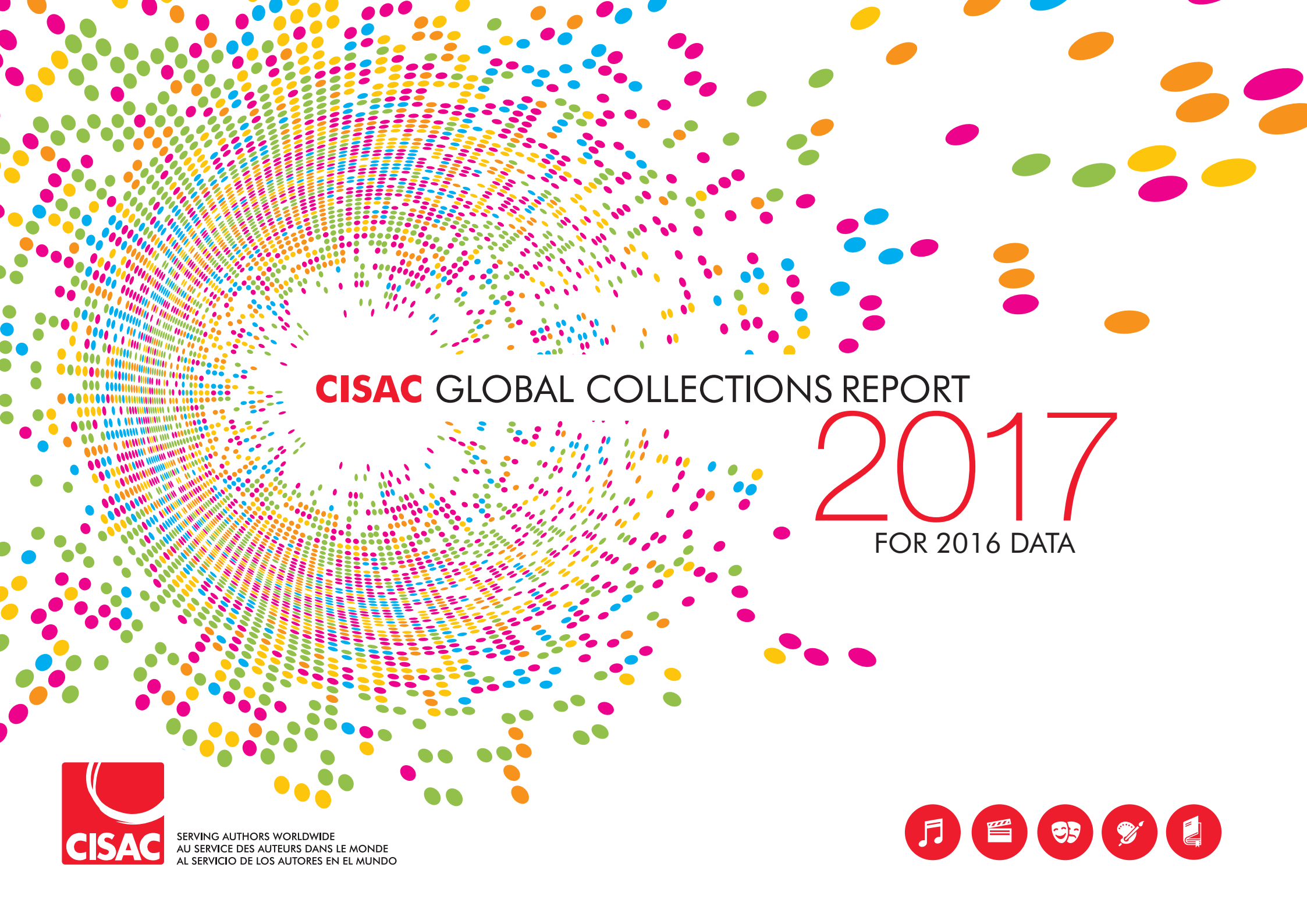




CISAC GLOBAL COLLECTIONS REPORT

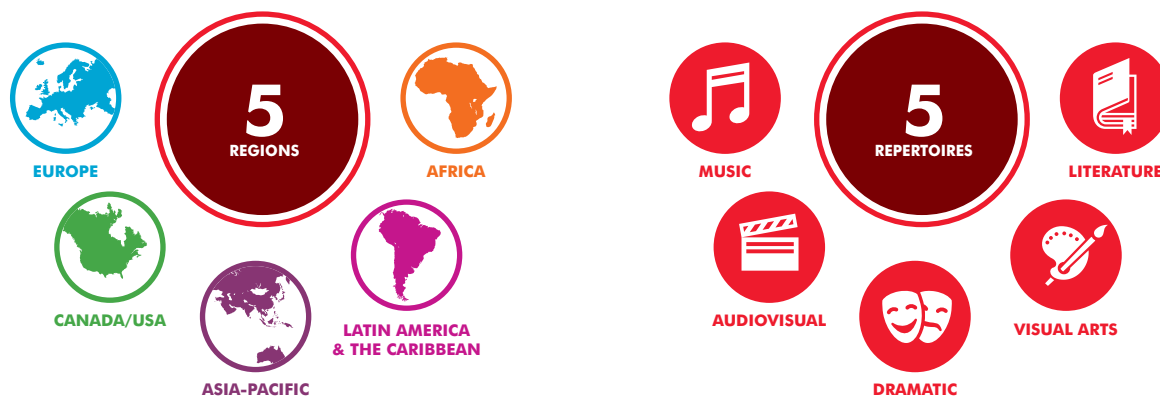
2017

FOR 2016 DATA

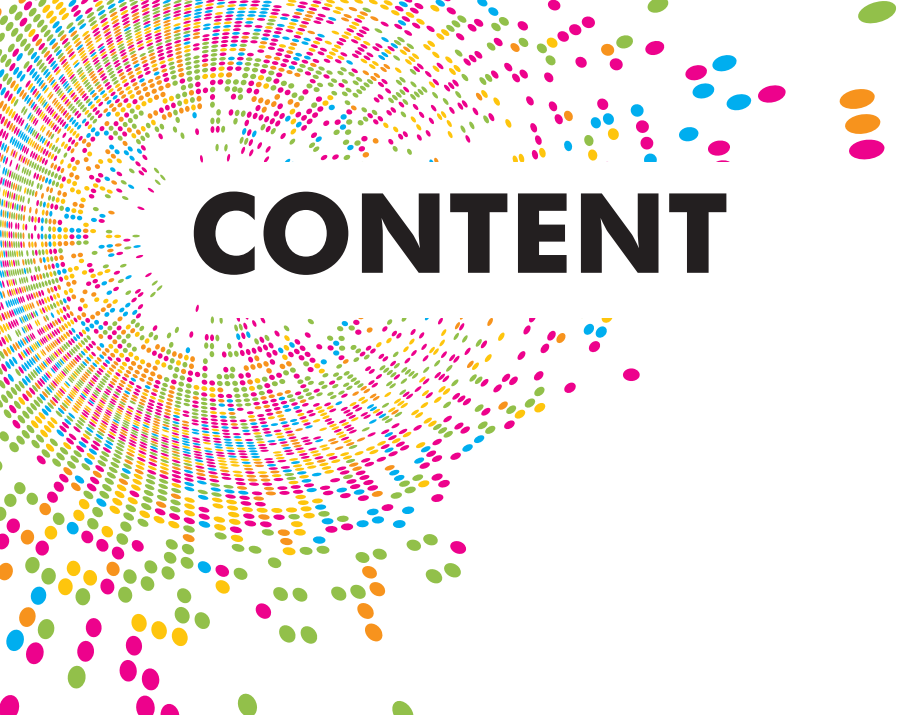


SERVING AUTHORS WORLDWIDE
AU SERVICE DES AUTEURS DANS LE MONDE
AL SERVICIO DE LOS AUTORES EN EL MUNDO





The International Confederation of Societies of Authors and Composers (CISAC) brings together 239 collective management organisations in 123 countries and five regions. These collective management organisations represent over four million creators active in the five major repertoires: Audiovisual, Dramatic, Literature, Music and Visual Arts.



CONTENT

- 2/** ABOUT THE REPORT/DEFINITIONS
- 4/** FOREWORD BY CISAC PRESIDENT, **JEAN-MICHEL JARRE**
- 5/** FOREWORD BY CISAC CHAIRPERSON OF THE BOARD, **ERIC BAPTISTE**
- 6/** FOREWORD BY CISAC DIRECTOR GENERAL, **GADI ORON**
- 7/** 2016 KEY GLOBAL NUMBERS AT A GLANCE
- 10/** REMUNERATING CREATORS: THE ROLE OF CMOs
- 12/** GLOBAL COLLECTIONS DATA
- 24/** GLOBAL MUSIC COLLECTIONS: ANALYSIS AND CONTEXT – BY **SUSAN BUTLER**
- 30/** FAIR REMUNERATION FOR CREATORS MEANS FIXING THE TRANSFER OF VALUE
- 32/** A THRIVING AUDIOVISUAL SECTOR NEEDS FAIR RIGHTS FOR SCREENWRITERS AND DIRECTORS – BY **MARCELO PIÑEYRO**
- 33/** A UNIVERSAL RESALE RIGHT WILL BRING FAIRNESS TO VISUAL ARTISTS – BY **MIQUEL BARCELÓ**
- 34/** EUROPE
- 40/** CANADA/USA
- 44/** ASIA-PACIFIC
- 50/** LATIN AMERICA & THE CARIBBEAN
- 56/** AFRICA
- 62/** MEMBERSHIPS BY REGION
- 64/** METHODOLOGY
- 68/** CREDITS



ABOUT THE REPORT/DEFINITIONS

CISAC's 2017 Global Collections Report compiles data from royalty income registered by its 239 member collective management organisations (CMOs) in 123 countries.

The calculations are based on the gross domestic collections of CISAC members. These generally correspond to the royalties collected for the use of global repertoire in each CMO's respective territories. International exchanges between CMOs (i.e. royalties received by a society for collections made on its behalf outside its own territory by another society) are not included.

CMOs grant licences for the use of creative works they represent, in exchange for remuneration. These works are categorized by CISAC under 5 repertoire groups: music, audiovisual, drama, literature and visual arts. This report monitors the flow of revenues from licensed users to CMOs in all five repertoire groups. The information is presented on a global basis and also split by region and by repertoire.

RIGHTS

CISAC member societies manage different legal rights on behalf of their affiliated authors and publishers. The two main rights managed by CISAC members are performing rights and reproduction rights:

- **Performing rights** allow creators to collect remuneration when their works are performed in public (e.g. at a bar, concert hall, restaurant or nightclub, by way of live performance or when a recording is played) or communicated to the public (e.g. by radio or TV broadcast, or dissemination via digital platforms such as streaming services);
- **Reproduction rights** allow creators to be remunerated every time a copy of their creative work is made, irrespective of the format in which it is made (e.g. physical or digital). The term "mechanical rights" is typically used to describe the right obtained by record producers in order to make a sound recording of a musical work. The term "reprography" is used in the context of the copying of literary and printed works. "Private copying exceptions" exist under some countries' law as an exception to the reproduction right and the term "private copying levies" refers to the remuneration paid to creators to compensate them for acts of copying that should fall within the reproduction right but are exempted under the law.

Throughout this report there is also reference to "other rights". This category includes all other income streams and royalties collected by CISAC members on behalf of their affiliates, which do not fall under the "performing rights" or "reproduction rights" categories. These cover royalties collected from private copying levy schemes, rental/public lending, educational use, synchronisation, exposition/exhibition and royalties collected from auction houses and galleries for the visual artists' resale right.

TYPES OF USE

In addition to presenting the royalties collected by category of right, collections are broken down by types of uses. Here, information is presented in order to track the income derived from the different types of use of creative works licensed by CISAC members. CMOs report their collections under different categories of use and method of exploitation by licensees. These types of use are defined in this report as follows:

- **TV & radio:** includes royalties coming from the use of creative works when transmitted by TV or radio broadcasters, for reception by members of the public. This category also includes collections from satellite and cable operators, as well as certain broadcast-related online services (e.g. catch-up TV). TV & radio dissemination may involve the exploitation of both performing rights and reproduction rights (because, on many occasions, a copy of the work is made by the broadcasting entity before the actual transmission takes place).

- **Live & background:** includes two main types of collections:
 - Collections for the performance of creative works in front of a live audience, such as playing, reciting or singing in public (for example during music concerts, theatre plays, or text recitations).
 - Collections from the use of works performed by means of other sources (e.g. recorded media, TV and radio broadcasts which are played in public places, cinemas) in front of a live audience. This can be either in the background (in public spaces such as hotel lobby, restaurants, bars...) or as the primary focus (in places such as discotheques or karaoke bars).
- **Digital & multimedia:** includes collections from the licensing of digital services (e.g. download and streaming platforms) as well as use of creative works on digital recordable devices (e.g. images on CD-ROMs). The exploitation of creative works covered under the digital & multimedia category may involve both performing rights and reproduction rights.
- **CDs:** includes collections from the licensing of mechanical reproduction of musical works primarily on compact discs but also on other types of sound carriers such as vinyl or cassettes.
- **Video:** includes collections from the licensing of musical works in respect of the mechanical reproduction of audiovisual productions (which incorporate the musical works) on DVDs.
- **Mechanical reproduction:** includes collections from the licensing of mechanical reproduction of works in the repertoires of dramatic works, literary works and visual art works (e.g. books, newspapers, brochures, etc.). This category excludes the reproduction of music over CDs and other carriers.
- **Reprography:** includes remuneration collected in respect of the copying of works by reprographic means, usually for manufacturing, importing or operating devices that permit works to be reproduced reprographically (e.g. photocopiers, fax machines, printers...).
- **Private copying:** includes remuneration from private copying levies to compensate rights holders for acts of copying carried out by individuals for their own personal use. Private copying levies are usually paid by manufacturers or distributors of blank media (e.g. recordable CDs) or electronic devices that have data storage capabilities (audio/video recorders, smartphones, PCs, laptops).
- **Resale right:** includes royalties collected for the resale right, a right granted to visual artists to obtain a percentage of the sale price when their works of art are re-sold by an art market professional (an auction house or a gallery). The right applies to paintings, sculptures, drawings, photographs, etc.
- **Rental/public lending:** includes collections from the licensing of the right to rent or lend the original or a copy of a work to members of the public.
- **Synchronisation right:** includes collections from the licensing of the right to incorporate a musical work, either in full or in part and in a timed relation manner, with other works (typically audiovisual works).
- **Exposition right:** includes collections from the right to show or otherwise exhibit a work of art to a public, such as in museums.
- **Educational:** includes collections from educational establishments in respect of uses of creative works for teaching purposes, for example the performance or display of a work by instructors as part of a course in a classroom or similar place.

A €9 BILLION GLOBAL SECTOR FOUNDED ON HUMAN CREATIVITY AND INNOVATION

Jean-Michel JARRE Foreword



Jean-Michel JARRE
President,
CISAC

“There is no greater priority that we ask from governments than for a solution to the transfer of value”

CISAC’s annual Global Collections Report is a key resource for millions of professional creators across the world and the societies which represent them.

Yet it is much more than that – it also depicts a vast sector of cultural and economic activity, all driven by an even more precious resource – human creativity.

This sector was worth an amazing €9 billion worldwide in 2016. These are revenues generated from myriad uses of creative works, from TV and radio to digital and live.

Creativity is hugely beneficial to the economy. The societies represented by CISAC across the world ensure creators can make a career and a living and contribute to the creative industries, growth and jobs.

Global collections are robust and seeing healthy growth. This is great news, and evidence that societies are becoming more efficient and contributing to stronger economic conditions globally.

Despite this growth, collections are nowhere near the level they should be. Across the world, in many different ways, creators’ works are being under-valued and unfairly remunerated. This is because large industries that use and profit from creative works, from broadcasters to digital platforms, are working to drive down the value of creative content.

A simple illustration of this is the “transfer of value” in the digital market, where platforms such as YouTube, the world’s biggest music service, are paying mere crumbs to authors. Another is the startling survey that suggests that only 40% of radio broadcasters in Africa are licenced.

This is why CISAC’s work, and that of the 239 societies it represents, is so vital. Our mission is to fight tooth and nail for the value of creative works and for the recognition of the rights of all creators. Societies work relentlessly to achieve this with users of creative works, international organisations, technology providers and governments.

Governments can make the biggest difference through laws and policies that support creators and their rights. There is no greater priority that we ask from governments in 2017 than for a solution to the “transfer of value”. The entire world is watching the European Union and how it will address this paramount issue.

I am delighted to present this comprehensive, authoritative and essential report to all of you.

CISAC MEMBERS ARE ADAPTING, INVESTING AND STRENGTHENING THE GLOBAL NETWORK

Eric BAPTISTE Foreword



Eric BAPTISTE
Chairperson of
the Board of **CISAC**
and CEO, **SOCAN**

***“The digital transition
undertaken by our members
is well underway”***

The figures in the Global Collections Report 2017 give us some reasons to be optimistic about the evolution of the global rights market. For the third year in a row, collections from CISAC members have been growing and for the first time, revenues have passed the €9 billion mark.

For the first time, also, digital revenues have exceeded 10% of total collections. This shows that the digital transition undertaken by our members is well underway. Our member societies have invested a lot in their infrastructure and positioned themselves to make the best of the digital evolution of the market, boosted by a global consumption in music streaming.

We have seen some growth in collections from many countries and regions, but there is still a lot of work to do. While most of the world's collections are concentrated on a limited number of countries, CISAC is fully committed to grow the global network of collective management organisations around the world, especially in Africa, Asia and Latin America – and in all repertoires.

As an organisation, we are concentrating a lot of our efforts in strengthening the network by providing support in governance, training, standards and systems to our members so that they can offer the best services to creators. We are also constantly monitoring the legal and copyright framework around the world. Our business is dependent on strong copyright laws with efficient enforcement.

The market has been evolving in recent years, with the creation of many new societies, especially in the audiovisual field, where we believe there is a lot of potential growth for collective management organisations. While collections in countries with established societies tend to plateau, these new societies will provide the bulk of our global growth in the years to come, with all the benefits trickling down to the creators. CMOs are alive and well and this report is its living proof.

COLLECTIVE MANAGEMENT IS ROBUST, SUCCESSFUL AND READY FOR MORE GROWTH

Gadi ORON Foreword



Gadi ORON
Director General,
CISAC

“Global collections rose for the third year running, by 6% in 2016”

CISAC’s 2017 Global Collections Report documents the data, trends and economic performance of a €9.2 billion global sector. It shows, in transparent detail, the royalty collections for over 4 million creators across the world in 2016.

In recent years, the CISAC Global Collections Report - published in 3 languages - has become the definitive source of information on creators’ royalties. It offers a wealth of information, a unique analysis of royalties’ collections across five repertoires, and a reflection on the vibrant worldwide creative industries.

Among the innovations of this year’s report are “country focus” pages, highlighting territories of particular interest. We have also significantly broadened our coverage of five-year historical trends.

This year’s report shows the system of collective management of creators’ rights is robust, successful and ready for more growth. CISAC’s societies continue to drive income growth in a relentless effort to become more efficient and more innovative. Global collections rose for the third year running, by 6% in 2016. The big traditional revenue streams, led by broadcast and live performance, remain broadly stable. Digital income continues to surge, rising by 51% year on year. In Europe, the live sector is especially healthy, with live and background music overtaking TV and radio for the first time to become the largest royalty source.

The report also reflects on key priorities for the future, among which I highlight only two here.

First, streaming is helping creative industries, led by music, to storm back to growth. Authors’ revenues, however, are not sharing in the digital boom in the way they should. While the jump in digital collections is encouraging, they account for only 10% of global royalty collections. This speaks to the biggest issue affecting our members today: the transfer of value in the digital market. The fact is that the revenues are there; but the sad truth is they are benefitting digital services and not creators. As explained in this report, there is a critical need for legislative reforms – starting in Europe - to correct this fundamental injustice and unacceptable market imbalance.

Second, while Europe, in so many ways the guardian of creators’ rights, is still the major source of collections, we need to focus on growing income channels in other regions. This report looks at some of the issues limiting creators’ royalties in Africa, a region of huge potential that currently accounts for less than 1% of global collections.

These are just two key issues reflected in a report that is full of comprehensive detail and analysis. I hope you will find it interesting and useful.

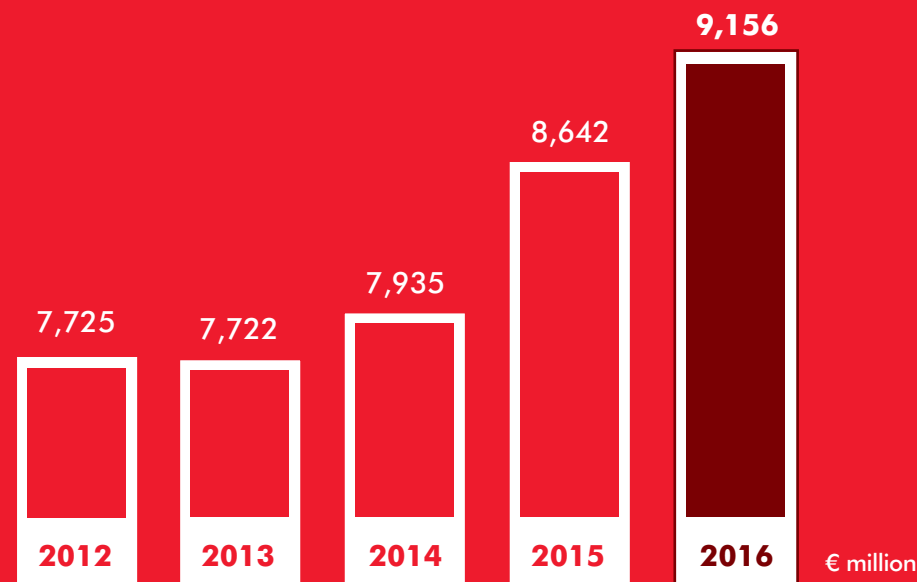
2016 KEY GLOBAL NUMBERS AT A GLANCE

TOTAL GLOBAL COLLECTIONS IN 2016



Global collections by CISAC member societies rose 6% in 2016 to €9.2 billion.

GLOBAL COLLECTIONS UP 18.5% SINCE 2012



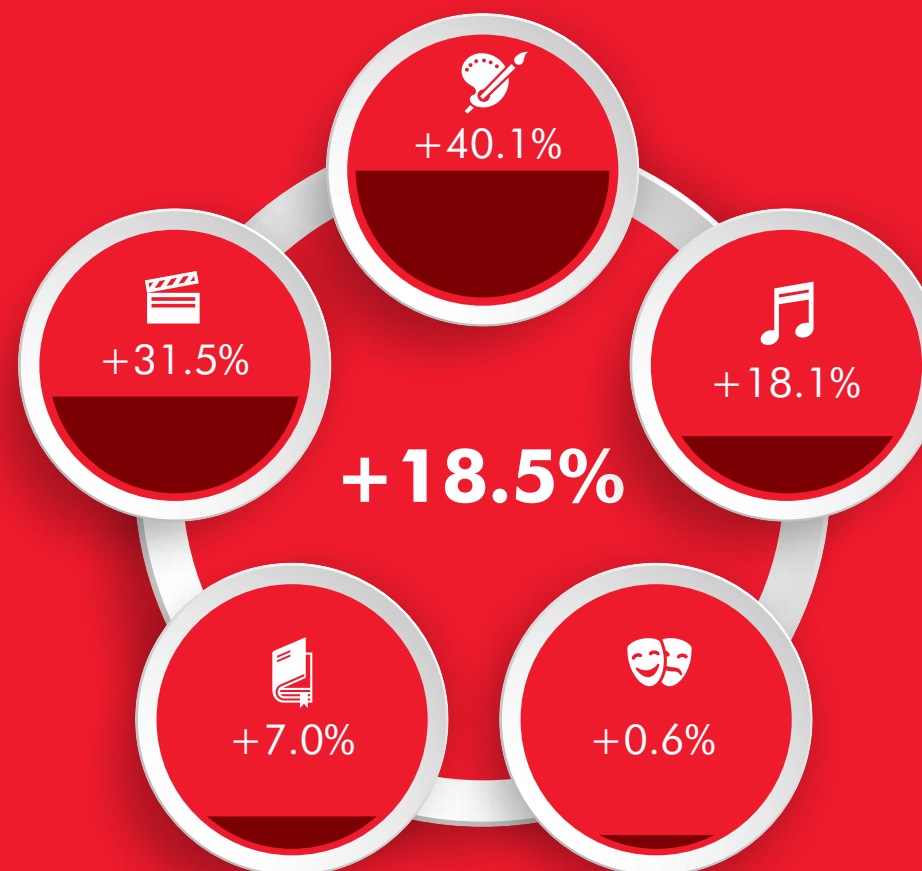
Collections by CISAC member societies have grown 18.5% since 2012. Much of this increase can be attributed to the sharp increase in digital collections that have made up for declines in other uses.

GLOBAL REPERTOIRE GROWTH IN 2016



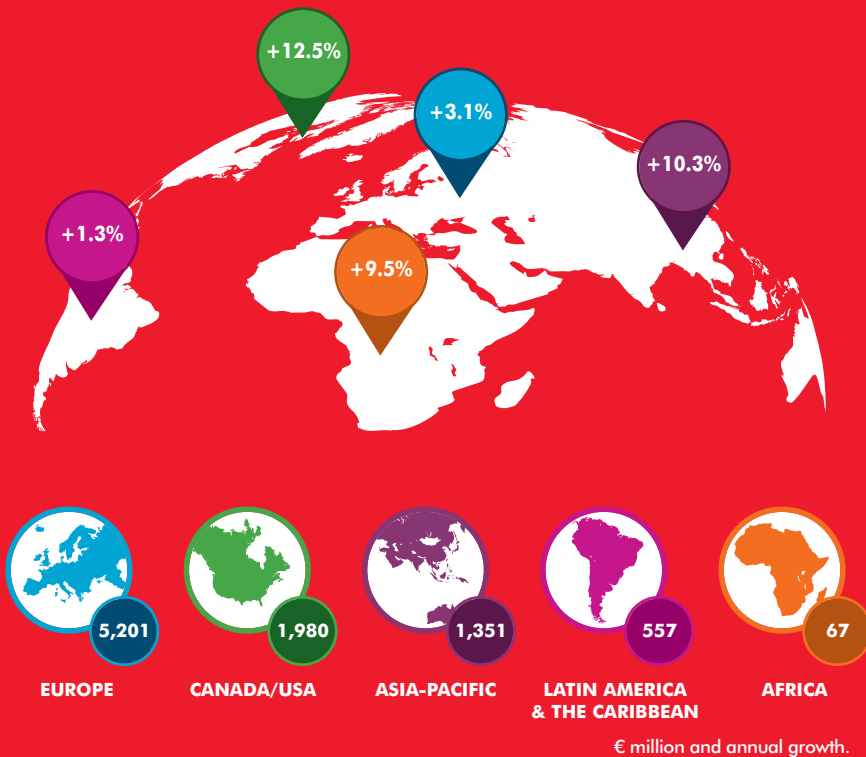
In 2016, music grew the most of all repertoires represented by CISAC members, at 6.8%. This was followed by literary, which grew at 5.3%. Audiovisual is seeing stable growth at 0.8%. Visual arts and dramatic declined by 4.2% and 0.7% respectively.

