms

The EU Directive on Copyright in the Digital Single Market, which now needs to be transposed into the law of European Union's members states, goes further than any legislation in addressing the so-called "transfer of value". Article 17 of the Directive (formerly Article 13) provides the crucial confirmation that user-generated content services such as YouTube and Facebook are covered under copyright rules and must be licensed by creators, just as other digital platforms are (from Spotify and Amazon to Apple and Netflix).

The legislation also makes it clear that YouTube and other such services cannot benefit from "safe harbour" exceptions in the law which the UGC services have mis-used in the past to avoid copyright responsibility. This has immense international implications, particularly in countries such as the US and Australia where, to different degrees, "safe harbours" continue to shelter UGC services from the responsibilities of normal music services.

CISAC Director-General Gadi Oron spells out the value of this clarification. "The directive confirms what right holders have known for years: that safe harbours are a 20th century solution to a 21st century problem. A necessary aid to protect start-ups from liability in the 1990s, but obsolete and unfair for use by the global tech giants of today."

For societies and creators around the world, the lack of such clarification up until now has been the root cause of the weakness of creators in licensing negotiations with UGC services. This is reflected in the breakdown of royalties collected by CISAC members societies. While digital royalties for creators are growing fast, they still account for only 17% of total collections. Services such as YouTube, though licensed, contribute a very small fraction of those revenues.

The Directive also establishes an essential principle in law – that of proportionate remuneration for creators. This is especially important for audiovisual creators – film and TV directors and screenwriters – who currently lack the negotiating power to secure an equitable share in the success of a project they have worked on and helped flourish.

While digital royalties for creators are growing fast, they still account for only 17% of total collections

Creators work to export EU principles worldwide

The directive also illuminated important principles about the wider role of copyright. Not surprisingly, the tech companies lobbied heavily against the legislation, with an onslaught of misinformation. "It was an incredibly difficult battle," says songwriter Crispin Hunt, Chair of the Ivors Academy and board member of the UK's PRS for Music. "It became clear early on that it was as much about copyright as it was about whether the internet could be or should be regulated at all. But in the end, we got our voices heard".

Hunt, who was on the lobbying front line, sees direct benefits to music creators, but only if the directive is correctly implemented. “If we work on the assumption that some of the value captured by YouTube can now be returned back to those who created it, music could go through a fantastic renaissance.”

Global resonance

The Directive has fueled creators’ advocacy work in every region. In Australia and New Zealand, the campaign on the transfer of value has the same goals as in Europe: Jenny Morris, songwriter and Chair of APRA Board, says: “The digital music revolution has provided unprecedented opportunities for both music creators and music fans. It’s crucial that global tech giants, who rely on our creative content, take meaningful action to ensure music creators’ work is rightfully valued.”

The EU directive resonates in Latin America, too. Songwriter and performer Diego Drexler, a board member of Uruguay’s rights society Agadu says: “The EU legislation is a big opportunity for the whole world – it’s like a light to us and we have to continue the good work of the authors in Europe.”

“When I meet artists from other countries I realise that we in South America are in the same position. The transfer of value affects us all, and especially creators in our markets where digital is a bigger part of the market than in other countries”.

For Drexler, the need for DSPs to negotiate license for content, including for UGC is a vital step forward. “It’s really difficult to have conversations with Google right now. They say: “we’ll pay you this” and we have to say “thanks”. He says Latin America governments should now adopt similar legislation that will make it mandatory to obtain a license from rights holders and pay creators a fair remuneration.

Drexler sees another big win from the European debate – it has shown the success that can be achieved when creators come out in a united front. “Policy makers don’t always want to hear from expert copyright lawyers, they need to hear it from the creators themselves,” he says.

“ Policy makers don’t always want to hear from expert copyright lawyers, they need to hear it from the creators themselves ”



Crispin Hunt: on the lobbying front line.



Jenny Morris: call to action from Australia and New Zealand.



Diego Drexler: directive resonates in Latin America.

WHY VISUAL ARTISTS NEED A PLACE AT THE NEGOTIATING TABLE



CISAC Vice President Miquel Barceló

Miquel Barceló, Spanish artist and Vice President of CISAC, is a campaigner for the rights of visual artists around the world. In this Q&A, he explains why.

Why is the fight for the rights of artists, and especially the resale right, so important to you?

I find it quite paradoxical that those who are least present at the negotiating table are the artists who created the work. Once they are put on the market, our works escape us and we lose control of them. I am delighted that my works are in many collectors' hands, but when my works are sold, resold and gain value, I rarely benefit from it except in countries that have the resale right. That is why I strongly support CISAC's work on the rights of visual artists.

Studies show that the work of visual artists generates billions of euros of revenue and jobs. Is that economic value widely enough understood?

The artist is usually working alone in a studio, but there are thousands of us at work and all around us there is indeed a large economy to which we contribute. We need to make ourselves understood with policy makers and help them realise that we are at the origin of this important art economy and that we should have our place at the table.

What role does CISAC have to play in this campaign?

Artistic works circulate globally. My works are exhibited all around the world. A ceramic I created, for example, in Mali or Majorca will end up in Asia-Pacific or Latin America. We do need a legal framework that is no longer just national,

or regional like Europe, but global. And for that, we need advocates of the cause of artists, and it seems legitimate that CISAC plays this role.

CISAC, which increasingly works with governments and organisations like WIPO, gets our message across. Artists have mobilised around the world for their rights.

Europe has led the way by introducing the resale right many years ago. I hope that other countries will follow its example, especially the United States and China, which are two of the largest markets for the visual arts.

Why has there been such strong support from artists all over the world for the international adoption of the resale right?

The resale right has a significant economic impact for those artists who benefit from it. It also allows us to continue to participate in the life of our works through time. It doesn't sound like much, but it's not insignificant. It's a recognition.

“ We are at the origin of this important art economy ”

ARTIST'S RESALE RIGHT CAN "CORRECT A GLARING INEQUITY"

In France, as in more than 80 territories around the world, artists benefit from the artist's resale right (ARR), allowing them to earn a share of the proceeds when their works are resold by auction houses and galleries. The right generated EUR44m in collections globally in 2018, providing a crucial income for artists.

In Canada, artists neither enjoy the ARR nor share in resale proceeds. Canadian artist, academic and policy advocate Grant McConnell is on the front line of a creators' campaign for the resale right in Canada. This would reward local artists not only at home but—under global reciprocity rules—also in art markets in the UK, France and all countries where the right exists.

Canada: work in progress

"We've been very working very hard over the past 10 years and we have gained a lot of support," explains McConnell, who has worked alongside CISAC's global campaign for the resale right in WIPO. Canada is one of a few major markets, along with the US, Japan and China, where this right is absent.

For McConnell, the current copyright review in Canada has been an important opportunity to raise awareness of the issue. The Standing Committee on Canadian Heritage at the House of Commons recommended that "the Government of Canada establish an artist's resale right". Similarly, the Commons' Standing Committee on Industry, Science and Technology has recommended that the government explore the possibility to introduce the ARR. CISAC made a submission to the Committee supporting the introduction of the ARR.

"The ARR would correct a glaring inequity," says McConnell. "Once established, it will be seen as a corrective for a lot of errors from colonial inheritance when it comes to indigenous artists in Canada." He cites Inuit artist Mattiussi Ivaikut as one of the most vocal proponents of the right after he saw one of his works being sold from his studio for CA\$200, but saw it being resold a short time later for CA\$5,000.

France: respect and income for artists

In France, the resale right pays more than EUR9m of income for artists. Marie-Anne Ferry-Fall, director general of the French Société des auteurs dans les Arts Graphiques et Plastiques (ADAGP) works in partnership with CISAC to advise governments and international agencies on the benefits of adopting the right globally.



Grant McConnell,
Artist, academic, policy advocate,
Canada.



Marie-Anne Ferry-Fall,
Director General of ADAGP
France.

Thanks to these efforts, UN intellectual property agency WIPO's Standing Committee on Copyright (SCCR) has set up a task force to evaluate the impact of the implementation of a resale right.

"We are going to strengthen the network of countries supporting the ARR. We have received a lot of support from the African Group at WIPO. One pivotal country to win over would be China, which is currently the second largest art market in the world."

The resilience of the British and the French art market demonstrates that the resale right helps creators at no cost to business and even boosts the creative industries. "CISAC studies show the sector of visual arts is a major supplier of jobs and contributes to the overall economy," says Ferry-Fall.

€5,500
AVERAGE ANNUAL EARNINGS
OF A VISUAL ARTIST

€110 bn
VALUE OF UK CREATIVE
INDUSTRIES

(DACS, UK)

AUDIOVISUAL CREATORS MAKE HEADWAY IN THE CAMPAIGN FOR FAIR RIGHTS

Audiovisual collections are a key revenue source for screenwriters and directors. Income collected by CISAC's member audiovisual societies has seen steady growth in recent years – up nearly over 22% since 2014 to EUR605m, driven by improving efficiencies, settlements securing back payments from previous years, and a more positive rights environment.

However, audiovisual collections by authors societies represents an under-performing sector. This is most apparent in the inadequacy of remuneration for digital channels. The explosion in digital use of creators works still amounts to just 2.2% of the total.

As new entrants such as YouTube, Netflix, Amazon, Apple TV and a host of local competitors have been revolutionising the sector, a huge disparity has appeared between the profits their work makes for these online platforms and the remuneration of the creators behind them.

Creators push for change

To address this injustice, audiovisual creators are pushing worldwide for legislative change. Since 2014 CISAC has been working in an alliance of audiovisual sector groups to bring about a simple change in the law to ensure fair pay and restore equality for screenwriters and directors.

€ **605** m
GLOBAL AUDIOVISUAL
COLLECTIONS

+22%
INCREASE SINCE 2014



Bong Joon-ho,
film director and
screenwriter

Directors, as creators, rightfully deserve fair remuneration. Let's work together to implement a proper system



Thousands of creators worldwide now support the campaign, “Directors, as creators, rightfully deserve fair remuneration. Let's work together to implement a proper system,” says Bong Joon-ho, Korean director of *Parasite* and winner of the 2019 Palme d'Or award at the Cannes Film Festival.

Yves Nilly, screenwriter and president of Writers & Directors Worldwide, cites research commissioned by the international audiovisual groups FERA (Federation of European Film Directors) and FSE (Federation of Screenwriters in Europe) in 2019¹ illuminating the need for a legislative fix: “In Europe, 85% of screenwriters and directors are freelancers and half of us already need a second job to survive. This means that we have no negotiating power against the giant digital



Yves Nilly,
screenwriter and President
of W&DW (Writers & Directors
Worldwide)

If we're to hold on to our rights, they need to be unwaivable and set into law



distributors that have emerged on the back of our work. If we're to hold on to our rights, they need to be unwaivable and set into law.”

Sarah Gavron, director of films including *Suffragette*, says that “The industry will only become stronger and the stories more varied and richer if it allows access for creatives—at the moment many creatives drop out or don't even begin as it is financially unviable”.

Breakthrough in Europe – the Copyright Directive

In April 2019 the campaign achieved a major step forward in the form of the Copyright Directive, a key legislative opportunity on which more than 21,000 directors and

1- European survey on the remuneration of audiovisual authors, FERA/FSE 2019

screenwriters petitioned the EU. Most importantly, the directive establishes, for the first time, the principle that audiovisual creators are entitled to receive appropriate and proportionate remuneration.

The legislation also improves transparency in the copyright value chain so that, as distribution extends across national borders, creators still know where their work is being used. A recent study by audiovisual society SCAM in France showed that this is not currently the case for 79% of documentary filmmakers.

The directive also allows creators to renegotiate their contracts if the original agreement is proved to be disproportionately low compared to the revenues their work delivers.

Global legislative progress

Outside Europe, the audiovisual campaign has proved most effective in Latin America. Chilean film director Silvio Caiozzi, winner of the Grand Prix des Amériques award for his 2017 film *Y de pronto el amanecer*, says: “It is only fair that the creative efforts and talent that go into months and years of work be fairly compensated. It is not right that most countries do not fairly compensate audiovisual directors and screenwriters.”

Chile led the way in 2016 passing the “Ricardo Larraín bill” into law. This extended national legislation to ensure an unwaivable right to equitable remuneration for screenwriters and film directors.



Silvio Caiozzi,
film director

It is not right that most countries do not fairly compensate audiovisual directors and screenwriters



In 2017 Colombia followed with the “Pepe Sánchez Act” being adopted, modifying the country’s author’s rights law to add a remuneration right for screenwriters and directors from the public broadcast of their works. In late 2018, Colombian society REDES received government authorisation to operate.

Further progress has established infrastructure to take advantage of new rights and to strengthen the campaign. The Latin American audiovisual CMO federation FESAAL was created in 2018. Soon after, in 2019, two new audiovisual societies in Brazil were licensed to collect for creators. Two new Writers & Directors Worldwide alliances have



Sarah Gavron,
director

I know how vital fair remuneration for creators is



also been established: the Pan-African Alliance of Screenwriters and Filmmakers (APASER) and the Alliance of Asia-Pacific Audiovisual Writers and Directors (AAPA).

The legal case for a remuneration right

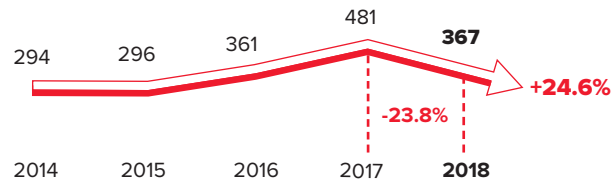
In May 2018, CISAC joined with SAA (Society of Audiovisual Authors) and W&DW to release “The International Legal Study on Implementing an Unwaivable Right for Audiovisual Authors”.

Authored by Prof. Raquel Xalabarder, intellectual property chair at the Universitat Oberta de Catalunya, this in-depth legal analysis recommends that an unwaivable and inalienable right to remuneration should become a provision stated in international law.

GROWING PRIVATE COPYING REMUNERATION: A CASE STUDY FROM MALAWI

Private copying levies are a significant but widely untapped source of revenue for creators. This is comprehensively outlined in CISAC's Private Copying Global Study, a first-ever global analysis of private copying systems examining the laws of 191 countries on five continents.

2014-2018 Global private copying collections (EUR million)



The study, published in 2017, identifies territories that could enact effective private copying systems to support creators.

In 2018, 41 countries collected EUR367m for private copying with significant potential for future growth. Since 2014, global private copying collections have climbed 24.6%.

Many markets in Africa stand to benefit considerably from improved private copying collections. Malawi presents an example of how a well-coordinated campaign can bring about legislative change and sharply increased income for creators.

As with all markets, Malawi's bid to generate private copying revenues started with the country's legal framework. Its copyright law from 1999 was updated in 2016 to provide the necessary measures for private copying. However, in order to be effective today, regulations needed to be developed for COSOMA to levy digital equipment and media devices (e.g., smartphones, CDs, computers).

Dora Salamba, COSOMA CEO says: "We engaged stakeholders and received support from CISAC to advance our case. Artists were able to speak to the minds and emotions of people to introduce the system."

Economic benefits promoted

Using the CISAC study, COSOMA convinced the Ministry of Finance of the economic benefits of private copying and that it would not be another tax. COSOMA worked together on the legislation with the Ministry to then authorise the Malawian revenue collecting service to collect from the device importers. Establishing this cooperation was a turning point for the country's creators.

The campaign shifted to educating importers and the Information Communication Technology Association of Malawi, who were at first reluctant to comply. COSOMA pointed out that private copying would not impact prices or revenues as feared.

Creators proved pivotal in the campaign too. Not only will private copying support their ability to earn a living from

“



Dora Salamba,
COSOMA CEO

We have a lot of challenges in the creative sector in Malawi. Private copying will go a long way in trying to fertilize the industry

”

their works, but it allowed a fund to be established to support the future creators in Malawi.

Malawi's new private copying law has been directly reaping rewards for creators. Between April and July 2019, the society collected EUR235k from private copying. This puts it on course to collect a total of EUR1.2m in 2019, more than tripling total annual collections.

COPYRIGHT AND THE BUSINESS OF CREATIVE INDUSTRIES

A free global online course by CISAC and FutureLearn



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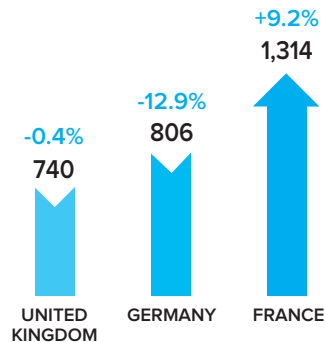


REGION
EUROPE

COLLECTIONS CONTINUE TO GROW



Largest collecting countries and annual growth (EUR million)



CISAC's society members in Europe collected EUR5.44bn on behalf of creators in 2018. This represents an increase of more than EUR50m or 1.0% over the previous year. The region now makes up 56.4% of the global total.

In 2017, an exceptional legal victory saw Germany achieve a EUR91m back payment for private copying usage. This drove a large proportion of that year's growth and created a high base from which to build in 2018.

Nevertheless, CISAC members saw collections growth in two thirds of all European countries and 17.1% total growth over the past five years.

France is the largest contributor to collections in Europe, adding EUR111m in 2018 to reach EUR1.3bn and account for just under

one quarter of Europe's total. Germany follows at 14.8%, and then the UK (13.6%), Italy (10.7%) and Spain (5.2%).

Many smaller collecting countries in Europe saw higher than average increases. Discounting the region's top 5 markets, there was 4.4% year-on-year growth in 2018, and 15.2% over five years.

Strong performers included Slovenia, which since 2014 grew by 102%, Iceland (89.8%), Romania (65.6%) and Bosnia and Herzegovina (60.3%). These were driven mainly by improving efficiencies, economies of scale and the addition of new society members in some territories.



