

## ISPs: The needle is moving

ISPs are uniquely situated to help tackle online piracy. A multi-faceted strategy is needed to address the problem in its different forms and channels. Broadly, the two main approaches to be taken are graduated response and website blocking measures. Site blocking is effective in dealing with the various new forms of infringement such as cyberlockers and websites. However, an approach based exclusively on website blocking is insufficient by itself, given the importance of major P2P services that are decentralised and therefore not covered by blocking.

IFPI advocates graduated response measures as the most proportionate and effective solution to address the major problem of P2P piracy. Policymakers worldwide, as well as some ISPs, are increasingly embracing this approach as fair and right.

### Graduated response

Under the graduated response approach, rights holders alert ISPs and mobile data network service providers to IP addresses that are being used to infringe copyright by uploading protected content on to the internet without permission. This is not done by monitoring individual user behaviour, but rather by keeping watch on P2P networks and infringing file distribution channels. ISPs can match the IP address to the subscriber details they hold and contact their customers to inform them their account is being used to break the law and urge them to use legal services. This is done without sharing personal information. The account holder is told that continued infringement after a series of notices will lead to a penalty or sanction. These vary from country to country, but may include temporary account suspension, bandwidth throttling or protocol blocking, as well as potential fines.

Essential to the impact of graduated response is the existence of a credible sanction. Notifications without consequences lack deterrent effect. Third-party research consistently indicates that graduated response, including legal consequences, is effective in changing consumer behaviour. Among numerous surveys conducted in 2011:

- In Germany, 81 per cent of consumers that download media content illegally believe that warnings with the prospect of consequences would make people stop their illegal activity (GfK, February 2011).
- In South Korea, government officials report that 70 per cent of infringing users stop their activity on receipt of a first notice. A similar pattern is found on receipt of the second notice, with 70 per cent of users ceasing to use their account to infringe.”



France's Hadopi law: Protection for artists.

## Progress in Europe

France became the first country in Europe to introduce graduated response legislation. The “Creation and Internet” law established a new agency, Hadopi, which sends notices to internet subscribers whose accounts have been used to infringe copyright. If a subscriber ignores two notices within six months and infringes copyright law for the third time in a year, Hadopi can notify a criminal court, which can suspend the internet account for up to a month and levy a fine of up to €1,500. To date there have been more than 700,000 notices sent, which IFPI estimates to have reached around 10 per cent of P2P users in France.

There are good indications of the impact Hadopi has had on piracy in its first year of operation. The use of unauthorised P2P networks has sharply declined, with overall P2P use down by 26 per cent since notices started being sent in October 2010 (IFPI/Nielsen). According to Peer Media Technologies, data on the number of infringing movie downloads initiated on P2P networks in France also shows a dramatic decline since notices started, supporting the view that P2P piracy has seen a significant drop.

A study commissioned by Hadopi in May 2011 found that among those who had either received a notice or knew someone who had received one, 50 per cent said knowledge or receipt of a notice made them stop their illegal activity and a further 22 per cent said it reduced their illegal consumption.

# 26%

Reduction in P2P use in France since October 2010

# 81%

German consumers who think warnings with consequences would deter illegal file-sharing

## New study assesses the effect of graduated response

A new academic study – *The Effect of Graduated Response Anti-Piracy Laws on Music Sales: Evidence from an Event Study in France*, by Danaher et al<sup>1</sup> - has also found evidence that Hadopi has had a positive impact on iTunes sales in France. The authors studied sales of digital singles and album downloads on iTunes from July 2008, before the law was adopted, until six months after the start of notices. They developed an estimate of what French iTunes sales would have looked like in the absence of Hadopi by studying a control group of similar markets.

The analysis found that French iTunes sales saw a significant uplift at exactly the period when awareness of Hadopi was at its highest, in Spring 2009, when the law was being debated in the National Assembly. This effect was maintained throughout the period studied. French iTunes sales were 22.5 per cent higher for singles and 25 per cent higher for digital albums than they would have been, on average, in the absence of Hadopi. The study also found that the increase in sales was larger for more heavily-pirated genres, such as rap, and smaller for less-pirated genres, such as jazz.

“We see sales in France for heavily pirated genres rise much faster than less pirated genres, which suggests that this sales increase is due to a reduction in French piracy levels,” say the authors. “Our results have important implications for other countries in Europe and abroad who are considering passing of similar graduated response laws...we also note that our study likely understates the true impact of Hadopi.”

THE ESTIMATED 'HADOPI EFFECT' ON iTUNES		
	SINGLE TRACKS	DIGITAL ALBUMS
INCREASE IN SALES IN CONTROL GROUP	26%	42%
INCREASE IN SALES IN FRANCE	48%	67%
EFFECT OF HADOPI (FRANCE MINUS CONTROL)	23%	25%

Source: *The Effect of Graduated Response Anti-Piracy Laws on Music Sales: Evidence from an Event Study in France*. (Figures are rounded).

A separate study by Ipsos MediaCT, conducted in November 2011, found 90 per cent of P2P users in France were aware of the law and 71 per cent would stop infringing if they received a notification with potential sanctions as part of the graduated response programme. Half of P2P users aged 15 to 50 (48%) claim the law has or will have a deterrent impact on their illegal behaviour. 23 per cent said they have either received a notification with potential sanctions directly or know someone that has. Approximately one in six P2P users (16%), around one million people, claim the new law has or will encourage them to use legal services more.

In **Ireland**, a graduated response programme has been in operation since October 2010 by eircom, the country's largest ISP, as part of an agreement with the music industry. Account holders receive three warning messages before facing a seven-day account suspension. If they continue to infringe after this they can face a twelve-month disconnection of their broadband service.