GLOBAL REPERTOIRE GROWTH IN 2012-2016



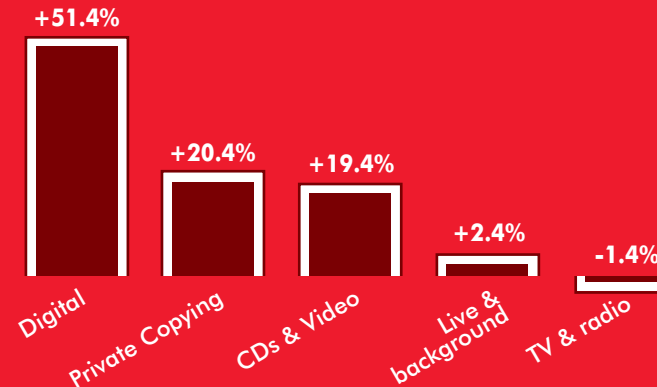
Over the last five years, visual arts saw the strongest revenue growth, driven by private copying, TV & radio, reprography and the resale right. The growth in audiovisual collections came from private copying levies, TV & radio, live & background, reprography and digital. Music's rise of 18.1% has been helped by significant digital and private copying levies growth.

REGIONS: % GROWTH BY REGION



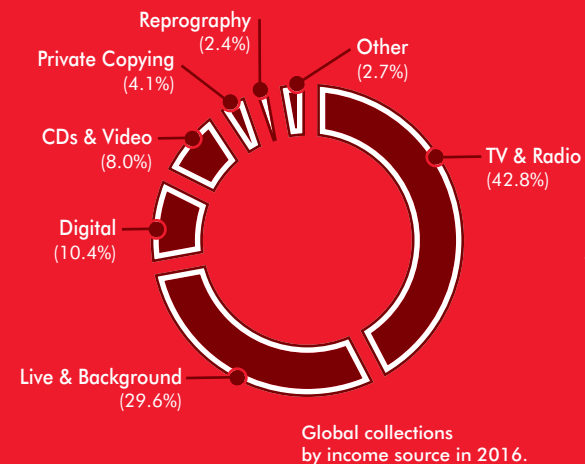
All regions of the world posted increases in royalty collections. Canada/USA grew 12.5% year-on-year. Asia-Pacific followed with a 10.3% increase while Africa grew by 9.5%. Europe is stable with an increase of 3.1% while Latin America & the Caribbean marked a 1.3% increase in collections.

REPERTOIRE USES: DIGITAL HELPS POWER GLOBAL GROWTH

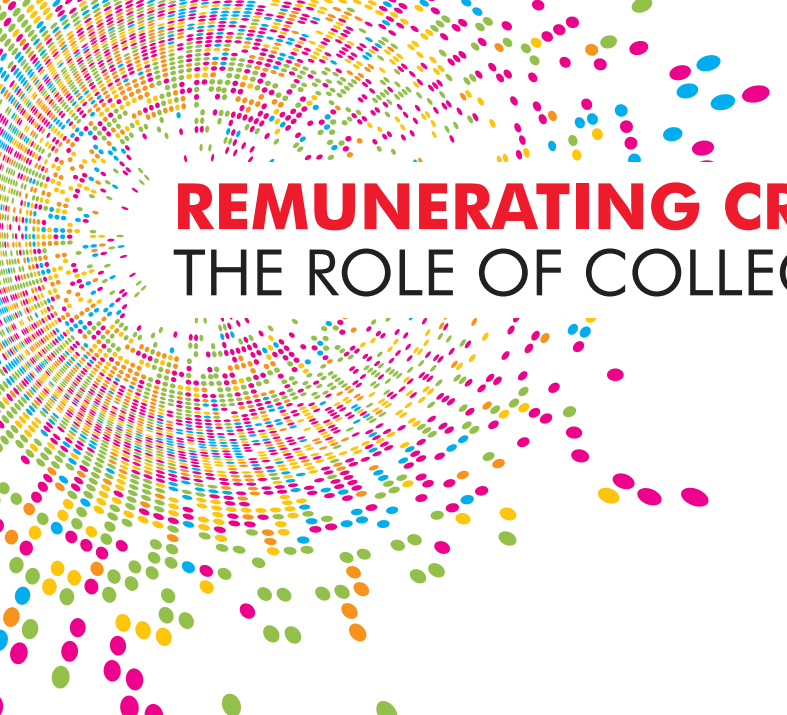


Digital royalty collections, though still a relatively small segment, dominate worldwide growth across regions. Digital collections increased 51.4% in 2016.

REPERTOIRE USES: TV & RADIO LEADS COLLECTIONS, DIGITAL HITS 10%



Throughout the world, TV & radio broadcasting is the largest source of collections at 42.8%. Digital, despite its rapid growth in recent years, still only made up 10.4% of total collections in the world.



REMUNERATING CREATORS: THE ROLE OF COLLECTIVE MANAGEMENT ORGANISATIONS

Collective Management Organisations (CMOs) ensure that authors' rights are respected and licensed to users, and that the creators receive compensation when works are used.

CISAC has 239 member societies in 123 countries, covering all main creative repertoires: audiovisual, dramatic works, literary, music and visual arts. CISAC members constitute the largest network of CMOs globally. Depending on the country, a CMO can manage one or multiple repertoires.

CMOs are usually not-for-profit bodies owned and controlled by their members (i.e. songwriters, composers, painters, playwrights, writers, photographers, music publishers). CMOs act on behalf of members in two key areas:

- **Service:** To ensure that creators receive their fair share of the value attached to their works when they are played in public or reproduced. CMOs negotiate licenses with users for the use of the organisation's repertoire to collect and distribute royalties to creators.
- **Advocacy:** To promote creators' rights and ensure that copyright laws are passed and efficiently enforced to protect these rights. CMOs lobby governments to ensure that each country's legal framework supports creators' rights. CISAC monitors the global environment, supporting societies where laws are threatened or in need of overhaul.

In addition, CMOs may bring litigation on behalf of their members to enforce rights against unlicensed use. Also, many CMOs around the world engage in cultural activities to help promote new talent and support the domestic creative sector.

The foundation of CMOs is the right bestowed upon creators to authorise or prohibit certain types of use of their works. These rights are enshrined in international, regional and national copyright laws. They oblige users of creative works to apply for licenses, if they want to use a work entrusted by the creator to a CMO. To facilitate access to repertoire, many countries have blanket licenses that allow users to use an entire CMO repertoire without having to obtain individual licences.

CMOs often sign reciprocal agreements between them. These agreements ensure creators are remunerated wherever works are used or sold.

“The foundation of CMOs is the rights bestowed upon creators to authorise or prohibit certain types of use of their works”

The bulk of CMO revenues are due to the rights of public performance and communication to the public of works. This is particularly the case with music. When works are played in public spaces, the person or entity who plays the music are required to obtain licenses. Radio and TV stations enter into licensing agreements with CMOs and pay remuneration each time they use works (an activity typically covered under the right of broadcasting/communication to the public, in many countries' laws). Digital platforms providing downloads or streaming services negotiate licenses for the use of repertoire on a national, regional or global basis.

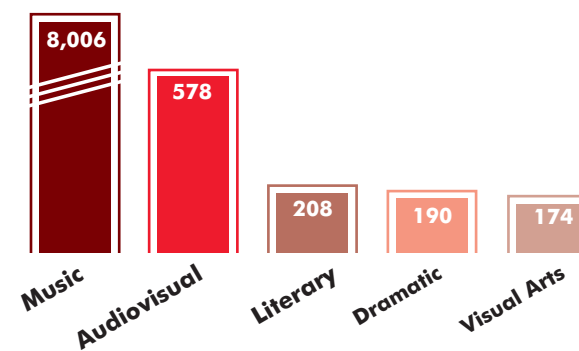
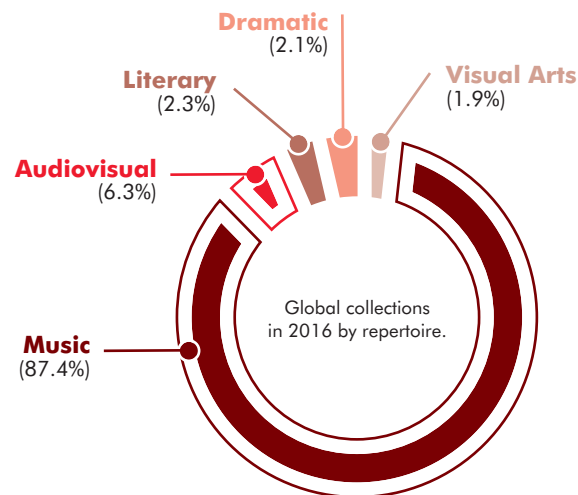
Additionally, music works are subject to mechanical reproduction rights. When works are transferred to media (i.e. CDs, vinyls, DVDs) or used by online services, creators and music publishers are entitled to remuneration for the reproduction involved in such acts.

Dramatic works used by radio stations or TV channels are subject to performance rights in some countries. In the visual arts sector, revenue is mainly derived from the reproduction right. A user (e.g. a journal reproducing photographs or paintings, or a website using visual arts) is required to obtain a license for their exploitation of works of art. Some countries or regions, such as the European Union, have introduced the visual artist resale right. This right entitles visual artists to a share in the sale price when their work is re-sold through an auction house or gallery.

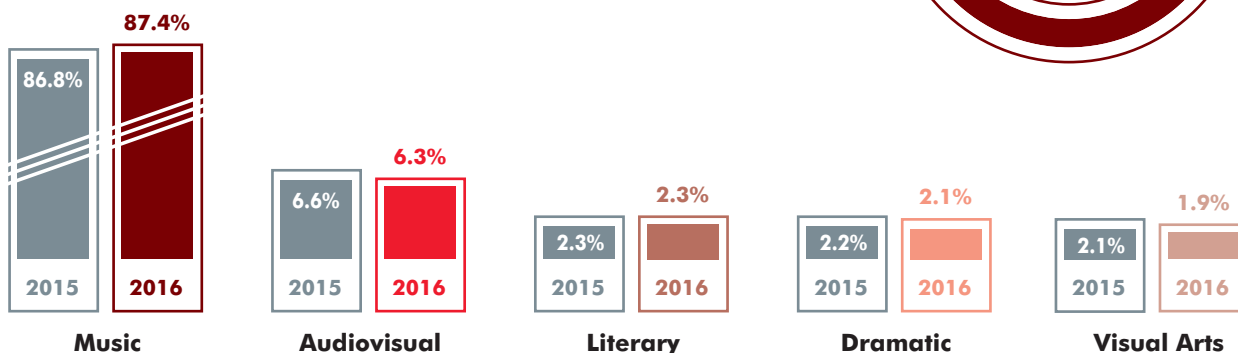
With digital content, CMOs deal with billions of transactions. To ensure efficient services to their members, CMOs have invested heavily in infrastructure to manage the volume of transactions coming from users, and in order to guarantee accurate and prompt distribution of royalties to the creators and publishers.

GLOBAL COLLECTIONS DATA

GLOBAL COLLECTIONS BY REPERTOIRE, 2016



REPERTOIRE SHARE OF ROYALTIES COLLECTED IN 2015 AND 2016



Music has the largest share of the collections of CISAC member societies worldwide. Music collections in 2016 totalled €8,006m, accounting for 87.4% of all global collections. Audiovisual increased to €578m (6.3%). Literary rose to €208m (2.3%). Dramatic and visual arts declined slightly to €190m (2.1%) of the total and €174m (1.9% of the total).

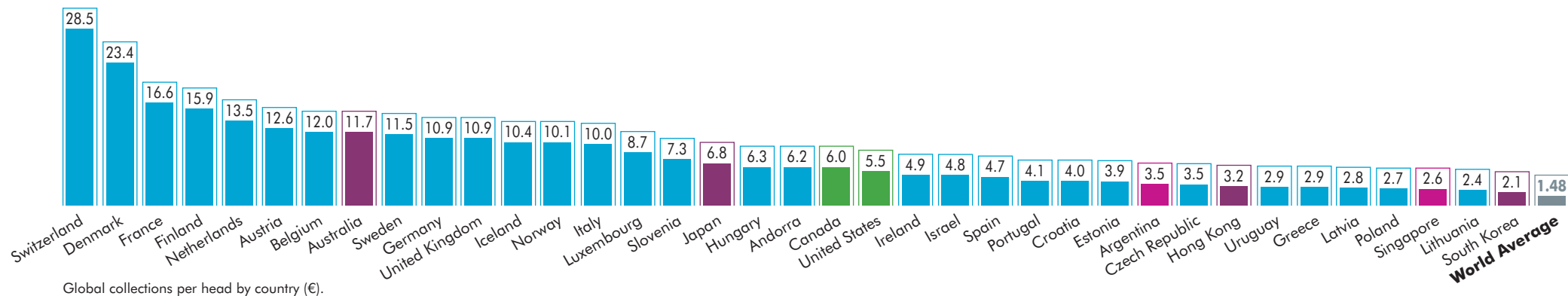
Overall collections for all repertoires increased year-on-year by 5.96% to reach, for the first time, over €9 billion in collections (€9,156m). This reflects the improved operations of CMOs and the continuous healthy growth of creative and cultural industries.

GLOBAL COLLECTIONS DATA

COLLECTIONS PER HEAD OF POPULATION BY REGION



COLLECTIONS PER HEAD OF POPULATION BY COUNTRY



Collections per head of population, by region and by country, show that two regions – Europe and Canada/USA – are performing well above the world average of €1.48 per inhabitant. The global average has increased year-on-year from €1.43 in 2015. The comparisons between countries and regions highlight significant room for growth for Africa, Asia-Pacific and Latin America & the Caribbean.

Collections per inhabitant increased in Europe and Canada/USA, to €5.79 (€5.65 in 2015) and €5.51 (€4.93 in 2015) respectively, as well as in Asia-Pacific to €0.38 (€0.35 in 2015). Latin America & the Caribbean and Africa remained stable at €0.91 and €0.09.

In terms of global collections by head of population by country, European countries comprise the first 7 places, followed by Australia. Switzerland leads all countries at €28.5, followed by Denmark (€23.4) and France (€16.6). Australia has increased to €11.7, surpassing Sweden (€11.5). Japan is the next non-European country at 17th place, or €6.8. Canada and the United States come in at 20th and 21st or €6.0 and €5.5 respectively. The first country in Latin America & the Caribbean is Argentina at 28th place with €3.5 collections per head.

GLOBAL COLLECTIONS DATA

COLLECTIONS AS % OF GDP BY REGION



COLLECTIONS AS % OF GDP BY COUNTRY



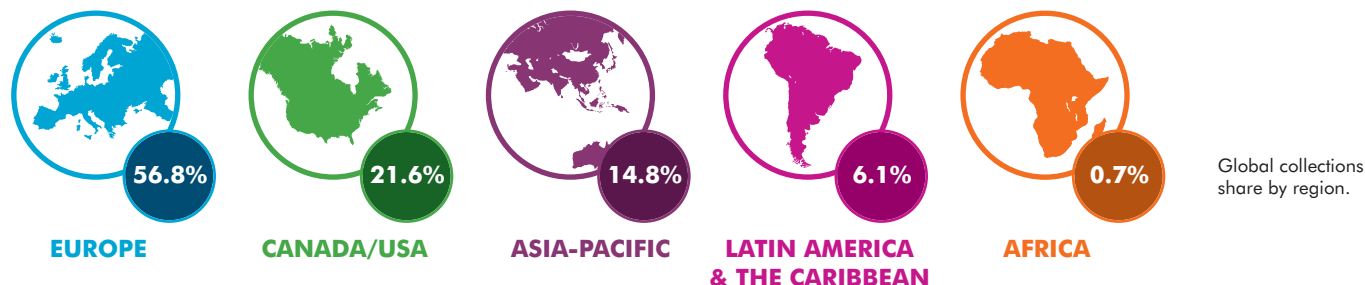
Collections as a percentage of GDP per region indicate the weight of CMO royalty collections compared to the overall economy of a particular country or region. They can also be an indicator of the health of the legislative and business environment in which creators and CMOs are working in different countries.

The highest collections to GDP ratio is found in Europe at 0.028%, double the world average of 0.014%. Latin America & the Caribbean follows at 0.012%, followed by Canada/USA at 0.011%. Asia-Pacific and Africa ratios are 0.006% and 0.005% respectively.

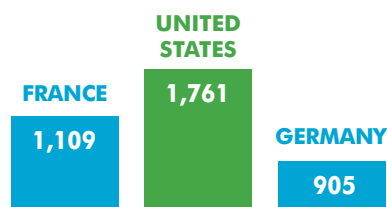
Per country, Hungary (0.055%), France (0.050%) and Denmark (0.049%) lead the rankings. Nine of the top 28 countries for collections as a percentage of GDP are in Eastern Europe (Hungary, Slovenia, Croatia, Montenegro, Serbia, Poland, Estonia, Latvia and Czech Republic), reflecting the importance of collective management in income streams for creators in this sub-region.

GLOBAL COLLECTIONS DATA

COLLECTIONS BY REGION



LARGEST COLLECTION COUNTRIES



Collections in € million.

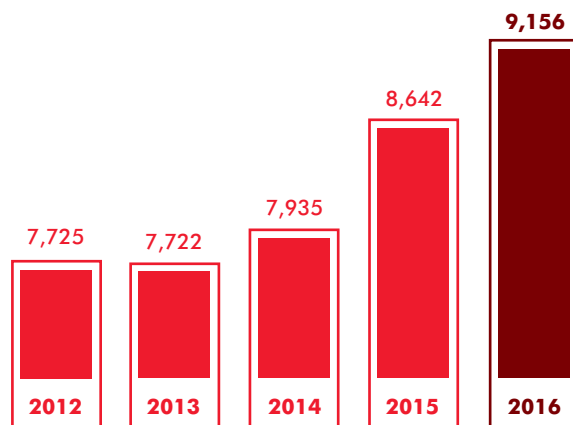
Largest country € growth: **USA**
Largest repertoire € growth: **Music**
Largest repertoire % growth: **Music**

Europe remains the region with the highest collections, accounting for more than half (56.8%) of all income collected globally. At the other end of the scale, Africa, a region of enormous untapped growth potential, accounts for less than 1% of global collections. The United States is the leading national market worldwide. Reported collections increased 13.6% in 2016 in terms of local currency values. This was due to increased collections in performing rights collections as well as the inclusion of full collections of mechanical rights from SESAC & the Harry Fox Agency.

The top 10 markets, and their growth rates in euros, are shown on page 16. France is the second largest market for collections, followed by Germany, Japan and the United Kingdom. Germany and the United Kingdom saw over 10% growth in local currency in 2016, although in euros the UK slightly declined due to currency fluctuation.

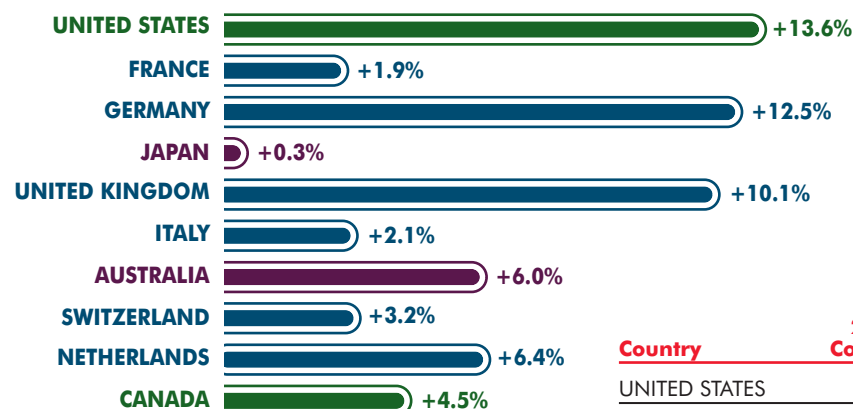
GLOBAL COLLECTIONS DATA

GLOBAL COLLECTIONS UP 6.0% IN 2016,
UP 18.5% SINCE 2012



Global collections in € million since 2012.

TOP 10 MARKETS AND GROWTH, 2016

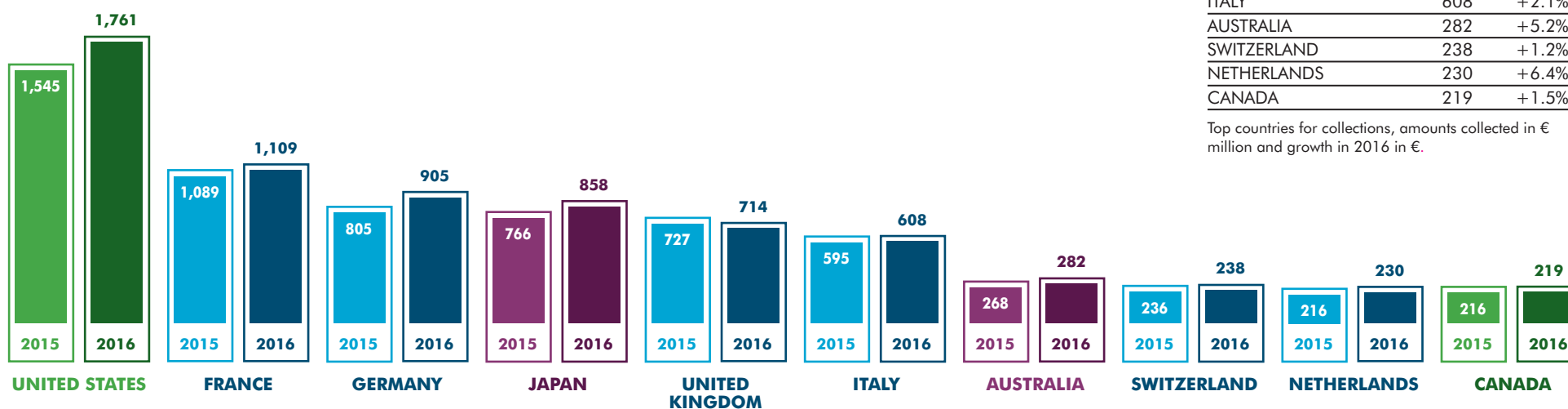


Growth in local currency.

Country	2016 €m Collections	Growth €
UNITED STATES	1,761	+14.0%
FRANCE	1,109	+1.9%
GERMANY	905	+12.5%
JAPAN	858	+12.0%
UNITED KINGDOM	714	-1.8%
ITALY	608	+2.1%
AUSTRALIA	282	+5.2%
SWITZERLAND	238	+1.2%
NETHERLANDS	230	+6.4%
CANADA	219	+1.5%

Top countries for collections, amounts collected in € million and growth in 2016 in €.

TOP 10 MARKETS IN VALUE AND GLOBAL SHARE

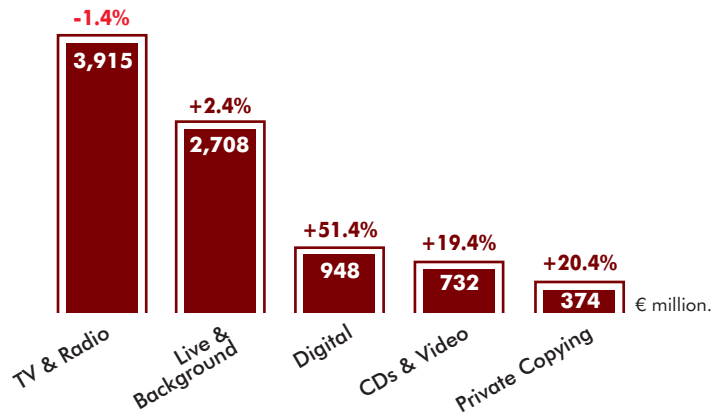


Top countries for collections, in € million, in 2015 and 2016.