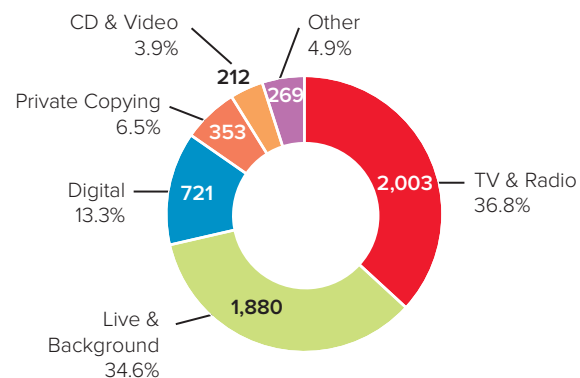
EUROPE TYPES OF USE

TV and radio exceed EUR2bn, live music strong

Collections from the use of music and audiovisual creators' works on TV and radio grew by 1.4% to pass the EUR2bn mark, indicating resilience in this sector despite the shift of users to digital. TV and radio account for 36.8% of the region's collections.

In the UK, these collections grew by 1.0% on top of a strong rise in 2017 helped by a one-off back payment from a national TV broadcaster. Growth in 2018 came despite a continued decline in linear TV viewing and was primarily due to the impact of newly negotiated licences.

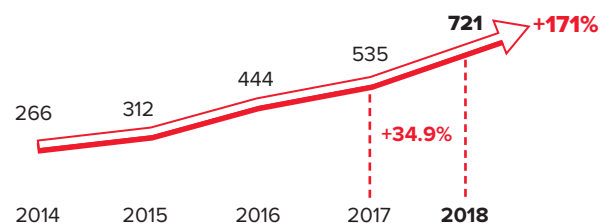
Share of collections by use (EUR million)



In a tough market, societies continue to fight with success for fair broadcast licensing rates. In Norway, local authors' society TONO finally prevailed in a six-year legal battle against a large terrestrial pay TV provider. The claim comprised over 20 TV channels for which the TV distributor is now liable to pay compensation for music rights.

The live music sector continues to grow healthily across Europe, with strong demand for concerts and festivals. Live and background collections reported by CISAC societies rose 1.2% in 2018.

Digital growth 2014-2018 (EUR million)



Digital grows by more than one third

Digital collections grew 34.9% in 2018 to EUR721m. The surge in streaming-led consumption has seen digital collections nearly triple (up 179%) over the past five years. However, digital still accounts for only 13.3% of collections in Europe – a reflection of the gross undervaluation of works by user-generated content digital platforms known as the “transfer of value”.

The two main drivers of digital growth in 2018 were France, which more than doubled its collections in this sector, and Germany which rose by 41.4%. The exceptional performance in France was attributed to new global deals with digital platforms covering international and national repertoires managed by SACEM.

Breakdown of regional collections (EUR million)

Repertoire	Collections	Growth	5 year growth
Music	4,457	+2.6%	+17.4%
Audiovisual	555	-2.4%	+21.1%
Dramatic	170	-2.5%	-3.0%
Visual Arts	156	-20.6%	+17.5%
Literary	100	+0.1%	+25.1%

Type of Use	Collections	Growth	5 year growth
TV & Radio	2,003	+1.4%	+7.8%
Live & Background	1,880	+1.2%	+9.8%
Private Copying	353	-24.6%	+24.5%
Digital	721	+34.9%	+171%
CD & Video	212	-12.3%	-20.9%
Reprography	114	-24.5%	+13.0%
Resale Right	43	+0.4%	+6.9%
Rental/Public Lending	32	-2.4%	+66.6%
Reproduction	15	-6.4%	+0.6%
Synchronisation	12	-1.1%	+26.3%
Educational Use	11	+11.4%	+97.3%
Mechanical Reproduction	4.2	-1.6%	-41.0%
Publication	0.01	+208%	-51.5%
Other	39	+0.8%	-33.4%

Type of Right	Collections	Growth	5 year growth
Performing	4,119	+4.1%	+18%
Mechanical	722	+3.6%	+7.8%
Other	598	-18.4%	+25.7%

Total	Collections	Growth	5 year growth
Total	5,438	+1.0%	+17.1%

A relatively late adopter of digital by comparison with other territories, Germany is now seeing sharp streaming growth at the expense of physical media, which are down by more than a quarter since 2014.



EUROPE REPERTOIRES

Music:

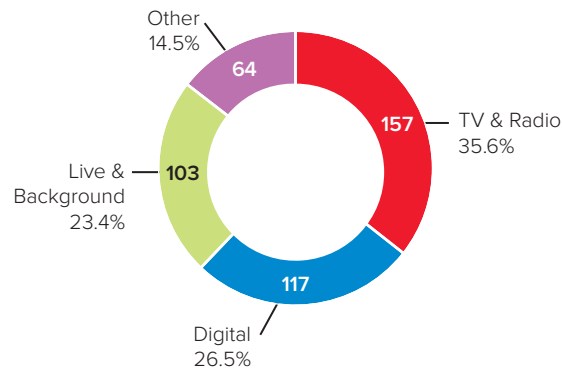
Digital up 34.9%, Nordics lead

The Nordic countries maintain their outstanding lead in the digital sector, driven by music subscription streaming. However, growth rates appear to be levelling out compared to other countries in the region as the take-up of premium subscription services hits record levels. Denmark saw 23.8% year-on-year growth in 2018 and a near 200% rise over five years. Sweden saw a 21.4% annual increase, followed by Norway at 11.2% and Finland at 9.3%.

In those four countries, digital accounts for 26.5% of collections – twice the European average.

Digital success in Scandinavia has been helped by closer intra-region collaboration that has brought additional efficiencies to the collection process. During 2018, the Polaris Music Hub initiative continued to expand, aiming to add a multi-territorial licensing unit for streaming services and other online players.

Share of music collections by use in the Nordics (EUR million)



Audiovisual makes up 10.2% of collections

Audiovisual collections in Europe account for 10.2% of the region's total. A large 2017 private copying back-payment in Germany significantly boosted collections in 2017, following which the sector remained largely flat in 2018. Discounting Germany, the rest of the audiovisual sector grew by 2.9%.

Strong performances in Austria, Spain and Italy were highlights, with the latter concluding a negotiation of a backlog of payment with an important national broadcaster. This success compensated for the interruption of payments by a primary Pay TV distributor in 2018 and led to Italian annual growth of EUR6.0m or 12.6% (see Italy, page 39).

Top 5 audiovisual collections 2014-2018 (EUR million)

	2014	2015	2016	2017	2018
FRANCE	209	218	224	234	222
SWITZERLAND	61	74	76	68	56
ITALY	34	73	71	48	54
SPAIN	35	34	34	34	42
POLAND	19	18	18	22	23



EUROPE REPERTOIRES

Resale right hits 27.5% of visual arts collections

In Europe, the resale right, a vital source of income for visual artists in countries where legislation allows its collection, generated 27.5% of all visual art income – significantly up on the 21.7% share of 2017.

These collections grew by 10.1% in Italy, 8.5% in Germany and 1.9% in the UK which remains the largest market and generates more than one-third of all European resale right income. A notable milestone in 2018 was UK visual arts society DACS passing the £80m mark (EUR90m) in resale right royalties. Over 50% of the works generating these resale right collections each year are sold exclusively under £5,000 (EUR5,600), highlighting the right's value to artists at all levels.

Visual artists' income from the resale right was exceeded only by reprography, which comprises 31.1% of collections. The region's visual arts total in 2018 was affected by the large one-off back-payment of 2017, declining year-on-year. However, income for this repertoire is still up 19.2% over five-years, from 2014 to 2018.

European dramatic and literary repertoires stable

Dramatic and literary repertoires held their ground in 2018, contributing 3.1% and 1.8% to the region's collections. Both sectors saw significant drops in private copying and TV and radio, the former largely attributable to the high 2017 base.

In the dramatic repertoire, national increases in France, Poland, Spain and Portugal were offset by a decline in live and background collections and a private copying back payment.

Top uses by repertoire (EUR million)

	Collections	Growth	5 year Growth
MUSIC			
Live & Background	1,707	+1.4%	+11.0%
TV & Radio	1,560	+1.1%	+3.7%
Digital	704	+36.6%	+173.4%
Music all uses	4,457	+2.6%	+17.4%
AUDIOVISUAL			
TV & Radio	406	+2.6%	+25.1%
Private Copying	85	-20.9%	+4.1%
Live & Background	18	-6.2%	+18.0%
Audiovisual all uses	555	-2.4%	+21.1%
DRAMATIC			
Live & Background	145	-1.0%	-4.4%
TV & Radio	20	-1.8%	-4.0%
Private Copying	2.7	-48.8%	+87.4%
Dramatic all uses	170	-2.5%	-3.0%
VISUAL ARTS			
Reprography	49	-44.2%	+19.2%
Resale Right	43	+0.4%	+6.9%
Private Copying	15	-15.2%	-24.8%
Visual Arts all uses	156	-20.6%	+17.5%
LITERARY			
Reprography	65	+3.3%	+9.2%
Rental/Public Lending	22	+2.8%	+83.8%
Private Copying	5.5	-32.7%	+279%
Literary all uses	100	+0.1%	+25.1%

DENMARK

A DIGITAL CHAMPION

Denmark is one of the digital champions of the collective management sector. It is one of the most connected countries in the world, with 97% of the country's population of 5.7 million inhabitants having online access. Digital collections have nearly tripled (up 192%) in the last five years and have now reached 27% of total income, twice the average digital share in Europe.

With total collections of DKK1,060m, the Danish market overall saw a slight decline in 2018, down 1.5% year-on-year. However, over the past five years, collections have risen 6.7%.

Music collections reached DKK1,000m, down 1.4% on 2017's figures. The difference between the two years is related to arrears from TV distribution for 2014 to 2017, accounted for in 2017, but which did not roll over in 2018.

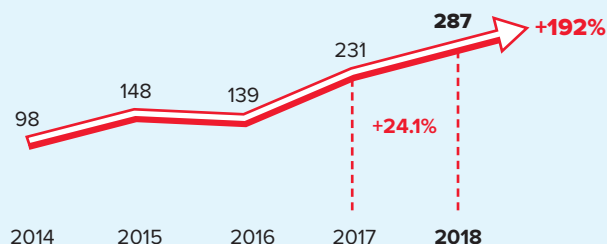
Video on demand on the rise

Digital growth in Denmark is being boosted by the surge in popularity of video on demand services. Collections from VoD services grew 18% in 2018. At the same time, income from traditional radio and TV broadcasting and live music remain resilient.

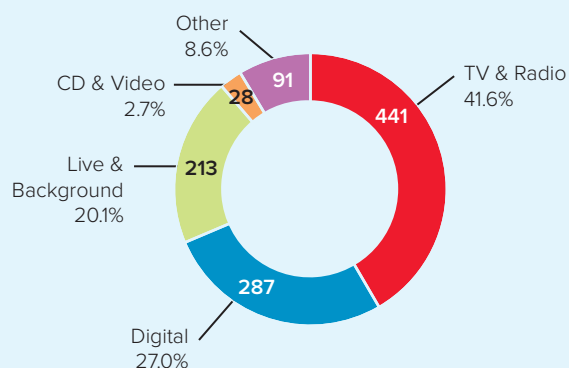
In 2018, music society KODA was active in negotiating new licensing deals with content users such as telecoms group TDC for TV distribution, and broadcasters such as regional radio stations and national radio group Bauer Media.

Investment in increased efficiencies in distributions and data processing are a major focus at KODA. These include moving to monthly distributions and shortening the time lag between performance and distribution from seven to two months. The society's administration rate in 2018 was 10.7%.

Digital growth 2014-2018 (DKK million)



Share of collections by use (DKK million)



Analysis shows concentration of income

KODA's research shows that these growing collections are being shared among a significantly rising membership. By contrast with a small core of high-earning members, the vast majority of its members earn very small amounts in royalties.

While 354 members received more than DKK150,000 (EUR20,000) in 2018, some 20,000 members – an 89% share – received less than DKK 10,000 (EUR1,340). KODA received no fewer than 1,600 new members in 2018.



Danish Krone 1.1 billion
Euro 142 million

Collections per capita €24.54
% of Internet users 97.1%

Breakdown of national collections (DKK million)

Repertoire	Collections	Growth	5 year Growth
Music	1,000	-1.4%	+6.6%
Visual Arts	60	-1.8%	+9.4%

Type of Use	Collections	Growth	5 year Growth
TV & Radio	441	-10.6%	-13.3%
Digital	287	+24.1%	+192%
Live & Background	213	+1.3%	+14.5%
CD & Video	28	-21.1%	-76.5%
Reprography	25	-9.9%	-38.6%
Synchronisation	21	-14.6%	-
Educational Use	20	+1.1%	-
Resale Right	7.3	-4.9%	-13.2%
Reproduction	4.9	+51.5%	+1.1%
Private Copying	4.2	-66.9%	-18.8%
Other	8.8	-7.6%	-56.1%

Type of Right	Collections	Growth	5 year Growth
Performing	875	-0.8%	+14.2%
Mechanical	102	+4.4%	-38.8%
Other	82	-13.9%	+38.4%

Total	Collections	Growth	5 year Growth
Total	1,060	-1.5%	+6.7%

Denmark is among the top 10 markets in the world for visual arts collections, which are managed by national society VISDA. Collections in 2018 were broadly flat at DK60m, the largest share (more than 40%) coming from reprography rights.

ITALY

MIXED INFLUENCES IN WORLD'S NO. 6 MARKET

Collections for creators in Italy slightly declined in 2018 despite a big jump in digital revenue and a strong 12.6% rise in audiovisual income. Collections reported by Italian society SIAE were down 1.3% to EUR583m in 2018.

Excluding from the total private copying remuneration attributed to each repertoire, there is an increase of 0.3% compared to 2017. Collections over five years have grown 10% from 2014-2018.

Total collections were also hit by a dispute with an important broadcaster, which resulted in the withholding of some EUR20m in distributable income to rights holders. However, the sector benefited from the payments of arrears from another major national broadcaster for backlog payments dating back several years.

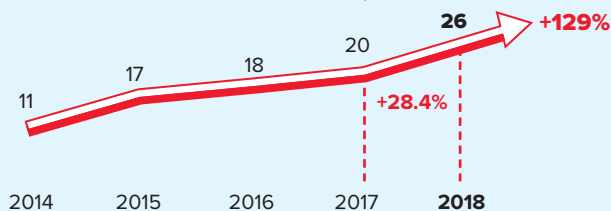
Italy has one of the highest growth rates in Europe for audiovisual and visual arts collections in the past five years. Audiovisual collections have grown by 58.6% since 2014 to reach EUR54m in 2018. Visual arts collections have increased by 30.9% over the same period, to EUR9.5 million (despite a 5.3% decrease in 2018).

Digital catching up

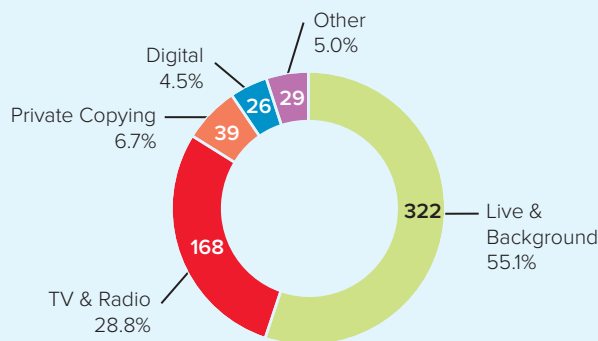
After a relatively slow start in consumer adoption of music streaming services, digital music collections have seen steep growth in the last two years. Digital income grew by 27.5% year-on-year to EUR24m. Increased efficiencies in repertoire identification systems has had a positive impact in growing gross collections.

At EUR63m, collections in the dramatic and music drama repertoires were in line with the previous years, except for a decline in the lyrical repertoire, where use by the

Digital growth 2014-2018 (EUR million)



Share of collections by use (EUR million)



most important cultural institutions has fallen sharply, and a fall in the choreography sector.

Artist resale right delivers growth

In the visual arts sector, Italy has seen an important increase in revenues from the artists resale right which grew 10.1% to EUR7.4 million. Increased controls by SIAE on art market transactions have helped drive growth, as well as the introduction of new tools for SIAE operators and art market professionals clarifying the resale right collections process.



Euro 583 million

Collections per capita €9.65
% of Internet users 61.3%

Breakdown of national collections (EUR million)

Repertoire	Collections	Growth	5 year Growth
Music	450	-1.8%	+7.0%
Dramatic	63	-6.0%	+0.6%
Audiovisual	54	+12.6%	+58.6%
Visual Arts	9,5	-5.3%	+30.9%
Literary	6.5	-15.3%	+14.9%

Type of Use	Collections	Growth	5 year Growth
Live & Background	322	-0.9%	+5.6%
TV & Radio	168	-0.5%	+15.4%
Private Copying	39	-19.6%	-2.5%
Digital	26	+28.4%	+129%
CD & Video	15	-4.3%	-9.7%
Resale Right	7.4	+10.1%	+15.2%
Reprography	2.7	+4.5%	-1.8%
Rental/Public Lending	1.8	+6.5%	+66.6%
Reproduction	1.0	+66.2%	+51.1%
Mechanical Reproduction	0.7	-50.2%	-45.9%

Type of Right	Collections	Growth	5 year Growth
Performing	503	+0.8%	+12.8%
Mechanical	29	-10,5%	-15,4%
Other	52	-13,7%	+1,9%

Total	583	-1.3%	+10.0%
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In the literary sector, collections declined to EUR6.5m, but income was boosted by more use of works in public spaces and by increased income from reprography (+4.5%), due to the conclusion of settlement agreements with the Ministry of Cultural Activities.

POLAND

ECONOMY DRIVES COLLECTIONS GROWTH

Poland is the largest source of collections for creators in Central and Eastern Europe, accounting for just over one quarter of all collections in the region. In 2018, collections in Poland grew by 5.5% to reach PLN476m. Collections were helped by a strong local economy, growing 5.1% in 2018.

Digital collections double from low base

Collections from digital sources more than doubled in 2018 but remain marginal, accounting for just 2.6% of Poland's total. Subscription streaming services have seen slower take-up than in many Western European countries and lag far behind TV and radio. Free streaming dominates online consumption and the share of paid subscribers using subscription services remains low.