In parallel to its graduated response programme, eircom established MusicHub, a fully authorised service. Streaming is free and unlimited for eircom customers and subscriptions to enable bundled downloads vary from €5.99 to €22.99 per month.

### Slow progress in UK

In the **UK**, the Digital Economy Act, which established provisions for a graduated response programme, was passed in April 2010.

Implementation has been delayed by a judicial review of the Act and development of an implementing code by regulatory body OFCOM.

The UK government has also disappointingly decided not to implement the sections of the Act that deal with website blocking. In the meantime, levels of unauthorised downloading remain high in the UK, despite the presence of more than 70 legal services. The UK government is attempting to reach a voluntary agreement on an expedited procedure for blocking user access to illegal websites and is committed to implementing the graduated response measures in the Digital Economy Act. Ed Vaizey, minister for culture, said in August 2011: “It is essential that businesses have the right tools to protect their hard work and investment in the digital age. Our creative industries must be able to protect their products and the Digital Economy Act will help them do that.”

In May 2011, the **European Union** announced it intends to review its Enforcement Directive, including the way it addresses online piracy. The Commission has noted that the exemptions from liability that ISPs enjoy under the eCommerce Directive do not free them from the obligation to tackle digital piracy. Internal Market Commissioner Barnier has indicated that the review will target the “source” of illegal content and will look to strengthen copyright protection online. The initiative needs to tackle all forms of infringement, website and P2P, if the initiative is to be effective.

“Our results have important implications for other countries in Europe and abroad who are considering passing of similar graduated response laws...we also note our study likely underestimates the true impact of Hadopi.”

Danaher et al



<sup>1</sup>Danaher, B; Smith, MD; Telang, R; and Chen, S

## US and New Zealand: ISPs engage

A ground-breaking ISP cooperation deal was struck in the **US** in 2011 and will be implemented in 2012. Most major ISPs have signed up to a “copyright alert system” that will issue escalating notices and warnings to subscribers, with deterrent measures applied to repeat infringements, accompanied by a new Copyright Information Centre and well-resourced education programmes.

Legislation addressing “rogue” websites is also being discussed (see US focus, page 21).

**New Zealand** implemented the Copyright (Infringing File Sharing) Amendment Act in September 2011, putting in place a graduated response programme involving notices sent by ISPs and sanctions for repeat infringers. John Key, the prime minister, said the internet could not be a “Wild West” where creators’ rights were trampled underfoot.

Early indications since the announcement of the new law suggest it has had an initial impact on consumer behaviour. Ipsos MediaCT research from

August 2011, on the eve of the implementation, found that seven in ten P2P users said they would stop infringing on receipt of a notice with a sanction as part of the country’s graduated response programme.

According to IFPI, usage of P2P networks fell 16 per cent between September and November 2011, accompanied by increasing online sales. By November 2011, digital sales in New Zealand were up 35 per cent (RIANZ). However, the high cost of notifications to ISPs by rights holders could prevent the graduated response system being used over the long term to optimum effect.

**Illegal downloading remains rife in the UK despite 70 legal music sites.**

### Consumers heed graduated response Ipsos MediaCT findings in New Zealand (August 2011)

- Half of all online adults aged 15-50 agree that internet suspension or fines for repeatedly downloading content without the copyright owners’ permission are acceptable.
- Although the law was not yet in place, 14 per cent of P2P users aware of it claimed their behaviour had already changed.
- Most P2P users that had already changed their behaviour as a result of the law (62%) avoid particular unauthorised services altogether.
- New legal measures have the ability to significantly impact P2P as seven in ten users claim they would stop on receipt of a notification with a sanction attached.

## Moves to block ‘rogue websites’

ISP and Mobile Service Providers’ position as gatekeepers to the internet also enables them to block users’ access to websites dedicated to the distribution of infringing material. There has been growing support for site blocking from courts and governments.

In June 2011, **Malaysia** announced it would take action to expedite the process of blocking access to infringing websites. The Malaysian Communications and Multimedia Commission (SKMM) required the country’s ISPs to block ten file-sharing websites for violating the Malaysian Copyright Act (1987). In **India**, the judiciary ordered website blocking measures against sites illegally distributing movies and music in April 2011. The Department of Information Technology announced that 11 websites would be blocked by Indian ISPs.

**In New Zealand, usage of P2P networks fell 16 per cent in the first three months of notices, accompanied by increasing online sales.**

## Evidence of site-blocking impact

Blocking of illegal sites can have a significant impact. In **Belgium**, in September 2011, the Antwerp Court of Appeal ordered ISPs Belgacom and Telenet to block access to The Pirate Bay by way of domain name service blocking. Data from comScore shows that this reduced the service’s audience by 84 per cent between August and November 2011. In **Italy**, ISPs were ordered to block access to The Pirate Bay in February 2010 - at the time, the biggest torrent site in Italy. Once the blocking order was passed, usage of the service fell dramatically and it is still down by 74 per cent (IFPI/Nielsen). In April 2011, ISPs were also ordered to block BTjunkie, another major torrent site in Italy. Use of the service fell dramatically by 80 per cent following the block (IFPI/Nielsen).

In **Denmark**, the Supreme Court required ISPs to block access to The Pirate Bay in a May 2010 ruling. Website blocking elsewhere in Europe is increasingly similar. Blocking measures were also introduced in 2011 in **Austria** and **Finland**, requiring ISPs to block access to The Pirate Bay or other infringing sites. In the UK, in October 2011, the High Court ordered leading ISP BT to block unauthorised service Newzbin2.

**Spain** has written website blocking into its Sustainable Economy Act, widely known as the “Law Sinde”, whose implementing decree will enter into force in March 2012. The legislation contains provisions that, in the absence of voluntary compliance by the website owner, require ISPs to block access to websites, blogs and forums that provide links to copyright infringing content. This takes place through an expedited administrative procedure combined with prior authorisation by the Courts.