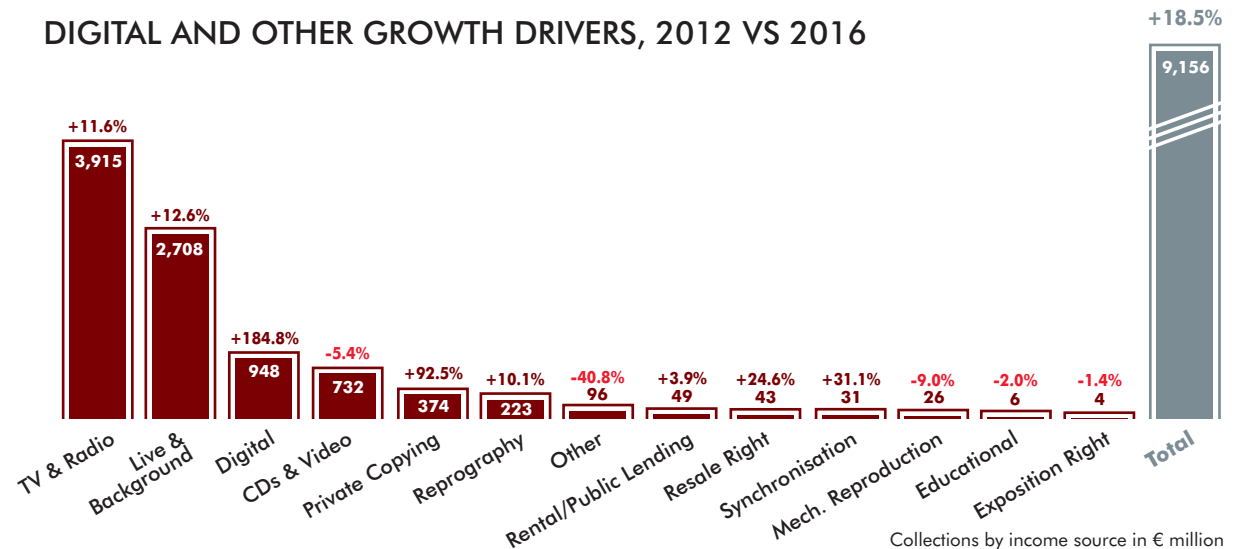
GLOBAL COLLECTIONS DATA

GLOBAL COLLECTIONS BY USE

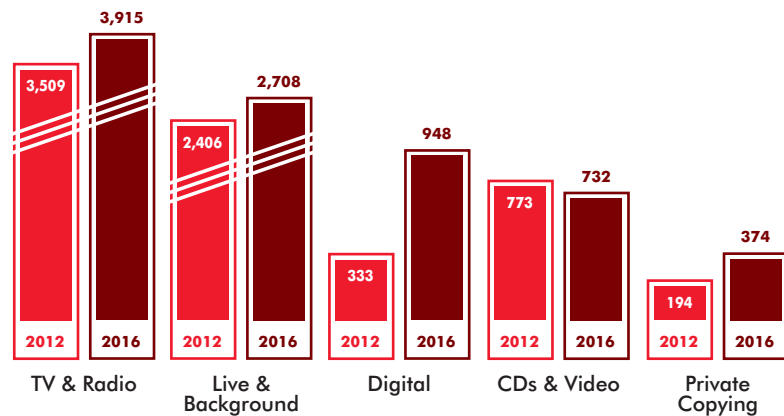
TV & RADIO LEADS COLLECTIONS,
DIGITAL SEES RAPID GROWTH IN 2016



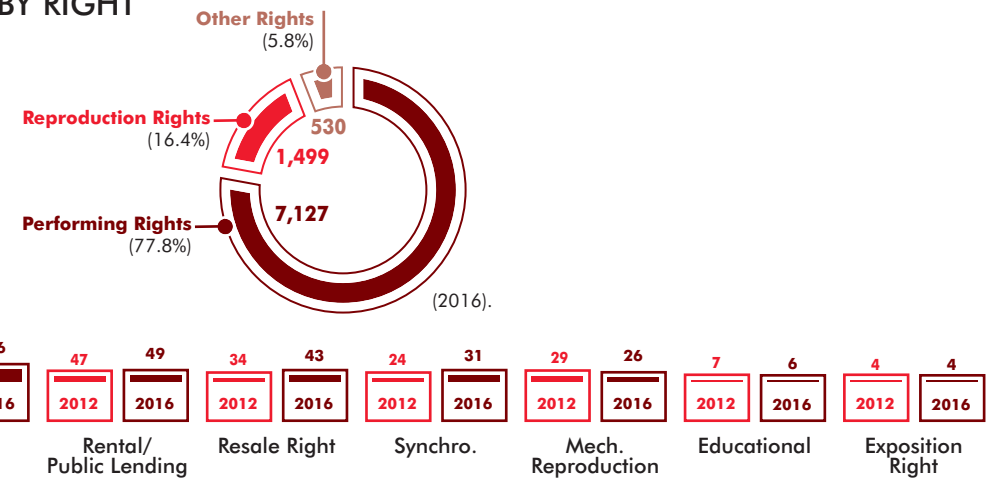
DIGITAL AND OTHER GROWTH DRIVERS, 2012 VS 2016



ALL REPERTOIRE USES, 2012 VS 2016



COLLECTIONS BY RIGHT



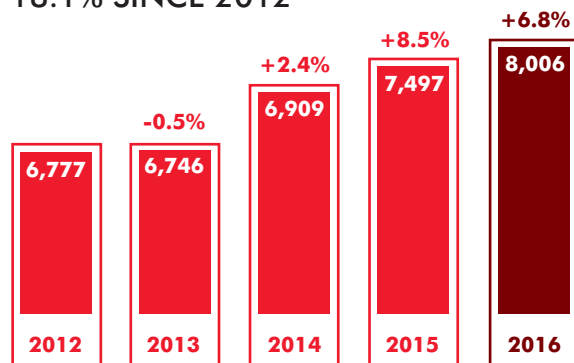
Top global sources of income in € million in 2012 and 2016.

TV & radio remains the largest source of collections for creators worldwide, although seeing a slight decline in 2016. Live & background is seeing robust growth in many regions, helped by healthy concert, festival and live music activity. Digital is substantially the fastest growing sector, with revenue nearly tripling (up 184.8%) over the last five years. Private copying collections have risen sharply since 2012, while revenues from physical media have declined.



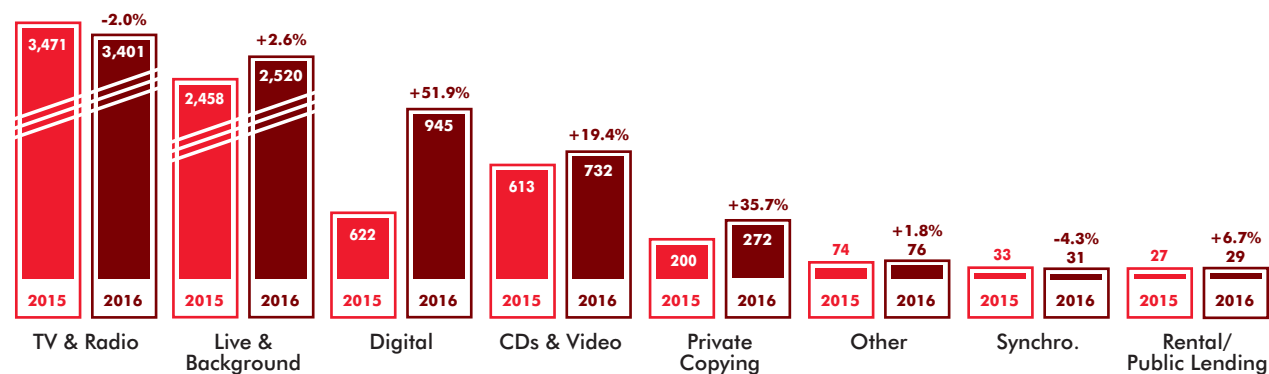
MUSIC REPERTOIRE - GLOBAL COLLECTIONS

MUSIC GROWS 6.8% IN 2016,
18.1% SINCE 2012



Global music collections in € million
and annual growth since 2012.

GLOBAL BREAKDOWN OF MUSIC REVENUE STREAMS AND ANNUAL GROWTH, 2016

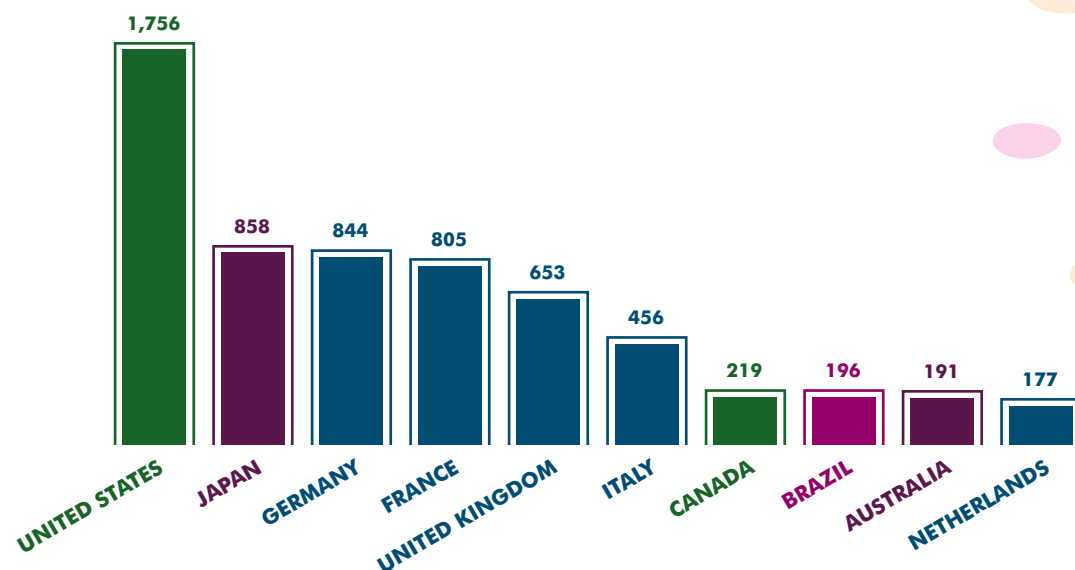


Top global sources of music collections, in € million, in 2015 and 2016.

Global music collections increased by 6.8% in 2016 to more than €8 billion for the first time (€8,006m), representing an aggregate growth of 18.1% since 2012. All regions reported music collections increase, including Africa (+11.1%), Asia-Pacific (+11.0%) and Canada/USA (+12.5%). Europe and Latin America & the Caribbean rose 3.5% and 2.8% respectively.

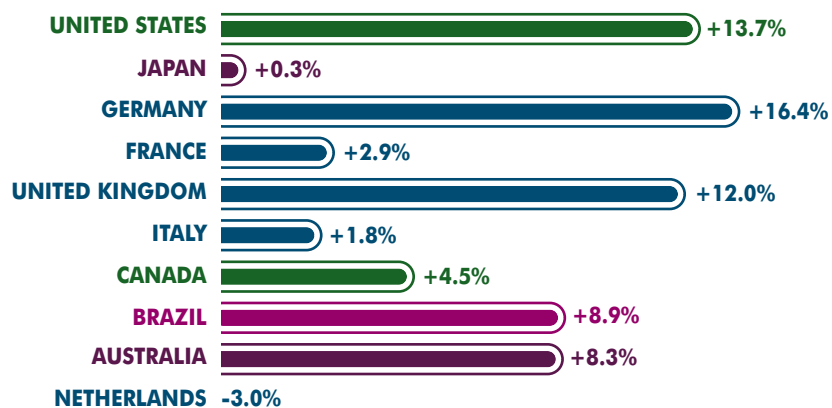
Worldwide, TV & radio brought in the most revenues to societies for music in 2016, despite a decline of 2.0% year-on-year. Live & background, spurred by healthy growth in the live sector in many countries, increased by 2.6%. Digital revenues have increased sharply year-on-year for several years and maintained that trajectory in 2016 (up 51.9%). Reported collections were also up for CDs & video (19.4%) and private copying (35.7%), the former largely driven by increased scope of reporting in the USA with the inclusion of collections from the Harry Fox Agency.

TOP 10 COUNTRIES FOR MUSIC COLLECTIONS, 2016



Top 10 countries for music collections, in € million, in 2016.

LOCAL AND EURO CURRENCY MUSIC COLLECTIONS GROWTH IN 2016



Growth in local currency.

Country	Value in € million	Growth €
UNITED STATES	1 756	+14.1%
JAPAN	858	+12.0%
GERMANY	844	+16.4%
FRANCE	805	+2.9%
UNITED KINGDOM	653	-0.6%
ITALY	456	+1.8%
CANADA	219	+1.6%
BRAZIL	196	+5.2%
AUSTRALIA	191	+7.4%
NETHERLANDS	177	-3.0%

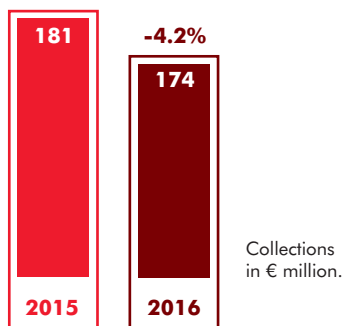
Top countries for music collections, amounts collected in € million and growth in 2016 in €.

The top 5 countries for music collections are the United States, Japan, Germany, France and the United Kingdom. Germany saw the highest growth for the repertoire at 16.4% in 2016, largely attributed to a major settlement of legal proceedings against YouTube.

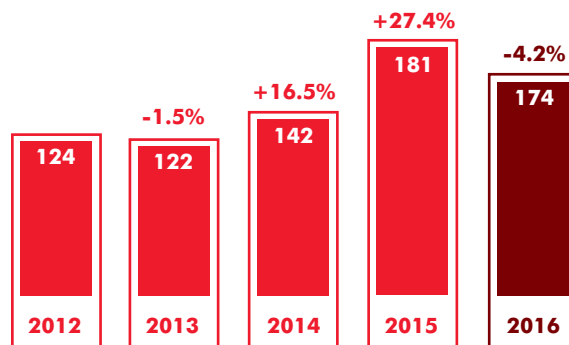


VISUAL ARTS REPERTOIRE - GLOBAL COLLECTIONS

VISUAL ARTS COLLECTIONS,
2015-2016

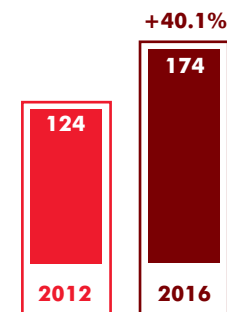


VISUAL ARTS COLLECTIONS,
2012-2016



Global visual arts collections in € million and annual growth since 2012.

VISUAL ARTS COLLECTIONS
GROW 40.1%, 2012 VS 2016

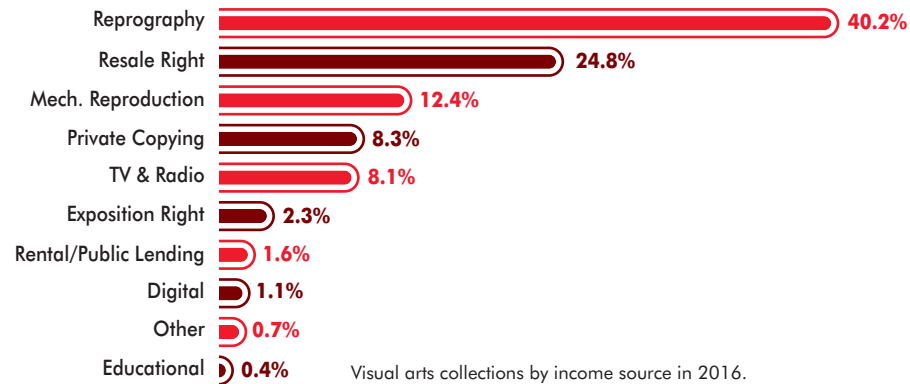


Global visual arts collections in € million and 5-year growth between 2012 and 2016.

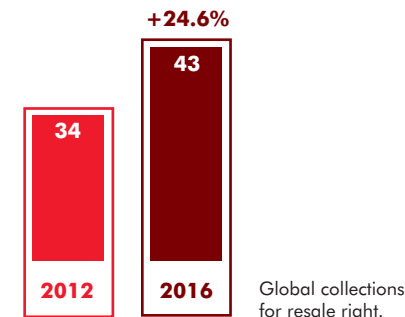
In 2016, visual arts collections declined year-on-year by 4.2% to €174m, reflecting a general wider decline in global art markets. Nevertheless, the repertoire has leapt by 40.1% since 2012 led by increases from TV & radio, reprography, resale right and private copying. The main source of collections, reprography, has grown by 62.0% since 2012 with the majority of the increase attributed to Germany.

The resale right provides a major segment of visual arts collections, accounting for about one quarter of revenues. Collections from the resale right have grown by 24.6% since 2012, boosting incomes for visual artists in countries where the right is implemented. The right exists in some 80 countries, including all members of the EU.

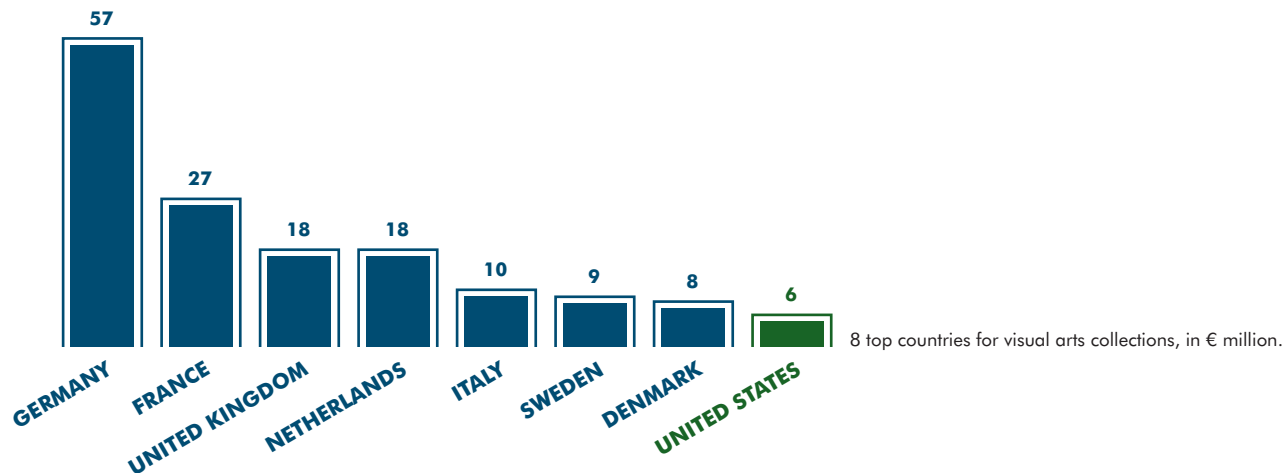
RESALE RIGHT ACCOUNTS FOR 25% OF VISUAL ARTS COLLECTIONS IN 2016



RESALE RIGHT COLLECTIONS GROW BY 24.6%, 2012-2016



GERMANY TOPS VISUAL ARTS COLLECTIONS GLOBALLY

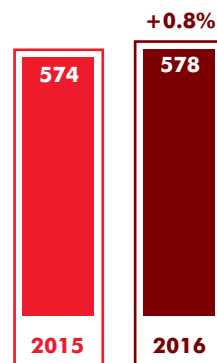


Visual arts collections are driven predominately by Europe. The top five countries all come from Europe in 2016, led by Germany, which represents a third of the global market, and followed by France. The Netherlands saw collections double, with growth of 99.1% year-on-year. The United States is the closest non-European country, coming in at the 8th place in 2016.



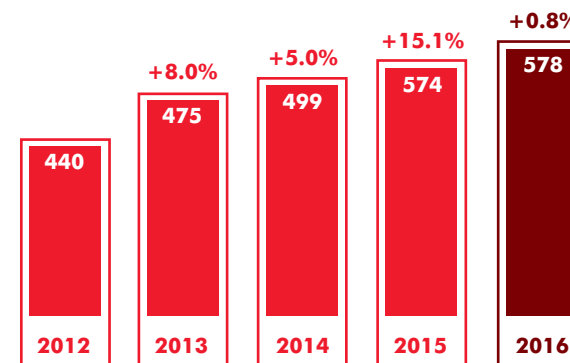
AUDIOVISUAL REPERTOIRE - GLOBAL COLLECTIONS

AUDIOVISUAL COLLECTIONS, 2015-2016



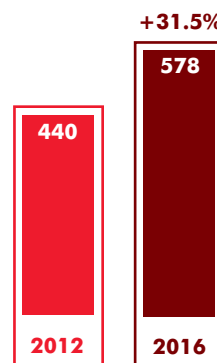
Global audiovisual collections in € million and annual growth in 2016.

AUDIOVISUAL COLLECTIONS, 2012-2016



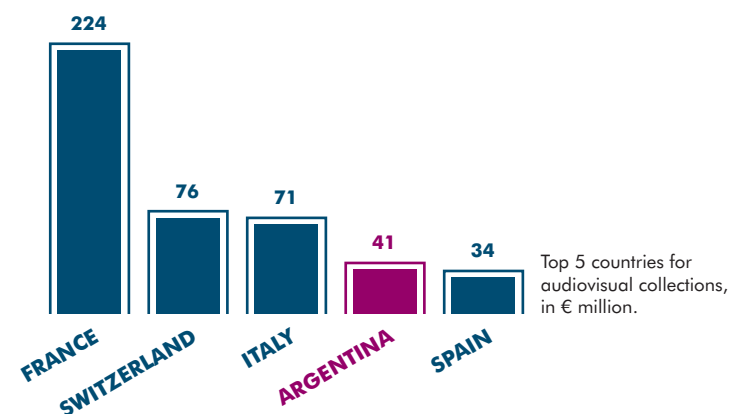
Global audiovisual collections in € million and annual growth since 2012.

AUDIOVISUAL COLLECTIONS GROW 31.5% SINCE 2012



Global audiovisual collections in € million and 5-year growth between 2012 and 2016.

FRANCE LEADS AUDIOVISUAL COLLECTIONS GLOBALLY



Top 5 countries for audiovisual collections, in € million.

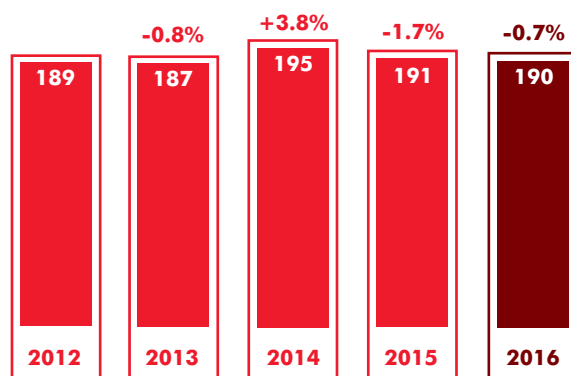
Audiovisual collections edged up by 0.8% to €578m in 2016. Europe, which accounts for the majority of collections for the repertoire, grew 2.0%. Asia-Pacific reported a small amount of collections for the first time. Meanwhile, Africa shrunk 16.7%, Canada/USA fell 47.4% while Latin America & the Caribbean declined 10.0%. Globally, the repertoire has increased by a robust 31.5% since 2012.

Four of the top countries for audiovisual collections come from Europe, with Argentina representing the largest source outside of Europe. France is by far the largest collector at €224m, followed by Switzerland and Italy.



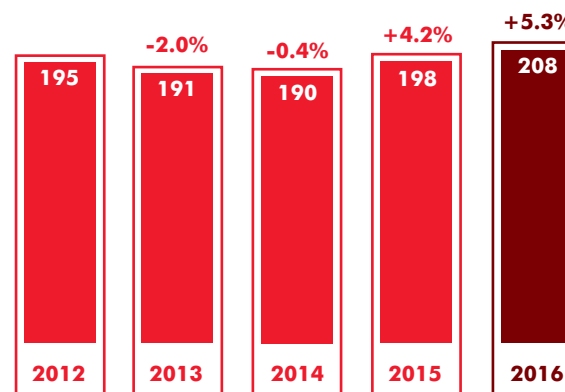
DRAMA & LITERATURE REPERTOIRE

DRAMATIC RIGHTS COLLECTIONS, 2012-2016



Global dramatic rights collections in € million and annual growth since 2012.

LITERATURE COLLECTIONS, 2012-2016



Global literary rights collections in € million and annual growth since 2012.

Collections for the drama repertoire remained broadly flat in 2016 and have been stable over the last five years. Growth in 2016 comes from Africa (+3.0%), as well as Asia-Pacific (+57.8%), Latin America & the Caribbean and Europe fell respectively by 7.2% and 0.1% while Canada/USA did not report. Collections in Asia-Pacific can be solely attributed to Japan.

In Africa, the addition of Tunisia and Benin figures to the figures of Africa partially explain the region's growth. Collections for drama works significantly increased in South Africa (+42.1%), Burkina Faso (+46.1%) and Morocco (+28.1%). South Africa is seeing a boost to live & background collections. In Morocco, TV & radio collections boosted dramatic rights collections.

Global literature collections have been stable since 2012 with growth of nearly 5% occurring in 2015 and 2016. In 2016, Asia-Pacific accounted for 43.5% of all collections with Australia collecting €89m.



GLOBAL MUSIC COLLECTIONS: ANALYSIS AND CONTEXT

By Susan Butler



SUSAN BUTLER
Music Confidential,
Executive Editor
& Publisher

INTRODUCTION

The network of collective rights societies plays an essential role in building a stronger music industry to support creators and to encourage their sharing of the human experience through song. The network gathers vast numbers of rights holders in musical compositions in order to function as a business-to-business provider of rights so that the world may more easily hear music from around the world.

Within this global network, however, there are stark differences from region to region in how rights flow from authors and composers of compositions through the societies, how each society licenses and collects remuneration for specific rights domestically and across its national borders, and how each society works with music markets.

For this analysis, information was gathered from 21 territories across six continents about music markets, licenses and tariffs (a.k.a. royalty rates) and legal challenges that impacted the three largest categories of collections in 2016 by societies in those territories—without disclosing confidential information.

In order to better compare similarities and differences from a global perspective, the markets are split into three categories: Music Users, Music Performers and Music Services.

Music Users focuses on the use of compositions for television and radio and as background music in restaurants, retailers and other business establishments.

Music Performers highlights the live music markets.

Music Services covers digital music service providers that significantly impacted collections for digital music.

The 21 territories are: Europe (Belgium, Denmark, Netherlands, Sweden, U.K., France, Spain, Italy, Germany, Switzerland, Czech Republic, Turkey); North America (Canada, U.S.); South America (Brazil); Asia (Hong Kong, Japan, Singapore, Taiwan); Australia; and Africa (South Africa).



MUSIC USERS: TELEVISION & RADIO

Television and radio, combined, was the largest music collections category last year for societies in 60% of the 21 territories. Across all of the regions, however, there were either drops in TV viewing time, fewer TV viewers, declines in broadcasters' advertising revenue or some combination of these. CISAC reports collections for TV and radio at €3,915m in 2016, accounting for 43% of the global total.

TV broadcasters and cable networks in most of the countries are struggling, competing for viewing audiences with providers of over-the-top (OTT) content (content delivered via the Internet) and with video-on-demand (VOD) streaming or download services like Netflix, Amazon Video and YouTube.

Public and private TV broadcasters that rely on ad revenue are competing with a range of digital and online content providers as more "ad spend" is moving to digital. Google (Search and YouTube) and Facebook are reportedly attracting the largest shares of the growth in ad spend.

How much each society's collections were impacted by the struggles depends in part on how tariffs (a.k.a. royalty rates) were set by the societies and by the terms of their various license agreements.

A tariff in Sweden (STIM) was based on viewer time and music hours broadcast, while a tariff in Ireland (IMRO) for the independent TV sector was based on a percentage of revenue. Both resulted in a slight decline in collections in this category last year. The same was true in Singapore (Compass) where TV ad revenue dropped.

In contrast, license agreements with major broadcasters in the U.K. (PRS for Music) were set up for lump sum payments over multiple years including 2016, without a tie to advertising. Tariffs in Turkey (MESAM/MSG) were also based on lumps sums despite a revenue-share model existing in the official tariff.