Increased efficiencies in licensing and processing of agreements are helping drive digital growth. Large services such as Spotify and Netflix are well established, and others, including Amazon and YouTube Premium, are expected to launch.

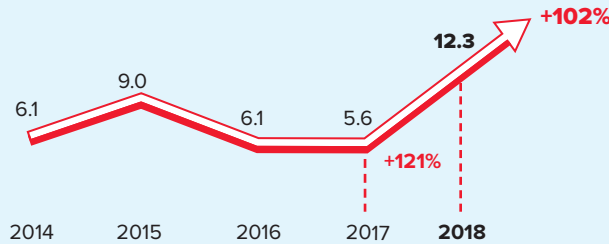
TV and radio returns to growth in 2018

TV and radio collections make up 60.4% of collections in Poland and saw modest growth in 2018.

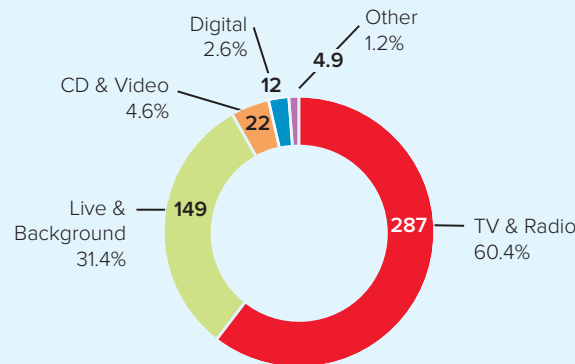
Public financing of national broadcasters is the dominant issue affecting royalties in this sector. Following an aborted plan to phase out household payments for public television, there is now an estimated EUR500m shortfall in funding for public media that is being temporarily subsidised by the government.

Major cable networks have a very strong position in Poland but currently suffer from limited subscribers growth. On the licensing front, the entire cable TV sector is now licensed, thanks to an agreement with the cable company Vectra in 2018.

Digital growth 2014-2018 (PLN million)



Share of collections by use (PLN million)



Live collections stay steady

The live and background sector provides 31.4% of all collections and has seen steady growth since 2014 (up 57.1%), helped by a combination of factors: a healthy live sector, increased disposable income, more efficient inspections and improved market intelligence.

The continuing popularity of Polish theatre contributed to a 9.2% increase in dramatic repertoire collections.

In the audiovisual sector, national society ZAPA saw collections rise 7.3%, largely due to revenues from TV. Authors'



Polish zloty 476 million
Euro 112 million

Collections per capita €2.94
% of Internet users 76.0%

Breakdown of national collections (PLN million)

Repertoire	Collections	Growth	5 year Growth
Music	354	+4.7%	+10.3%
Audiovisual	100	+7.3%	+26.7%
Dramatic	22	+9.2%	+28.1%
Visual Arts	0.3	+95.9%	-

Type of Use	Collections	Growth	5 year Growth
TV & Radio	287	+3.5%	+1.8%
Live & Background	149	+3.9%	+57.1%
CD & Video	22	+6.1%	+11.8%
Digital	12	+121%	+102%
Mechanical Reproduction	4.2	+120%	+133%
Private Copying	0.3	-74.4%	-97.5%
Synchronisation	0.05	+19.7%	-29.0%
Reprography	0.01	-94.6%	-
Resale Right	0.001	-	-
Other	1.2	+10.2%	+11.0%

Type of Right	Collections	Growth	5 year Growth
Performing	445	+4.4%	+16.3%
Mechanical	30	+27.8%	+31.2%
Other	0.3	-73.7%	-97.1%

Total	Collections	Growth	5 year Growth
	476	+5.5%	+14.2%

collections are limited, as online exploitation is not included in the legal remuneration right, the only exception being an agreement for public broadcasters showing archive material. Fixing this anomaly is a key policy objective for local societies.

Visual arts collections in Poland remain negligible after an unsuccessful attempt to establish collections for the resale right by a society, which lost its license. A new effort is underway in 2019–2020 to address this issue.

CENTRAL & EASTERN EUROPE

STRONG PERFORMANCE COMPENSATES FOR SLOW DIGITAL TAKE-UP

Most authors societies in Central and Eastern Europe, in particular in the music field, are well established and many deliver high rates of performance versus their country's GDP. This is despite often hostile copyright environments and modest consumer take-up of paid-for digital subscriptions. CISAC members in the region grew their collections by 3.0% in 2018 to reach EUR436m. This represents 4.5% of the global total and amounts to a 10.4% growth over five years.

Poland and Russia lead region

Poland and Russia are the region's largest markets, with 25.6% and 22.6% of the region respectively. The Czech Republic has overtaken Hungary thanks to an increase of more than 30% in private copying remuneration in 2018.

Digital collections in the region have risen steadily over five years, but declined in 2018 following a major back payment in Turkey in 2017 that had inflated the result for the region.

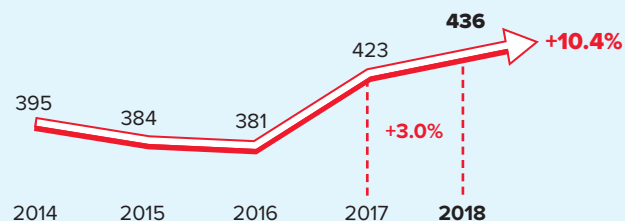
Direct licensing of repertoire by non-local CMOs in countries such as Poland and Hungary has limited local digital collections. However, this practice has been changing in some countries, for example in Hungary, where music society Artisjus has been a part of the multi-territory licensing hub Armonia since 2013.

Collections in Romania grew by 24.3% in 2018 to reach EUR33.1m, helped by a sharp rise in broadcast revenue.

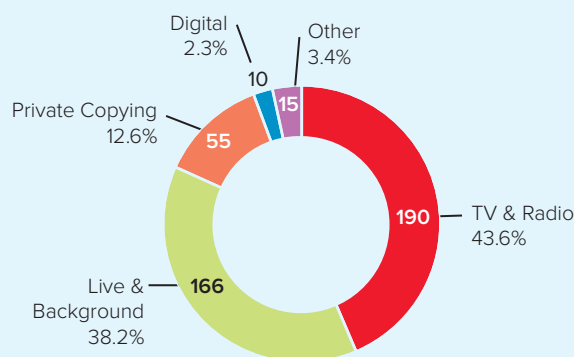
Audiovisual collections see strong growth

Collections for audiovisual repertoire rose by 29.6% in 2018, driven by strong TV and radio collections in Romania, Poland and Slovenia. In most countries in the region, audiovisual rights are in the hands of producers rather

Regional collections over 5 years (EUR million)



Share of collections by use (EUR million)



than authors. There are some exceptions, such as in Poland, where a remuneration right exists; nonetheless the legislation's effectiveness is limited, as it does not cover online use.

The result is that the region's authors have virtually no revenue from the digital use of audiovisual authors' works. Expanding subscription and video subscription services will drive future growth, but authors' collections remain limited by the legal environment.

Breakdown of regional collections (EUR million)

Repertoire	Collections	Growth	5 year Growth
Music	326	+0.1%	+4.6%
Audiovisual	74	+29.6%	+60.7%
Dramatic	27	-11.1%	-10.5%
Literary	6.3	+1.7%	+9.8%
Visual Arts	2.8	-32.6%	+107%

Type of Use	Collections	Growth	5 year Growth
TV & Radio	190	+3.3%	+12.6%
Live & Background	166	-0.0%	+11.7%
Private Copying	55	+22.5%	+1.7%
Digital	9.8	-13.2%	+33.2%
CD & Video	7.8	-5.6%	-0.7%
Reprography	2.2	+0.9%	+18.5%
Rental/Public Lending	1.9	+11.7%	+45.1%
Resale Right	1.1	+4.7%	+56.1%
Mechanical Reproduction	1.1	+101.8%	+100%
Synchronisation	0.1	+6.9%	+0.3%
Reproduction	0.1	-89.1%	-20.2%
Other	0.6	-72.8%	-83.6%

Type of Right	Collections	Growth	5 year Growth
Performing	356	+0.7%	+11.0%
Mechanical	19	+5.5%	+23.8%
Other	61	+18.0%	+3.7%

Total	Collections	Growth	5 year Growth
	436	+3.0%	+10.4%

CISAC society collections from private copying increased by 22.5% in 2018, generated largely by just three countries: the Russian Federation, Hungary and the Czech Republic.

Private copying levies make up more than 10% of the region's revenue. However, income is limited by ineffective or out-of-date legislation, which continues to impede contribution from the majority of nations.

Total collections from drama, literature and visual arts repertoires changed -11.1%, +1.7% and -32.6% respectively year-on-year.

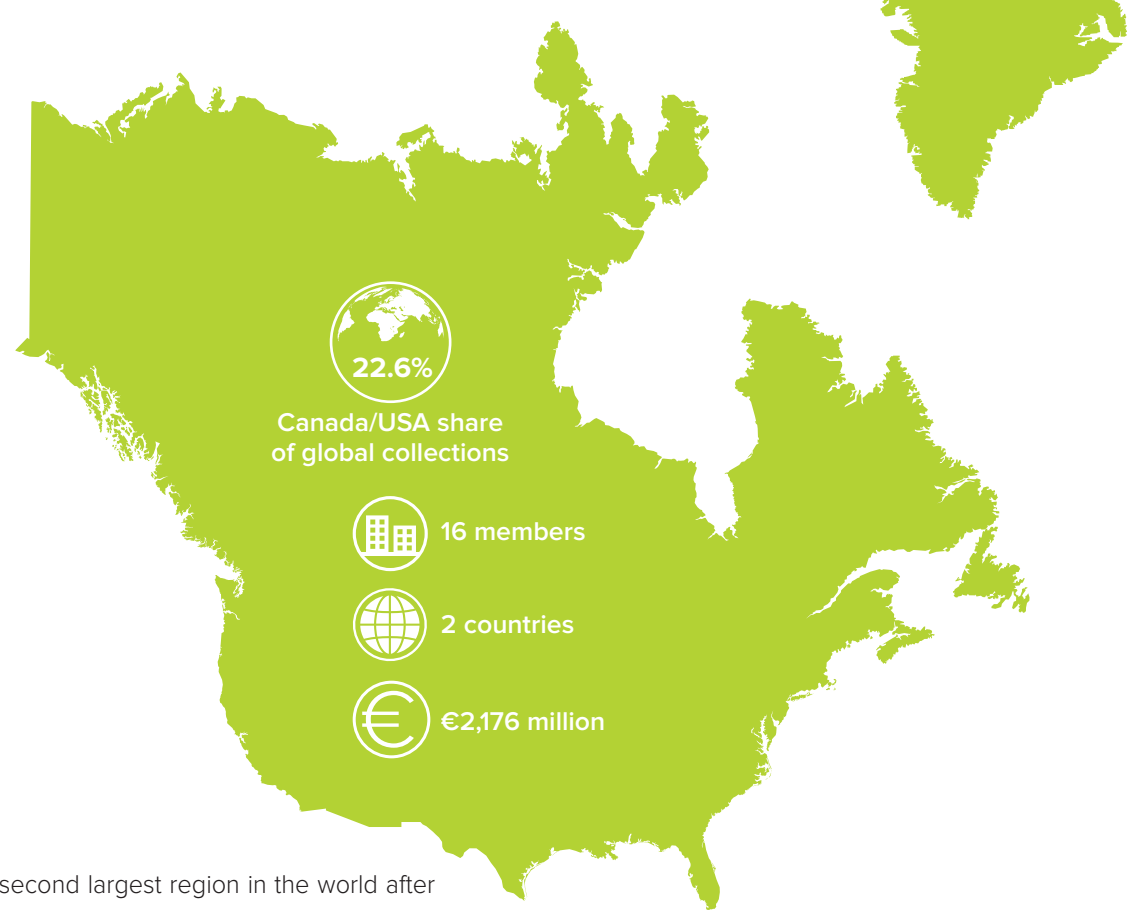
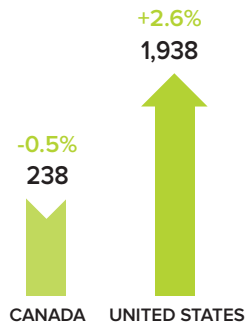
REGION

CANADA/USA

A SOLID PERFORMANCE IN NORTH AMERICA



Largest collecting countries
and annual growth (EUR million)



Canada-USA is the second largest region in the world after Western Europe in terms of collections. The region accounts for 22.6% of total collections, which amounted to EUR2.176bn in 2018, up 2.2% over 2017.

Music collections account for 99.7% of the region's income, split mostly between performing (85.9% of the total) and mechanical rights (13.7%). Both ASCAP and BMI, the two biggest music rights societies in the US, announced record collections of over a billion dollars in 2018, while SOCAN in Canada also experienced a record year for licensing revenues.

The North American market has one of the most developed music streaming sectors, with major brands competing for the attention of consumers. Digital revenue has now reached over a fifth of total collections and posted a 24.4% growth year-on-year at over EUR45m. Digital income grew by 267% in the past five years, reflecting the strategy of US and

Canadian societies to license a wide range of music and video streaming services.

Despite a 2.9% drop in revenues, reflecting pressure on the advertising market, TV and radio still grab the lion's share of collections at EUR1.13bn in 2018 or 52% of the total. Live and background continues to post growth, due to the solid state of the live music scene in North America, and by societies' efforts to maximise licensing of music.

While a private copying levy is in place in Canada, collections from this source of revenue have dropped significantly since 2012 (-69.5%), when the Copyright Law was amended and limited the scope of the levy. It now represents less than half-a-million euros for the year. Meanwhile, in the USA, there is no private copying levy scheme in place.



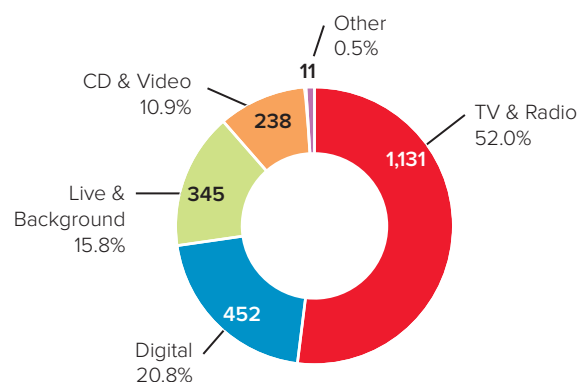
CANADA/USA TYPES OF USE

A changing landscape

The USA was the source of major legislative and regulatory action during 2018, with the adoption of the Music Modernisation Act, which will fundamentally change the business of mechanical rights in the country.

The MMA established a Mechanical Licensing Collective (MLC) that is tasked with negotiating mechanical licences with digital service providers, which will operate under a blanket licence as of January 1, 2021.

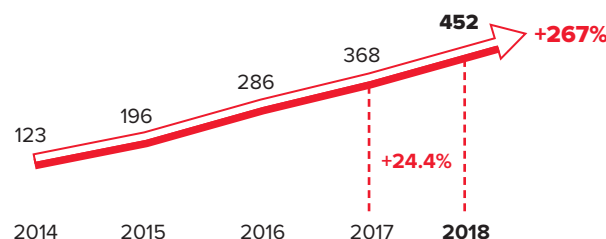
Share of collections by use (EUR million)



A project supported by the National Music Publishers' Association (NMPA), the Nashville Songwriters Association International (NSAI) and the Songwriters of North America (SONA) has been picked by the Copyright Office to operate the MLC, which was backed by a wide industry coalition.

Meanwhile, the Department of Justice has launched a wide-ranging review of the consent decrees that have been ruling ASCAP and BMI since 1941. If the decrees were to be relaxed, both ASCAP and BMI would have more latitude to negotiate fairer deals for songwriters, composers and publishers with users of music.

Digital growth 2014-2018 (EUR million)



In Canada, the House of Commons has launched a vast review of the country's Copyright Law and several proposals have been made by both the Standing Committees on Canadian Heritage and on Industry, Science and Technology, in particular the recommendation for the government to adopt an artist re-sale right for visual artists.

The government has also provided funds to modernise the work of the Copyright Board of Canada, which has been slow to make decisions due to a lack of resources.

Breakdown of regional collections (EUR million)

Repertoire	Collections	Growth	5 year growth
Music	2,170	+2.2%	+65.2%
Visual Arts	6.9	+5.5%	+35.7%
Audiovisual	0.03	-4.3%	-98.6%
Type of Use			
TV & Radio	1,131	-2.9%	+21.9%
Digital	452	+24.4%	+267%
Live & Background	345	+2.2%	+40.7%
CD & Video	238	-5.1%	+2,137%
Reproduction	6.8	+6.3%	+44.5%
Synchronisation	2.7	-25.2%	+382%
Private Copying	0.4	-68.1%	-87.6%
Reprography	0.1	-11.5%	-52.3%
Other	0.5	-55.4%	-90.0%
Type of Right			
Performing	1,869	+2.8%	+47.0%
Mechanical	297	-0.9%	+645%
Other	10	-12.0%	+14.3%
Total	2,176	+2.2%	+64.8%



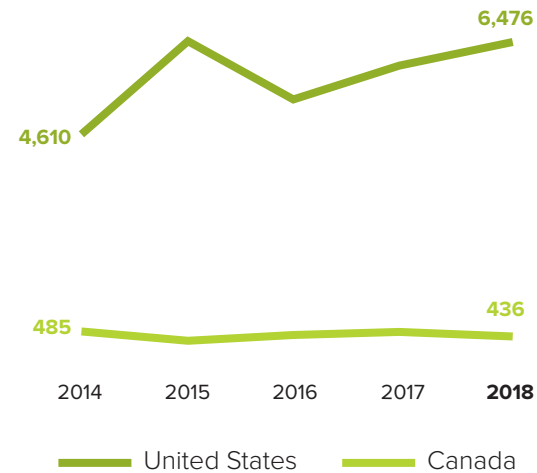
CANADA/USA REPERTOIRES

Audiovisual rights are almost insignificant in the region, due to the studio system that sees the producers of films and TV shows manage ancillary rights known as residuals on behalf of screenwriters and directors to compensate them for the distribution or exhibition of their work beyond its initial use. Payment of residuals is then deferred to the guilds representing them.