## Focus on France



Marie-Françoise Marais.

### Hadopi: “positive impact for years to come”

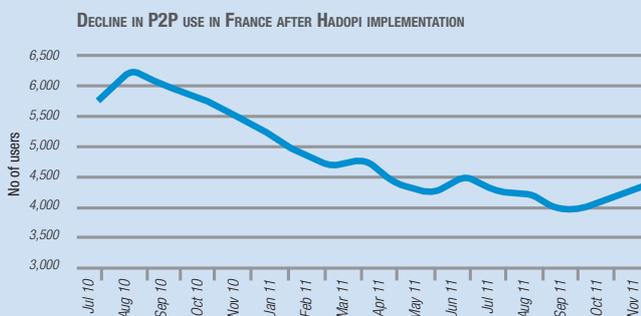
Marie-Françoise Marais, who runs Hadopi, the agency responsible for tackling internet copyright infringement and promoting legal offers in France, has no doubt it is successful. “Hadopi is working well. It is gaining widespread acceptance. People

are changing their behaviour in favour of legal offerings.”

Hadopi is the leading example in Europe of the graduated response model. It takes a progressive approach, warning users about their infringing behaviour, creating awareness of the importance of intellectual property, promoting legal services and applying sanctions only after repeated warnings.

Hadopi’s goal is to ensure that intellectual property rights are protected effectively. It is a big task. Ipsos MediaCT research indicates that around 10 per cent of P2P users in France have by now received a notice.

Hadopi runs education campaigns through the www.Pur.fr site, which certifies more than 30 legal digital content services in France. Marais praises the music sector for offering consumers what they want. She says: “The music sector cannot be criticised for a lack of diversity or types of services. Music has fully evolved online and is adapted to the needs of internet consumers.”



Source: IFPI/Nielsen.

Hadopi is being watched by other countries looking to follow its example. Marais says requests for meetings have come from a wide variety of countries including Canada, Denmark, Italy, Norway, Singapore, Spain and the US. Marais says Hadopi’s mission is a long-term one. “We are looking to achieve a real long-term solution to piracy, creating close cooperation between ISPs and rights holders.” She says there has been negligible adverse reaction to letters. “Most of the calls we get are from people who received a warning and they are asking what was downloaded. They want to understand. There is a change in perception from the public, and they are accepting what we are doing, and that our efforts will have a positive impact on France.”

Marais says the programme is flexible enough to keep pace with changes in piracy trends as Hadopi’s remit covers streaming and cyberlockers sites. “Hadopi will have an important role to play in promoting culture in France; we can have a positive impact for years to come.”



Yves Riesel. Photo by JB Millot

### The independent’s view: innovation and “meaningful sanctions”

Yves Riesel is chief executive of Abeille Music, an independent label that holds France’s largest catalogue of classical music.

Riesel has responded to the changing marketplace, embracing digital channels and pioneering high-quality products, moving into the digital market in 2007 with streaming service Qobuz. The premium service is aimed at audiophiles and is available for €29 per month. Riesel’s latest innovation is a fully licensed, super-high quality, high value subscription service available in multiple territories.

“If piracy goes unchallenged, every part of the music sector suffers.”

Yves Riesel, chief executive, Abeille Music

“Classical music needs to take an approach just as innovative in the digital world as other genres. That goes for all aspects of the business, from the production to digital products to marketing but also in the types and quality of products we offer.”

Riesel believes France’s graduated response system is vital for the future. Independent businesses depend on recouping significant investments, and the legal environment plays an important factor in allowing them to do so. Riesel praises Hadopi: “It is necessary for the market to have a body curbing piracy and placing real and meaningful sanctions on those who steal music. If piracy goes unchallenged, every part of the music sector suffers. Classical is affected by piracy. No-one can deny that piracy destroys sales.”

Some 12 per cent of Abeille’s revenues are currently from digital channels. However, Riesel expects his efforts in the digital realm to change that, predicting growth to 85 per cent over the next five years. “The challenge will be once all the businesses are mostly digital, to still maintain the value of music enough for producers and artists to make a living off it. If piracy continues to destroy the market that will no longer be possible.”

“Hadopi will have an important role to play in promoting culture in France; we can have a positive impact for years to come.”

Marie-Françoise-Marais, president, Hadopi

# Focus on US



## ISP agreement and strong digital growth

2011 was a watershed year for the US music industry. The launch of innovative services, new market entrants, growth in smartphone and tablets and the shutdown of the illegal file-sharing service Limewire, have helped return the market towards growth.

Digital growth has helped revive the US music market. Download sales have grown and there has been growth in legal streaming services, such as Rhapsody, and particularly strong performances from the newly-launched Spotify and Muve Music. Rhapsody announced in December 2011 that it had passed the one million mark for paying customers. Growth in 2011 was partly thanks to a new partnership with mobile phone service provider Metro PCS, which bundled Rhapsody's offering in with a US\$60 per month unlimited data plan.

Growth has also come from internet radio services such as Pandora, Rdio and MOG. Internet radio services helped boost performance rights revenue in recent years, making the US the largest market in the world in this sector. US album sales increased by 3.2 per cent 2011, while singles sales climbed by 8 per cent, according to Nielsen SoundScan.

There have also been groundbreaking steps forward in the fight against piracy. In July, an agreement was struck between rights holders and ISPs, establishing a system of "copyright alerts" that will notify internet subscribers when their accounts are being misused to infringe copyright law. A system of "mitigation measures" aims to deter repeat infringements by those who ignore repeated alerts. The agreement also establishes a Center for Copyright Information to administer the programme and coordinate education activities. A separate new body will handle disputes.