Long-term license agreements with built-in, periodic tariff increases resulted in higher TV collections last year in Germany (GEMA) and from commercial satellite broadcasters in Japan (JASRAC). New or renegotiated agreements for higher tariffs resulted in increased collections from the public service broadcaster in Ireland (IMRO) and from private broadcasters covered under a 2015-2017 agreement in Switzerland (SUISA).



MUSIC USERS: TELEVISION & RADIO

Despite competition, the TV sector grew overall revenue in some countries that resulted in higher collections by societies from them.

Japanese broadcasters' revenues grew last year, in part from increased advertising spend. Many U.S. TV networks and broadcasters benefitted from ads for the 2016 Summer Olympics and political campaigns, and despite cable TV subscribership declining, many cable networks still had growth in ad revenues and affiliate fees.

There was a boom in the launch of new small TV broadcasters in the Czech Republic. A new TV broadcaster acquiring rights from large professional sports organizations entered the South African market last year. Even though new TV stations were launched in Hong Kong, other large broadcasters either ceased operations or moved to another territory in 2015.

Legal claims or government actions impacted collections in some territories.

Disputes over cable retransmissions impacted collections in Denmark (KODA) and Belgium (Sabam). A new government regulation in Spain required that new tariffs be set by collective rights societies based on specific criteria; collections by SGAE reflected a lower interim tariff. Collections in Ireland were even affected by the U.K.'s planned exit from the European Union; the ad market suffered a downturn from "Brexit" uncertainty.

In contrast to TV, ad or gross revenues increased for radio broadcasters in many territories. As a result, collections from private radio broadcasters grew in territories including Sweden, U.K., Czech Republic and Singapore. New or recent license negotiations helped grow this segment for Ireland and Switzerland.

Last year U.S. commercial radio broadcasters maintained their listener numbers despite new digital music streaming options. Satellite radio increased their subscriber numbers in part due to a strong automobile market; satellite radio is installed and offered automatically as an optional subscription in most new cars.

"Legal claims or government actions impacted collections in some territories"



MUSIC USERS: BACKGROUND MUSIC

The use of compositions as background music by retailers, restaurants, bars and other business establishments is perhaps the market most affected by changes in local economic conditions. It is also the most labor-intensive work as societies have to deal with a vast number of businesses, to convince them to properly license — or even to use — the repertoire they represent.

Reflecting their local economies, collections for background music remained stable or grew across much of the world last year, with some exceptions in places such as the U.K. and Taiwan. Many societies reported a noticeable growth in the switch by businesses to the use of royalty-free production music. Typically this could result in drops in collections, but some societies have been able to turn the trend around by proactively pitching the use of repertoire they represent. In Sweden (STIM) for example, the society re-attracted customers to licensing compositions rather than using royalty-free music to help grow its collections.

Many societies report ongoing shifts in the licensing and collection processes to more efficiently cover all of the individual businesses involved.

For example, growth in the number of multi-national business-to-business providers of background music, which secure licenses covering groups of their customers rather than for each business individually, contributed to growing collections in countries such as France (SACEM). A major restructuring is in progress in Germany (GEMA) in the way the society assigns responsibilities internally for covering this market.

An area of concern with many societies is the growth of consumer retail purchases from online sites. This has reduced the number of brick-and-mortar retailers that license background music for their stores.

“Collections for background music remained stable or grew across much of the world”



MUSIC PERFORMERS: CONCERTS & FESTIVALS

While the live music market is often impacted by local economic conditions as reflected in rising or falling ticket sales, this sector is also perhaps the best mirror of the people who live in each territory, their cultural preferences and their openness to other cultures.

For example, in Hong Kong last year, K-pop helped drive concert attendance. In Singapore, growth in the number of pop concerts strengthened society collections. In Brazil, the country hosted a number of international festivals but Sertanejo festival attendance was noticeably strong.

South Africa attracted more international performers than in the past. Eastern European societies report increased touring from international acts in their region. And even the late 2015 terrorist attacks in France did not seem to impact attendance at concerts.

Indeed, in 2016 the live music markets were strong in nearly all of the 21 territories. The popularity of music festivals especially drove collections upward in Denmark, Netherlands, Sweden and Brazil. Even higher concert ticket prices did not appear to negatively impact attendance in Hong Kong and Singapore.

Growth in the number of concerts and attendees contributed to increased collections in Italy, U.K., U.S., Japan, Hong Kong, Singapore, Australia and South Africa. More live music venues also opened from Denmark to Japan.

***“Live music markets were strong
in nearly all of the 21 territories”***



DIGITAL MUSIC SERVICES

The inexorable growth of music streaming dominated the music market in 2016 and continues to do so throughout 2017. Whether a digital music service provider (DSP) offers a paid-subscription or a free, ad-supported service or both, most consumers show a preference to use the international streaming services over local services, with few exceptions. Payments from these DSPs for compositions are demonstrating that paid-subscription business models are generating the most value for rights holders. CISAC reports that collections for digital from societies totaled €948m in 2016, up 51% year-on-year.

Only a few of the DSPs share subscriber numbers, and then very generally and occasionally. When they do, it is clear that not all paid-subscribers are the same. A subscriber paying €9.99 per month for a standalone service, for example, will typically generate more money for rights holders than a subscriber paying for bundled services that may include mobile phone service or videos plus music, with rights holders in each of the bundled services sharing the subscription fee.

SIX KEY DIGITAL SERVICES

Last year Apple Music and Spotify were the market drivers as two of the six DSPs most mentioned by society executives; the others were Deezer, Google/YouTube, TIDAL and Amazon. As the DSPs continue to seek ways to build and keep their user bases and grow revenues, each of the six is demonstrating some distinguishing business strategies.

Apple Music is building on the love that the musician community has shown for Apple that dates back at least to the 1980s. After the explosion of iPod sales and the success of iTunes, Apple continues to succeed through its streaming service. Its strategy follows the historical path of funneling users to products and services that are mostly from Apple's ecosystem. The company has been making some deals with telcos, but it seems less aggressive than other DSPs on this front.

Apple Music, available as a paid subscription (free during a trial period), has grown its paid subscriber base since the mid-2015 launch to 11 million (Feb. 2016), then 20 million (Dec. 2016) then 27 million (June 2017). Collections by societies reflect this growth. Apple Music has spread across more than 115 territories.

One of Spotify's greatest assets has been its easy-to-use interface. The company has built its expansion efforts through, and been the most aggressive service to strike, dozens of 'partnership' deals around the world. The partners include telcos, auto makers, TV-connected device manufacturers, social networks and apps, and credit card providers.

Over the past two years, Spotify reported about 100 million users, 30 million of which were paid subscribers (June 2016) growing to 40 million paid subscribers (Sept. 2016) and to over 140 million active users of which over 60 million are 'subscribers' (July 2017), across 61 markets.

Deezer is a smaller player based on the number of users. Yet the company's strength in forging partnerships with telcos (e.g., Orange, T-Mobile, Vodafone) to offer music as part of a bundle is evident by the breadth of the service's availability. Deezer is available in over 185 territories. In France where it partners with Orange, it was one of the strongest contributors last year to digital growth for societies. Deezer reported more than 10 million active users (Jan. 2017).

YouTube has been the leading ad-supported video site for years. Last year YouTube formally launched YouTube Music, an app designed for music discovery, free to use with advertisements or available ad-free for a YouTube Red paid subscription.

TIDAL, which includes top artists among its owners, is a subscription service offering high-quality audio and video, often exclusive content. As a standalone service, the DSP reportedly had the fewest paying subscribers among the top six DSPs. American telco Sprint then invested heavily in TIDAL, with the partnership offering Sprint's customers (more than 59 million 'connections') a free six-month trial this year.

Amazon began with selling CDs, then downloads, and then an annual Prime Membership (paid subscription) in many countries. The membership includes a limited catalog of on-demand music with other offerings. Now tying the service with its voice-activated assistant and its Echo speaker, Amazon has begun rolling out a music subscription streaming service with a broader catalog.



FAIR COLLECTIONS FOR CREATORS MEANS FIXING THE TRANSFER OF VALUE

What is the 'Transfer of Value'?

The digital market place has helped transform access to and consumption of creative works in the digital world. However, it has also had a significant negative impact on creators, who are seeing the revenues that should be due to them siphoned off to profit some large digital services.

There is a fundamentally unfair misallocation of revenues in the digital market today. Those who make available content generate a significantly larger share of the revenues than those who create, invest and publish it. Often those entities refuse to pay anything to the creators. The overall result is devastating to the creative sector. While consumption of creative content is seeing explosive growth, little is being paid back to creators in return.

What is the scale of the problem for creators?

At the heart of the transfer of value are user-generated content (UGC) services, which are the largest on-demand source of music.

Revenues being returned to creators by these services in the digital market are disproportionately small. Ad-supported video (such as YouTube) pay music authors and publishers significantly less than other music subscription services (such as Spotify). This is despite their vast global user numbers. YouTube claims it has more than 1 billion users, while Spotify has only 60 million paying subscribers (July 2017).

What has created this problem?

The transfer of value has arisen from fundamental flaws in the legal environment, the result of which is that creators are often either remunerated inadequately or not at all. Some online intermediaries do not seek licenses from rights holders or are exploiting loopholes in copyright legislation. These intermediaries typically claim the benefit of "safe harbours". These are laws adopted originally in the mid-90 to protect genuinely passive online hosting services. They were never meant to protect services that had not been in existence when the laws were passed, that are not passive conduits and that have become the world's largest source of music and audiovisual content.

Yet, these laws are misapplied and abused by leading digital services in order to avoid entering into negotiations with content owners and keep all their profits without sharing them with the creators.



What is CISAC calling for to address the transfer of value in the digital market?

CISAC is pressing for governments worldwide to take legislative action to address the problem. In 2016-2017, the legislative opportunity to address the transfer of value has been focused on Europe. Proposals from the European Commission in September 2016 were hailed by CISAC, CIAM, GESAC and others as a positive first step. They are currently heading through the European Parliament.

The key principles for which authors are campaigning in Europe are the same globally - from the US where the Copyright Office is studying safe harbour provisions as part of a wider review of digital copyright law, to Australia where creators have opposed government proposals to extend liability exemptions for service providers.

What is needed from governments?

An environment that encourages thriving creative industries and cultural diversity must be based on a level playing field for creators, as well as between digital services.

First, this means applying copyright laws to online services that play an active role in making available copyright protected works, in the same way as they are applied to subscription streaming services.

Second, those online services must not be allowed to abuse the so-called “safe harbour” laws. Those laws were designed to protect passive hosting companies in the early days of the internet. Today they are being used to shield some of the most powerful digital services from having to negotiate licences in the normal way, or to obtain licences at their own terms.



YouTube has more than 1 billion users



Spotify's 60 million paying subscribers (July 2017)



A THRIVING AUDIOVISUAL SECTOR NEEDS FAIR RIGHTS FOR SCREENWRITERS AND DIRECTORS



Marcelo PIÑEYRO
CISAC Vice President

Global audiovisual collections rose 1% to €578m in 2016. With proper protection for audiovisual creators, there is substantial growth potential. Filmmaker, screenwriter and CISAC Vice President, Marcelo Piñeyro, shares his view.

The global audiovisual sector is a dynamic cultural industry, full of talent and creativity. Cinema, films and TV programmes are being produced and enjoyed across the world as never before. These are unique expressions of a country's culture and international reputation. They are also huge drivers of creative industries and jobs.

The sector at first sight looks to be in a healthy state, as this CISAC report shows. The number of channels is growing and the total revenues from the sector are higher than ever. Digital distribution is revolutionising the way people access our works, especially the young. This is a wonderful opportunity to reach larger audiences; but it also poses big challenges for the rights and the livelihoods of audiovisual creators.

There is a fundamental injustice in the audiovisual sector that I passionately believe needs addressing. In most parts of the world, writers and directors do not get remunerated when their works are re-used by broadcasters or online services. This happens because the law does not bestow any specific right to remuneration onto its audiovisual authors. The result is that, instead of having an equitable share in the success of a project like other contributors, writers and directors have to settle for a smaller one-off payment, made before the film production has even started.

CISAC and Writers & Directors Worldwide are fighting to change this unfair situation. We are campaigning for an inalienable and unwaivable audiovisual remuneration right for screenwriters and directors everywhere.

The proposal is gaining momentum internationally. In the last two years both Chile and Colombia have changed their national legislations to grant the right. In China, a new copyright law is under consideration that can also bring positive change.

Directors and writers are indispensable to the success of audiovisual works and of a country's film industry. Their work helps generate jobs, economic growth and international prestige. They must be fairly protected and remunerated if the audiovisual sector is to thrive into the future.

“There is a fundamental injustice in the audiovisual sector that I passionately believe needs addressing”



A UNIVERSAL RESALE RIGHT WILL BRING FAIRNESS TO VISUAL ARTISTS



Miquel BARCELÓ
CISAC Vice President

“Artists today work in a global world, so international rules are needed”

Global collections for visual arts totalled €174M in 2016. In these comments, CISAC Vice President and renowned visual artist Miquel Barceló supports the campaign for the resale right.

It is hard to imagine a world without the works of Michelangelo, Picasso, Pollock, Velázquez, Klee or Manet, to name a few. Their art enriches our history and our lives.

Every visual artist offers a unique perspective on the world. When our works start a life of their own, we let them go. They escape us.

Over time and history, however, creators have had to fight to attach rights to their works. The idea behind creators' rights is to ensure that the integrity of the works is not compromised, and that artists receive proper remuneration when their works are sold or used by others.

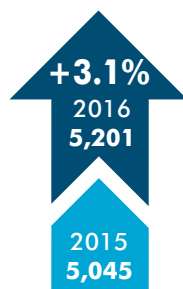
As visual artists, we have a difficult time extracting revenues from our works. But in many countries we benefit from the resale right, which gives artists a small proportion when our works are resold by an auction house or art gallery. The birthplace of the resale right is Europe, which adopted this right early on. It is now in effect in some 80 countries in the world.

On behalf of creators, CISAC, alongside the International Council of Creators of Graphic, Plastic and Photographic Arts (CIAGP) and European Visual Artists (EVA), are leading the fight for the adoption of a universal resale right. It is not enough for governments to act by themselves. Artists today work in a global world, so international rules are needed. That is why it has been so important to see this initiative gain momentum all around the world. This year, artists from all corners of the globe spoke in one united voice at the World Intellectual Property Organization in Geneva.

As Vice-President of CISAC and as an artist, I fully support this campaign. The resale right is about greater fairness in the creative world. It reconnects creators with the life of their works and it reinjects much needed resources into the creative system. In doing so, it helps nurture the future generations of Basquiat, O'Keeffe, Rodin or Sow.

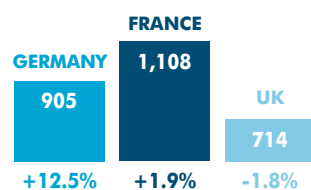
region EUROPE

TOTAL COLLECTIONS AND ANNUAL GROWTH

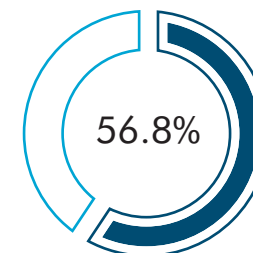
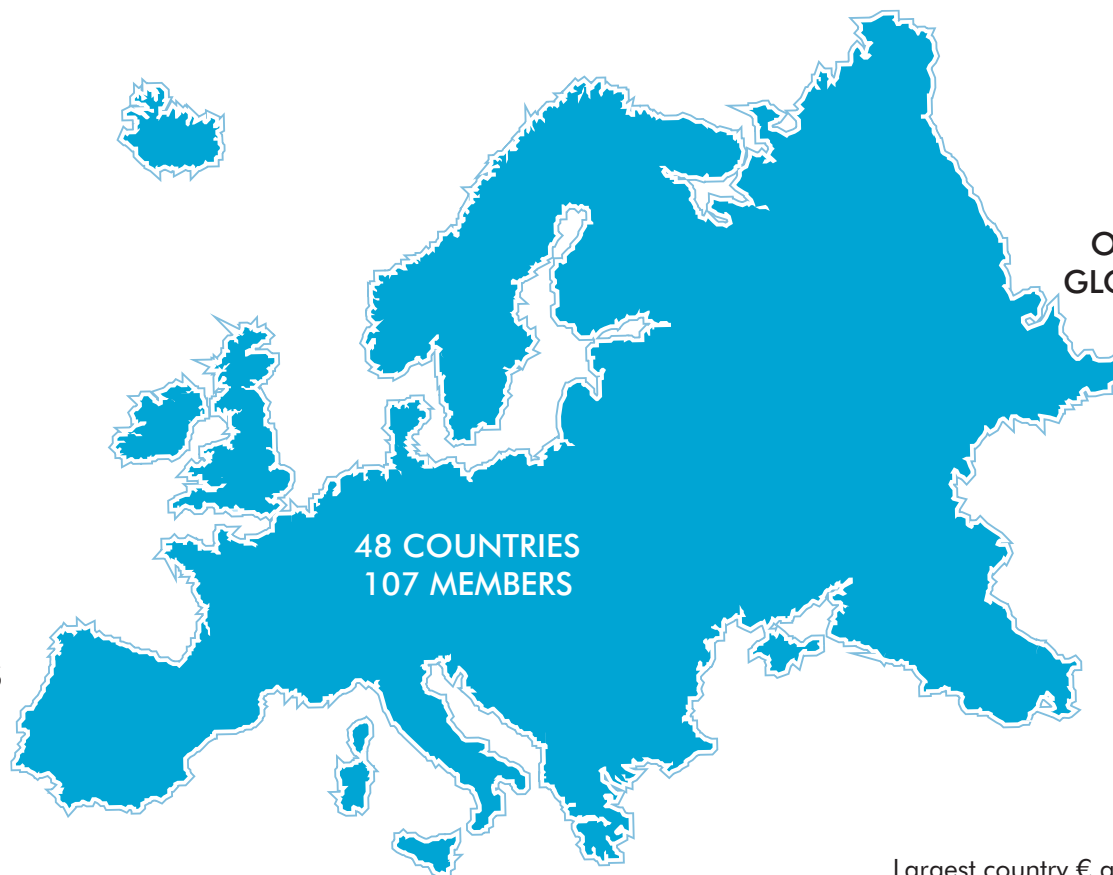


€ million.

LARGEST COLLECTIONS COUNTRIES AND ANNUAL GROWTH, 2016



€ million.



OVERALL SHARE OF GLOBAL COLLECTIONS

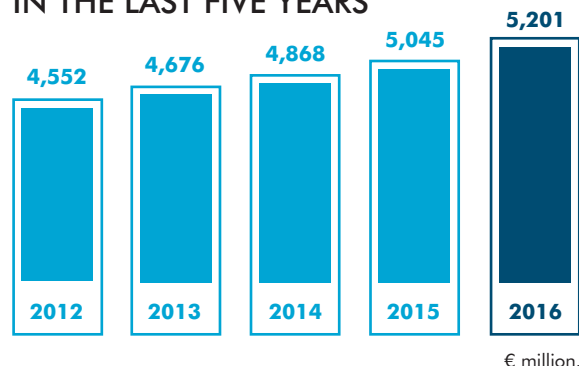
Largest country € growth: **Germany**
 Largest repertoire € growth: **Music**
 Largest repertoire % growth: **Literary**

Europe is the largest region for collections, accounting for 56.8% of the worldwide total. European societies collected €5,201m in 2016, up 3.1% on 2015. France is the largest contributor with just over one fifth of all income received, followed by Germany and the UK. Total collections growth in Europe was driven most significantly by increased revenues in Germany. That country's 12.5% increase follows a landmark settlement with YouTube in November 2016, leading to substantial retroactive licence payments to authors. Collections for private copying in Germany also soared in 2016, up by nearly fourfold, helped by an agreement on private copying levies for smartphones and tablets.

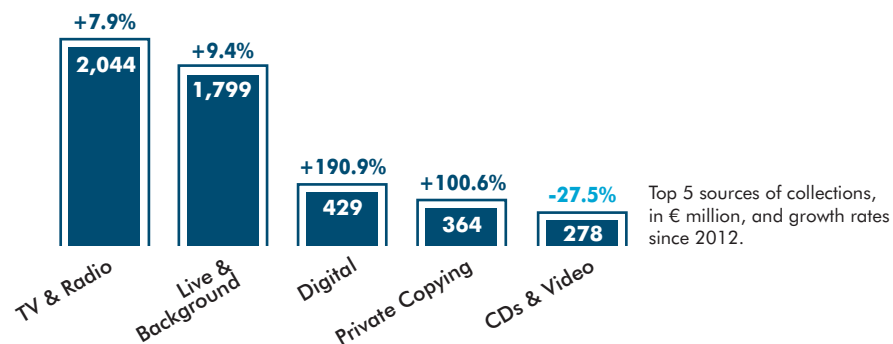
In the UK collections increased 10.1% in pounds sterling, but declined 1.8% year-on-year in euros. This increase was boosted by digital collections, which grew 86.3% in 2016 in pounds sterling. In France, digital collections grew by 41.4% in 2016.

EUROPE

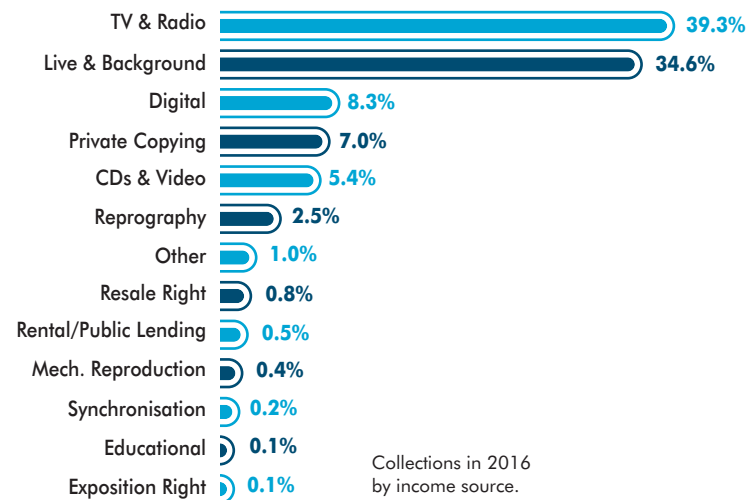
EUROPE COLLECTIONS UP 14.3% IN THE LAST FIVE YEARS



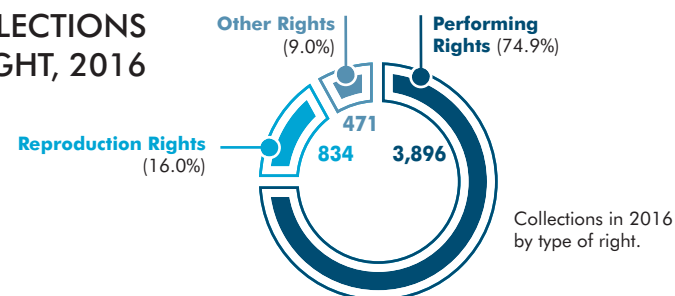
TOP 5 REVENUE SEGMENTS AND GROWTH RATES SINCE 2012



BROADCAST AND LIVE & BACKGROUND ROYALTIES LEAD COLLECTIONS IN 2016



COLLECTIONS BY RIGHT, 2016



TV & radio remains the largest collection revenue stream within Europe, and has remained steady throughout the period 2012 to 2016. The sector has grown by 7.9% since 2012, although in 2016 revenues for TV & radio decreased slightly for the first time in 5 years.

Private copying levies in Europe have grown sharply, increasing by over 100% since 2012, with 2016 seeing the largest increase (+22.1%). Private copying income in Germany more than tripled in 2016, due mainly to levies placed on smartphones and tablets thanks to a retroactive agreement covering 2012-2016 with collection agency ZPÜ. In France, private copying collections increased by 3.9% in 2016, also helped by a strong market for smartphones and favourable regulatory factors.

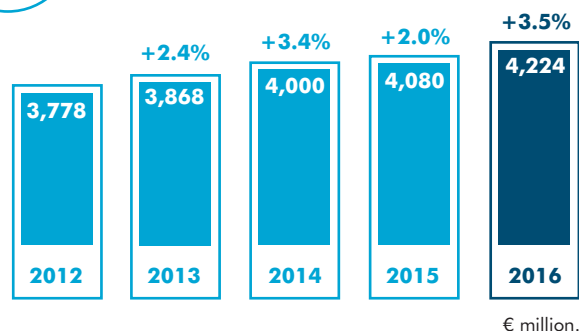
Digital collections in Europe grew by 39.9% in 2016. Growth is overwhelmingly driven by the rise of audio, video and VOD/SVOD streaming services. In Germany, digital collections increased by 90.9%, largely boosted by the retrospective licence payments from YouTube. Digital collections in the UK, which has the largest share of the digital market (37.0%), grew 65.3%.

Income from CDs & video fell in 2016 by 3.0% and now accounts for 5.4% of total collections in Europe.