In the US, the Directors Guild of America received north of USD300m (EUR266m) in residuals in 2017, while the Writers' Guild of America collected on behalf of its members residuals of USD431m (EUR381m) in 2017, with over USD100m (EUR89m) coming from the international exploitation of film and TV shows. Neither are accounted for in CISAC's collections report.

At EUR6.9m, **visual arts** collection accounted for 0.3% of the region's revenues, up 5.5%, thanks mostly to a spike in reproduction rights, up 6.4% year-on-year. Streams of revenues for visual artists in North America are mostly limited to reproduction rights, as neither Canada nor the United States has implemented the artist resale right.

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



Top uses by repertoire (EUR million)

	Collections	Growth	5 year Growth
MUSIC			
TV & Radio	1,131	-2.9%	+21.9%
Digital	452	+24.4%	+267.6%
Live & Background	345	+2.2%	+40.7%
Music all uses	2,170	+2.2%	+65.2%
VISUAL ARTS			
Reproduction	6.8	+6.4%	+44.7%
Reprography	0.07	-11.5%	-52.3%
Live & Background	0.01	-50.6%	-25.8%
Visual Arts all uses	6.9	+5.5%	+35.7%
AUDIOVISUAL			
Other	0.03	-4.3%	-98.6%
Audiovisual all uses	0.03	-4.3%	-98.6%

CANADA

COLLECTIONS STRONG BUT CREATORS AVERAGE \$54 PAYOUT FOR DIGITAL

Canada had another strong year in 2018, mostly thanks to a good performance from the music repertoire, which accounts for 99.8% of total collections. Collections were up 3.9% year-on-year, at CAD364m, with digital revenue up 23.6% over 2017.

The growth in digital was driven by the adoption of streaming services, and increased licensing of services. However, rights society SOCAN says that while digital sources accounted for 29% of SOCAN's income, more should be done to ensure that all rights holders receive a more equitable share of digital revenues

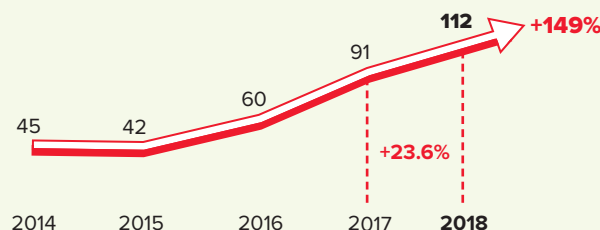
A SOCAN member who received royalties in 2018 on average took in only \$54 from digital sources, the society says. While several uses saw growth, there were falls in TV and radio (-1.0%), private copying (-69.2%), synchronization (-19.3%) and reprography (-7.6%). The Canadian radio and TV markets have suffered from pressure on the advertising business and from the transition to online consumption of creative content; nonetheless broadcasters still account for 53.8% of total collections.

Live and background music collections were stable, reflecting the continued success of live music in Canada. Due to a reduction of the scope of the private copying scheme, revenues from private copying shrunk from CAD4.9m to CAD0.6m in the past five years.

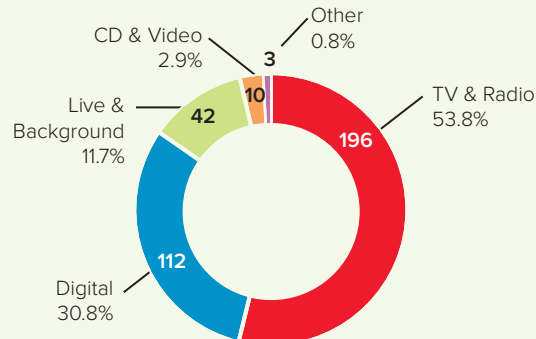
Increase in mechanical rights

In 2018, SOCAN fully integrated Quebec-based mechanical rights society SODRAC. SODRAC collected CAD7.2m in 2018, down 28.1% year-on-year, despite a rise in TV and radio revenues, due to retroactive payments from commercial radio stations for the period 2012–2016.

Digital growth 2014-2018 (CAD million)



Share of collections by use (CAD million)



Mechanical rights society CMRRA, owned by US rights society SoundExchange, saw its revenues grow 9.0% year-on-year, thanks to a strong flow of income from digital and TV and radio, which more than compensated for the drop in mechanical rights from CDs and videos. All societies combined, mechanical rights rose by 10.0% in 2018.

In the visual arts sector, collections by Copyright Visual Arts – Droits d'auteur Arts visuels (formerly CARCC) have been stable year-on-year, but have seen a significant decline of reprographic rights due to a loosening of Canada's Copyright Law since 2012.



Canadian dollar 364 million
Euro 238 million

Collections per capita €6.42
% of Internet users 92.7%

Breakdown of national collections (CAD million)

Repertoire	Collections	Growth	5 year growth
Music	363	+4.0%	+20.2%
Visual Arts	0.7	-5.7%	-6.2%
Audiovisual	0.05	-0.0%	-18.2%

Type of Use	Collections	Growth	5 year growth
TV & Radio	196	-1.0%	+1.3%
Digital	112	+23.6%	+149%
Live & Background	42	-0.0%	+9.5%
CD & Video	10	-23.2%	-32.8%
Synchronisation	1.0	-19.3%	+23.8%
Private Copying	0.6	-69.2%	-88.0%
Reproduction	0.5	+6.4%	+13.7%
Reprography	0.1	-7.6%	-50.2%
Other	0.7	-53.4%	-79.5%

Type of Right	Collections	Growth	5 year growth
Performing	282	+2.7%	+16.8%
Mechanical	79	+11.0%	+44.9%
Other	2.3	-39.2%	-64.0%

Total	Collections	Growth	5 year growth
	364	+3.9%	+20.2%

Collections in the audiovisual sector are close to non-existent, with CSCS collecting foreign royalties on behalf of members of the Screenwriters' Guild of Canada.

REGION

ASIA-PACIFIC

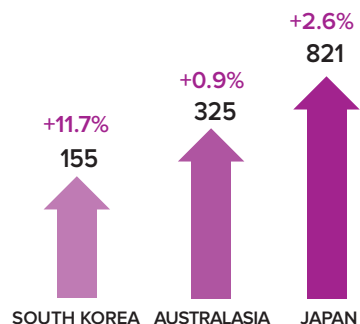
DIGITAL POWERS GROWTH IN ASIA-PACIFIC

+4.6%



1,430
(EUR million)

Largest collecting countries and annual growth (EUR million)



Collections for creators in the Asia-Pacific region grew by 4.6% in 2018 to reach a record high of EUR1.4bn. Within the region, Japan is the region's dominant market, followed by Australasia and Korea, and these territories account respectively for 57.4%, 22.8% and 10.8% of the total.

The top five markets, also including China and Hong Kong SAR, make up more than 95% of the region's revenue.

TV and radio is the largest source of collections at 27.5% of the total. Authors' societies across Asia-Pacific countries/territories face a continuous battle with historically powerful broadcasters to bring rates in line with other regions.

The region also has some of the world's most digitally-penetrated markets, such as Korea and China. After years of steady growth, the Asia-Pacific region saw digital achieve near parity with TV and radio in 2018, at 26.3%.

If this trend continues, Asia-Pacific could be the first region in the world to see digital as the largest source of creators' income. India is seeing rapid collections growth, driven by licensing arrangements with major international and local streaming players (see country focus pages 50-51).

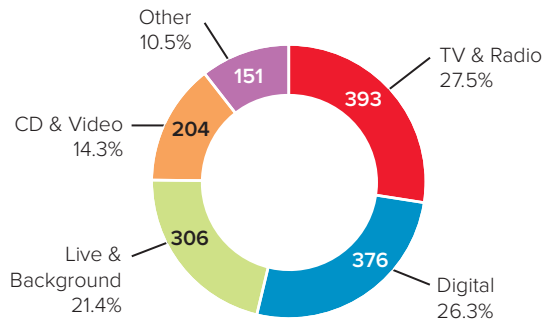


ASIA-PACIFIC TYPES OF USE

Japan leads digital collections in Asia-Pacific

Digital uses of creators' works are by far the largest driver of growth in Asia-Pacific. Across the region, these collections grew by EUR69m or 22.4% in 2018, and half of all these royalties were generated within Japan alone. Having lagged behind other major markets for many years, Japan is seeing spectacular streaming growth with both audio and video subscriber numbers up by more than 60%. New and renewed licensing deals are helping translate this into revenue for authors.

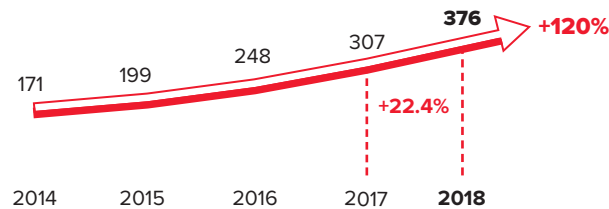
Share of collections by use (EUR million)



Digital is now Japan's second largest source of authors' collections, growing 19.6% and overtaking both live and background and CD and video during 2018. It provides 22.9% of the country's royalties, with TV and radio at 30.8%. In other major markets, digital is powering growth. Collections in China are growing faster than almost any other territory, nearly doubling in 2018 on the back of a renewed licensing

agreement with the largest digital platform Tencent (see case study page 49). In Korea, local society KOMCA reported a 17.7% increase in music streaming.

Digital growth 2014-2018 (EUR million)



Video on demand boosts growth in Australasia

Music and audiovisual subscription has contributed to strong growth in Australasia. Music revenues grew by 10.4% in local currency in 2018. Local video streaming services such as STAN and New Zealand's Lightbox compete with the rapid expansion of Netflix and the recently-launched Amazon Prime to drive collections. Disney Plus and Apple TV are expected to enter the market soon.

Australasia has one of the highest digital collections shares among major markets (26.1%) and saw a remarkable upward digital revenue trend on the back of expanding streaming subscription and improvements in tariff rates.

The total collections in this sector have doubled over the past five years. In 2018 one of the world's first licensing deals was struck with Facebook to monetise that platform for authors for the first time. Digital revenue growth is nonetheless

Breakdown of regional collections (EUR million)

Repertoire	Collections	Growth	5 year growth
Music	1,330	+5.3%	+23.9%
Literary	96	-5.8%	+12.4%
Visual Arts	4.5	+88.6%	+174%
Dramatic	0.4	-6.4%	-15.7%
Audiovisual	0.01	+20.0%	

Type of Use	Collections	Growth	5 year growth
TV & Radio	393	-3.7%	+5.6%
Digital	376	+22.4%	+120%
Live & Background	306	+3.0%	+22.3%
CD & Video	204	+4.7%	-8.2%
Reprography	92	-3.5%	+9.6%
Rental/Public Lending	12	-37.4%	-46.0%
Publication	6.5	-3.4%	-15.4%
Educational Use	4.6	-16.5%	
Synchronisation	2.8	-3.4%	+74.4%
Reproduction	1.8	+10.3%	+61.7%
Resale Right	0.6	+15.4%	+55.9%
Private Copying	0.1	-24.9%	+2,353%
Other	30	+9.8%	+11.4%

Type of Right	Collections	Growth	5 year growth
Performing	919	+4.6%	+29.6%
Mechanical	390	+9.6%	+16.7%
Other	121	-8.6%	+3.4%

Total	Collections	Growth	5 year growth
	1,430	+4.6%	+23.2%

beginning to show signs of plateauing as subscription take-up becomes more saturated. Digital income is limited by the relatively small share of revenues received from user upload services such as YouTube, which can use the flawed legislative environment to avoid licensing as a normal music service.



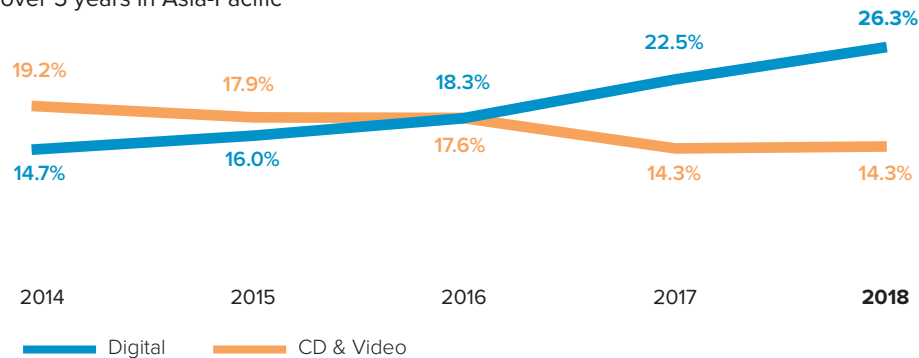
ASIA-PACIFIC TYPES OF USE

Korean CD and video revenues remain significant

Korea is a world leader as a digital music market but is also seeing exceptional resilience in physical media. Korea saw the fifth consecutive year of growth in CD and videos sales in 2018. Expanding by more than 30%, this source now provides 12.0% of the country's total collections.

Growth is boosted by the huge popularity of K-Pop artists and "idol groups" with a dedicated fanbase. The steady output of physical music and video products from these groups has proven popular with fans while generating more than a one-third increase in mechanical revenues for the country.

Digital and CD & Video share of total collections over 5 years in Asia-Pacific



Private copying and artist's resale right need support

Unlike other regions, the artist's resale right and private copying currently contribute only marginally to Asia-Pacific's collections. With the resale right existing only in Australia and the dysfunctional private copying levy system in Japan, the revenues for these categories remain negligible.

With CISAC's support, authors societies across the region are continuing to lobby governments for the effective implementation of these crucial rights.

Top uses by repertoire (EUR million)

	Collections	Growth	5 year Growth
MUSIC			
TV & Radio	393	-3.7%	+5.6%
Digital	376	+22.4%	+120%
Live & Background	306	+3.1%	+22.4%
Music all uses	1,330	+5.3%	+23.9%
LITERARY			
Reprography	92	-3.5%	+9.5%
Educational Use	3.0	-44.8%	
Other	0.5	-15.2%	-44.2%
Literary all uses	96	-5.8%	+12.4%
VISUAL ARTS			
Reproduction	1.8	+10.3%	+61.7%
Educational Use	1.6	+5,671%	
Resale Right	0.6	+15.4%	+55.9%
Visual Arts all uses	4.5	+88.6%	+174%
DRAMATIC			
Live & Background	0.4	-6.4%	-15.7%
Dramatic all uses	0.4	-6.4%	-15.7%
AUDIOVISUAL			
TV & Radio	0.01	+17.4%	
Private Copying	0.001	+32.1%	
Rental/Public Lending	0.0002		
Audiovisual all uses	0.01	+20.0%	

CHINA

DIGITAL COLLECTIONS CONTINUE TO SURGE

China is a priority market for creators and creative industries, driven by the explosive growth of digital music and continually aligning itself to international standards in copyright and collections.

With the world's biggest online music consumer base (800 million Internet users, according to CNNIC), a few dominant licensed digital platforms and music and video subscription growing exponentially, China has huge potential for further growth.

Collections reported to CISAC by China music society MCSC for 2018 rose sharply 41.0% to CNY290m. Digital income more than doubled in one year, up 104%, and is up 458% over the five years from 2014 to 2018, a period that has seen a transformation of the licensing landscape. Digital now represents 55% of total collections, making China one of the world's most digitally-penetrated markets.

Improved digital rates

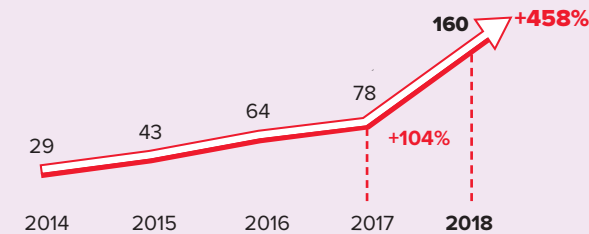
The main driver of this growth in 2018 was a renewed agreement setting higher rates between MCSC and Tencent Music Entertainment, the largest online music platform. The deal includes all Tencent services such as QQ Music, Kugou and Kuwo.

Alongside this growth, the Chinese government has focused heavily on intellectual property protection, notably at its major global trade event in November 2018, the China International Import Expo, which included a keynote by CISAC's Director General.

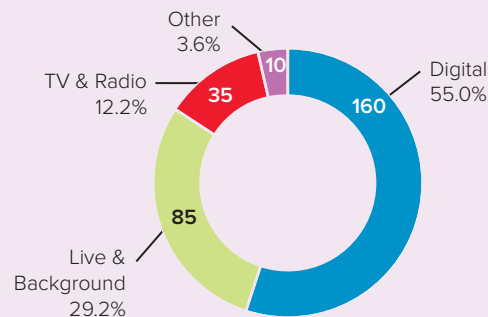
However, despite improvements in the landscape, work is needed on licensing conditions and collections infrastructure, which still lag behind other major territories.

A pending but currently stalled Copyright Act seeks to address some of these concerns, strengthening the rights

Digital growth 2014-2018 (CNY million)



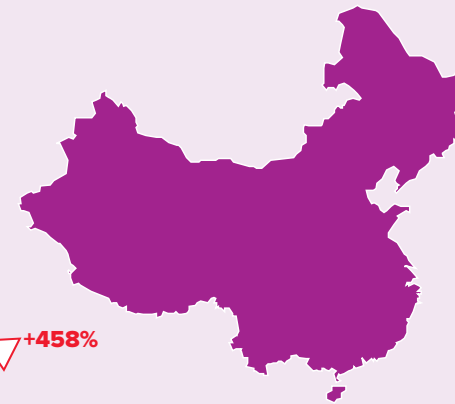
Share of collections by use (CNY million)



and the protection of creators of all repertoires online.