**“We wanted to cooperate in a way that would be effective in curtailing piracy, and also raise awareness among our customers of copyright law.”**

Randal S. Milch, General Counsel, Verizon

US KEY DATA IN 2011 (UNITS)	
INCREASE IN SINGLES SALES	8%
INCREASE IN ALBUM SALES (PHYSICAL AND DIGITAL UNITS)	3.2%

Source: Nielsen SoundScan.

THE IMPACT OF THE LIMEWIRE JUDGMENT		
	Q4 2007	Q4 2010
% OF US INTERNET POPULATION USING INFRINGING P2P SERVICES	16	9
AVERAGE NUMBER OF TRACKS DOWNLOADED FROM P2P SERVICES	35	18

Source: The NPD Group.

The agreement, the result of two years of negotiations, has strong support on both sides. Randal S. Milch, General Counsel of major ISP Verizon, says: "We understood the problem and its importance to the creative industries. We wanted to cooperate in a way that would be effective in curtailing piracy, and also raise awareness among our customers of copyright law and the security issues around P2P networks. We also wanted to ensure the privacy rights of our customers. We're very confident this balance will be achieved and that this new partnership will work for all sides and serve as a model to others."

**“This initiative is one of the things that will fuel the shift in the mindset of American consumers.”**

Glen Barros, chief executive, Concord Music Group

Music companies say the hard-fought ISP agreement has changed the mood in the US industry. "This initiative is one of the things that will fuel the shift in the mindset of American consumers. Some element of deterrence is needed, and this is a proportionate programme," says Glen Barros, chief executive of independent label Concord Music Group.

Litigation has also played its part in the US recovery. The most heavily-used illegal music service in America, Limewire, was closed in October 2010 when a federal court in New York issued a permanent injunction against the company. The percentage of the US internet population using a P2P file-sharing service fell from 16 per cent in the fourth quarter of 2007 to 9 per cent in the fourth quarter of 2010, when Limewire ceased its file-sharing operations. The average number of tracks downloaded fell from 35 tracks per person to 18 tracks per person over the same period (The NPD Group).

Meanwhile, both the US House of Representatives and the Senate are advancing "rogue site" legislation that would target foreign websites that exist fundamentally to trade in infringing works and counterfeit products. Both pieces of legislation, known respectively as the "Stop Online Piracy Act" (SOPA) and the "Protect IP Act" (PIPA), seek, through court orders, to disrupt funding of the sites by payment processors and advertising networks. Both pieces of legislation are set to be debated further in early 2012.

# Focus on South Korea

## A continuing success

South Korea illustrates how good legal services, combined with strong repertoire and a healthy legal environment can lead to significant market growth. The recorded music market in South Korea grew by 6 per cent in value in the first half of 2011, following a 12 per cent increase in 2010. In 2005 it was ranked as the 33rd music market in the world. Today, it ranks as the 11th largest market.

One of the key rewards of South Korea's improved legal environment is more investment in local artists. Domestic repertoire used to account for around 60 per cent of recorded music sales, but this figure has climbed to around 80 per cent in 2011. Around 70 per cent of the revenue from "K-pop" repertoire comes through digital channels, compared with 55 per cent across the market as a whole.

Q Chung, managing director, Sony Music Entertainment Korea, says: "South Korea is committed to being the most advanced digital economy in the world. Our government understands that a fair legal environment is an essential foundation for such an ambition. This means we have been able to concentrate on what record companies do best: discovering, signing and promoting great local talent both at home and overseas."

South Korea's improved copyright landscape did not happen overnight. The government began to update its copyright law in 2007, requiring online service providers to filter illegal content on request from rights holders. In July 2009, graduated response measures were introduced and in April 2011 a new law required cyberlockers and P2P services to register with the government and implement filtering measures. South Korea operates a range of measures to tackle digital piracy, overseen by the Ministry of Culture, Sports and Tourism (MCST) and largely implemented by the Korea Copyright Commission (KCC).

Graduated response is integral to South Korea's copyright enforcement system. The KCC has sent around 100,000 "recommendation notices" to service providers, requiring them to tell infringing users to stop breaking the law.

SOUTH KOREA PLACEMENT IN GLOBAL MARKET RANKINGS	
2007	23
2009	14
2011	11

Source: IFPI, based on total music revenues.

The government says 70 per cent of infringing users stop on receipt of a first notice and 70 per cent of the remaining infringers stop on receipt of a second notice. If users refuse to stop following three notices, this triggers a further series of "correction orders" issued by the MCST. Only a small percentage of users continued to infringe once they received repeat notices backed by a sanction.

South Korean copyright law also requires online service providers, including P2P services, to block the illegal distribution of infringing material. Unauthorised P2P services and overseas blogs and cyberlockers are targeted through a programme of website blocking. The Korea Communications Commission reports that 17 mostly international sites were blocked in the first five months of 2011.

USAGE OF CYBERLOCKERS (WEBHARDS), THE PRIMARY TARGET OF GRADUATED RESPONSE, HAS FALLEN SHARPLY



Source: IFPI, based on data from Nielsen.



K-Pop stars Yiruma, M.C the Max and BEAST.

# Developing a legitimate business in China

## Major record companies license Baidu

China is a market with huge potential for the music industry. Yet it has suffered from an estimated 99 per cent digital piracy rate in recent years, meaning the legitimate market has operated at only a fraction of its true potential.

China has nearly twice as many internet users as the US, but digital music revenues per user are currently about 1 per cent of that of the US. More than 70 per cent of music sales in China are digital, but the market has achieved a tiny fraction of its potential. In 2010, China's overall music sales were worth only US\$67 million, making it a smaller market than Ireland.