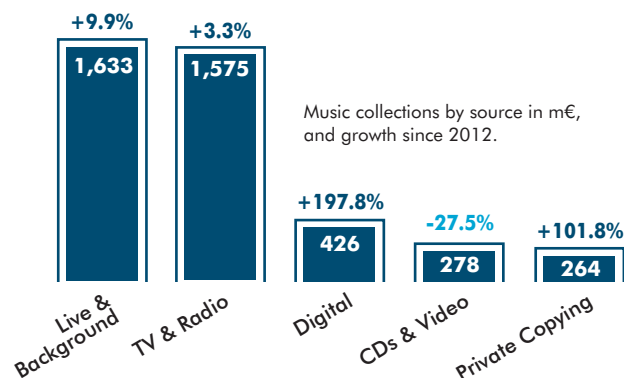


EUROPE

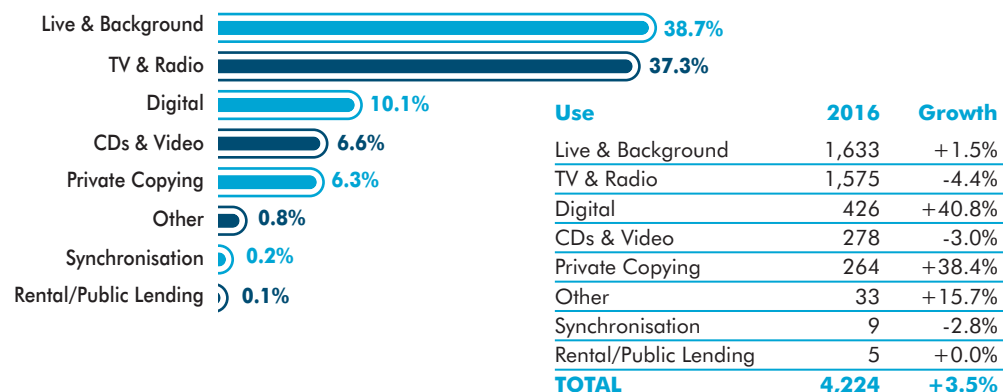
MUSIC REPERTOIRE COLLECTIONS, 2012-2016



5 TOP REVENUES AND % GROWTH SINCE 2012

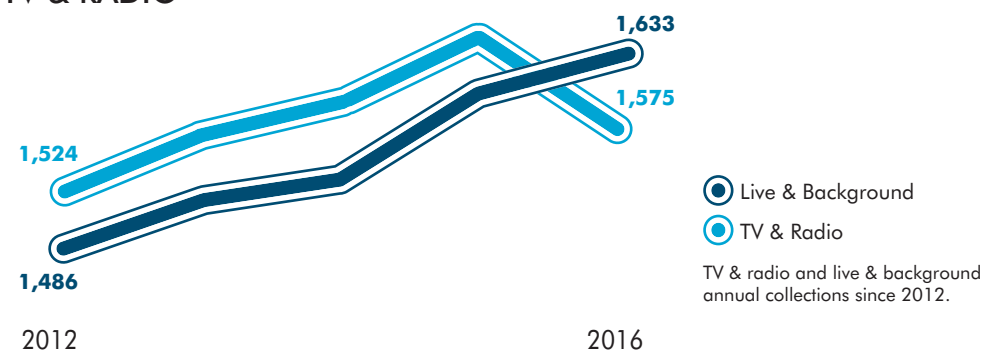


LIVE & BACKGROUND AND TV & RADIO HAVE BIGGEST SHARES IN 2016



Music collections, in m€, and annual growth by income source in 2016.

LIVE & BACKGROUND OVERTAKES TV & RADIO



Music collections in Europe rose 3.5% in 2016, helped by steady growth in the largest income sectors, a surge in digital revenues and retroactive payments from YouTube in Germany. Royalties from live & background overtook TV & radio for the first time in 5 years, becoming the largest music revenue stream. France, the largest contributor in this sector, saw 2.7% growth, helped by a healthy live music scene and new contracts for entertainment activities in bars, hotels and restaurants.

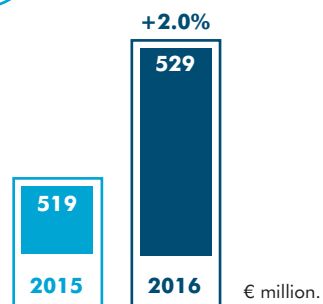
Sweden grew live & background collections by 6.7% (8.0% in local currency), boosted by mega-concerts and growth in one-day festivals. In the UK, live & background saw a 4.6% increase in local currency growth in 2016, thanks to higher ticket prices and an additional 7,600 concerts and festivals.

Digital collections for music in Europe soared 40.8% and have nearly tripled in the last five years, driven by explosive growth in streaming music and video platforms. In local currencies, digital grew over 1,000% in Croatia, more than 220% in Lithuania, 115.8% in Finland and 97.6% in Germany. Private copying collections for music grew 38.4% with strong growth coming from Germany and Portugal.

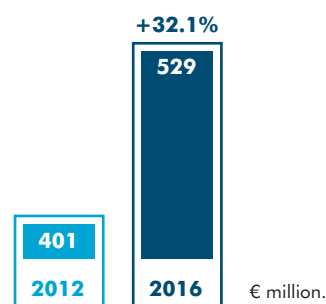
EUROPE



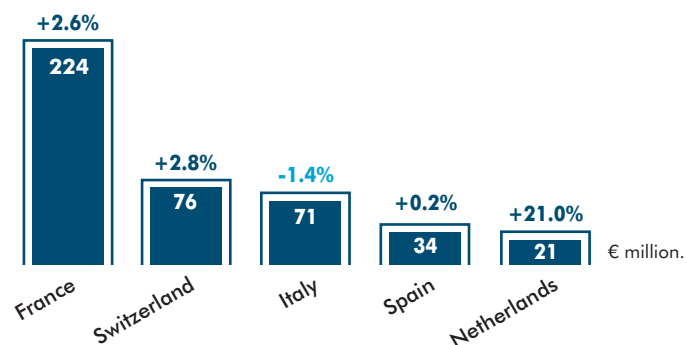
AUDIOVISUAL COLLECTIONS RISE IN 2016



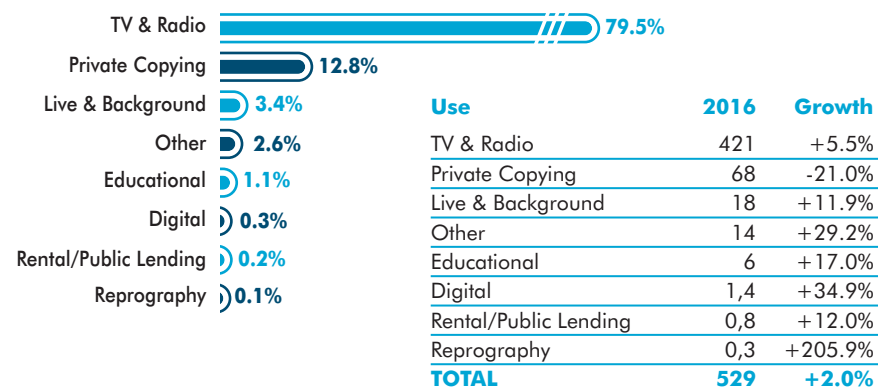
AUDIOVISUAL COLLECTIONS, VALUE AND GROWTH, 2012 VS 2016



FRANCE LEADS THE TOP 5 COUNTRIES, 2016



TV & RADIO DOMINATES INCOME STREAMS



Audiovisual collections by income source, in € million, and annual growth in 2016.

Audiovisual repertoire collections in Europe

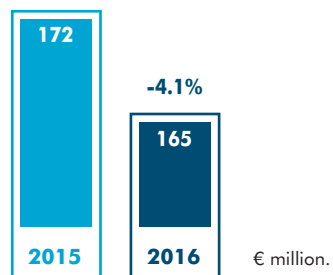
Collections for audiovisual repertoire in Europe increased by 2.0% in 2016 and have grown 32.1% since 2012. France has the largest income in the sector (42.3%), with growth of 2.6% driven mainly by increasing video on demand and online revenues. The Netherlands has the largest growth rate out of the top 5 countries at 21.0%. Audiovisual collections from TV & radio increased by 98.4% following a court ruling on the liability of cable operators.

TV & radio remains the largest income source for audiovisual in Europe, increasing by 5.5% in 2016. Digital collections have seen the largest increase, up 34.9%.

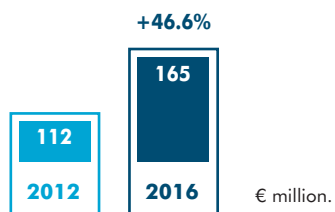


EUROPE

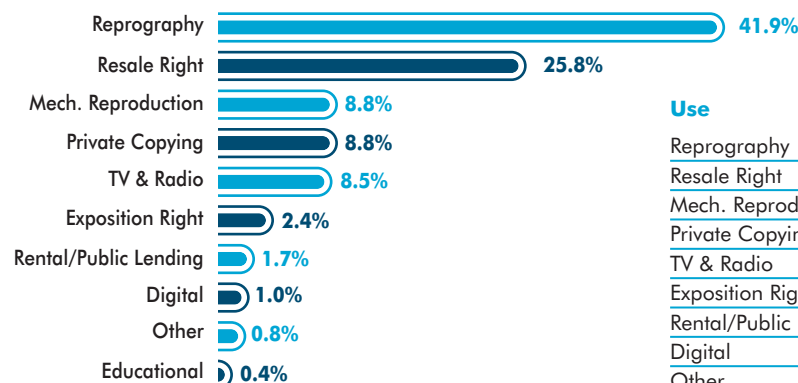
VISUAL ARTS COLLECTIONS DECLINE IN 2016



STRONG VISUAL ARTS GROWTH OVER FIVE YEARS



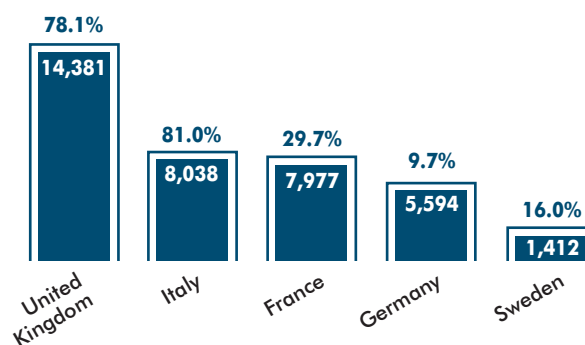
REPROGRAPHY AND RESALE RIGHT TOP INCOME STREAMS



Visual arts collections, in € million, by income source and annual growth in 2016.

Use	2016	Growth
Reprography	69	-5.1%
Resale Right	42	-4.1%
Mech. Reproduction	14	-5.2%
Private Copying	14	+2.0%
TV & Radio	14	+9.3%
Exposition Right	4	-0.3%
Rental/Public Lending	37	-26.3%
Digital	2	-46.6%
Other	2	+25.3%
Educational	2	-8.2%
TOTAL	165	-4.1%

RESALE RIGHT TAKES MAJOR SHARE OF COLLECTIONS



Top 5 countries in Europe for resale right collections, in € million, and resale right share of visual arts collections.

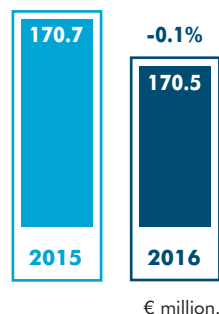
Visual arts collections and the resale right

Collections for visual arts in Europe declined by 4.1% in 2016, although the sector has grown by 46.6% between 2012 and 2016. In the UK, this is attributed to a cyclical slowdown after several years of growth, coupled with a small decline in the volume of high-value works up for sale. Germany has the largest share of the visual arts market within Europe in 2016 (34.9%), but saw a 13.5% decline in 2016. Collections also decreased in France.

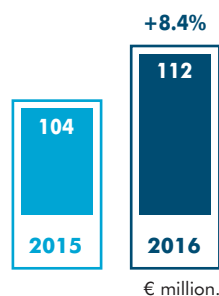
Income from the resale right remains a vital revenue stream for visual artists. Income from the resale right has grown by 24.3% in Europe during the last five years and currently accounts for 25.8% of total visual artists royalties in Europe. The UK has the largest share of the resale right market within Europe (33.9%) in 2016.



COLLECTIONS FOR DRAMA REPERTOIRE STABLE IN 2016



LITERATURE COLLECTIONS GROW IN 2016



Drama repertoire and literature collections in Europe

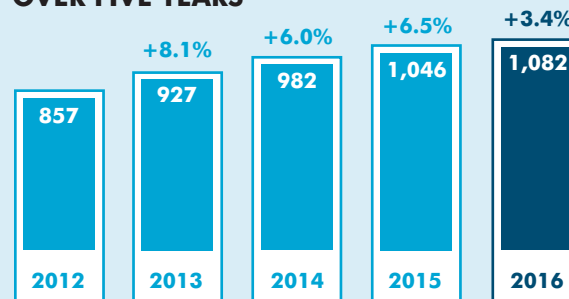
Collections for drama repertoire in Europe were stable in 2016. Italy, the highest collecting country, saw growth of 7.8% but France declined 10.0%, hindered by difficulties for independent companies and emptier venues in Paris at the start of the year, following the attacks of November 2015.

Despite flat contributions from larger territories, literature in Europe grew 8.4%. This is driven mainly by the boom in the Netherlands (+101.5%), where renegotiations of covenants in reprography and private copying, as well as some back payments to screenwriters more than doubled 2015 collections.

Country focus SWEDEN

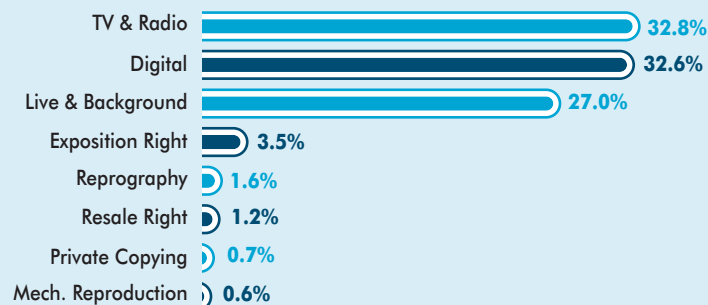
All values in Swedish kronas

COLLECTIONS GROW 26.2% OVER FIVE YEARS



Annual collections in million Swedish kronas for all repertoires in Sweden since 2012.

DIGITAL TOTALS ONE THIRD OF COLLECTIONS



THE RISE OF DIGITAL COLLECTIONS, 2012 - 2016



● Digital ● Live & Background
● TV & Radio ● Other

Collections in Sweden in million Swedish kronas by source since 2012.



The pioneer of premium and ad-supported music streaming in the last decade, Sweden remains Europe's leading case study in digital transformation. Total royalties increased by 3.4% on 2015 and have risen 26.2% since 2012.

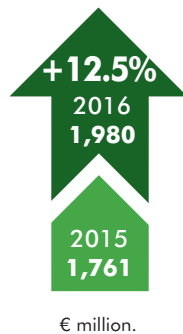
Since 2012, digital collections have grown by more 118.4%, now making up almost one third of total collections. With a saturated streaming market tending towards flatter growth, digital grew 2.4% in 2016. Sweden is Europe's fourth largest contributor to digital collections.

Live & background music grew strongly in 2016 (up 8.0%), now making up 27.0% of total collections. There has been growth of live music events/festivals and art music concerts, despite a decrease in revenue from church concerts and music dramas. In line with the European trend, Sweden saw a slight decrease in revenue from TV & radio.

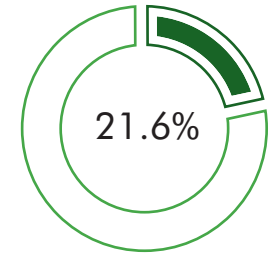
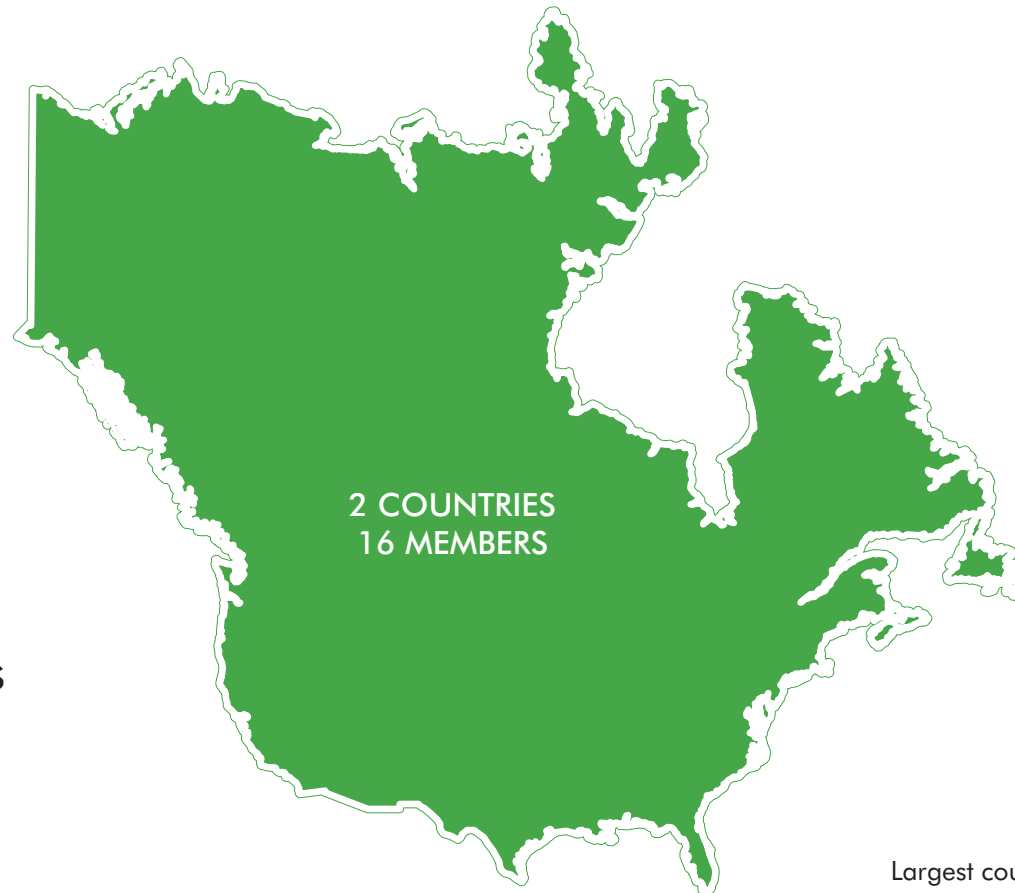
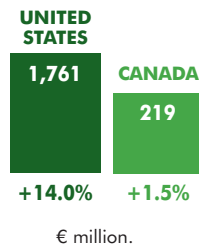
This is due in part to a large additional distribution in 2015 for 'commercial TV', which related to television broadcasts for the period 2010–2014.

region CANADA/USA

TOTAL COLLECTIONS AND ANNUAL GROWTH



LARGEST COLLECTIONS COUNTRIES AND ANNUAL GROWTH, 2016



OVERALL SHARE OF GLOBAL COLLECTIONS

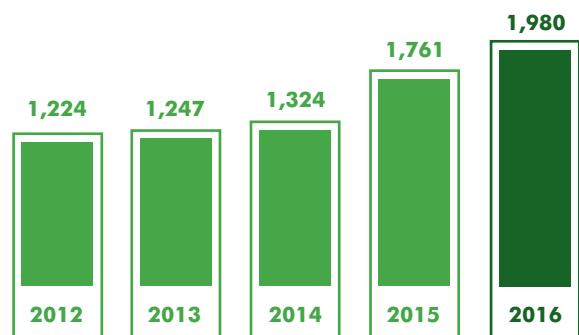
Largest country € growth: **United States**
 Largest repertoire € growth: **Music**
 Largest repertoire % growth: **Music**

Collections in the Canada/USA region account for about a fifth (21.6%) of the world's total at €1,980m in 2016, up 12.5% year-on-year, the vast majority of which coming from music repertoire. Music represented 99.7% of total collections in the region. In the USA, music revenues grew 14.1% while in Canada, music increased by 1.6%. Other repertoires saw little or no revenue except audiovisual in Canada and visual arts in both countries. In the USA, film studios and the Guilds (DGA and WGA) have agreements and payments of residuals are passed on directly from the studios to the writers and directors via their guilds.

The region has now posted four consecutive years of growth, reflecting a stronger music market and the impact of streaming with Spotify as the market leader and the arrival of new platforms such as Apple Music and Tidal. The USA accounted for 88.9% of the region's collections, with the remaining coming from Canada.

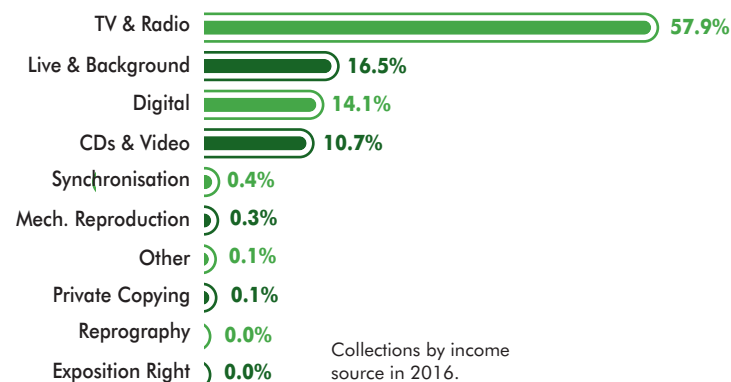
CANADA/USA

TOTAL COLLECTIONS, 2012-2016¹



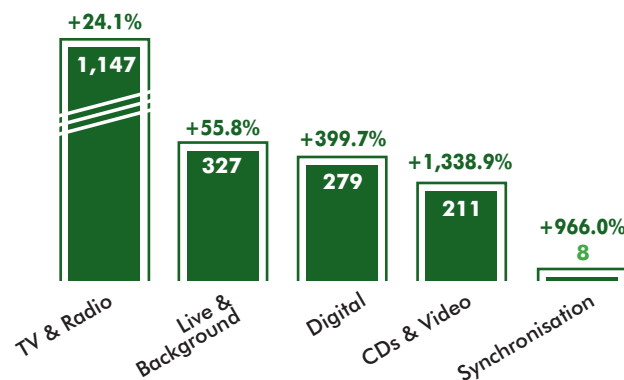
Canada/USA collections, in € million.

TV & RADIO DOMINATES



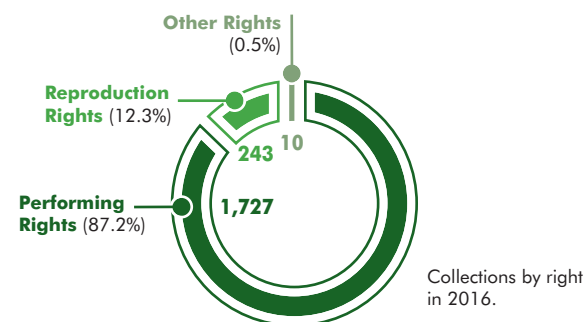
Collections by income source in 2016.

TOP 5 REVENUES, GROWTH SINCE 2012



Top 5 sources of collections, in € million, in 2016 and 5-year growth.

COLLECTIONS BY RIGHT, 2016



Collections by right in 2016.

In the Canada/USA region, music collections grew 12.5% year-on-year, to €1,974m, while audiovisual dropped 47.4% to €47,327 and visual arts saw a slight drop of 1.2%, compared to €5.9m in 2015.

The largest collection stream comes from performances on TV & radio at €1,147m (down 1.9% compared to 2015). TV & radio, which grew 24.1% since 2012, accounts for 57.9% of total collections, down from 66.4% in 2015. Live & background is the second largest source of revenue in the region, representing 16.5% of total collections. Live & background collections increased 4.1% in 2016.

Digital accounts for 14.1% of all collections and saw 73.2% year-on-year growth rate, reflecting the streaming boom in 2016. Both ASCAP and BMI processed each more than one trillion audio performances in 2016. The fourth largest source of revenue, at €211m, is CDs & video, which grew 114.2%. Collections from the private copying levy, operational in Canada but not the US, dropped 49.8% to €1.6m in 2016 due to limitations in the private copying regime. Collections for mechanical reproduction rights also dropped 0.2% to €5.5m.

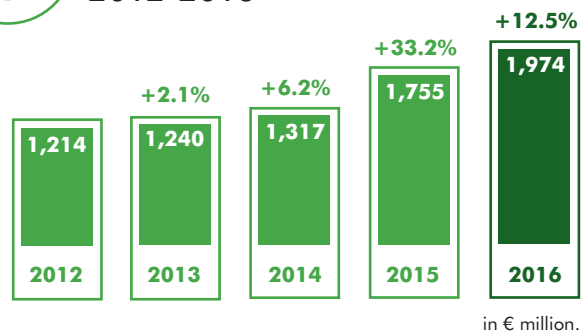
Performing rights make up 87.2% of total collections at €1,727m, with reproduction rights at 12.3% (€243m) and other rights at 0.5% (€10m).

¹ The addition of collections from the Harry Fox Agency in 2015 to the Global Collections Report account for the large increase between 2014 and 2015. Disregarding this, regional collections have grown in a stable consistent manner since 2012.

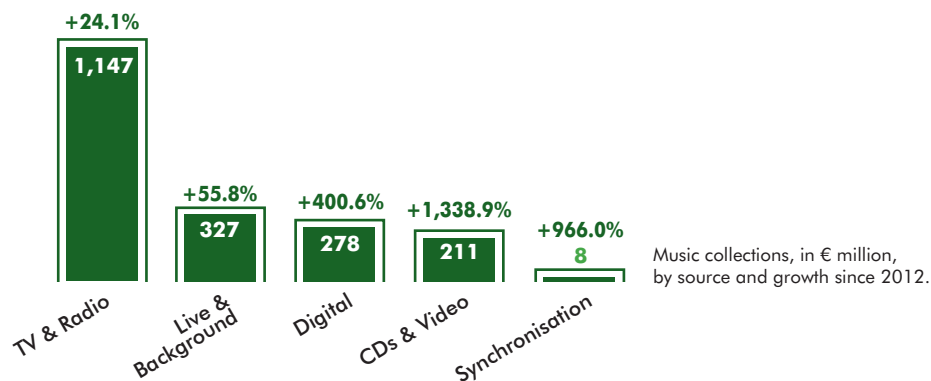


CANADA/USA

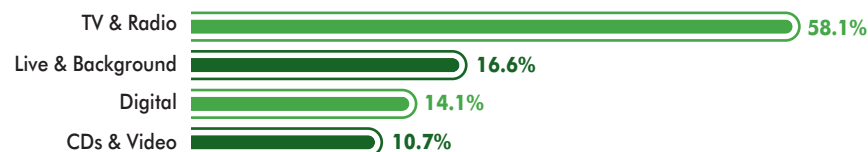
MUSIC REPERTOIRE COLLECTIONS, 2012-2016²



TOP 5 MUSIC USES AND % GROWTH SINCE 2012



BREAKDOWN OF MUSIC USES AND GROWTH, 2016



Use	2016	Growth
TV & Radio	1,147	-1.9%
Live & Background	327	+4.1%
Digital	278	+73.3%
CDs & Video	211	+114.1%
Synchronisation	8	+10.5%
Other	2	-24.6%
Private Copying	2	-49.8%
TOTAL	1,974	+12.5%

Music collections by income source, in € million, and annual growth in 2016.