Working to improve rates

Despite China's market growth, low tariff rates in the broadcasting and live and background sectors have stymied growth with declining collections over recent years. Collections from broadcasting in 2018 declined 22.1% to CNY35m. To address this, a gradual increase in tariffs—the first in years—has been established in a Memorandum of Cooperation between MCSC and the Broadcasting



Chinese yuan 290 million
Euro 37 million

Collections per capita €0.03
% of Internet users 54.3%

Breakdown of national collections (CNY million)

Repertoire	Collections	Growth	5 year Growth
Music	290	+41.0%	+134%
Type of Use			
Digital	160	+104%	+458%
Live & Background	85	+17.9%	+84.9%
TV & Radio	35	-22.1%	-22.3%
Synchronisation	4.2	-2.2%	+239%
CD & Video	3.0	-20.4%	+106%
Other	3.2	+65.3%	+149%
Type of Right			
Performing	168	+19.3%	+68.1%
Mechanical	118	+94.7%	+418%
Other	4.2	-2.2%	+239%
Total	290	+41.0%	+134%

Copyright Committee & Television Copyright Committee of China Radio & Television Association.

Expanding licensing

Licensing of works is expanding in China. In 2018, licences were provided for textbook publishing houses for musical works, and agreements were signed with 17 airlines in mainland China. In addition, MCSC debuted a new tool allowing users to apply for music copyright licenses online.

INDIA

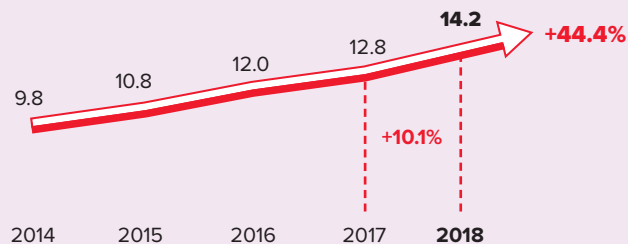
STREAMING BOOM SEES GAINS FOR CREATORS

Collections in India have grown strongly in the last two years, helped by a series of digital licensing deals, back payments from previous years and improved operations at music society IPRS (Indian Performing Rights Society), which was accorded registration by the Indian government and re-admitted to CISAC membership in 2018.

These trends take place in a market where music has historically underperformed compared to other parts of the creative and entertainment sector. The Indian music market, valued at approximately INR 14 billion (EUR176m) in 2018, is the smallest contributor to the INR 1,674 billion (EUR 21bn) media & entertainment sector in India.¹

While lack of accurate data has hindered assessment of the Indian music sector, it is clear that the Indian music industry is now on a sharp upward curve. Recording revenues grew 24.5% in 2018, fueled by 50% growth in revenue from music streaming services (IFPI). Total industry revenues grew 10.1% using different metrics, (FICCI-EY Analysis - A Billion Screens of Opportunity Report 2019). For music authors, collections are also sharply on the rise.

Value of the music industry in India 2014-2018 (INR billion)



Sources : FICCI; KPMG; EY

Digital and TV drive collections growth

In addition to calendar 2018 income reported to CISAC, IPRS reports pre-audit collections up to April 2019. These grew by 242% (pre-audit) to INR 1,552 million. Collections growth has been driven largely by audio and video streaming, and this is expected to continue going forward. Since 2018 IPRS has entered into licensing arrangements with major streaming players such as Spotify, Apple and Amazon, and also licensed YouTube's UGC and music streaming service (IPRS statutory disclosures). Combined with a boost from back payments of digital income, this had led to a more than 7-fold increase in digital collections in the year to April 2019.

India's growth is driven above all by mobile use. As of April 2019, India has more than 1.16 billion mobile connections, according to business-standard.com, with more than 500 million subscribers using smartphones and the cheapest mobile data pack rates in the world. The mobile phone is the content 'gateway device' for consumers in India.



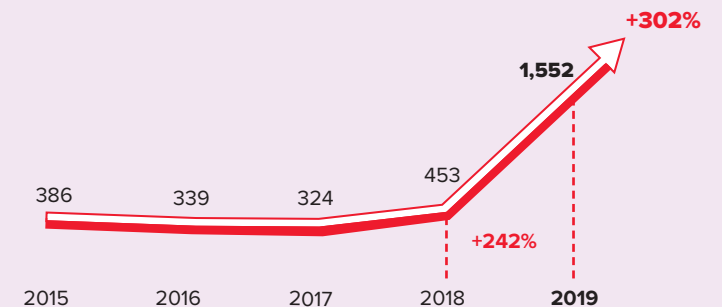
Indian rupee 1.6 billion
Euro 20 million

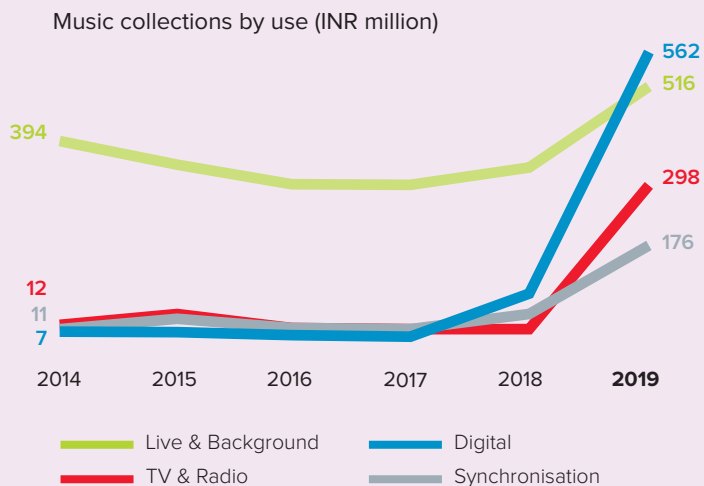
Collections per capita €0.01
% of Internet users 34.5%

Television is another growing revenue source, as IPRS settles claims for past music usage with STAR TV and Zee TV, two of India's biggest national broadcasters (IPRS statutory disclosures).

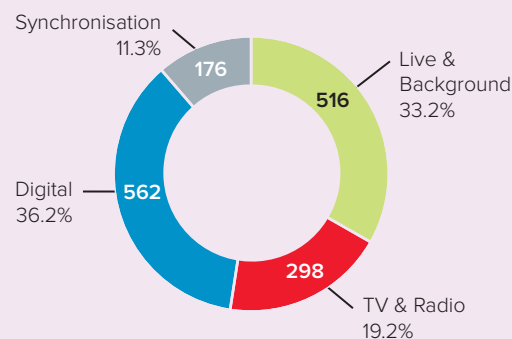
TV & radio collections grew almost twelve-fold in 2018-19, thanks to a major back payment for TV use. Public performance collections grew by 50.2%.

Collections growth over five years (INR million)





Share of collections by use, 2019 (INR million)



Breakdown of national collections, 2019 (INR million)

Repertoire	Collections	Growth	5 year Growth
Music	1,552	+242%	+302%
Type of Use			
Digital	562	+649%	+7,946%
Live & Background	516	+50.2%	+47.1%
TV & Radio	298	+448%	+1,858%
Synchronisation	176	+11,312%	+1,223%
Type of Right			
Performing	1,376	+227%	+269%
Other	176	+448%	+1,223%
Total	1,552	+242%	+302%

Copyright law update

The legal environment for creators in India has been improving. In 2012, the Copyright Act, 1957 was amended by the Indian legislature, granting unique and unprecedented rights to lyricists and music composers allowing them to claim an ‘equal share of royalty’ for the utilization of musical compositions and lyrics in ‘any form’.

This right is inalienable and in the past year has significantly benefitted songwriters in India. IPRS, the sole authors society in India, is now empowered to solely act as a CMO on behalf of authors. IPRS administers the performing right and the mechanical right in India.

Music publishing has largely been controlled by the recorded music business in India with master rights and publishing rights licensing generally being held and conducted by a single entity. IPRS has emerged as an exception to this

general rule in India, with most Indian and international music publishing business joining IPRS.

IPRS was re-registered by the Indian Government in late 2017 and was able to enforce the [Indian] Copyright Act, 1957. It was re-admitted to CISAC in December 2018, having restructured its constitution, among other changes, to its policies.

Legal and policy challenges

The Indian music sector continues to face challenges arising from legislative change proposals relating to a potential inclusion of music streaming under rules that support the existing statutory licensing provision. This would complicate the licensing terrain in India particularly where music streaming has assumed critical proportions from a revenue perspective.

The Indian government is currently deliberating on industry feedback on the proposed changes. This is further complicated by a continuing reluctance of various platforms, particularly private FM Radio, to pay publishing royalties. IPRS has instituted litigations against various users including telecom service provider Vodafone in the past year.

1- FICCI- EY Analysis - A Billion Screens of Opportunity Report 2019

REGION

LATIN AMERICA & THE CARIBBEAN

DIGITAL COLLECTIONS GROW, BROADCAST DECLINES

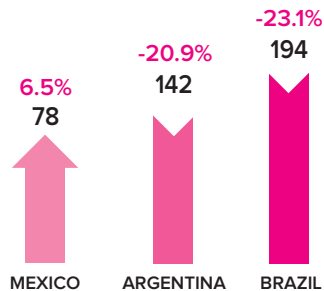
-13.6%



525

(EUR million)

Largest collecting countries and annual growth (EUR million)



Rapid digital collections growth, streaming-driven, has been the hallmark of Latin America and the Caribbean market for several years. A cascade of licensing deals with international and local digital platforms has spurred growth and made a large volume of Latin America repertoire available to the rest of the world.

Two of the region's largest markets, Brazil and Mexico, have evolved in markedly different ways: the former counting on a strong TV and radio sector, the latter shifting more rapidly to digital.

While the regional digital upward trend continues, total collections for the region in 2018 fell 13.6% due to a combination of factors. These include a decline in broadcast advertising, reduced back payments from previous years in Brazil, and currency fluctuations in Argentina.

In 2018, total collections for the Latin America and the Caribbean region reached EUR525m.

Digital collections grew 49.1% to EUR76m and have surged in recent years compared to other regions. Collections for

audiovisual creators, although shrinking 1.8% to EUR50m in 2018, have grown healthily (up 45.2%) from 2014-18.

Brazil is seeing rapid growth in video streaming and cinema-related royalties, but overall the market fell as the flow of collections from unidentified works from earlier years was reduced in 2018. In addition, declining broadcast advertising rates and consumer migration from traditional to video on demand streaming services had an impact.

Mexico's digital boom continues to drive overall growth (up 6.5%) in the region's third largest market. Digital accounts for nearly half of all collections in the country.



5.4%
Latin America & the Caribbean share of global collections

- 24 countries
- 50 members
- €525 million



LATIN AMERICA & THE CARIBBEAN USES AND REPERTOIRES

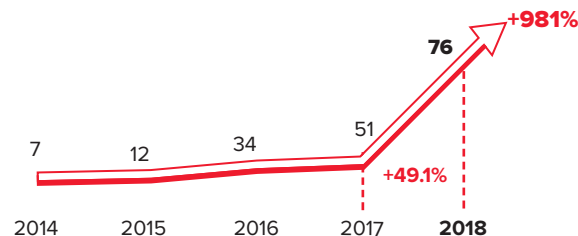
Digital climbs helped by VOD

Regional digital collections reached EUR76m, expanding 49.1% in 2018 while increasing more than tenfold (+981%) since 2014. The four largest countries for digital collections are Mexico, Brazil, Chile and Argentina.

The flow of licensing agreements with digital platforms has been helped by the one-stop shop licensing hub LATINAUTOR. Its members El Salvador and Bolivia collected digital for the first time. Agreements have been signed with Amazon Music, Amazon Prime and Facebook, boosting collections.

Brazil has seen new renewed agreements with Amazon Video, Facebook, Google Play, ABRAPLEX and Tim Music by Deezer, leading to a 40.8% increase. Chile saw digital royalties up 263% to EUR7m, helped by back payments from previous years.

Digital growth 2014-2018 (EUR million)

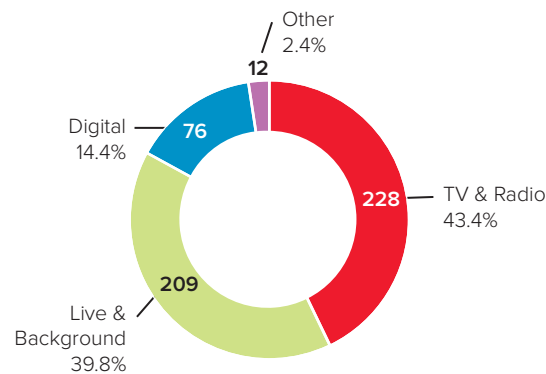


Live and background

Live and background has grown healthily in the region, attracting touring performers from Europe and the United States. The use increased to EUR209m in 2018. Live and background represents 39.8% of all collections in the region. Cinema-related collections rose 333% in Brazil following societies' new licensing agreement with cinema operators.

Colombia, Costa Rica, Guatemala and Panama experienced live and background growth of at least 10%.

Share of collections by use (EUR million)



Private copying levies promoted in Mexico

Private copying remuneration is growing despite only coming from Paraguay and Peru, which registered collections for the first time in 2018. Mexican music society SACM has made private copying legislation a major priority. Legislation is also being prepared in the Dominican Republic and Peru.

Breakdown of regional collections (EUR million)

Repertoire	Collections	Growth	5 year growth
Music	461	-14.1%	-0.1%
Audiovisual	49	-1.8%	+45.2%
Dramatic	14	-29.5%	-5.2%
Visual Arts	0.4	-8.9%	-5.4%
Literary	0.0	-79.3%	-92.1%
Type of Use			
TV & Radio	228	-24.7%	-23.4%
Live & Background	209	-11.3%	+12.1%
Digital	76	+49.1%	+981%
Synchronisation	9.2	-34.7%	-8.0%
CD & Video	1.0	-39.2%	-67%
Private Copying	0.7	+4.3%	+579%
Reproduction	0.7	-15.5%	-10.9%
Resale Right	0.3	+120%	-
Other	0.4	-20.4%	-91.3%
Type of Right			
Performing	507	-13.3%	+2.6%
Mechanical	7.2	+1.0%	+23.7%
Other	11	-31.5%	+0.2%
Total	525	-13.6%	+2.8%



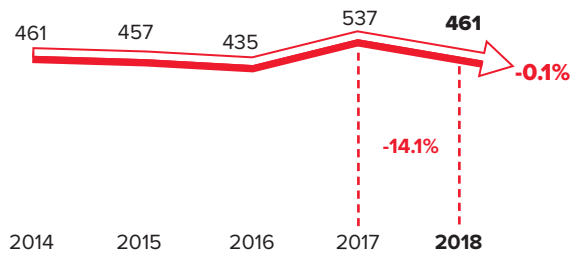
LATIN AMERICA & THE CARIBBEAN USES AND REPERTOIRES

Mexico leads music royalties growth

Music collections reached EUR461m for the region, a decline of 14.1% but which translates into an increase of 5.7% year-on-year in constant currency terms. There was strong growth in Mexico (up 6.5%), and in digital and live and background uses across the region.

In Brazil, regardless of the negative impact of reduced back payments, music society UBC reported digital collections for the first time surpassing pay TV for the society. Broadcast income declined due to falling ad revenues and the transition from cable to VOD services.

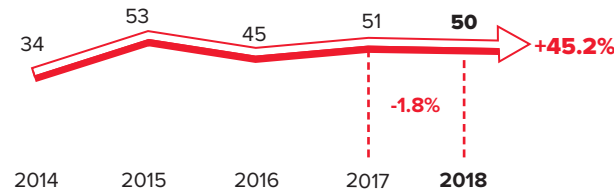
Regional music collections over 5 years (EUR million)



Audiovisual revenues up

Latin America and the Caribbean generated EUR50m in collections for audiovisual creators in 2018, helped by years of successful campaigning for the rights of directors and screenwriters.

Regional audiovisual collections over 5 years (EUR million)



On the back of the new “Pepe Sánchez” legislation introduced in 2017, Colombia joined Argentina, Mexico and Uruguay in collecting audiovisual royalties. A decline across the region was due to a one-off TV and radio payment made in 2017 in Argentina, the largest collecting country. The second largest country for audiovisual collections, Mexico, increased by 16.4% to EUR5.8m.

The outlook for the further growth is promising after Colombia authorised REDES and Brazil authorised DBCA and GEDAR to collect.

Top uses by repertoire (EUR million)

	Collections	Growth	5 year Growth
MUSIC			
Live & Background	194	-9.5%	+14.2%
TV & Radio	180	-29.2%	-32.3%
Digital	75	+49.3%	+978%
Music all uses	461	-14.1%	-0.1%
AUDIOVISUAL			
TV & Radio	48	-1.1%	+50.7%
Live & Background	1.7	-18.2%	-31.4%
Digital	0.2	-5.2%	-
Audiovisual all uses	50	-1.8%	+45.2%
DRAMATIC			
Live & Background	14	-29.5%	-5.1%
TV & Radio	0.2	-25.4%	-9.4%
Dramatic all uses	14	-29.5%	-5.2%
VISUAL ARTS			
Reproduction	0.3	-15.5%	-10.9%
Resale Right	0.1	+120%	-
Digital	0.004	+93.9%	+209%
Visual Arts all uses	0.4	-8.9%	-5.4%
LITERARY			
Live & Background	0.0	-79.3%	-92.1%
Literary all uses	0.0	-79.3%	-92.1%



LATIN AMERICA & THE CARIBBEAN USES AND REPERTOIRES

Resale right helps visual arts

Only seven countries collect for visual arts in Latin America. Total collections are modest, but revenues from the resale right more than doubled in 2018. Collections from resale right come only from Uruguay. Efforts are being made to further develop visual arts societies in the region. The Latin America Visual Artists Entities Group was created in late 2018. Including national societies AGADU, APSAV, ARTEGESTION, AUTVIS, CREAMAGEN, SAVA and SOMAAP, it seeks to create new and support existing societies to develop visual arts collections. It has already strengthened societies in Chile, Ecuador and Peru.

Annual growth in countries collecting for visual arts

COUNTRY	GROWTH
ARGENTINA	-60.8%
BRAZIL	-23.0%
CHILE	-73.7%
ECUADOR	-
MEXICO	+23.4%
PERU	-
URUGUAY	+120%

Dramatic and literary collections

Nine countries report for dramatic repertoire. Argentina brought in 84.6% of the total, followed by Uruguay (9.7%).

Mexico is the only country collecting literary income in 2018, with live and background as the only use.