In July 2011 three major record companies – Universal, Sony and Warner - struck a partnership with China's largest internet company, Baidu, a milestone in the music industry's development in China. While the other major company, EMI, already had a licensing agreement with Baidu, under the new venture Baidu pledged to close its infringing deep-linking music search service. The agreement between Baidu and One Stop China, in which the three music companies are investors, also marked the close of years of litigation.

Under the terms of the new partnership, consumers can download tracks for free from Ting, a new legitimate service supported by advertising revenues.

The deal by no means ends China's piracy problem. Other unauthorised "deep-linking" services are still operating, while cyberlockers and illegal download sites remain a huge barrier to growth. China has increased its commitment to fighting piracy with numerous special anti-piracy campaigns. These have achieved some results, but a sustained enforcement campaign is needed over the long-term.

“The next generation of young people need to be encouraged to consume music in the right way.”

Catherine Leung, general manager, music and entertainment division, Baidu

CHINA FACTS AND FIGURES	
MUSIC SALES 2010	US\$67 MILLION
DIGITAL SALES PENETRATION	71%
PIRACY RATE	ESTIMATED 99%

Source: IFPI.

Lachie Rutherford, president, Warner Music Asia Pacific, says: “Baidu's decision to switch to an authorised music service in a market that has until now been dominated by infringement is a milestone for the development of our business in China.”

“This is a market with enormous potential where attitudes to copyright are slowly but noticeably improving. The Baidu deal is a groundbreaking partnership that combines the enormous reach of China's biggest internet company with the expertise and creativity of the largest music companies.”

“The Baidu deal is a groundbreaking partnership that combines the enormous reach of China's biggest internet company with the expertise and creativity of the largest music companies.”

Lachie Rutherford, president, Warner Music Asia Pacific

Catherine Leung of Baidu says: “We believe in the long-term commercial viability and success of music for Baidu. The next generation of young people needs to be encouraged to consume music in the right way. Hopefully, in a couple of years, perhaps 20 per cent of our users will be in one way or another paying customers for music. Even 10 per cent of 100 million is a big number.”



# Protecting content online: intermediaries step up

## Search engines should link to legal music

Search engines such as Bing, Google and Yahoo! are a major channel for consumers to access music. However, many of the top results provided by search engines are linked to unauthorised content or sites which regularly infringe copyright. The music industry believes search engines should bear important responsibilities in this area.

The scale of the problem is illustrated by research commissioned in the UK, where Harris Interactive found that 23 per cent of consumers regularly download music illegally using Google as their means to find the content (September 2010). Further research in New Zealand by Ipsos MediaCT (August 2011) also highlighted that search engines direct a significant number of users to unauthorised sources. 54 per cent of users of unauthorised downloads said they found the music through a search engine. In Ireland, this figure was 49 per cent (Ipsos MediaCT, October 2011).

For some search terms, links shown on the first page of results are often overwhelmingly to infringing sources. IFPI's anti-piracy team conducted research which found that entering the name of the top five artists in the Billboard Top 100 chart on 1st November 2011 plus the term "mp3", the dominant legal and illegal file format for digital music, found the majority of search results were infringing.

ARTIST	INFRINGING RESULTS FROM SEARCH FOR ARTIST NAME AND 'MP3'		
	GOOGLE	YAHOO!	BING
ADELE	77%	62%	70%
RIHANNA	86%	71%	65%
MAROON 5	82%	67%	75%
LMFAO	82%	81%	80%
FOSTER THE PEOPLE	55%	57%	60%

Source: IFPI.

Search engines need to adopt responsible practices and procedures if they are to ensure that consumers are not drawn into behaviour that is illegal and often compromises their online security. In January 2011, it was announced that rights holders in the UK were in discussions with the government and search engines on a draft code of conduct covering matters such as the prioritisation of legal sites in search results and online advertising.

There is already cooperation between the music industry and search engines in this area - but it needs to be much better. Mass numbers of takedown notices are sent to search engines each month asking them to delist links to non-legal content. However, response times vary and delays still occur. There are also sometimes restrictions on the number of non-legal links that rights holders can notify. These need to be removed, and search engines should take measures to prevent notified infringing links re-appearing in results. Search engines also need to go beyond delisting and address the prioritisation of links. They need to rank search results factoring in clear indication of legality or illegality. A basic measure such as this would help consumers not only avoid viruses and malware, but also being directed unwittingly towards content piracy.

Search engines also have a key role preventing advertising revenues from funding piracy. Some have advertising businesses that sell search terms to advertisers or that serve advertisements to websites wishing to generate revenue from advertising, which can be used to fund providers of websites that are dedicated to illegal use of content. Search engines should implement effective screening procedures for advertising partners, and eliminate all advertisements on substantially infringing sites and on search results pages that contain links to such sites.

## Advertising: cutting the funds to piracy

Advertising is a major source of funding for digital piracy worldwide. Illegal music sites may offer their content for free, but they are often commercially driven, and advertising revenues are a principal source of funding for many of them.

The amount of revenue generated by such sites can be substantial, as demonstrated in the legal case against Limewire in the US. Prosecutors showed Limewire made an estimated US\$20 million in revenues from advertising in 2006 alone. The judgment that shut the site down noted "LW's sources of revenue depend on Limewire attracting the massive user population generated by its infringing-enabling features...As Limewire's user base expanded LW's revenues from advertising and software distribution increased."

Reputable companies are increasingly removing their advertisements from unlicensed sites. The recording industry approaches advertisers, alerting them to the fact their advertisements are appearing on such services. Companies including E-ON, HSBC, ING Direct, Mazda and Monarch Airlines were clear they did not wish to associate their brands with piracy. Such companies were commonly unaware their media buyers were placing advertisements on networks that included illegal websites.