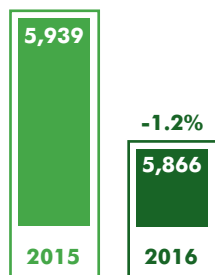
Music collections reached €1,974m in 2016 compared to €1,754m the previous year (+12.5%), due to strong increases in revenue from digital and CDs & video. Digital was up 73.3% in 2016, accounting for €278m or 14.1% of the country's collections. TV & radio remains the leading source of revenue for music, accounting for €1,147m in 2016, posting a slight decline of 1.9%. Live & background, at €327m, grew 4.1%, due to efforts from the main CMOs to licence businesses using background music.

Since 2012, all music revenue streams, except private copying, have posted growth. This is partly because of the one-off impact of the inclusion of revenues from HFA in 2015. Live & background has enjoyed healthy growth over 55.8% since 2012. The biggest growth came from digital, jumping 400.6% to €278m from €56m. Private copying dropped significantly from €6.7m in 2012 to €1.6m in 2016, down 76.3%, due to changes in Canada's royalty system.

² The jump between 2014 and 2015 can be directly attributed to the addition of the Harry Fox Agency to the Global Collections Report.



VISUAL ARTS COLLECTIONS, VALUE AND % CHANGE, 2015-2016



Visual arts collections, in € thousand, in 2015 and 2016.

Visual arts, audiovisual and dramatic repertoires

Visual arts collections in Canada/USA declined by 1.2% compared to 2015. Almost all collections stem from mechanical reproduction in the United States (89.7% of all visual arts collections in the region), which remained stable. Reprography and exposition rights, though only collected in Canada for low amounts, lost a third of their value between 2015 and 2016.

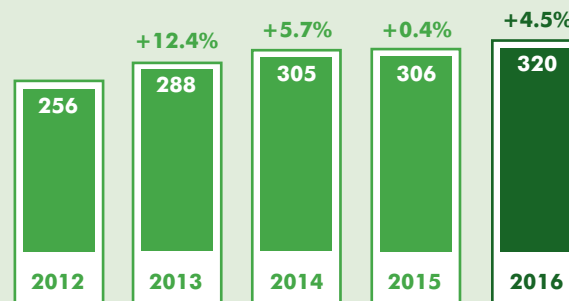
2016 data for audiovisual were not significant enough to be reported. In the US, directors' and writers' rights are managed by the Guilds and payments are made directly by the film studio (residuals).

No data was reported to CISAC in 2016 for the dramatic and literary repertoires.

Country focus CANADA

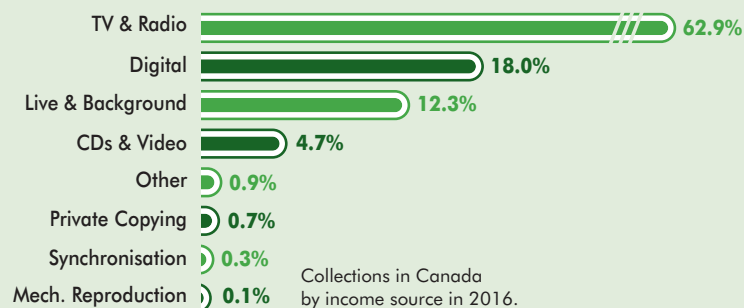
All values in Canadian dollars (Can\$)

COLLECTIONS GROW 24.6% OVER FIVE YEARS



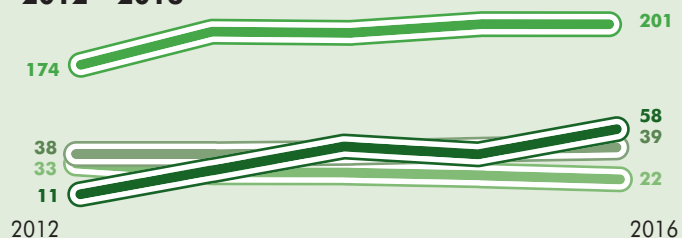
Annual collections in Canada for all repertoires in million Canadian dollars since 2012.

BREAKDOWN OF REVENUE STREAMS IN CAN\$ MILLION, 2016



Collections in Canada by income source in 2016.

THE RISE OF DIGITAL COLLECTIONS, 2012 - 2016



Legend: Digital, Live & Background, TV & Radio, Other

Annual collections from top 4 sources in Canada in current million Canadian dollars since 2012.

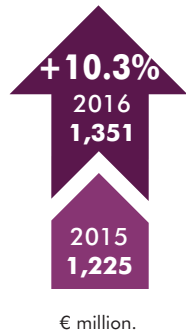


At Can\$320m (€219m), Canada's collections accounted for 11.1% of the region's total collections. For the first time, digital leapfrogged live & background as the country's second largest stream of revenue. Digital accounted for Can\$58m (€39m) in 2016, up 45.4% from Can\$40m (€28m) in 2015. It made for 18.0% of total collections. Canadian society SOCAN saw its 2016 revenues grow 7.4%, pushed by a 118.3% increase in streaming revenue compared to 2015.

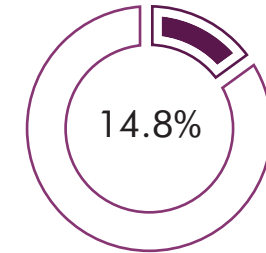
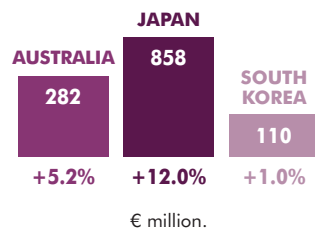
TV & radio remains the single largest source of revenue at Can\$200.9m (€137m) in 2016, stable compared to the previous year and accounting for 62.9% of Canada's collections. Revenues from live & background were down close to 3% at Can\$39m (€27m, 12.3% of the total) while CDs & video were down 1.0% at Can\$15m (€11m, 4.7%). The biggest decline was seen in private copying, sliding 49.3% year-on-year to Can\$2.3m (€1.6m).

region ASIA-PACIFIC

TOTAL COLLECTIONS AND ANNUAL GROWTH



LARGEST COLLECTIONS COUNTRIES AND ANNUAL GROWTH, 2016



OVERALL SHARE OF GLOBAL COLLECTIONS

Largest country € growth: **Japan**
 Largest repertoire € growth: **Music**
 Largest repertoire % growth: **Drama**

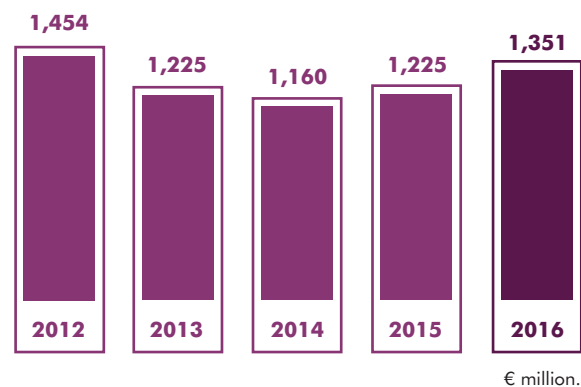


The Asia-Pacific region continues a trajectory of growth of several years, with improved efficiencies in collection despite numerous regulatory and commercial challenges. Asia-Pacific and Australasia collections reached €1,351m in 2016, an increase of 10.3% year-on-year. Digital revenues from Japan are helping drive growth, alongside large retroactive payments from background music. Many countries in Asia-Pacific are seeing strong growth from a low base, developing a copyright and collections infrastructure over recent years.

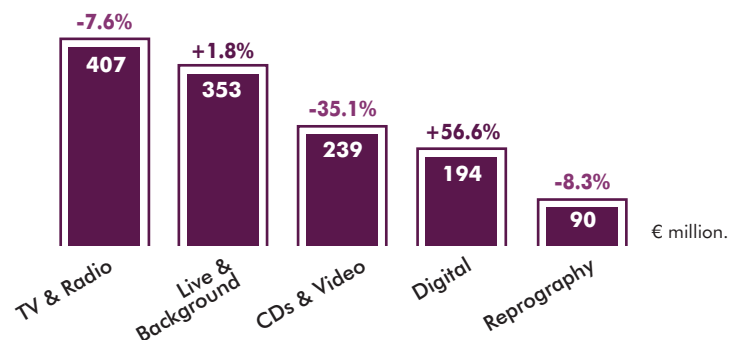
Japan dominates the region, with 63.5% of the total, followed by Australia (20.9%), South Korea (8.1%), Hong Kong (1.8%) and China (1.7%). All countries are growing except Thailand. In local currency many countries saw impressive growth rates: the Philippines 32.0%, Macau 27.5% and Singapore 11.7%. China is an undeveloped market which is rapidly evolving a licensed digital music business (see China Focus, page 49).

ASIA-PACIFIC

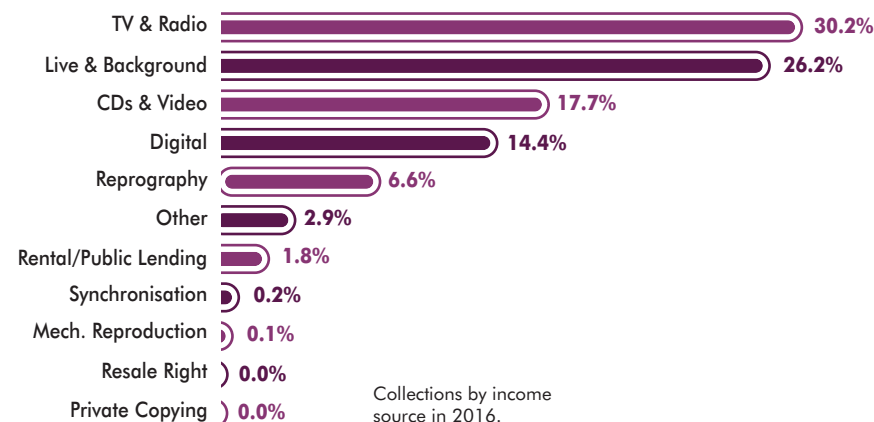
ASIA-PACIFIC COLLECTIONS 2012-2016



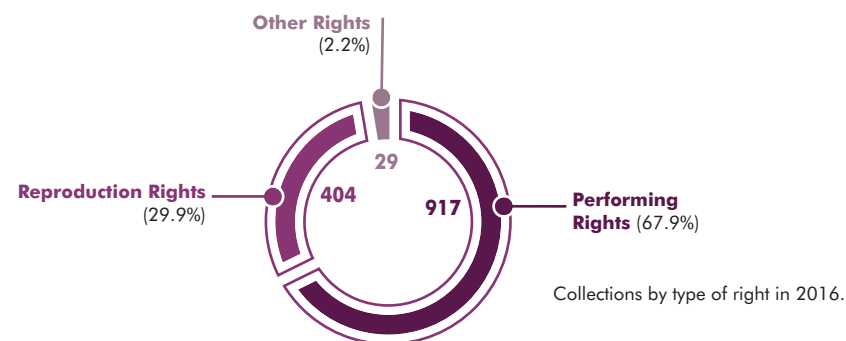
5 TOP REVENUE SEGMENTS AND % GROWTH SINCE 2012



TV & RADIO AND LIVE & BACKGROUND LEAD ASIA-PACIFIC COLLECTIONS IN 2016



COLLECTIONS BY RIGHT, 2016



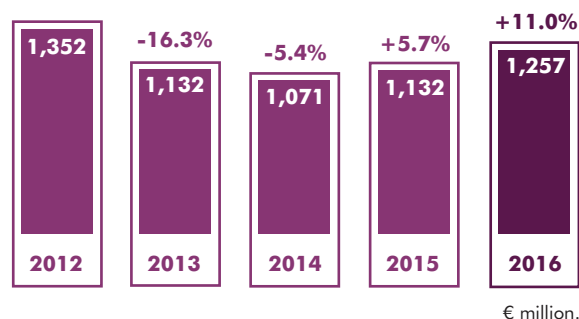
The biggest revenue streams in the Asia Pacific region help explain the region's 7.1% decline in collections since 2012. Over that period, digital has seen a consistent growth (56.6%). CDs & video and TV & radio both declined by 35.1% and 7.6% respectively, while live & background has seen modest growth (1.8%). Despite their growth rates, digital and live & background have yet to make up for the decline in CDs & video as well as TV & radio.

Nevertheless, live & background and digital achieved new highs in 2016. Live & background grew 10.0% between 2015 and 2016 while digital jumped 33.5%. Among the smaller revenue streams, synchronisation and resale right (limited to Australia) have risen sharply at 64.2% and 42.9% growth respectively since 2012. By type of right, Asia-Pacific collections are predominately performing right with 67.9% followed by reproduction rights with 29.9% share in 2016. Performing rights income grew 12.7% between 2015 and 2016.

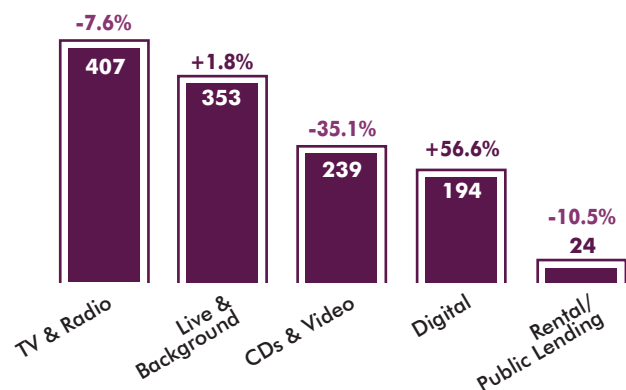
ASIA-PACIFIC



MUSIC REPERTOIRE COLLECTIONS, 2012-2016

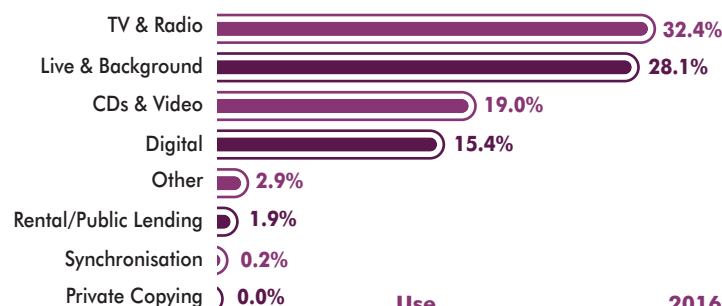


TOP REVENUE STREAMS AND % GROWTH SINCE 2012



Music collections, in € million, by source and growth since 2012.

BREAKDOWN OF USES AND GROWTH, 2016



Use	2016	Growth
TV & Radio	407	+7.1%
Live & Background	353	+9.9%
CDs & Video	239	+7.5%
Digital	194	+33.5%
Other	37	-5.1%
Rental/Public Lending	24	+8.5%
Synchronisation	3	+42.6%
Private Copying	0	-59.2%
TOTAL	1,257	+11.0%

Music collections, in € million, by income source and annual growth in 2016.

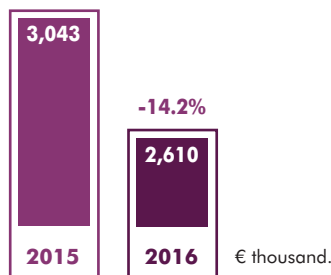
Music collections in the Asia-Pacific region grew by 11.0% year-on-year to €1,257m, accounting for 93.1% of total Asia-Pacific collections. Digital (+33.5%) and live & background (+9.9%), are the most significant engines of growth. Even though TV & radio, as well as CDs & video, declined between 2012 and 2016 in Asia-Pacific, revenues respectively grew 7.1% and 7.5% year-on-year.

Digital growth over recent years (+56.6% since 2012) indicates that the void left by declining CDs sales is consistently being replaced by digital revenues. Live & background has shown modest growth (1.8%) in the past five years. Private copying (-92.3%) and CDs & video (-35.1%) lead declines. Synchronisation's explosion represents a significant opportunity for creators. While still small compared to other revenue sources, its growth since 2012 has nearly filled private copying's revenue drop. This was due to a 2012 decision by Japan's Supreme Court that wiped out the ability to collect private copying revenue from video devices.

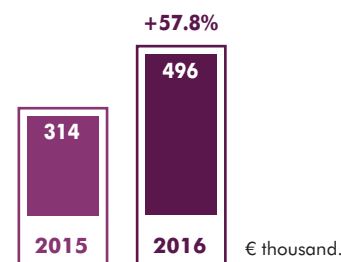


ASIA-PACIFIC

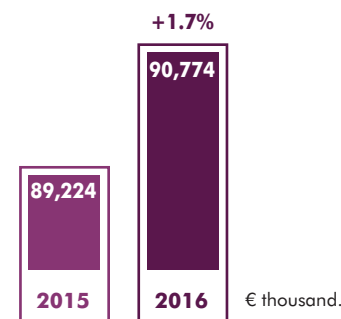
ASIA-PACIFIC VISUAL ARTS COLLECTIONS, 2016



DRAMATIC RIGHTS COLLECTIONS, VALUE AND % CHANGE, 2015-2016



LITERATURE COLLECTIONS GROW IN 2016



Visual arts, dramatic repertoire and literature

Collections for visual arts, drama and literature are relatively undeveloped in the region. Visual arts collections in Asia-Pacific declined by 14.2% in 2016, compared to 2015. These figures come from Australia, Japan and South Korea. Looking back to 2012, this decline was more marked at 18.7% over five years. Reprography has seen a drastic drop of 54.0% since 2012. Mechanical reproduction increased by 8.9% over this time period.

The resale right, which has been a primary legislative priority for CISAC in the region for the repertoire, has seen strong growth rate of 42.9% since 2012, all of the revenues coming from Australia. Resale right is the third largest category of revenue coming from visual arts in the region. TV & radio collections in the region remain small, yet have increased by 119.2% since 2012. There is enormous potential for growth in income for visual artists from the resale right in Asia. This is especially the case in China, one of the top 3 art markets worldwide, where the right is being considered as part of the pending draft copyright reform, and in Japan.

Collections for dramatic works increased 57.8% year-on-year in 2016. All collections came from Japan.

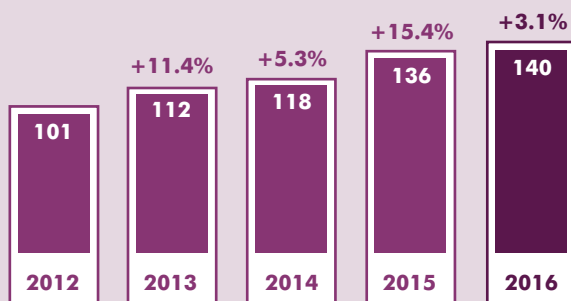
Collections for literary works grew by 1.7% year-on-year in 2016. Nearly all income came from Australia and South Korea as well as primarily from reprographic uses.



Country focus KOREA

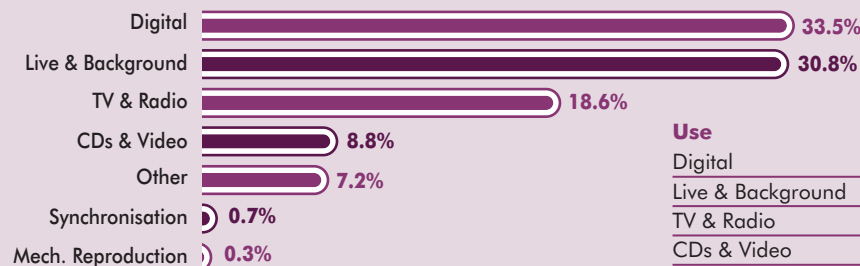
All values in South Korean won (₩)

COLLECTIONS IN LOCAL CURRENCY GROW 40% OVER FIVE YEARS



Annual collections in Korea for all repertoires in billion South Korean won since 2012.

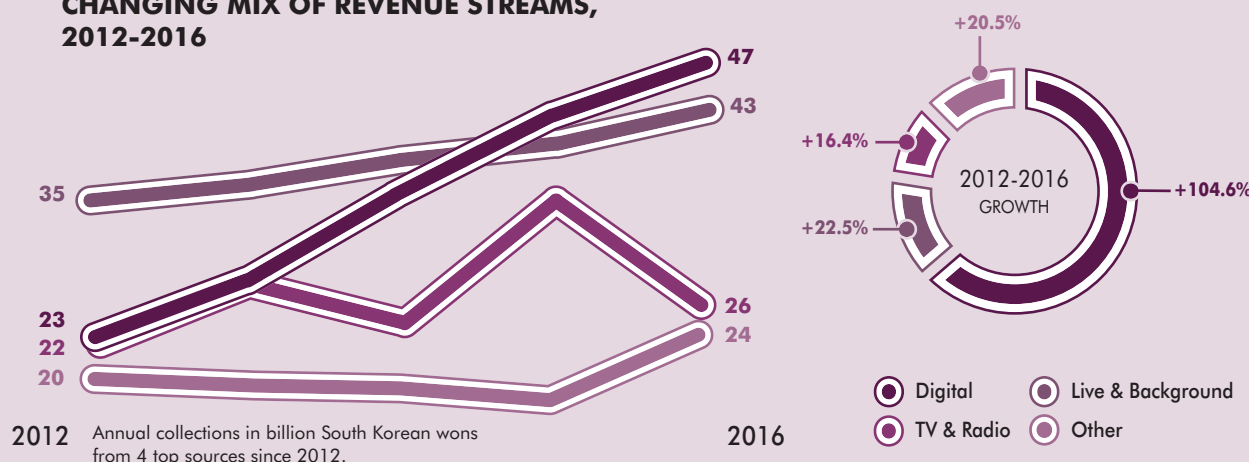
DIGITAL BECOMES THE LEADING COLLECTION STREAM IN 2016



Use	Collections in ₩bn	Share
Digital	47	33.5%
Live & Background	43	30.8%
TV & Radio	26	18.6%
CDs & Video	12	8.8%
Other	10	7.2%
Synchronisation	1	0.7%
Mech. Reproduction	0	0.3%

Repartition of collections in Korea by income source in 2016.

CHANGING MIX OF REVENUE STREAMS, 2012-2016



2012 Annual collections in billion South Korean won from 4 top sources since 2012.

2016

Korea is one of the most connected countries in the world and a global champion in the development of a digital music sector. The country is a cultural hub and leading exporter in the region, deriving substantial collections from exports of music and TV shows. In 2016, collections reached ₩140bn (€110m), up 3.1% year-on-year.

Korea is one of very few countries where digital is the largest source of collections at ₩47bn (€37m). Digital revenue has grown 104.6% since 2012. In 2016, digital income exceeded live & background music for the first time. The rise of streaming and reduced copyright infringement have helped drive growth.

Korea was an early pioneer of subscription services via high-profile bundled telco offerings with a large consumer base. National rather than global digital service providers continue to dominate the market, with a more than 95% share of the streaming and download sector.

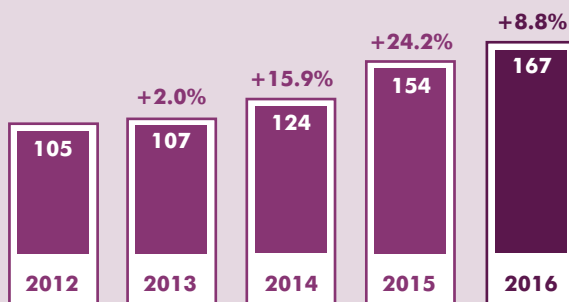
Public performance is an important revenue stream which is currently limited due to licencing exemptions for many business premises – a focus of local members' and CISAC lobbying for change.



Country focus CHINA

All values in Chinese yuan (CN¥)

COLLECTIONS IN LOCAL CURRENCY GROW 59.7% OVER FIVE YEARS



Annual collections in China for all repertoires in million Chinese yuan since 2012.

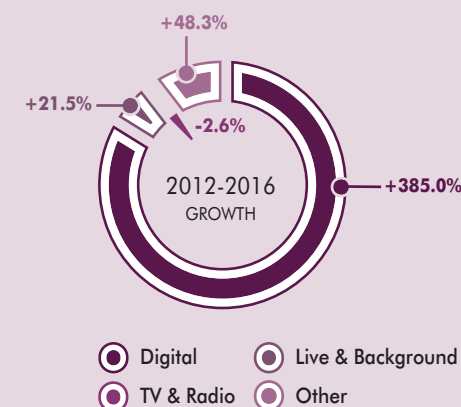
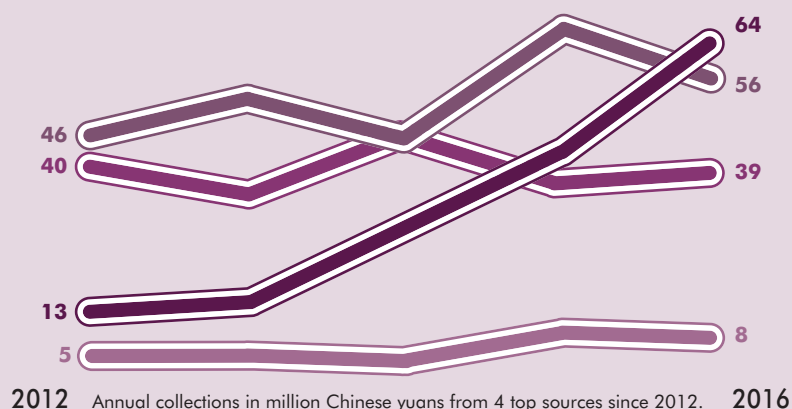
DIGITAL BECOMES THE LEADING COLLECTION STREAM IN 2016



Use	Collections in CN¥m	Share
Digital	64	38.4%
Live & Background	56	33.4%
TV & Radio	39	23.4%
CDs & Video	3	2.0%
Synchronisation	3	1.6%
Other	2	1.2%

Collections in China by income source in 2016.

CHANGING MIX OF REVENUE STREAMS, 2012-2016



China is a market of huge potential with a rapidly evolving licensed digital music business. While China is strengthening its intellectual property rights to foster strong creative industries, there is much room for improvement in public performance income collection, with many venues and broadcasters still unlicensed. CISAC is actively lobbying for China's draft copyright law reform to address this issue as well as to make new audiovisual rights and resale right collections possible in the future.

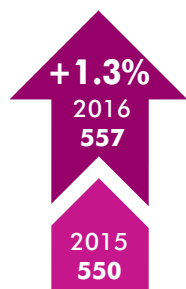
Collections in China rose 8.8% to 167 million yuan (€23m) in 2016 and have increased by 59.7% since 2012. China's digital explosion has shifted a vast internet population over to a few dominant licensed services in recent years. Digital collections for creators have become the pre-eminent income source, with a 38.4% share. Digital licensing is limited, however, with most music apps, social media and video sites still unlicensed.