Annual growth in countries collecting for dramatic repertoire

COUNTRY	GROWTH
ARGENTINA	-32.5%
BRAZIL	-21.6%
CHILE	-0.0%
COLOMBIA	-9.8%
MEXICO	-50.4%
PERU	+173%
URUGUAY	+3.2%

MEXICO

DIGITAL AND NEW LICENSING DEALS DRIVE GROWTH

Mexico has seen remarkable growth over the past five years, with a 115% increase in collections between 2014 and 2018, thanks mostly to good performances of the music, visual arts and audiovisual repertoires. In 2018, collections grew 13.3% to MXN 1,773m (EUR78m).

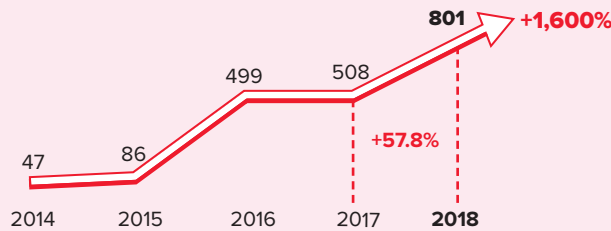
Music income, over 90% of the total, has seen digital collections surge on the back of rapid take-up of subscription streaming services. Digital music collections have grown nearly 1,600% since 2014 and rose 58.0% in 2018. Half (48.9%) of Mexico's music collections now come from digital, giving it the highest digital music share of the world's top 20 markets.

New licensing agreements

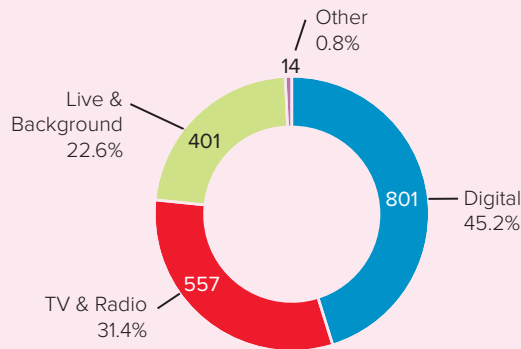
National music society SACM has designed a one-stop-shop with music publishers to facilitate the licensing of repertoire to DSPs. This scheme led to new agreements in 2018, with Amazon Prime, Amazon Music and Facebook (including Instagram, Messenger, WhatsApp, Oculus VR, tbn and Watch). The latter is the first agreement to be reached in Latin America with a social network, and one of the first worldwide. SACM has also renewed licensing agreements with Mexico's leading DSPs: Spotify and Google. TV & radio collections remain resilient, despite pressure on the advertising market. The 23.9% drop in TV & radio music revenues between 2017 and 2018 is mostly due to retroactive payments from cable and satellite services in 2017 that did not roll over in 2018. Income is also increasing from subscription video on demand.

Audiovisual revenues rose 23.9% due mostly to AV society Directores receiving payments for cinema use in 2017

Digital growth 2014-2018 (MXN million)



Share of collections by use (MXN million)



and 2018. Revenues from TV for the audiovisual society SOGEM also grew strongly. Visual arts collections rose 31.3% in 2018, thanks to a rise in reproduction revenues from society SOMAAP.

Hopes of a private copying levy

Mexico's collective management organisations are hopeful that they will soon benefit from a new stream of revenues. They are campaigning, with the support of CISAC and CIAM, to obtain clarification from the government about Article



Mexican pesos 1.8 billion
Euro 78 million

Collections per capita €0.62
% of Internetusers 63.9%

Breakdown of national collections (MXN million)

Repertoire	Collections	Growth	5 year Growth
Music	1,635	+12.7%	+128%
Audiovisual	131	+23.9%	+32.2%
Visual Arts	3.1	+31.3%	+9.6%
Dramatic	2.9	-47.2%	-25.4%
Literary	0.01	-78.0%	-89.9%

Type of Use	Collections	Growth	5 year Growth
Digital	801	+57.8%	+1,600%
TV & Radio	557	-17.4%	+3.8%
Live & Background	401	+8.2%	+80.6%
CD & Video	6.1	-23.2%	-52.2%
Synchronisation	4.4	+112%	+585%
Reproduction	3.1	+31.3%	+9.6%
Other	0.02	-34.7%	-98.3%

Type of Right	Collections	Growth	5 year Growth
Performing	1,759	+13.3%	+118%
Mechanical	6.1	-23.2%	-52.2%
Other	7.5	+68.9%	+89.2%

Total	Collections	Growth	5 year Growth
	1,773	+13.3%	+115%

40 of the Federal Copyright Law. The law introduces a provision for private copying to compensate rights holders from the reproduction of protected works on various devices, but fails to determine who it applies to and what are the rates and mechanisms applicable to enforce the right to remuneration.

CHILE

DIGITAL AND LOCAL REPERTOIRE SHOW POSITIVE TRENDS

Collections from Chile returned to growth in 2018 after a slight decline the previous year. Collections reached CLP22.5 billion in 2018, up 20.3% year-on-year, helped by retroactive payments and strong digital growth. Creators have seen total royalty growth of 47.6% between 2014 and 2018.

Total digital revenues in Chile now account for 23.8% of total collections, with an exceptional back payment boosting collections in 2018. Digital music and growing take-up of subscription platforms and streaming services have driven the growth, offsetting a 13.4% drop in revenues from radio and TV, including cable and satellite.

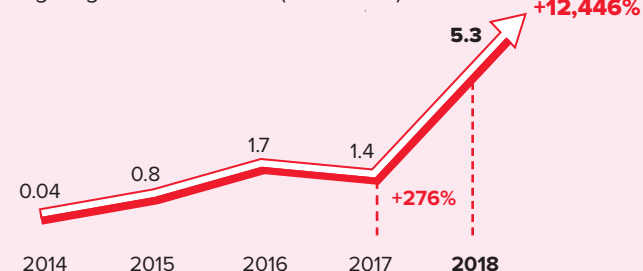
Digital collections also benefited from the retroactive payments from several online users via international licensing hub LATINAUTOR.

New rates for TV

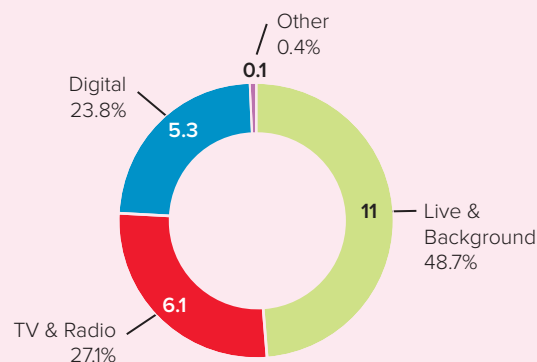
Music collections were also affected by lower income from the public performance of music from major supermarket chains that have turned to suppliers offering music free of rights.

The decrease in music revenues from radio and TV has been caused by the struggling finances of some radio stations and the actions of terrestrial TV broadcasters, which imposed a moratorium on royalty payments during the course of negotiations over new rates with national music society SCD. A new rate-setting agreement with TV broadcasters, which runs until 2035, has now entered into force and will have a positive impact on 2019 revenues.

Digital growth 2014-2018 (CLP billion)



Share of collections by use (CLP billion)



Support for local repertoire

SCD's membership is benefitting from the implementation of the law requiring radio stations to broadcast a minimum of 20% of local repertoire. A 2018 survey carried out by GFK Adimark on behalf of SCD revealed the growing popularity of local music in the country: 64% of the respondents claimed they like national music, a significant increase from 54% in 2016.



Chilean peso 22 billion
Euro 30 million

Collections per capita €1.59
% of Internet users 82.3%

Breakdown of national collections (CLP million)

Repertoire	Collections	Growth	5 year Growth
Music	22,227	+20.7%	+48.2%
Dramatic	257	+3.8%	+13.0%
Visual Arts	9	-72.7%	-11.7%
Type of Use			
Live & Background	10,960	+8.4%	+23.3%
TV & Radio	6,101	-13.4%	-0.9%
Digital	5,348	+276%	+12,446%
CD & Video	43	-32.1%	-43.3%
Synchronisation	33	+65.8%	-44.2%
Reproduction	9	-72.7%	-11.7%
Type of Right			
Performing	22,409	+20.6%	+48.6%
Mechanical	43	-32.1%	-48.3%
Other	42	-20.8%	-39.3%
Total	22,494	+20.3%	+47.6%

Rights collections for dramatic authors, represented by ATN, grew 3.8% in 2018 due to an increase in live and background collections. Visual arts collections in 2018 declined after a major spike in 2017, which had seen two major exhibitions from international artists represented by visual arts society CREAMAGEN.

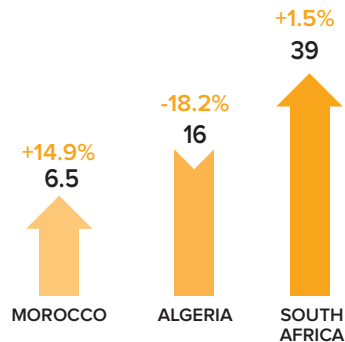
REGION

AFRICA

LIMITED BUT GROWING COLLECTIONS



Largest collecting countries and annual growth (EUR million)



In 2018, societies in Africa reported EUR78m in total collections. This slight increase (+0.7%) was due largely to currency fluctuations. In constant currency terms, the region would have seen collections grow by 5.8%.

Creators' collections in Africa are still mismatched compared to the region's creative output, representing less than 1% of the global total. But there has been growth (up 29.1%) over the last five years, helped by substantial and increasing broadcast revenues in South Africa, significant growth in Morocco and increased effectiveness in collections systems in a number of countries.

While TV and radio are the biggest income sources for members in Africa, digital is a vast and mostly untapped market. Digital

collections have grown by 32.5% over the last five years, helped by South Africa and smaller societies, such as in Senegal.

Remuneration for private copying is a key revenue source in the region. Collections have grown by 69.0% to EUR12m since 2014.

Progress in the region has been possible despite weak copyright enforcement and resistance from broadcasters. Many African countries saw growth of over 10% in 2018, including Burkina Faso, Cape Verde, Djibouti, Mali, Mauritius, Senegal, Seychelles, Togo and Zambia. South Africa, Algeria and Morocco account for nearly four fifths (78.4%) of all collections in Africa.



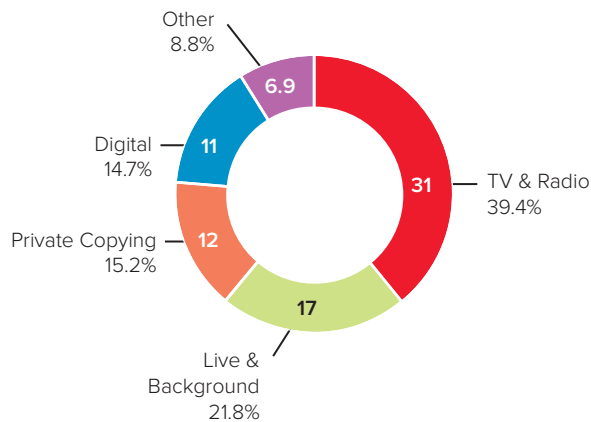
AFRICA TYPES OF USE

Traditional uses dominate

TV and radio, as well as live and background uses, remain the primary revenue sources in Africa. TV and radio income grew 5.5% in 2018, while live and background dropped 0.9%.

Actions to train societies in monitoring use, raise awareness and enforce collections from users continue. Societies showing improvement include those in Senegal, where SODAV has added an office to license users; Ivory Coast where BURIDA has collected back payments from broadcasters; and Malawi, which has started collecting private copying levies (see Malawi case study, page 32).

Share of collections by use (EUR million)

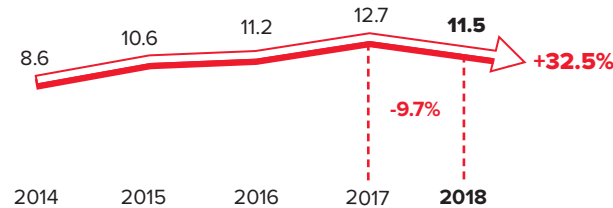


Creators payments “left on table” because of broadcasters

TV and radio collections rose 5.5% to EUR31m in 2018, but difficulties in licensing broadcasters restrict growth. Society reports to CISAC indicate that almost half of the region’s radio stations are unlicensed, while others, including state-owned broadcasters, are not paying royalties.

CMOs are fighting to improve licensing and rates. Additionally, Benin and South Africa have drawn attention to outdated tariffs that have not been updated for over 20 years.

Digital growth 2014-2018 (EUR million)



Breakdown of regional collections (EUR million)

Repertoire	Collections	Growth	5 year growth
Music	72	+1.8%	+35.8%
Literary	3.9	-14.9%	-11.2%
Dramatic	1.3	+10.5%	-8.5%
Audiovisual	0.8	-15.1%	-50.0%
Visual Arts	0.01	-59.2%	-61.3%
Type of Use			
TV & Radio	31	+5.5%	+23.8%
Live & Background	17	-0.9%	+13.3%
Private Copying	12	+10.6%	+69.0%
Digital	11	-9.7%	+32.5%
Reprography	3.1	-4.5%	+15.9%
CD & Video	2.3	-14.5%	+114%
Mechanical Reproduction	0.1	-20.1%	-45.2%
Rental/Public Lending	0.1	-0.0%	+8.7%
Reproduction	0.01	-72.6%	-77.4%
Other	1.2	-14.4%	+47.5%
Type of Right			
Performing	48	-2.3%	+20.2%
Mechanical	15	+4.2%	+39.4%
Other	15	+7.7%	+54.4%
Total	78	+0.7%	+29.1%



AFRICA TYPES OF USE

Private copying gaining share

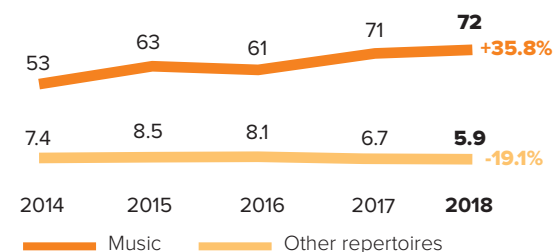
Accounting for more collections in Africa than digital in 2018, private copying remuneration grew 10.6% to EUR12m in 2018. The category has seen a 69.0% growth over the past five years, becoming a leading contributor to creators and societies in the region.

Eight countries show private copying figures with notable shares in collections, including Algeria (27.9%), Burkina Faso (59.3%) and Morocco (79.1%). Private copying levies in Morocco increased by 21.1% to surpass EUR5m following its first year of collection in 2017. Cape Verde's figures also grew over fivefold year-on-year. Burkina Faso more than doubled private copying income. Meanwhile, Malawi collected for the first time in 2018.

Several countries have explored improving or implementing private copying collections, which would help grow the sector beyond its current 15.2% share of total collections.

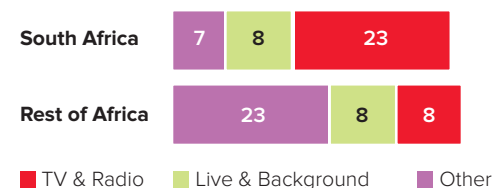
RSAU would like to see a private copying law exist in Rwanda, while GHAMRO hopes to update Ghana's legislation to include hard drives, mobile phones and laptops.

Growth in music versus other repertoires 2014–2018 (EUR million)



Regional legislation has boosted these developments. The West African Economic & Monetary Union (UEMOA) is calling on its member countries to enact private copying within two years. UEMOA will enforce compliance through sanctions. CISAC will be supporting societies in building their capacities.

South Africa leads 2018 TV & Radio collections (EUR million)



Top uses by repertoire (EUR million)

	Collections	Growth	5 year Growth
MUSIC			
TV & Radio	30	+7.4%	+26.4%
Live & Background	17	-0.9%	+13.9%
Digital	11	-9.7%	+34.2%
Music all uses	72	+1.8%	+35.8%
LITERARY			
Reprography	3.1	-4.4%	+15.9%
TV & Radio	0.5	-54.1%	-41.6%
Private Copying	0.2	-1.0%	-60.9%
Literary all uses	3.9	-14.9%	-11.2%
DRAMATIC			
Private Copying	0.5	-17.2%	-34.0%
TV & Radio	0.4	+77.2%	+68.4%
Live & Background	0.2	-1.2%	-26.6%
Dramatic all uses	1.3	+10.5%	-8.5%
AUDIOVISUAL			
Private Copying	0.5	+1.0%	-53.0%
TV & Radio	0.2	-36.9%	-44.6%
Rental/Public Lending	0.1	-0.0%	+8.7%
Audiovisual all uses	0.8	-15.1%	-50.0%
VISUAL ARTS			
Reproduction	0.007	-72.6%	-77.4%
TV & Radio	0.006	+7.7%	+55.7%
Live & Background	0.001	+58.4%	-26.0%
Visual Arts all uses	0.014	-59.2%	-61.3%



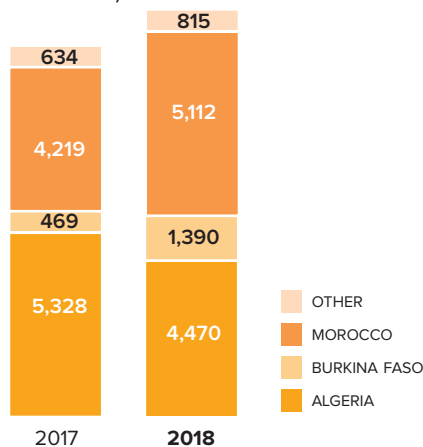
AFRICA REPERTOIRES

Music tops all repertoires

Music collections rose 1.8% in 2018 with the repertoire increasing 35.8% in five years, a growth rate second only to USA/Canada (+65.2%) over the same period. Music accounts for 92.4% of the region's total collections.

Literature royalties are reported by 13 countries and declined by 14.9% to EUR3.9m in 2018. South Africa and Algeria are the two largest contributors, accounting for 80.3% and 14.0% respectively. Reprography (81.9%), as well as TV and radio (10.5%), are the two largest uses in the repertoire.