In June 2011, GroupM, WPP's media investment arm, developed and adopted a pioneering new digital media buying policy designed to prevent its clients' ads from appearing on websites that distribute illegally obtained content. The policy is designed to actively oppose online piracy in all its forms and to protect the copyright-protected, intellectual property of all content-producing companies. In conjunction with the new policy, GroupM created a list of more than 2000 sites that were identified as containing or supporting pirated content. GroupM buys an estimated US\$82 billion a year globally in media for its clients (Source: RECMA).

"We're serious about combating piracy and protecting our clients' intellectual property as forcefully as we possibly can," said GroupM Interaction Global CEO, Rob Norman. "This policy extends to digital media buyers at all GroupM agencies, as well as other WPP companies like Team Detroit, which manages Ford's media business."

In October 2011, the US Congressional International Anti-Piracy Caucus wrote to the American Association of Advertising Agencies, the Association of National Advertisers and the Interactive Advertising Bureau, asking them to take action to curb advertising on illegal websites. The bipartisan committee said that advertisements from blue chip brands helped to fund piracy and their appearance on illegal sites could give visitors the impression the sites were legitimate.

## Payment providers act on illegal sites

The music industry is stepping up pressure on the illegal websites that distribute its products without permission or payment by removing their ability to abuse payment services. Thanks to close cooperation between IFPI, law enforcement and the payment industry, rogue sites are finding it more difficult to secure the merchandising services of companies such as MasterCard, PayPal, the paysafecard group and Visa, as well as phone payment services.

A partnership between IFPI, the City of London Police and payment providers has prevented 62 illegal websites based in Russia and Ukraine from abusing payment services since it began in March 2011.

Under the terms of the cooperation, IFPI supplies the City of London Police with evidence that illegal downloads are being made available from an infringing site. The police review the evidence, verify its integrity and notify payment providers that their services should not be provided to such sites. It is estimated that, to date, the programme has stopped some £180 million of illegal trade, based on the revenues generated by the sites over the previous year.

Payment providers have always prohibited the sale of illegal goods and services using their payment systems, but this collaboration expedites the process and ensures website operators cannot continue to build businesses based on theft.

Detective Chief Superintendent Steve Head of the City of London Police says: "We are fully committed to proactive initiatives such as these, where we work with the private sector to prevent offending and minimise harm to entire business sectors such as the music industry."

Jim Issokson, senior business leader, public affairs communications, MasterCard Worldwide, adds: "The partnership between MasterCard, IFPI and the City of London Police is progressing very well. The coalition approach we have created is both effective and mutually beneficial. Our collaboration has successfully disrupted illegal activity and curtailed the ability for criminals to profit from such activity at the expense of hard-working, legitimate participants in the recording industry. MasterCard plans to continue to partner with both entities to eradicate intellectual property piracy in the recording industry."

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**“Our collaboration has successfully disrupted illegal activity and curtailed the ability of criminals to profit from such activity at the expense of hard-working, legitimate participants in the recording industry.”**

Jim Issokson, senior business leader, public affairs communications, MasterCard Worldwide

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**It is estimated that, to date, the programme has stopped some £180 million of illegal trade, based on revenues generated by the sites over the previous year.**

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MasterCard  
Worldwide



representing the  
recording industry  
worldwide

## Hosting providers: A key partner

Web hosting services are also a priority. These provide server space and internet connectivity to websites, sometimes enabling rogue websites to illegally distribute copyrighted material. IFPI sends warnings to make the host provider aware, taking legal action if necessary. In May 2011, a court in Luxembourg ruled against a leading hosting provider which was providing services to a number of illegal websites.

Some companies appear to market themselves as offering an opportunity to circumvent copyright laws. In Canada, web hosting company Amanah offers its clients "no more fighting with DMCA restrictions" as a feature of its server hosting services, playing on its location outside of the US. Under the US Digital Millennium Copyright Act, rights holders can issue takedown notices to web hosting companies. Cases such as this highlight the need for legal reform to strengthen copyright protection in Canada and other jurisdictions worldwide.

# Self-help: anti-piracy enforcement and education

## Tackling the pre-release hackers

Pre-release piracy is a major problem for the music industry as online leaks have the potential to significantly damage sales of albums and singles. So-called “release groups”, “splinter groups” and individuals seek to obtain music before it officially goes on sale, distributing it on blogs and forums, from where it can proliferate across the internet. This costs valuable sales in the critical period around release, often also costing artists an optimum chart position.

IFPI works with its member labels to prevent leaks occurring, improving security around promotional copies of new music, and if a leak does take place, it works to remove the infringing links that appear online. Anti-piracy investigators use the latest automated technology to identify and remove infringing links worldwide. In 2011, it removed more than 15 million tracks, up from seven million in 2010, a 115 per cent increase.

As a result of this increased security, hackers are now targeting the email accounts of artists and those who work with them to illegally obtain content before its commercial release. They send “phishing” emails, purporting to be from legitimate contacts, asking recipients to reset passwords and linking through to bogus websites that pose as legitimate social networking sites or personal email services. Once a hacker has obtained log-in details for an email account he can check it for audio files, copy the victim’s address book and even unleash a virus that lets him take over a computer.

Hackers seek the kudos from their peers by releasing music online before it goes on sale. Some also try to secure “shouts” from artists, audio or video recordings praising the hacker, in exchange for them not leaking their music. Hackers have also been able to hijack individuals’ social networking profiles, leaking personal content such as photographs.

“We all must improve the way we secure our most valuable assets.”

Paul Rosenberg,  
manager of Eminem

Eminem: tracks were obtained by hackers

IFPI assists artists and labels in tracing such hackers. One such investigation was launched after those working at Shady Records were targeted to secure tracks from Eminem’s seventh studio album *Recovery*.