Broadcast collections in China have substantial potential for growth, held back by inadequate royalty rates and unwillingness by broadcasters to respect existing rates. Of more than 2000 radio and TV broadcasters in China, only 105 have paid royalties, and even those at lower than the suggested statutory tariff. If broadcast licensing could reach full capacity, it would increase royalties to creators by tens of millions of euros.

region

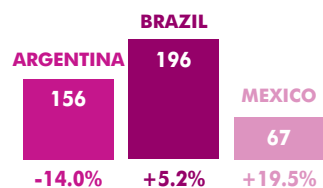
LATIN AMERICA & THE CARIBBEAN

TOTAL COLLECTIONS AND ANNUAL GROWTH

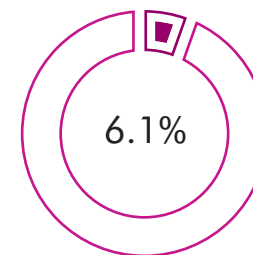


€ million.

LARGEST COLLECTIONS COUNTRIES AND ANNUAL GROWTH, 2016



€ million.



OVERALL SHARE OF GLOBAL COLLECTIONS

25 COUNTRIES
51 MEMBERS

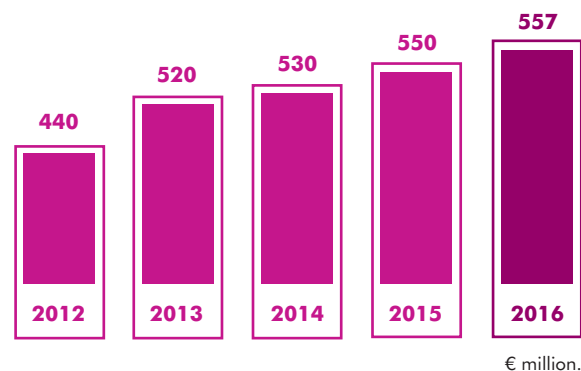
Largest country € growth: **Brazil**
Largest repertoire € growth: **Music**
Largest repertoire % growth: **Visual arts**

Latin America & the Caribbean collections reached €557m in 2016, an increase of 1.3% year-on-year. This represents 6.1% of overall global collections. Brazil contributed the most at 35.2% of total regional collections, followed by Argentina (27.9%) and Mexico (12.1%). Inflation and exchange rate fluctuations played a significant role in the revenue growth of some countries in the region. Latin America & the Caribbean showed growth of 25.8% in constant currency terms, led by countries such as Venezuela (up 77.3% in constant €) and Argentina (up 36.8%).

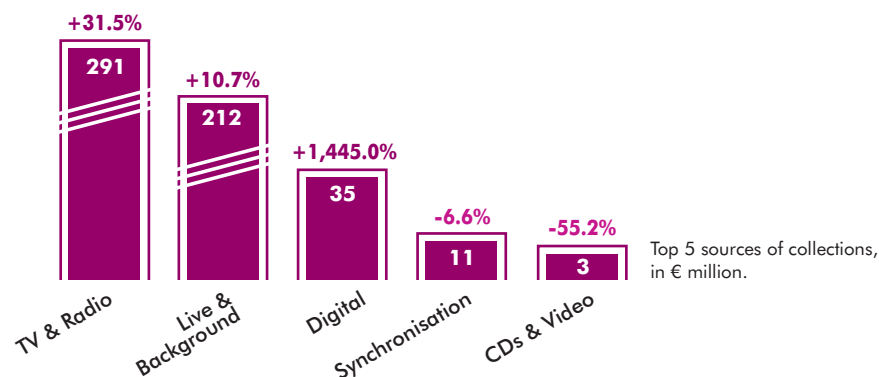
Regional developments affecting collections in 2016 include a tripling of digital revenues in Brazil to €2.5m following judicial judgments that resolved that digital musical uses fall within public communication. Total collections declined in Argentina by 14.0%, despite a settlement following litigation against YouTube as well as new tariffs agreed with cable TV operator Cablevisión. Music collections in Argentina also fell by 16.1%. Much of this can be attributed to a change in government, which has brought its exchange rate closer to market realities. Chile signed a licencing agreement with Netflix and agreed new television tariffs. Meanwhile, Cuba achieved its highest growth in collections since the foundation of its society ACAM.

LATIN AMERICA & THE CARIBBEAN

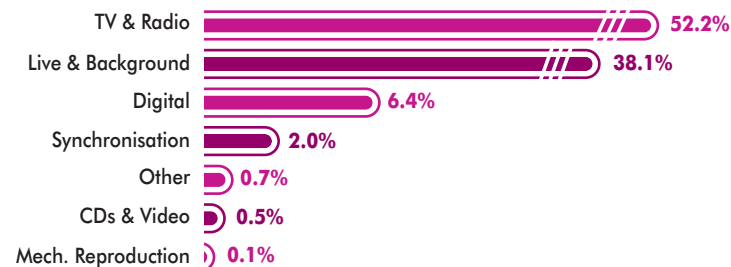
LATIN AMERICA & CARIBBEAN COLLECTIONS, 2012-2016



LATIN AMERICA & CARIBBEAN, TOP REVENUE STREAMS IN 2016 AND 5-YEAR GROWTH

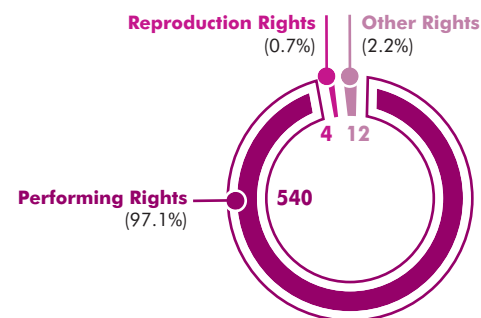


TV & RADIO ACCOUNTS FOR OVER HALF OF TOTAL COLLECTIONS, 2016



Collections by income source in 2016.

COLLECTIONS BY RIGHT, 2016



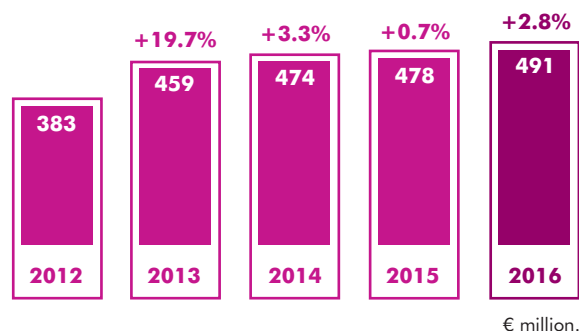
Total collections in Latin America & the Caribbean have grown by 26.6% from €440m in 2012 to €557m in 2016. Collections have steadily increased year-on-year for the region. When comparing the top 5 revenue sources over time since 2012 in growth percentage terms, digital has exceeded all others, leaping from €2.3m in 2012 to €35.4m in 2016.

TV & radio remains the largest category with a 52.2% share of collections, increasing by about one third (31.5%) since 2012, to €291m. This was followed by live & background at a 38.1% total collections share, increasing 10.7% since 2012 to €212m in 2016. Digital accounts for only 6.4% of total collections, with €35m in 2016, yet has quickly taken share from other categories in the past year. To compare, digital only accounted for 1.9% in 2015 in Latin America & the Caribbean.

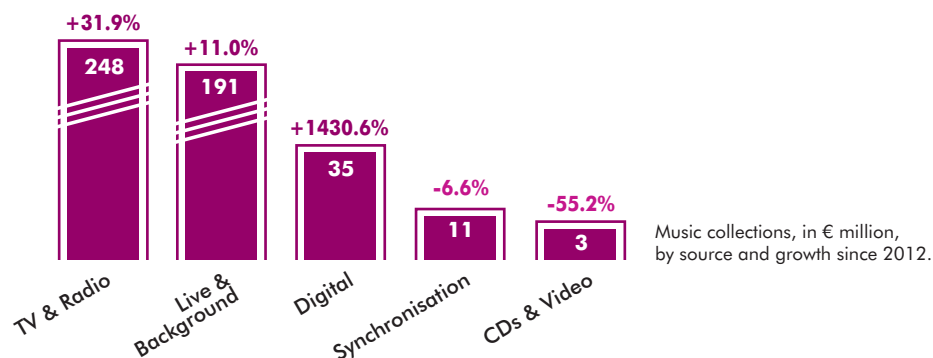


LATIN AMERICA & THE CARIBBEAN

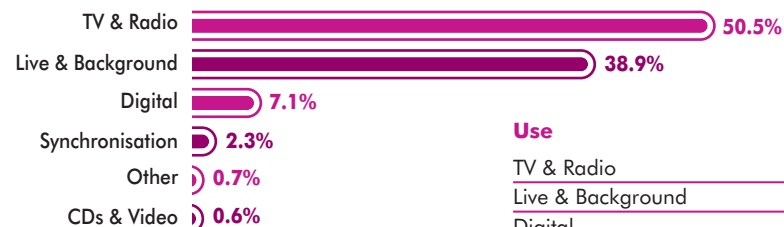
MUSIC REPERTOIRE GROWTH, 2012-2016



FIVE TOP REVENUES IN 2016 AND % GROWTH SINCE 2012



TV & RADIO AND LIVE & BACKGROUND DOMINATE, DIGITAL GROWS



Use	2016	Growth
TV & Radio	248	-0.8%
Live & Background	191	-2.2%
Digital	35	+231.8%
Synchronisation	11	-19.4%
Other	3	-13.0%
CDs & Video	3	-34.0%
TOTAL	491	+2.8%

Music collections, in € million, by income source and annual growth in 2016.

TOP 3 MARKETS IN THE REGION – DIGITAL GROWTH AND SHARE OF COLLECTIONS

Country	Digital share	Digital growth
BRAZIL	1.3%	+238.6%
ARGENTINA	3.7%	+99.0%
MEXICO	40.4%	+481.6%

Digital as a share of collections and growth in 2016 in local currency.

In Latin America & the Caribbean, music collections have grown by 28.1% to €491m over the last five years to 2016. In 2016, TV & radio represented 50.5% of all income. Live & background is the second largest use at 38.9%. Digital is third with 7.1% in 2016, growing by a 231.8% year-on-year. The growth in digital can be partly attributed to legal judgments in Brazil that declared that digital falls within public communication.

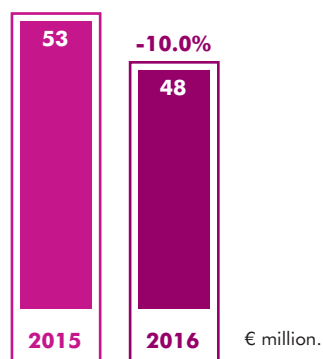
Since 2012, TV & radio has been the largest source of music revenue, increasing 31.9% from €188m in 2012 to €248m in 2016. Live & background is the second largest, increasing 11.0% from €172m in 2012 to €191m in 2016. Digital has surged by more than 1,400% since 2012. Yet with only €35m in collections in 2016, there is significant room to fill in order to catch up to live & background in the region.

Synchronisation, CDs & video and private copying all have seen declines since 2012. The biggest decline was CDs & video, dropping 55.2% since 2012 from €6.1m to €2.7m in 2016.

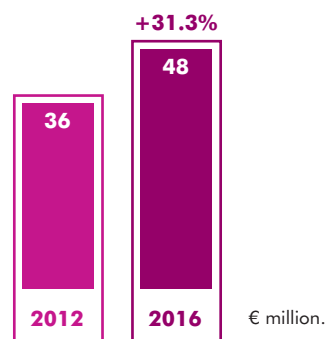
LATIN AMERICA & THE CARIBBEAN



AUDIOVISUAL COLLECTIONS,
2016



AUDIOVISUAL COLLECTIONS UP 31.3%,
2012-2016



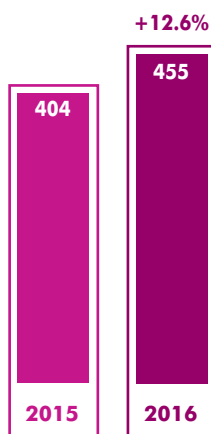
Audiovisual collections decreased 10.0% year-on-year in 2016, despite a near-doubling of live & background income in the region, alongside a decline in TV & radio income. Since 2012, audiovisual has grown 31.3% or €12m. TV & radio is the repertoire's largest collections source at €42m, an increase of 27.1% since 2012. Live & background surged from only €102k in 2012 to €4.9m in 2016.

Digital revenues for audiovisual repertoire were first reported in 2015, growing by more than four times to €395k in 2016. Some of the changes can be attributed to exchange rate fluctuations in Argentina. This impacted numbers from local societies ARGENTORES and DAC, which both report increases in local currency but decreased year-on-year revenues in euro terms.

LATIN AMERICA & THE CARIBBEAN



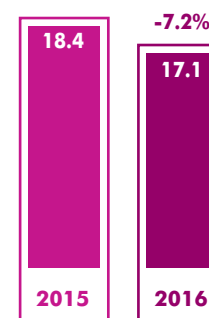
VISUAL ARTS COLLECTIONS GROW IN 2016



Visual arts collections, in € thousand, in 2016.



DRAMATIC RIGHTS COLLECTIONS, 2016



Dramatic rights collections, in € million, in 2016.

Visual arts, drama and literature

Visual arts collections are minimal in the region but increased 12.6% year-on-year in 2016. Most collections come from mechanical reproduction, which holds an 83.7% share and saw 28.8% year-on-year growth.

Collections for the dramatic repertoire declined 7.2% year-on-year. TV & radio collections from Argentina led growth of 278.3% to €0.9m between 2015 and 2016. As with audiovisual, Argentina's exchange rate decision also affected ARGENTORES' figures, yet the society increased collections in local currency and euros.

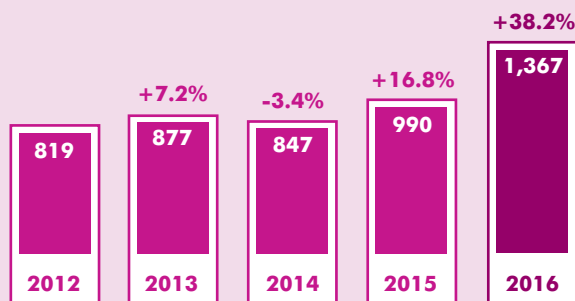
No data was reported in 2016 for literature.



Country focus MEXICO

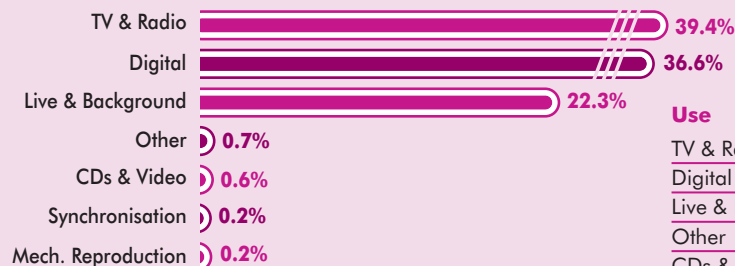
All values in Mexican pesos (Mex\$)

COLLECTIONS GROW 67% OVER FIVE YEARS



Annual collections for all repertoires in Mexico in million Mexican pesos since 2012.

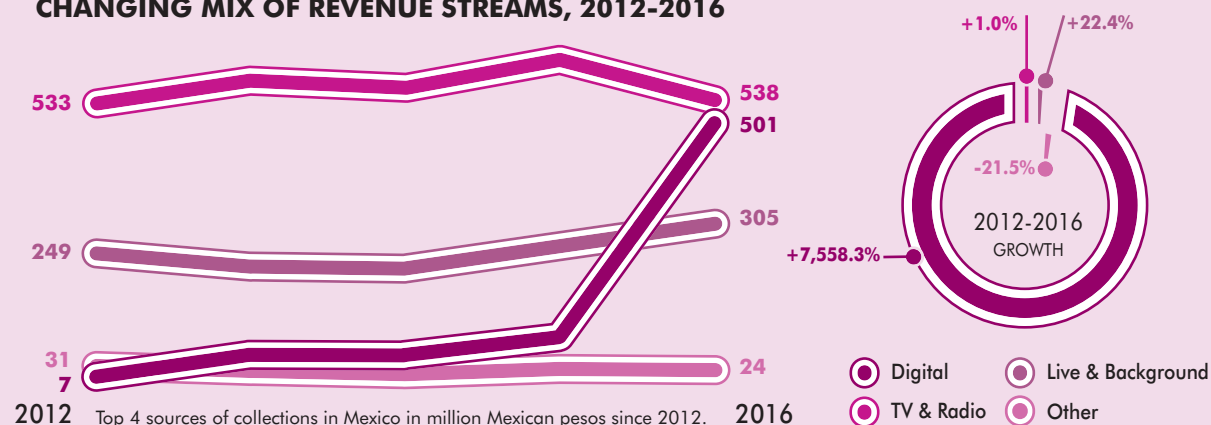
DIGITAL IS 37% OF ALL COLLECTIONS, 2016



Use	Collections in Mex\$m	Share
TV & Radio	538	39.4%
Digital	501	36.6%
Live & Background	305	22.3%
Other	9	0.7%
CDs & Video	8	0.6%
Synchronisation	3	0.2%
Mech. Reproduction	3	0.2%

Collections by income source in 2016.

CHANGING MIX OF REVENUE STREAMS, 2012-2016



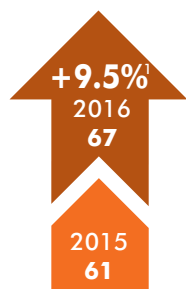
Mexico has been a notable success story for digital collections, especially in the music sector where revenues from subscription streaming services have risen sharply in recent years. Since 2012, Mexico has seen its share of collections in the Latin America & the Caribbean region increase from 11.0% to 12.1%.

Digital growth has transformed the sector. In local currency terms, digital revenues have soared from Mex\$6.6m (€386k) in 2012 to Mex\$501m (€24m) in 2016. In 2016 collections were boosted exceptionally by the licencing of YouTube and the distribution of 100% of retroactive revenues from the digital platform. While these figures are significant, Mexico has not reached full collections since there are government barriers in place for setting tariffs. Digital growth has also been driven by Spotify, Apple Music and other subscription services.

TV & radio lead all sources of revenue at 39.4% or Mex\$538m (€27m). This is followed by digital at 36.6% or Mex\$501m (€24m) then live & background at 22.3% or Mex\$305m (€15m).

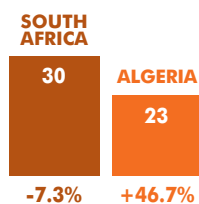
region AFRICA

TOTAL COLLECTIONS AND ANNUAL GROWTH

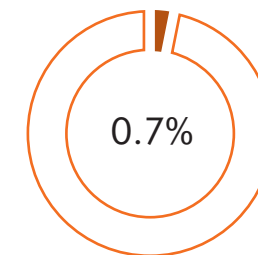


€ million.

LARGEST COLLECTIONS COUNTRIES AND ANNUAL GROWTH, 2016



€ million.



OVERALL SHARE OF GLOBAL COLLECTIONS

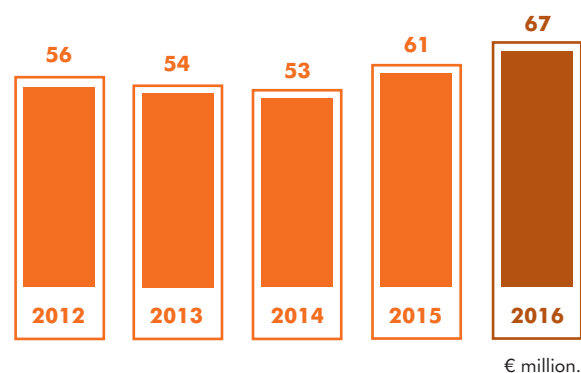
Largest country € growth: **South Africa**
 Largest repertoire € growth: **Music**
 Largest repertoire % growth: **Music**

Africa collections reported to CISAC increased 9.5% to €67m in 2016, representing only 0.7% of the overall share of global collections. The region's collections have remained stable year-on-year, yet the overall picture of the region remains distorted. Much of the collections came from only a few societies or countries, notably South Africa and Algeria. South Africa represents 45.0% of Africa's collections, or €30m. Algeria collected 34.0% of the continent's totals, or €23m, a share which has increased with the inclusion in 2016 of previously unreported mobile digital income from pre-loaded ringtones. Other African countries collected 21.0% or a combined €14m in 2016. The music repertoire saw the largest growth in collections both in monetary (€5.9m) and growth percentage terms (11.1%).

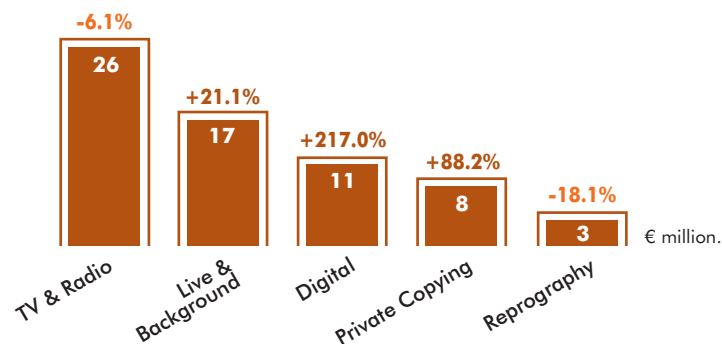
¹ Growth figure reflects collections reported to CISAC and is impacted by the inclusion of some mobile digital revenues in Algeria that were not reported in previous years.

AFRICA

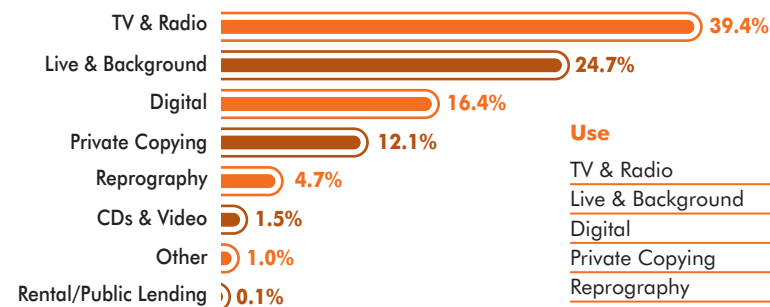
COLLECTIONS UP 20.8%, 2012-2016



5 TOP REVENUE STREAMS IN AFRICA AND % GROWTH, 2012 - 2016²



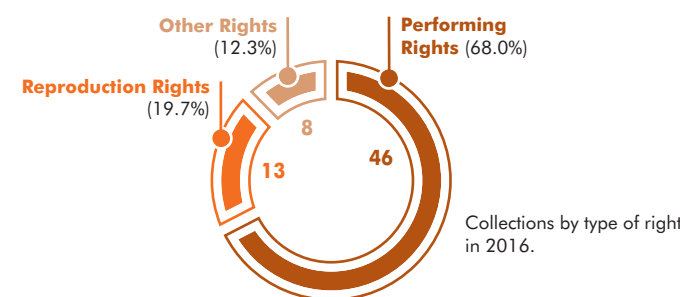
TV & RADIO IS THE LARGEST SEGMENT IN 2016



Use	2016	Share
TV & Radio	26	39.4%
Live & Background	17	24.7%
Digital	11	16.4%
Private Copying	8	12.1%
Reprography	3	4.7%
CDs & Video	1	1.5%
Other	1	1.0%
Rental/Public Lending	0	0.1%

Collections by income source in 2016.

COLLECTIONS BY RIGHT, 2016



Collections by type of right in 2016.

Collections in Africa have grown by 20.8% since 2012. The region is full of untapped potential, with significant challenges to overcome. Progress is hindered by lack of a strong licencing and rights enforcement environment and undeveloped infrastructure.

Challenges include developing a legislative environment so that CMOs can licence radio and TV stations; increasing low tariff rates which limit collections; and digitising radio station resources (i.e. requiring playlist information to be consolidated at radio stations and sent to CMOs).

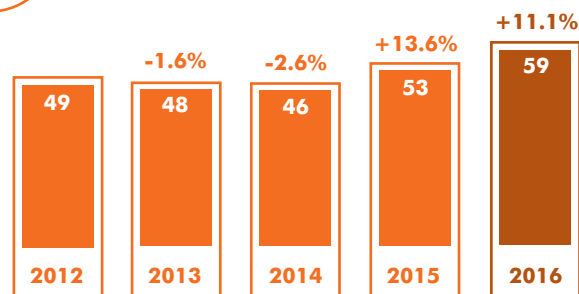
For private copying, Algeria is the standard bearer in Africa, taking its expertise to train others. Ivory Coast and Burkina Faso are also making marked progress. Ivory Coast has enacted a new law but still needs to implement application decrees. Burkina Faso's private copying system is in place and working.

Digital collections could increase more if societies negotiate better rates with powerful regional telecom operators. Smartphone use and streaming present an important opportunity for increased collections, particularly in Kenya and Nigeria.

² Digital growth reflects collections reported to CISAC and is impacted by the inclusion of some mobile digital revenues in Algeria in 2016 that were not reported in previous years.

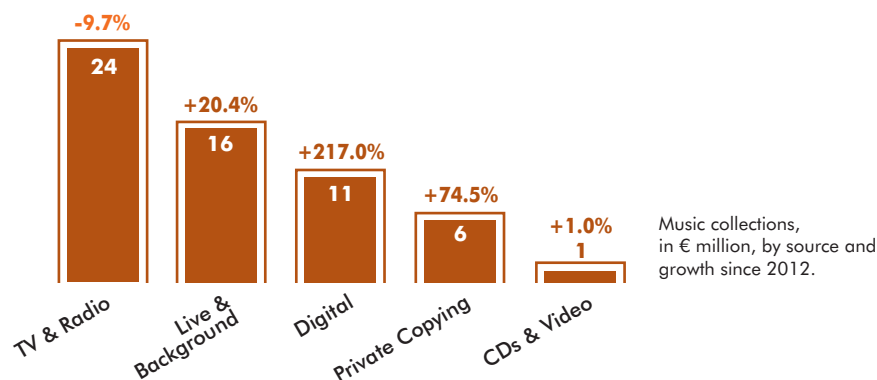
AFRICA

MUSIC REPERTOIRE GROWTH, 2012-16



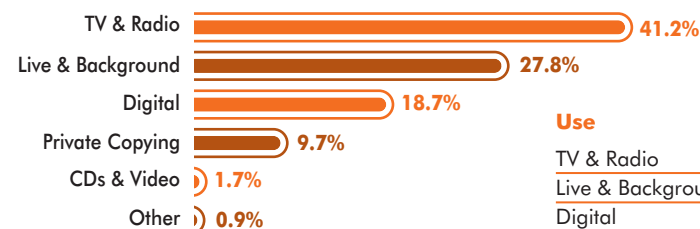
Annual music collections, in € million, since 2012.