Leading countries for private copying collections (EUR million)



Other repertoires

As in other emerging markets, the African region is in need of societies managing repertoires outside of music. MASA in Mauritius has announced that it will become multi-disciplinary and include literary, dramatic and audiovisual among its repertoires.

Visual arts, dramatic and audiovisual repertoires account for less than a 3% share of collections in Africa. Societies collected EUR1.3m for dramatic repertoires in 2018, growing 10.5% year-on-year.

Visual arts and audiovisual collections both declined. Visual arts collections is primarily supported by South Africa (78.6%), Togo (9.1%) and Burkina Faso (6.6%). Audiovisual collections mostly come from Burkina Faso (42.3%), Algeria (35.8%) and Egypt (18.5%).

Africa country growth rates over five years

Africa has weathered political, legislative, judicial and other challenges over the last five years, and collections have grown by 29.1%. The following table shows the top 10 countries with collections above EUR700k with five-year growth rates (Algeria would have shown an increase if local currencies had been used).

Top 10 countries in Africa, regional share and 2014-2018 growth (EUR million)

COUNTRY	2018 Collections	Share of region Collections	5 year Growth
SOUTH AFRICA	39	49.6%	+30.1%
ALGERIA	16	20.5%	-10.2%
MOROCCO	6.5	8.3%	+772%
IVORY COAST	4.5	5.7%	+76.6%
BURKINA FASO	2.3	3.0%	+158%
ZAMBIA	1.4	1.8%	+50.1%
SENEGAL	1.2	1.6%	+94.0%
ZIMBABWE	1.0	1.3%	+70.5%
MAURITIUS	1.0	1.2%	+32.8%
GHANA	0.8	1.0%	

SENEGAL

PROGRESS THROUGH STABILITY AND DEVELOPMENT

Senegal is one of the region's leaders in adapting its collections process to the shift from physical to digital consumption of creative works. Digital collections in Senegal, though small, have nearly grown sixfold by 465% over the last five years.

National authors society SODAV, recently privatised, helped generate strong growth in 2018. Collections were up 27.1% to XOF794m, and are up 94.0% since 2014. However, there are significant challenges in establishing a healthy royalties payment system for authors.

Digital collections leap

In the digital sector, unlike in many other regions, ringtone downloads account for the vast majority of income, and Senegal has had success in monetising this particular digital format. Of total 2018 digital collections of XOF426m, ringtones claimed a 98% share.

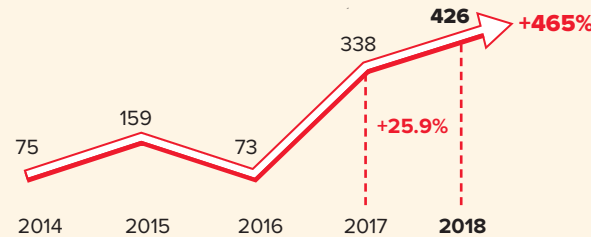
While digital collections today are at a low level, there is huge growth potential. Internet penetration in Senegal is rapidly growing at above-average rates for the region, but still stands at only 29.6% (2017) according to the World Bank.

CISAC member society SODAV has struck digital licensing deals with the top telecom providers, Sonatel-Orange and Tigo, and a third operator, Expresso, is expected to be licensed in 2019. Negotiations are in progress for a new licensing agreement for YouTube's operations in the country.

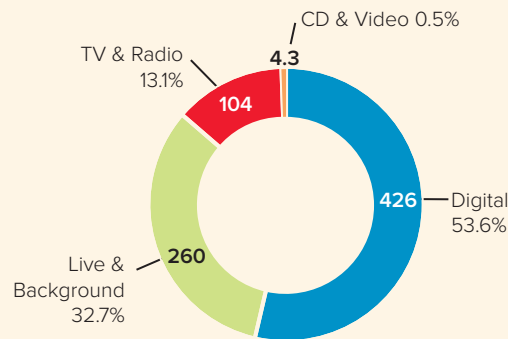
Working to make broadcasters pay

In the broadcast sector, the society is working to reclaim massive unpaid licensing fees going back many years. TV and radio collections nearly doubled (up 172%) in 2018 to XOF104m in 2018.

Digital & Multimedia growth 2014-2018 (XOF million)



Share of collections by use (XOF million)



SODAV is currently in negotiations with public broadcaster Radiodiffusion Télévision Sénégalaise (RTS) to shift from a lump sum payment to a percentage of revenues to boost these figures. With 259 radio and 27 TV stations, licensing and collections remain challenging due to resistance to higher rates and frequent changes of corporate ownership among music users.

A major campaign to license live & background uses is underway. The campaign was able to license 600 businesses in Dakar in two months in 2018. It will expand regionally, out of the capital Dakar, in 2019.



CFA francs 794 million
Euro 1.2 million

Collections per capita €0.08
% of Internet users 29.6%

Breakdown of national collections (XOF million)

Repertoire	Collections	Growth	5 year Growth
Music	794	+27.1%	+94.0%
Type of Use			
Digital	426	+25.9%	+465%
Live & Background	260	+5.7%	-2.9%
TV & Radio	104	+172%	+77.8%
CD & Video	4.3	+74.4%	-45.6%
Type of Right			
Performing	790	+27.0%	+96.7%
Mechanical	4.3	+74.4%	-45.6%
Total	794	+27.1%	+94.0%

Lobbying for private copying

SODAV, supported by CISAC, is working to address the lack of private copying remuneration, a potentially important income stream for creators. Senegal's Ministry of Culture expressed strong support at a 2018 seminar organised by CISAC with OIF, the international francophone organisation.

Visual arts

On the visual arts front, SODAV is working with French society ADAGP to improve licensing visual arts as well as collaborating with IFFRO to collect for literary.

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TABLES OF COLLECTIONS

ALL REPERTOIRES



COLLECTIONS FOR ALL REPERTOIRES IN EUR MILLION

RANK	COUNTRY/TERRITORY	COLLECTIONS	GROWTH	GLOBAL SHARE
1	UNITED STATES	1,938	+2.6%	20.1%
2	FRANCE	1,314	+9.2%	13.6%
3	JAPAN	821	+2.6%	8.5%
4	GERMANY	806	-12.9%	8.4%
5	UNITED KINGDOM	740	-0.4%	7.7%
6	ITALY	583	-1.3%	6.0%
7	AUSTRALASIA	325	+0.9%	3.4%
8	SPAIN	285	+27.1%	3.0%
9	CANADA	238	-0.5%	2.5%
10	NETHERLANDS	236	+0.4%	2.4%
11	SWITZERLAND	202	-8.3%	2.1%
12	BRAZIL	194	-23.1%	2.0%
13	SOUTH KOREA	155	+11.7%	1.6%
14	ARGENTINA	142	-20.9%	1.5%
15	DENMARK	142	-1.6%	1.5%
16	SWEDEN	136	-0.1%	1.4%
17	BELGIUM	131	-2.9%	1.4%
18	AUSTRIA	126	+10.5%	1.3%
19	POLAND	112	+5.4%	1.2%
20	RUSSIAN FEDERATION	99	+0.7%	1.0%
21	FINLAND	98	-0.1%	1.0%
22	MEXICO	78	+6.5%	0.8%
23	NORWAY	65	+4.2%	0.7%
24	PORTUGAL	49	+10.5%	0.5%
25	CZECH REPUBLIC	45	+8.0%	0.5%

RANK	COUNTRY/TERRITORY	COLLECTIONS	GROWTH	GLOBAL SHARE
26	ISRAEL	43	-0.4%	0.4%
27	HUNGARY	43	+0.4%	0.4%
28	SOUTH AFRICA	39	+1.5%	0.4%
29	CHINA	37	+37.9%	0.4%
30	ROMANIA	33	+24.3%	0.3%
31	COLOMBIA	31	+24.9%	0.3%
32	IRELAND	30	+13.3%	0.3%
33	CHILE	30	+16.0%	0.3%
34	HONG KONG	27	+5.4%	0.3%
35	CROATIA	19	+8.2%	0.2%
36	PERU	18	-1.2%	0.2%
37	SLOVENIA	18	+20.7%	0.2%
38	TAIWAN, CHINESE TAIPEI	17	+33.3%	0.2%
39	ALGERIA	16	-18.2%	0.2%
40	SINGAPORE	15	-0.8%	0.2%
41	SLOVAKIA	12	+18.3%	0.1%
42	TURKEY	11	-44.3%	0.1%
43	URUGUAY	11	-3.9%	0.1%
44	MALAYSIA	10	+52.5%	0.1%
45	SERBIA	10	+4.7%	0.1%
46	LITHUANIA	7.0	+10.4%	0.1%
47	LATVIA	6.5	+2.8%	0.1%
48	MOROCCO	6.5	+14.9%	0.1%
49	ESTONIA	5.8	-4.9%	0.1%
50	GREECE	5.7	+47.7%	0.1%



TABLES OF COLLECTIONS

MUSIC

COLLECTIONS IN EUR MILLION

RANK	COUNTRY/TERRITORY	COLLECTIONS	GROWTH	GLOBAL SHARE
1	UNITED STATES	1,932	+2.5%	22.8%
2	FRANCE	1,006	+13.6%	11.9%
3	JAPAN	819	+2.6%	9.7%
4	GERMANY	758	-5.9%	8.9%
5	UNITED KINGDOM	671	-1.2%	7.9%
6	ITALY	450	-1.8%	5.3%
7	CANADA	238	-0.5%	2.8%
8	AUSTRALASIA	232	+2.9%	2.7%
9	SPAIN	227	+29.4%	2.7%
10	BRAZIL	194	-23.1%	2.3%
11	NETHERLANDS	191	+0.5%	2.3%
12	SOUTH KOREA	149	+12.5%	1.8%
13	DENMARK	134	-1.6%	1.6%
14	SWEDEN	127	-0.4%	1.5%
15	SWITZERLAND	121	-4.7%	1.4%
16	BELGIUM	108	-2.5%	1.3%
17	AUSTRIA	91	+3.6%	1.1%
18	ARGENTINA	87	-25.9%	1.0%
19	POLAND	83	+4.6%	1.0%
20	MEXICO	72	+6.0%	0.8%
21	NORWAY	64	+4.0%	0.8%
22	FINLAND	64	-0.3%	0.8%
23	RUSSIAN FEDERATION	58	+0.2%	0.7%
24	PORTUGAL	42	+7.5%	0.5%
25	HUNGARY	39	-0.4%	0.5%

RANK	COUNTRY/TERRITORY	COLLECTIONS	GROWTH	GLOBAL SHARE
26	CHINA	37	+37.9%	0.4%
27	CZECH REPUBLIC	36	+5.1%	0.4%
28	ISRAEL	36	+1.6%	0.4%
29	SOUTH AFRICA	35	+2.0%	0.4%
30	COLOMBIA	31	+24.9%	0.4%
31	IRELAND	30	+13.3%	0.4%
32	CHILE	29	+16.4%	0.3%
33	HONG KONG	27	+5.4%	0.3%
34	ROMANIA	22	+5.5%	0.3%
35	PERU	18	-1.4%	0.2%
36	TAIWAN, CHINESE TAIPEI	17	+33.3%	0.2%
37	CROATIA	17	+7.8%	0.2%
38	SINGAPORE	15	-0.8%	0.2%
39	ALGERIA	14	-15.9%	0.2%
40	SLOVENIA	12	+15.2%	0.1%
41	TURKEY	11	-44.3%	0.1%
42	MALAYSIA	10	+52.5%	0.1%
43	SERBIA	10	+4.7%	0.1%
44	URUGUAY	9.0	-4.4%	0.1%
45	SLOVAKIA	8.2	+10.2%	0.1%
46	MOROCCO	6.3	+13.3%	0.1%
47	INDIA	5.6	+27.5%	0.1%
48	LITHUANIA	5.6	+7.7%	0.1%
49	LATVIA	5.1	-0.3%	0.1%
50	ICELAND	4.9	+1.8%	0.1%



TABLES OF COLLECTIONS

AUDIOVISUAL

COLLECTIONS IN EUR MILLION

RANK	COUNTRY/TERRITORY	COLLECTIONS	GROWTH	GLOBAL SHARE
1	FRANCE	222	-5.2%	36.6%
2	SWITZERLAND	56	-17.2%	9.3%
3	ITALY	54	+12.6%	9.0%
4	ARGENTINA	44	-3.7%	7.2%
5	SPAIN	42	+21.6%	6.9%
6	POLAND	23	+7.2%	3.9%
7	AUSTRIA	22	+70.7%	3.6%
8	RUSSIAN FEDERATION	21	+30.0%	3.4%
9	NETHERLANDS	19	+11.8%	3.2%
10	UNITED KINGDOM	16	+0.3%	2.7%
11	BELGIUM	14	+1.5%	2.4%
12	GERMANY	13	-68.4%	2.2%
13	ROMANIA	11	+99.9%	1.8%
14	FINLAND	8.5	-20.7%	1.4%
15	ISRAEL	7.1	-8.1%	1.2%
16	MEXICO	5.8	+16.4%	1.0%
17	SLOVENIA	5.5	+37.0%	0.9%
18	CZECH REPUBLIC	5.1	+53.9%	0.8%
19	GREECE	3.6	+15.7%	0.6%
20	SLOVAKIA	2.4	+82.3%	0.4%



TABLES OF COLLECTIONS

DRAMA

COLLECTIONS IN EUR MILLION

RANK	COUNTRY/TERRITORY	COLLECTIONS	GROWTH	GLOBAL SHARE
1	ITALY	63	-6.0%	33.7%
2	FRANCE	55	+4.8%	29.3%
3	RUSSIAN FEDERATION	20	-14.0%	10.6%
4	ARGENTINA	12	-32.5%	6.4%
5	SPAIN	11	+2.8%	5.9%
6	SWITZERLAND	9.1	-1.0%	4.9%
7	POLAND	5.1	+9.1%	2.7%
8	BELGIUM	3.7	+2.6%	2.0%
9	URUGUAY	1.4	+3.2%	0.7%
10	PORTUGAL	1.3	+19.5%	0.7%
11	ALGERIA	0.8	-6.1%	0.4%
12	LITHUANIA	0.6	+50.2%	0.3%
13	LUXEMBOURG	0.6	+9.8%	0.3%
14	BELARUS	0.4	-3.6%	0.2%
15	JAPAN	0.4	-6.4%	0.2%
16	GREECE	0.4	+0.0%	0.2%
17	CHILE	0.3	-0.0%	0.2%
18	SLOVAKIA	0.3	+43.1%	0.2%
19	LATVIA	0.3	+11.0%	0.2%
20	BRAZIL	0.3	-21.6%	0.2%



TABLES OF COLLECTIONS

VISUAL ARTS

COLLECTIONS IN EUR MILLION

RANK	COUNTRY/TERRITORY	COLLECTIONS	GROWTH	GLOBAL SHARE
1	GERMANY	34	-56.1%	20.2%
2	FRANCE	30	-3.9%	18.1%
3	UNITED KINGDOM	25	+16.7%	14.8%
4	NETHERLANDS	15	-7.0%	8.8%
5	ITALY	9.5	-5.3%	5.7%
6	SWEDEN	9.3	+5.2%	5.5%
7	DENMARK	8.0	-2.0%	4.8%
8	UNITED STATES	6.5	+6.7%	3.9%
9	FINLAND	6.2	+43.5%	3.7%
10	SPAIN	5.0	+44.2%	2.9%
11	AUSTRIA	4.1	-12.1%	2.5%
12	BELGIUM	3.8	-14.2%	2.3%
13	SOUTH KOREA	2.5	+1143%	1.5%
14	PORTUGAL	1.3	+244%	0.8%
15	NORWAY	1.2	+13.9%	0.7%
16	CZECH REPUBLIC	1.1	-30.0%	0.7%
17	AUSTRALIA	1.0	-19.3%	0.6%
18	SWITZERLAND	1.0	+3.2%	0.6%
19	JAPAN	0.9	+4.0%	0.6%
20	HUNGARY	0.6	-2.8%	0.4%



TABLES OF COLLECTIONS

LITERATURE

COLLECTIONS IN EUR MILLION

RANK	COUNTRY/TERRITORY	COLLECTIONS	GROWTH	GLOBAL SHARE
1	AUSTRALIA	92	-3.5%	46.1%
2	UNITED KINGDOM	28	+4.4%	14.2%
3	FINLAND	20	+2.3%	9.8%
4	SWITZERLAND	15	-3.6%	7.4%
5	NETHERLANDS	11	-8.4%	5.4%
6	AUSTRIA	9.3	+4.0%	4.7%
7	ITALY	6.5	-15.3%	3.3%
8	SOUTH KOREA	3.6	-41.7%	1.8%
9	SOUTH AFRICA	3.1	-4.1%	1.5%
10	CZECH REPUBLIC	2.5	+11.6%	1.3%
11	PORTUGAL	2.1	+59.4%	1.0%
12	HUNGARY	1.4	-5.9%	0.7%
13	BELGIUM	1.2	-41.5%	0.6%
14	FRANCE	1.0	+28507%	0.5%
15	SLOVAKIA	1.0	-11.5%	0.5%
16	SLOVENIA	0.6	+2.5%	0.3%
17	ALGERIA	0.6	-51.5%	0.3%
18	LATVIA	0.5	+4.1%	0.2%
19	ISRAEL	0.3	-27.8%	0.2%
20	LITHUANIA	0.3	+11.8%	0.2%

TABLES OF COLLECTIONS

COLLECTIONS PER CAPITA BY COUNTRY/TERRITORY (EUR)