Paul Rosenberg, Eminem’s manager, says: “Eminem is obviously an artist that takes his craft very seriously and puts a huge amount of time and effort into making his music. If outsiders are able to pry his work to share with the world when the songs may not be finished or possibly never intended to ultimately be released it’s a difficult thing to come to terms with.”

Once it was clear hackers had been able to obtain tracks from the album, Rosenberg alerted his contacts to the fact they were being targeted. He says: “We need to raise awareness within the label and those involved with the recording process that they will be targeted and should be aware of emails asking for log-in details. We all must improve the way we secure our most valuable assets.”

Jeremy Banks, director, anti-piracy, IFPI, says: “Pre-release leaks have always been a damaging problem for record labels and artists, threatening to sabotage months of work. In the last couple of years we have seen such piracy take a new and sinister form as hackers compromise people’s privacy to get hold of commercially valuable pre-release music. This is being addressed through cooperation between artists, labels, anti-piracy experts and law enforcement.”

## Public education: a long term commitment

Public education plays a crucial role in developing a thriving digital music sector. The industry supports campaigns across the world to promote legitimate services and improve understanding of copyright. A few of these are highlighted below. Governments are playing their part too, with France and South Korea leading the way.

### Music Matters

The Music Matters campaign was developed by a collective of artists and others that work in and around music to remind listeners of its enduring value. It encourages music fans to consume in an ethical way by highlighting the digital

services that support artists and those that invest in them through the Music Matters trust mark. The campaign was launched in the UK in 2010 and extended to Australia and New Zealand in 2011. It highlights the value of music through a series of films focusing on inspirational music with featured artists including Dave Dobbyn, Eskimo Joe, Kate Bush, The Jam, Sigur Rós and Thin Lizzy. In August 2011, the biggest band in history joined the campaign when The Beatles authorised a film using their music. Music Matters will get a further boost in 2012 with the launch of *Música Trasciende*, the Spanish-language version of the campaign, in Latin America.

[www.whymusicmatters.org](http://www.whymusicmatters.org)



Eminem. Photo by Nigel Parry.

## A Guide to Music, Film, TV and the Internet



IFPI and its right holder partners in the international alliance Pro-Music first launched a guide for parents and teachers in partnership with international children's charity Childnet in 2005. The guide provides simple and practical advice for parents and teachers advising young people how to enjoy music safely and legally online. The most recent edition of the guide was rolled out internationally in 2011. In total, the

three editions of the guide have been translated into 17 languages and made available in 21 countries. Copies of the third edition were sent to the head teachers of every secondary school in the UK and endorsed by the Ministry of Culture in Spain. In Italy, the government of Milan Province backed the campaign by issuing copies of the guide and producing posters to be placed in staff rooms of senior schools across the region.

[www.childnet.com/downloading](http://www.childnet.com/downloading); [www.pro-music.org](http://www.pro-music.org)

"We needed to communicate directly to the public and explain what Hadopi really aims to achieve," says Pichevin. "If music and films are just taken without reward that will have a very important impact on the kind of offerings we will get tomorrow. The campaign was about highlighting the youth and the promise of creators."

As Pichevin explains, "We wanted to show that Hadopi is defending artists and the emotions their works engender, rather than being an internet censor. Promoting the PUR trust mark for legitimate services will help French consumers know which sites are legitimate, and the campaign has widened the discussion." Education, coupled with Hadopi's graduated response system, provides consumers with everything they need to make informed decisions.

Pichevin says the campaign provoked an awareness-raising debate. "People know that taking content illegally is wrong, but our campaign aimed at going beyond the morality to explain the consequences for our culture. We believe many people might change their behaviour once they understand this better."

[www.pur.fr](http://www.pur.fr)



### Pop4Schools

Pop4Schools is a programme designed to help teachers use the medium of pop music to teach pupils about curriculum subjects from mathematics to art by bringing the concept of a

record company into the classroom. Children write, produce, market, promote, distribute and sell a piece of music, role-playing the process that takes place in the real world. Teachers can match pupils' skills to certain tasks, such as performing the song, designing the artwork or writing sleeve notes. Pop4Schools launched in December 2010 and rolled out over the course of 2011.

[www.pop4schools.com](http://www.pop4schools.com)



### South Korea

South Korea has conducted a comprehensive education programme to complement its actions to protect intellectual property online. When the copyright law was updated, the government launched an advertising blitz across billboards, broadcast outlets and the print media. It explained that if users wanted to benefit from cultural

goods and services, it was only fair they pay for them, and that if the government did not protect copyright today, then consumers would have fewer cultural products to enjoy tomorrow.

Copyright has been placed on the national curriculum and The Korea Copyright Commission (KCC) trains teachers so that they can tackle the subject in the classroom. The KCC also uses music to communicate, engaging well-known singer-songwriter Kim Tae-Won to write *The Copyright Song*, which a range of artists sing when they appear on TV or radio. Artists and comedians have been engaged by the government to act as "ambassadors for copyright", explaining the new law and its benefits to consumers in broadcasts and other public appearances.

There is a Copyright Academy for those working in the creative, technology and other relevant industries, running eight courses tailored to their specific needs. The courses explain how these professionals can keep on the right side of copyright legislation as they are engaged in their business. More than 350,000 people a year receive some form of education or training from the KCC.

[www.copyright.or.kr](http://www.copyright.or.kr)

### France: €3 million campaign to support Hadopi



A major campaign supported the launch of Hadopi, the French agency tasked with protecting copyright online. The campaign also introduced PUR, the website dedicated to promoting certified legal digital services. The €3 million campaign is Hadopi's first marketing campaign and ran across television,

radio, cinemas, online, on public transportation and through leaflets and direct mail. Aymeric Pichevin of H.O.M.E Media helped to craft the strategy for the campaign. A series of short clips depicts imagined hit films and music of the early 2020s, ending with the common message that without the work of Hadopi these might never be realised.