TOP 5 REVENUES AND % GROWTH SINCE 2012³



Music collections, in € million, by source and growth since 2012.

TV & RADIO LEADS USES OF MUSIC



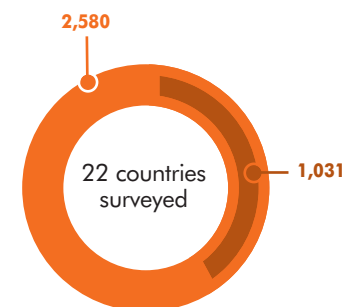
Use	2016	Growth
TV & Radio	24	-6.4%
Live & Background	16	-6.0%
Digital	11	+339.5%
Private Copying	6	-0.6%
CDs & Video	1	+12.3%
Other	1	-1.6%
TOTAL	59	+11.1%

Music collections, in € million, by income source and annual growth in 2016.

CISAC SURVEY HIGHLIGHTS THE POTENTIAL FOR BROADCAST ROYALTIES IN AFRICA

Number of radio broadcasters in 22 countries surveyed: **2,580**

Number of radio broadcasters licensed and paying authors and songwriters: **1,031**



Since 2012, music collections have increased 21.0% or €10.2m. At 41.2%, TV & radio is the largest share of collections in the repertoire, followed by live & background at 27.8% and digital at 18.7%.

CISAC and its Creators' Councils work with African societies and international bodies to address the challenging conditions for music licensing in Africa - via training, legislation and education campaigns. In 2017 CISAC signed partnership agreements with ARIPO and OAPI, the African regional copyright agencies for anglophone and francophone countries. A short CISAC survey of 22 countries in the region conducted in July 2017 starkly highlighted the challenge: it identified that less than 40% of radio stations in Africa are licenced to broadcast music (only 1,031 out of 2,580 broadcasters).

Digital is an extremely small but growing income source, totalling €11.0m in 2016. Digital collections have grown in Algeria, Benin, Guinea, Ivory Coast, Mauritius, Nigeria and Togo. Private copying has been a success thanks to efforts in Algeria with an increase of 74.5% or from €3.2m in 2012 to €5.7m in 2016. Live & background rose 20.4% from €13.5m in 2012 to €16.3m in 2016.

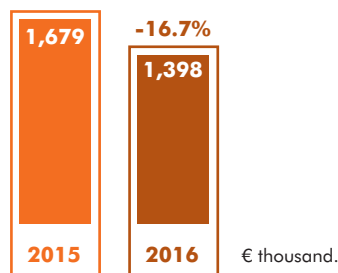
³ Digital growth is impacted by the inclusion of some mobile digital revenues in Algeria in 2016 that were not reported in previous years.



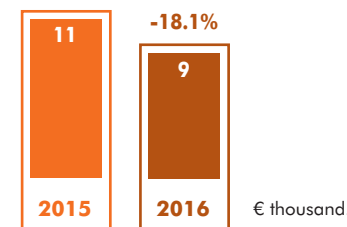
AFRICA



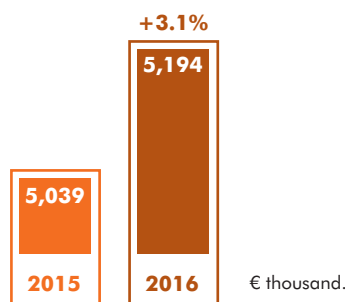
AUDIOVISUAL COLLECTIONS, 2015-2016



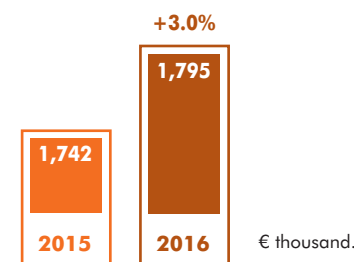
VISUAL ARTS COLLECTIONS, 2015-2016



LITERATURE COLLECTIONS, 2015-2016



DRAMATIC RIGHTS COLLECTIONS, 2015-2016



Audiovisual, visual arts, literature and dramatic repertoires

The audiovisual repertoire in Africa saw a decline of 16.7% year-on-year due to a drop in private copying collections, notably from Algeria. TV & radio in Algeria also decreased. Ivory Coast, however, increased TV & radio collections year-on-year. Visual arts were only collected by three countries in the region; Burkina Faso, South Africa and Togo. Only Burkina Faso and Togo collected and distributed revenue from TV & radio.

Literature is the second largest source of income in Africa, remaining stable over the past five years. Reprography is the most significant share of collections for literary with South Africa being the primary contributor. TV & radio collections, mostly from Algeria, were the second largest. Year-on-year, drama remained stable with 3.0% growth. The main sources of drama collections are private copying, exclusively from Algeria, as well as TV & radio, also from Algeria. South Africa is the main contributor of live & background collections for the dramatic repertoire.

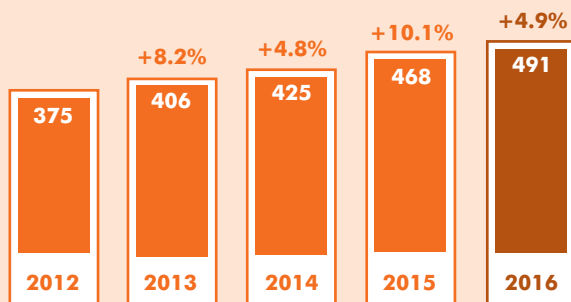


Country focus

SOUTH AFRICA

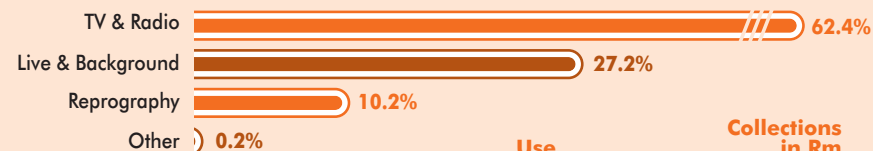
All values in South African rand (R)

COLLECTIONS IN LOCAL CURRENCY GROW 31.1% OVER FIVE YEARS



Annual collections for all repertoires in South Africa in million South African rands since 2012.

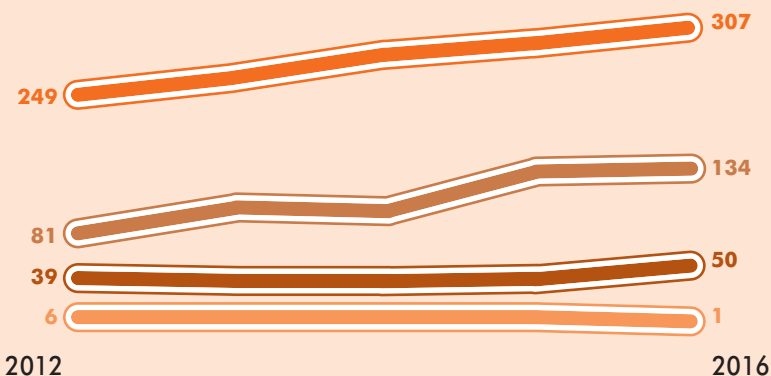
BREAKDOWN OF REVENUE STREAMS, 2016⁴



Use	Collections in Rm	Share
TV & Radio	307	62.4%
Live & Background	134	27.2%
Reprography	50	10.2%
Other	1	0.2%

Collections in South Africa by income source in 2016.

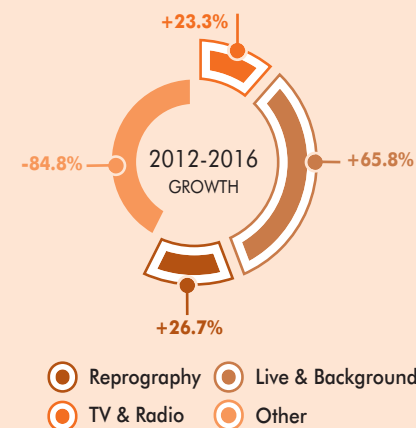
CHANGING MIX OF REVENUE STREAMS, 2012-2016



2012

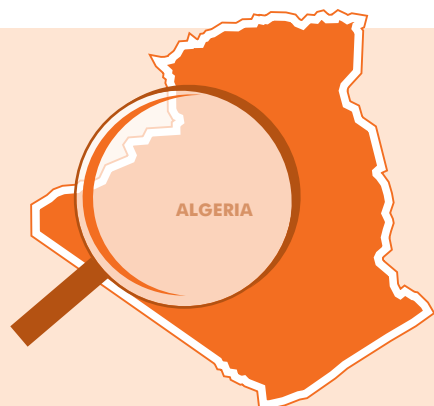
2016

Annual collections from top 4 sources in South Africa in million South African rands since 2012.



South Africa is the largest source of collections in Africa, with 45.0% of total collections. In local currency, all revenue streams, except CDs & video and "other", saw increases in the country since 2012. When broken down, TV & radio accounts for 62.4%, followed by live & background at 27.2% and reprography at 10.2%. Since 2012, in local currency terms, South Africa has grown 31.1%. The largest growth in percentage terms came from live & background, which saw an increase of 65.8% since 2012. This use was followed by reprography, which increased by 26.7%, and TV & radio at 23.3%.

⁴ Data excludes digital royalties which are not reported to CISAC.

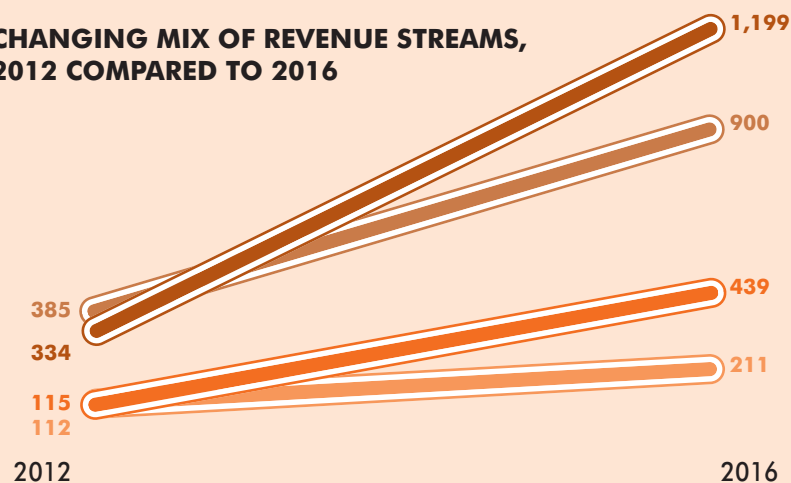


Country focus

ALGERIA

All values in Algerian dinars (DA)

CHANGING MIX OF REVENUE STREAMS, 2012 COMPARED TO 2016

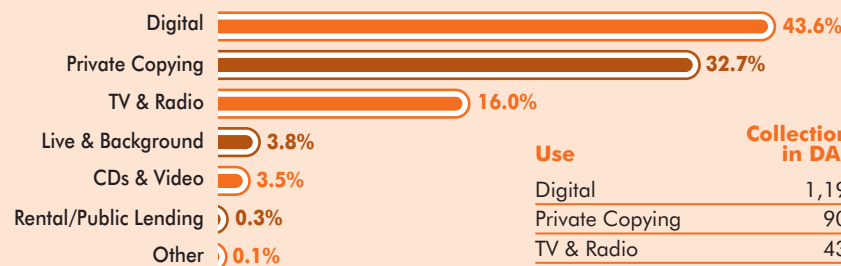


2012

2016

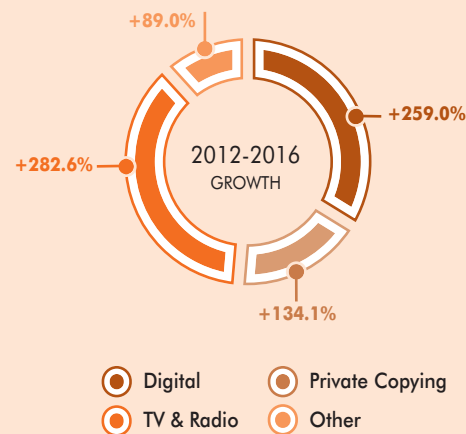
Annual collections in Algeria from the 4 top sources in million Algerian Dinars since 2012.

BREAKDOWN OF REVENUE STREAMS, 2016



Use	Collections in DAm	Share
Digital	1,199	43.6%
Private Copying	900	32.7%
TV & Radio	439	16.0%
Live & Background	103	3.8%
CDs & Video	96	3.5%
Rental/Public Lending	9	0.3%
Other	3	0.1%

Repartition of collections in Algeria by income source in 2016.



- Digital
- Private Copying
- TV & Radio
- Other

Algeria is the second largest market in Africa in terms of royalty collections with a total of 34.0% collected in 2016. It is a case study in successfully applying private copying levies royalties, which account for 32.7% of all collections in the country. 16.0% of collections came from TV & radio, followed by 3.8% from live & background and 3.5% of CDs & video.

Since 2012, in local currency terms, Algeria has seen collections nearly triple (up 190.9%) from DA945m to DA2,759m. The major contributors to this include digital – this sector almost entirely comprises ringtones pre-loaded on mobile devices (rather than digital download or subscription revenues). TV & radio (up 282.6%), private copying (up 134.1%), CDs & video (up 103.3%) and live & background (88.6%) have also grown sharply over the five year period.



MEMBERSHIPS BY REGION (VALID FOR 2016)

123 countries - 239 members



EUROPE

48 countries
107 members

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

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

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



CANADA/USA

2 countries
16 members

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

STATUS WITHIN CISAC

M = Member **A** = Associate **P** = Provisional

REPERTOIRES



MU = Music



D = Drama



AGP = Visual Arts



AV = Audiovisual



L = Literature

NR = No Repertoire

Societies no longer CISAC members as of June 2017: AEPI (Greece), BEAT (Brunei Darussalam), BSDA (Senegal), IPRS (India), MCSK (Kenya), NICAUTOR (Nicaragua), SDCSI (Ireland) and The Society Of Authors (United Kingdom).



MEMBERSHIPS BY REGION (VALID FOR 2016)

123 countries - 239 members



ASIA-PACIFIC

17 countries
29 members

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

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

SOCIETY	STATUS	REPERTOIRE	COUNTRY/TERRITORY
MOSCAP	P	MU	MONGOLIA
MRCSN	P	MU	NEPAL
MUST	M	MU	TAIWAN, CHINESE TAIPEI
PAPPRI	A	MU	INDONESIA
SACENC	M	MU	NEW CALEDONIA (FRANCE)
SACK	M	AGP	KOREA, REPUBLIC OF
VCPMC	M	MU	VIET NAM
VISCOPY	M	AGP	AUSTRALIA
WAMI	P	MU	INDONESIA



LATIN AMERICA & THE CARIBBEAN

25 countries
51 members

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

SOCIETY	STATUS	REPERTOIRE	COUNTRY/TERRITORY
AUTORARTE	A	AGP	VENEZUELA
AUTVIS	M	AGP	BRAZIL
BSCAP	M	MU	BELIZE
COSCAP	M	MU	BARBADOS
COTT	M	MU	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	MU	SAINT LUCIA
JACAP	M	MU	JAMAICA
LATINAUTOR	A	NR	URUGUAY
NICAUTOR	M	MU	NICARAGUA
REDES	P	AV	COLOMBIA
SACIM, EGC	M	MU	EL SALVADOR
SACM	M	MU	MEXICO

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



AFRICA

31 countries
36 members

SOCIETY	STATUS	REPERTOIRE	COUNTRY/TERRITORY
BBDA	M	MU, AV, D, L, AGP	BURKINA FASO
BCDA	M	MU	CONGO
BGDA	M	MU, AV, L	GUINEA
BMDA	M	MU, D, L	MOROCCO
BNDA	M	MU, D, L	NIGER
BSDA	M	MU, AV, D, L, AGP	SENEGAL
BUBEDRA	M	MU, AV, D, L	BENIN
BUMDA	M	MU, AV, D, L, AGP	MALI
BURIDA	M	MU	COTE D'IVOIRE
BUTODRA	M	MU, AV, D, L, AGP	TOGO
CMC	M	MU	CAMEROON
COSOMA	M	MU, L	MALAWI

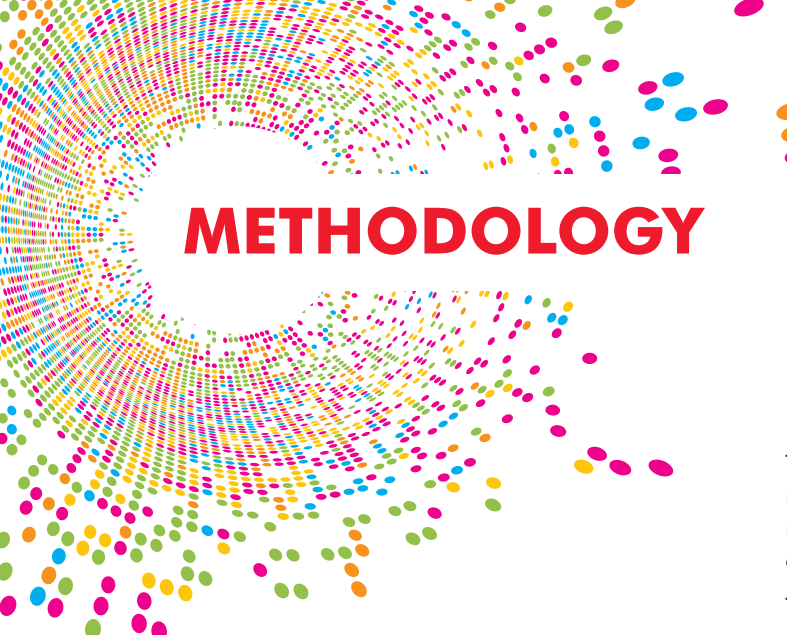
SOCIETY	STATUS	REPERTOIRE	COUNTRY/TERRITORY
COSON	M	MU	NIGERIA
COSOTA	M	MU	TANZANIA, UNITED REPUBLIC OF
COSOZA	P	MU	TANZANIA, UNITED REPUBLIC OF
DALRO	M	L, D, AGP	SOUTH AFRICA
GHAMRO	P	MU	GHANA
MASA	M	MU, L	MAURITIUS
MCSK	M	MU	KENYA
MCSN	M	MU	NIGERIA
NASCAM	M	MU	NAMIBIA
ODDA	P	MU	DJIBOUTI
OMDA	M	MU, AV, D, L	MADAGASCAR
ONDA	M	MU, AV, D, L, AGP	ALGERIA

SOCIETY	STATUS	REPERTOIRE	COUNTRY/TERRITORY
OTPD	M	MU, D, L	TUNISIA
RSAU	P	MU, AV, D, L, AGP	RWANDA
SACERAU	M	MU	EGYPT
SACS	M	MU	SEYCHELLES
SADIA	M	MU, AV	ANGOLA
SAMRO	M	MU	SOUTH AFRICA
SOCILADRA	M	D, L	CAMEROON
SOMAS	M	MU	MOZAMBIQUE
UNAC-SA	P	MU, AV, D	ANGOLA
UPRS	M	MU	UGANDA
ZAMCOPS	M	MU	ZAMBIA
ZIMURA	M	MU	ZIMBABWE

New CISAC members as of June 2017

SOCIETY	STATUS	REPERTOIRE	COUNTRY	REGION
CAPASSO	P	MU	SOUTH AFRICA	AFRICA
DACIN-SARA	P	AV	ROMANIA	EUROPE
EVA	A	AGP	BELGIUM	EUROPE
GEDAR	P	AV	BRAZIL	LATIN AMERICA AND THE CARIBBEAN

SOCIETY	STATUS	REPERTOIRE	COUNTRY	REGION
OOA-S	P	AGP, AV	CZECH REPUBLIC	EUROPE
SCM-COOPERATIVA	P	MU	CAPE VERDE	AFRICA
SODAV (FORMER BSDA)	P	MU	SENEGAL	AFRICA



METHODOLOGY

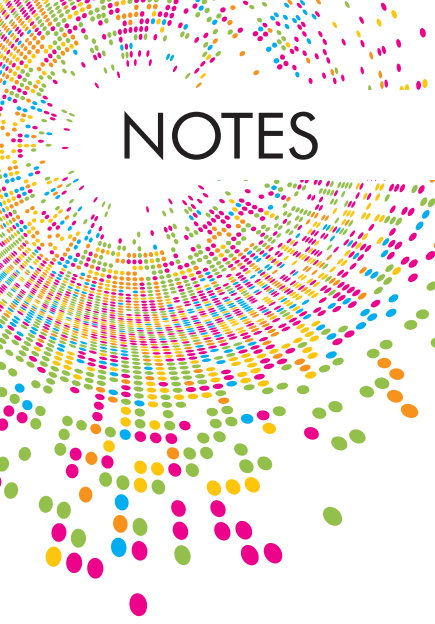
The CISAC Global Collections Report presents the collections of CISAC member societies. Each member society declares revenues collected for the use of the repertoires it represents within its country (domestic collections) as well as revenues received from sister societies. Only domestic collections are taken into account in the report, so as to avoid any double counting. Collections are gross collections, i.e. before any deduction for administrative, cultural or social purposes.

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

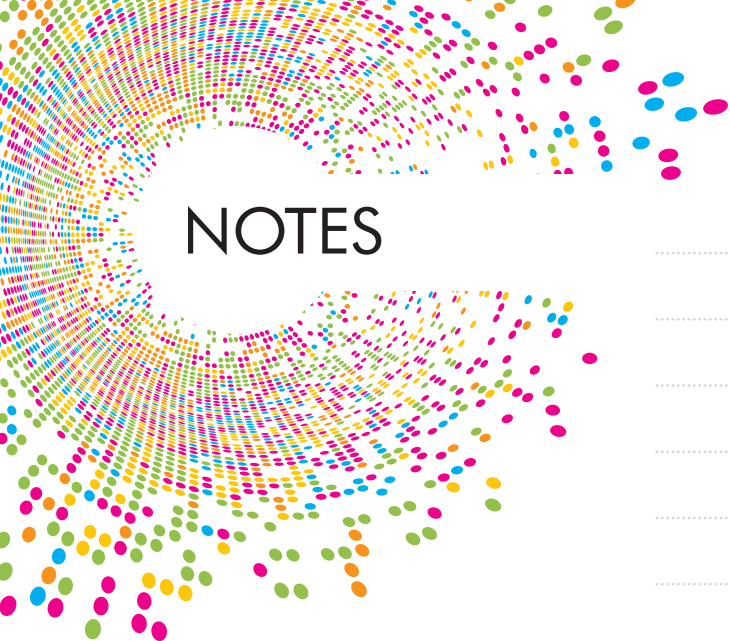
The exchange rate of the euro is taken at its average 2016 rate. All figures for previous years are converted into euros using the rate of the year in question. Year-on-year comparisons are therefore made on a floating currency basis. Taking into account the variations of value between different currencies gives an accurate picture of the amounts in euros that is actually available for creators. It may in certain cases give a different picture from reporting on a constant currency basis, where only volume variations would be reflected.

The focuses on specific countries are expressed in local currency to show the evolution of collections in that country, independent of variations of the currency compared to euro.

For the sake of clarity, collections figures have been rounded up to the nearest million or thousand, except when said figures are too small to be significant, in which case one decimal has been added. Percentages are calculated using the actual unrounded figures, which can explain that, in some cases, they may slightly differ from the one that would be calculated using the rounded-up figures that are displayed.



NOTES



NOTES

A series of horizontal dotted lines for taking notes, spanning the width of the page.



CREDITS

CISAC wishes to thank the following:

Front cover: ©Liu zishan

Photos credits:

Inside pages: Jean-Michel Jarre, Composer and Artist (CISAC President - France) © M.Kuenster monsterpics (p.4) - Eric Baptiste - CEO, SOCAN - Chairperson of the CISAC Board © Steve Carty Photographer (p.5)- Gadi Oron (CISAC Director General - Paris) ©Eilon Paz (p.6) - Susan Butler © James Kriegsmann (p.24) - ©shutterstock/zhu difeng (p.25) - ©shutterstock/Catwalk Photos (p.26) - ©shutterstock/YJPTO (p.27) - ©shutterstock/kondrukhov (p.28) - ©shutterstock/GarryKillian (p.29) - ©shutterstock/Chompoo (p.31) - ©shutterstock/279photo Studio (p.32) - Marcelo Piñeyro ©Lucia Faraig (p.32) - ©shutterstock/Sylverarts Vectors (p.33) - Miquel Barceló© Xavier Forcioli (p.33) - ©shutterstock/Andrey Armyagov (p.36) - ©shutterstock/Billion Photos (p.37) - ©shutterstock/LanaBrest (p.38) - ©shutterstock/MaskaRad (p.39) - ©shutterstock/Marko Ristic Serbia (p.42) - ©shutterstock/agsandrew (p.43) - ©shutterstock/Erofeeva Natalya (p.46) - ©shutterstock/Vudhikrai (p.47) - ©shutterstock/ Sofia Zhuravetc (p.47) - ©shutterstock/rongyiquan (p.47) - ©shutterstock/T photography (p.52) - ©shutterstock/Anna Baburkina (p.53) - ©shutterstock/Aleksandar Todorovic (p.54) -©shutterstock/Stanislav Beloglazov (p.54) - ©shutterstock/Mark Atkins (p.58) - ©shutterstock/Philiplmage (p.59) - ©shutterstock/Roman Motizov (p.59) - ©shutterstock/lazy clouds (p.59) - ©shutterstock/NH (p.59).

Translation/editing: John Brunner, Emmanuel Legrand, Marco Foley/652South, Hélène Caruyer, Paz Juan Gutiérrez.

Published by the Communications Department of CISAC – November 2017.

Graphic design: Olivier Noël, ON.

Printing : ICA-38230 Tignieu-Jameyzieu, France- Nov.2017

Hear, There And Everywhere

Every second we listen to 6,000 televisions, radios, venues and digital services. Every hour we process 100 million digital transactions. Every day we identify 5 million plays in broadcasts and clubs. Every month we report to 100 CMOs. Every quarter we receive 2 million new audio tracks. Every year we celebrate the biggest monitoring network with you.

www.bmat.com



CISAC

International Confederation of Societies of Authors and Composers
France • South Africa • Chile • China • Hungary
www.cisac.org