WORLD AVERAGE: 1.51

RANK	COUNTRY/TERRITORY	COLLECTIONS PER CAPITA	REGION
1	DENMARK	24.54	EUROPE
2	SWITZERLAND	23.72	EUROPE
3	FRANCE	19.61	EUROPE
4	FINLAND	17.74	EUROPE
5	AUSTRIA	14.25	EUROPE
6	ICELAND	13.83	EUROPE
7	NETHERLANDS	13.68	EUROPE
8	SWEDEN	13.34	EUROPE
9	NORWAY	12.32	EUROPE
10	BELGIUM	11.46	EUROPE
11	UNITED KINGDOM	11.13	EUROPE
12	AUSTRALASIA	10.89	ASIA-PACIFIC
13	GERMANY	9.72	EUROPE
14	ITALY	9.65	EUROPE
15	LUXEMBOURG	9.13	EUROPE
16	SLOVENIA	8.55	EUROPE
17	NEW CALEDONIA (FRANCE)	7.47	ASIA-PACIFIC
18	JAPAN	6.49	ASIA-PACIFIC
19	CANADA	6.42	CANADA/USA
20	IRELAND	6.19	EUROPE
21	SPAIN	6.10	EUROPE
22	UNITED STATES	5.93	CANADA/USA
23	ANDORRA	5.74	EUROPE
24	ISRAEL	4.85	EUROPE
25	PORTUGAL	4.75	EUROPE

RANK	COUNTRY/TERRITORY	COLLECTIONS PER CAPITA	REGION
26	CROATIA	4.63	EUROPE
27	HUNGARY	4.37	EUROPE
28	ESTONIA	4.36	EUROPE
29	CZECH REPUBLIC	4.19	EUROPE
30	HONG KONG	3.63	ASIA-PACIFIC
31	LATVIA	3.36	EUROPE
32	ARGENTINA	3.20	LATIN AMERICA AND THE CARIBBEAN
33	URUGUAY	3.07	LATIN AMERICA AND THE CARIBBEAN
34	SOUTH KOREA	3.00	ASIA-PACIFIC
35	POLAND	2.94	EUROPE
36	SAINT LUCIA	2.70	LATIN AMERICA AND THE CARIBBEAN
37	SINGAPORE	2.59	ASIA-PACIFIC
38	LITHUANIA	2.52	EUROPE
39	SLOVAKIA	2.26	EUROPE
40	MONTENEGRO	1.92	EUROPE
41	MACAU	1.90	ASIA-PACIFIC
42	ROMANIA	1.70	EUROPE
43	BARBADOS	1.65	LATIN AMERICA AND THE CARIBBEAN
44	CHILE	1.59	LATIN AMERICA AND THE CARIBBEAN
45	SERBIA	1.44	EUROPE
46	TRINIDAD AND TOBAGO	1.16	LATIN AMERICA AND THE CARIBBEAN
47	BRAZIL	0.93	LATIN AMERICA AND THE CARIBBEAN
48	NORTHERN MACEDONIA	0.84	EUROPE
49	MAURITIUS	0.76	AFRICA
50	TAIWAN, CHINESE TAIPEI	0.74	ASIA-PACIFIC

TABLES OF COLLECTIONS

COLLECTIONS AS % OF GDP BY COUNTRY/TERRITORY

WORLD AVERAGE: **0.014%**

RANK	COUNTRY/TERRITORY	COLLECTIONS AS % OF GDP	REGION
1	FRANCE	0.056%	EUROPE
2	DENMARK	0.048%	EUROPE
3	FINLAND	0.042%	EUROPE
4	SLOVENIA	0.038%	EUROPE
5	CROATIA	0.037%	EUROPE
6	SWITZERLAND	0.034%	EUROPE
7	ITALY	0.033%	EUROPE
8	AUSTRIA	0.033%	EUROPE
9	ARGENTINA	0.032%	LATIN AMERICA AND THE CARIBBEAN
10	HUNGARY	0.032%	EUROPE
11	UNITED KINGDOM	0.031%	EUROPE
12	SAINT LUCIA	0.031%	LATIN AMERICA AND THE CARIBBEAN
13	NETHERLANDS	0.031%	EUROPE
14	SWEDEN	0.029%	EUROPE
15	BELGIUM	0.029%	EUROPE
16	MONTENEGRO	0.026%	EUROPE
17	PORTUGAL	0.024%	EUROPE
18	GERMANY	0.024%	EUROPE
19	SPAIN	0.024%	EUROPE
20	SERBIA	0.023%	EUROPE
21	AUSTRALASIA	0.023%	ASIA-PACIFIC
22	POLAND	0.023%	EUROPE
23	ESTONIA	0.022%	EUROPE
24	ICELAND	0.022%	EUROPE
25	LATVIA	0.022%	EUROPE

RANK	COUNTRY/TERRITORY	COLLECTIONS AS % OF GDP	REGION
26	CZECH REPUBLIC	0.022%	EUROPE
27	URUGUAY	0.021%	LATIN AMERICA AND THE CARIBBEAN
28	JAPAN	0.019%	ASIA-PACIFIC
29	BURKINA FASO	0.019%	AFRICA
30	NORWAY	0.018%	EUROPE
31	DJIBOUTI	0.018%	AFRICA
32	CANADA	0.016%	CANADA/USA
33	ROMANIA	0.016%	EUROPE
34	NORTHERN MACEDONIA	0.016%	EUROPE
35	ANDORRA	0.016%	EUROPE
36	LITHUANIA	0.016%	EUROPE
37	BOSNIA AND HERZEGOVINA	0.014%	EUROPE
38	ISRAEL	0.014%	EUROPE
39	SLOVAKIA	0.014%	EUROPE
40	SOUTH AFRICA	0.012%	AFRICA
41	IVORY COAST	0.012%	AFRICA
42	BRAZIL	0.012%	LATIN AMERICA AND THE CARIBBEAN
43	CHILE	0.012%	LATIN AMERICA AND THE CARIBBEAN
44	SOUTH KOREA	0.011%	ASIA-PACIFIC
45	UNITED STATES	0.011%	CANADA/USA
46	COLOMBIA	0.011%	LATIN AMERICA AND THE CARIBBEAN
47	BARBADOS	0.011%	LATIN AMERICA AND THE CARIBBEAN
48	PARAGUAY	0.011%	LATIN AMERICA AND THE CARIBBEAN
49	CAPE VERDE	0.011%	AFRICA
50	ALGERIA	0.010%	AFRICA



Membership by region

122 countries - 239 members



EUROPE

47 countries
108 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
ANCO	P	M, AV	MOLDOVA, REPUBLIC OF
ARMAUTOR NGO	M	D, M	ARMENIA
ARTISJUS	M	M, L	HUNGARY
ATHINA-SADA	P	AV	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
CRSEA	A	NR	RUSSIAN FEDERATION
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
GCA	M	M, AV, D, L, AGP	GEORGIA
GEMA	M	M	GERMANY
GESAC	A	NR	BELGIUM

SOCIETY	STATUS	REPERTOIRE	COUNTRY/TERRITORY
GESTOR	M	AGP	CZECH REPUBLIC
HDS-ZAMP	M	M	CROATIA
HUNGART	M	AGP	HUNGARY
IMPF	A	NR	BELGIUM
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	L, AV, D	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
NGO-UACRR	P	M, D	UKRAINE
OAZA	P	AV	CZECH REPUBLIC
OFA	P	AGP	SERBIA
OOA-5	P	AGP, AV	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	AV, M	RUSSIAN FEDERATION
SAA	A	AV	BELGIUM
SABAM	M	M, AV, D, L, AGP	BELGIUM
SACD	M	AV, D	FRANCE
SACEM	M	M	FRANCE

SOCIETY	STATUS	REPERTOIRE	COUNTRY/TERRITORY
SACELUXEMBOURG	M	M	LUXEMBOURG
SAIF	M	AGP	FRANCE
SANASTO	M	L	FINLAND
SAZAS	M	M	SLOVENIA
SCAM	M	AV, L, AGP	FRANCE
SDADV	P	AV, M	ANDORRA
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
SUIJA	M	M	SWITZERLAND
SUISSIMAGE	M	AV	SWITZERLAND
TALI	M	AV	ISRAEL
TEOSTO	M	M	FINLAND
TONO	M	M	NORWAY
UCMR-ADA	M	M	ROMANIA
UFFICIO GIURIDICO	A	M	HOLY SEE (VATICAN CITY STATE)
UPRAVIS	P	AGP	RUSSIAN FEDERATION
VDFS	M	AV	AUSTRIA
VEGAP	M	AGP	SPAIN
VEVAM	M	AV	NETHERLANDS
VG BILD-KUNST	M	AGP, AV	GERMANY
VISDA	M	AGP	DENMARK
ZAIKS	M	M, D, L	POLAND
ZAMP ASS. OF SLOVENIA	M	L	SLOVENIA
ZAMP MACEDONIA	M	NR	NORTHERN MACEDONIA
ZAPA	M	AV	POLAND
ZPAP	P	AGP	POLAND



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	M	M	UNITED STATES
SOCAN	M	M	CANADA
SODRAC	M	M, AGP	CANADA
SPACQ	A	M	CANADA
VAGA	M	AGP	UNITED STATES
WGAW	A	AV, D	UNITED STATES

STATUS WITHIN CISAC

M = Member A = Associate P = Provisional

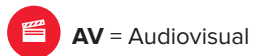
REPERTOIRES



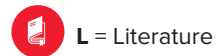
M = Music



D = Drama



AV = Audiovisual



L = Literature



AGP = Visual Arts

NR = No Repertoire



Membership by region

122 countries - 239 members



ASIA-PACIFIC

17 countries/territories
28 members

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

SOCIETY	STATUS	REPERTOIRE	COUNTRY/TERRITORY
IPRS	M	M	INDIA
JASPAR	P	AGP	JAPAN
JASRAC	M	M, D	JAPAN
KOMCA	M	M	SOUTH KOREA
KORRA	P	L, AGP	SOUTH KOREA
KOSA	M	L, AGP	SOUTH KOREA
MACA	M	M	MACAU
MACP	M	M	MALAYSIA
MCSC	M	M	CHINA
MCT	M	M	THAILAND

SOCIETY	STATUS	REPERTOIRE	COUNTRY/TERRITORY
MOSCAP	P	M, AV	MONGOLIA
MRCNS	P	M	NEPAL
MÜST	M	M	TAIWAN, CHINESE TAIPEI
PAPPRI	A	M	INDONESIA
SACENC	M	M	NEW CALEDONIA (FRANCE)
SACK	M	AGP	SOUTH KOREA
VCPMC	M	M	VIET NAM
WAMI	P	M	INDONESIA



LATIN AMERICA & THE CARIBBEAN

24 countries
50 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 SOMBRÁS	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	AV, 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
REDES	P	AV	COLOMBIA
SACIM, EGC	M	M	EL SALVADOR
SACM	M	M	MEXICO
SACVEN	M	M, D	VENEZUELA

SOCIETY	STATUS	REPERTOIRE	COUNTRY/TERRITORY
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

32 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
CNRCMSE	P	M, AV, D, L, AGP	ETHIOPIA
COSOMA	M	M, L	MALAWI

SOCIETY	STATUS	REPERTOIRE	COUNTRY/TERRITORY
COSON	M	M	NIGERIA
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	P	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	RWANDA

SOCIETY	STATUS	REPERTOIRE	COUNTRY/TERRITORY
SACERAU	M	M, AV	EGYPT
SACS	M	M	SEYCHELLES
SAMRO	M	M	SOUTH AFRICA
SCM-COOPERATIVA	P	M	CAPE VERDE
SOCILADRA	M	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 2019

SOCIETY	STATUS	REPERTOIRE	COUNTRY/TERRITORY	REGION
ICSC	P	AGP	CHINA	ASIA-PACIFIC
MCSK	P	M	KENYA	AFRICA
SINGCAPS	P	M	SINGAPORE	ASIA-PACIFIC

Societies having changed membership status as of June 2019:

Copyright Agency and WAMI are now Members, ARTEGESTION is now a provisional member.

Societies no longer CISAC members as of June 2019:

ADAVIS (CUBA, AGP), AUTORARTE (VENEZUELA, AGP), BNDA (NIGER, MU, D, L), KYRGYZPATENT (KYRGYSTAN, MU, D), PAPPRI (INDONESIA, MU), SGAÉ (SPAIN, MU, AV, D, L), SGDL (FRANCE, L), SODRAC (CANADA, MU, AGP), SPACQ (CANADA, MU), VAGA (USA, AGP)



About the report/definitions

The International Confederation of Societies of Authors and Composers (CISAC) is the world's leading network of authors' societies. Every year, royalty income data is compiled from its 239 collective management organisation (CMO) members in 122 countries to generate this comprehensive global collection report.

This 2019 report features figures based on the gross domestic collections of CISAC members in their respective countries. To avoid double-counting, only final royalties collected for the use of creative works are compiled. International exchanges among CMOs, which are based on reciprocal agreements, are excluded.

Collections are presented globally, on a regional basis with focused data as well as split into the five CISAC repertoires that member societies represent: music, audiovisual, drama, literature and visual arts.

Types of Rights

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

Performing Rights

Performing rights let creators be remunerated when their works are performed in public, either through live performance or when a recording is played. These rights also apply when works are communicated to the public by radio, TV broadcast or by digital platforms (e.g., streaming services).

Reproduction Rights

Reproduction rights allow creators to be remunerated every time a copy of their creative work is made in any format, including physical copies (e.g., CDs) or a digital download. "Mechanical rights" is the term used to describe the right obtained by record producers to make a sound recording of a musical work. The term "reprography" pertains to copying literature and printed works.

Consumers are allowed to copy works from one device to another through a "private copying exception" to reproduction right, which exists in the laws of certain countries. Creators can be compensated for this exemption through a "private copying remuneration" in the form of a tax on blank digital media and electronic products with ability to store data.

Other Rights

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

Types of Use

Collection data is split 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 (e.g., catch-up TV). This use may involve exploitation of both performing and reproduction rights because a copy of the work is often made by the broadcaster before actual transmission occurs.

Live and Background

Collections for the performance of creative works in front of a live audience (e.g., playing, reciting or singing in public). This also includes collections from the use of works performed by other sources (e.g., recorded media, TV or radio broadcasts) played in public places. Background in hotel lobbies or restaurants, or as the main focus of a live audience at discotheques, clubs or karaoke bars fall under this category.

Digital and Multimedia

Collections from licensing digital services (e.g., download and streaming platforms) as well as the use of creative works on digital recordable devices such as photographic images on USB keys.. The exploitation of creative works covered under digital and multimedia may involve both performing and reproduction rights.

Compact Discs (CDs)

Collections from licensing mechanical reproduction of musical works primarily on compact discs as well as other types of sound carriers (e.g., vinyl records or cassettes).

Video

Collections from licensing musical works within audiovisual productions that are reproduced on DVDs or Blu-Ray.

Mechanical Reproduction

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

Reprography

Collections from reproduction of graphic works through mechanical or electrical means (e.g., photocopiers and printers). These are typically collected from manufacturers, importers or operators of devices that allow works to be reproduced.

Private Copying

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

Resale Right

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

Rental and Public Lending

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

Synchronisation Right

Collections from incorporating a musical work within a soundtrack that is timed to accompany visual images. The work can be used either in full or in part. The right typically refers to audiovisual works (e.g., films, commercials and video games).

Exposition Right

Collections from the exhibition or showing 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 may include the performance or display of a work by instructors as part of a course in a classroom.



Methodology

Scope of reporting

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

The figures exclude revenues received from sister societies to avoid duplication. Collections are gross collections before deductions for administrative, cultural or social purposes.

Reporting in Euro

CISAC reports collections in Euro. Almost 40% of collections declared to CISAC come from the Eurozone, while about 20% are expressed in US dollar and almost 10% in Yen. More than two thirds of the global remuneration of creators for the use of their works are expressed in these three currencies.

Current year currency

For the current year, collections are expressed or converted in Euro at an average rate for 2018. Previous year figures are converted into Euro using the rate of the corresponding year. Year-by-year comparisons are therefore impacted by currency value changes. In 2018, the lower value of many national currencies against the Euro significantly reduced the value of collections when expressed in Euro. This has no effect on regional or national trends expressed in local currency.

Collections reported in current currency (EUR million)

	Music	Audiovisual	Literary	Dramatic	Visual Arts	Total
2014	6,697	496	169	192	140	7,695
2015	7,362	585	184	191	182	8,505
2016	7,872	581	196	189	173	9,012
2017	8,338	620	206	196	206	9,566
2018	8,490	605	199	186	168	9,649
Annual growth	+1.8%	-2.4%	-3.1%	-5.1%	-18.4%	+0.9%
5yr growth	+26.8%	+22.0%	+17.7%	-3.3%	+19.9%	+25.4%

Collections reported in constant currency (EUR million), 2018 basis

	Music	Audiovisual	Literary	Dramatic	Visual Arts	Total
2014	6,627	473	162	176	138	7,575
2015	6,939	542	171	177	176	8,005
2016	7,512	556	188	181	170	8,608
2017	8,063	595	198	185	205	9,246
2018	8,490	605	199	186	168	9,649
Annual growth	+5.3%	+1.7%	+0.6%	+0.5%	-17.9%	+4.4%
5yr growth	+28.1%	+28.0%	+23.2%	+6.1%	+22.1%	+27.4%

Comparison with constant currency reporting

An alternative way of presenting trends in CISAC's collections would be in constant currency. Reporting in a constant Euro value would erase the effects of year-to-year currency fluctuations, using the 2018 Euro exchange rate for the collections of both 2018 and the previous year.

The tables compare the change in collections between 2017 and 2018 and over five years by repertoire in constant currency Euro values.

Market focus pages

The individual market focus reports are expressed in national currencies to show the change in collections of that country independent of currency variations compared to Euro. Each currency is expressed by its three-letter ISO code (e.g., USD for US dollar).

Each country focus mentions the percentage of the country's population using the internet. This figure is provided by the World Bank for the year 2017. Internet users are individuals who have used the Internet in the last 3 months from any type of device.

Exceptionally, the market focus on India reports figures in local currency in the calendar year to April 2019.

Restatements

Collection figures have been rounded up to the nearest million or thousands, except when figures are too small to be significant. In these cases, one decimal has been added.

In the 2019 Global Collections Report, 2014 to 2018 collections data may differ partially from previous reports due to certain declared collections being recategorized to more precisely describe the society's collection activities.

Collections trends have also been impacted by a change in the number of CISAC members. When societies join CISAC and declare their income, this automatically increases revenues in their territory.

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