# Digital Music Services Worldwide

The featured list of legitimate digital music services appears on the Pro-music information resource ([www.pro-music.org](http://www.pro-music.org)). This is the most comprehensive up-to-date directory of the world's legitimate music website. The list numbers around 500 legitimate services in 78 countries.

## ANDORRA

Deezer

## ARGENTINA

BajáMúsica  
Faro Latino  
iTunes  
Personal Música  
Sonora  
Ubby Música  
YouTube

## AUSTRALIA

Anubis.fm  
Bandit.fm  
BigPondMusic  
Cartell Download  
DanceMusicHub  
Getmusic.com.au  
Guvera  
Hutchison "Three"  
Inertia  
iTunes  
Jamster  
JB Hi Fi  
Liveband.com.au  
Mobile Active  
Music Unlimited  
Nokia Music  
Optus Music Store  
Qtrax  
Rdio  
Samsung Music Hub  
Songl  
The In Song  
Third Mile  
Ticketek Music  
Virgin Mobile  
Vodafone  
YouTube

## AUSTRIA

3MusicStore  
7digital  
A1 Music  
AmazonMP3  
Artistxite.com  
Deezer  
DG Webshop  
eMusic  
Finetunes  
iTunes  
Jamba  
JUKE  
Ladezone  
Last.fm  
Musicbox  
Musicload  
Mycokemusic  
MySpace  
Nokia Music

## AUSTRIA CONT.

Orange  
Preiser  
rara.com  
Simfy  
SMS.at  
Soulseduction  
Spotify  
Telering  
T-Mobile  
Weltbild  
YouTube  
Zed  
Zero-Inch  
Zune

## BELARUS

Yandex Music

## BELGIUM

7digital  
Beatport  
Dance-Tunes.com  
Deezer  
DJTUNES  
Downloadmusic.nl  
eMusic  
Fnac  
iTunes  
Jamba  
Jamster  
Junodownload  
La Mediatheque  
Legal Download  
Nokia Music  
Proximus  
rara.com  
Simfy  
Spotify  
We7  
YouTube

## BOLIVIA

iTunes

## BRAZIL

Claro Music Store  
Ideas Music Store  
Ideas Musik  
iTunes  
iMusica  
Mercado da Musica –  
Transamerica  
MSN Music Store  
Mundo Oi  
Nokia Music  
Oi Rdio  
Power Music Club (GVT)  
Sonora  
TIM Music Store  
Universal Music Loja

## BRAZIL CONT.

UOL Megastore  
Vivo Play  
Warner Music Store  
Yahoo! Music  
YouTube

## BULGARIA

4fun  
7digital  
eMusic  
Hitbox.bg  
iTunes  
M.Dir.bg  
mp3.bg  
MTel Music Unlimited  
Musicspace

## CANADA

7digital  
BBM Music  
Bell Mobility  
Classical Archives  
eMusic  
Galaxie Mobile  
HMV Digital Canada  
iTunes  
Motime  
Puretracks  
rara.com  
Rdio  
Slacker  
TELUS  
urMusic  
VEVO  
YouTube  
Zik  
Zune

## CHILE

Bazuca  
ClaroIdeas  
Entel-Napster Mobile  
iTunes  
Mimix  
Nokia Music  
Portaldisc

## CHINA

Baidu  
China Mobile  
China Telecom  
China Unicom  
Douban  
Google Music  
Netease  
Nokia CWM  
Renren  
Sina  
Tencent  
Todou  
Top100  
Youku

## CHINESE TAIPEI

Emome  
Ezpeer+  
Far Eastone  
Hami Music  
iNDIEVOX  
iNmusic  
KKBOX  
muziU  
Omusic  
Taiwan Mobile  
VIBO  
YouTube

## COLOMBIA

Codiscos  
ETB Musica  
Ideas Comcel Music Store  
iTunes  
Música  
Prodiscos – Entertainment  
Store  
Supertienda Movistar  
Sonora  
Tigo

## COSTA RICA

iTunes

## CROATIA

Cedeterija  
Fonoteka

## CYPRUS

7digital  
eMusic  
iTunes

## CZECH REPUBLIC

7digital  
eMusic  
iTunes  
MusicJet  
Nokia Music  
O2 Active  
Stream  
t-music  
Vodafone  
YouTube

## DENMARK

3musik  
BibZoom.dk  
Bilka Musik  
Billigcd.dk  
CDON Danmark  
Deezer  
DSB  
DVD00.dk  
Ekstrabladet.dk  
eMusic  
GUCCA  
Inpoc  
iTunes  
M1  
Music Unlimited  
PlayNow Arena  
(Sony Ericsson)  
rara.com  
Spotify  
TDC Play  
Telia  
TouchDiva  
TP Musik  
VoxHall  
WavesOut  
WiMP

## DOMINICAN REPUBLIC

iTunes

## ECUADOR

iTunes

## EGYPT

Alamelphan  
Mazzika Box

## EL SALVADOR

iTunes

## ESTONIA

7digital  
Deezer

## ESTONIA CONT.

eMusic  
iTunes  
Muusika24

## FAROE ISLANDS

Deezer

## FINLAND

7digital  
City Market CM Store  
Deezer  
DNA Musiikkikauppa  
download.MTV3.fi  
Download.NetAnttila  
Downloads.cdon.com  
eMusic  
Equal Dreams  
iTunes  
Meteli.net  
MTV Music Shop  
Music Unlimited  
Nokia Musiikki  
NRJ Kauppa  
Paimuri  
rara.com  
Spotify  
Store.radiorock.fi

## FRANCE

121 MusicStore  
7digital  
Allomusic  
Amazon  
Beatport  
Beezik  
Carrefour  
cd1d  
Cultura.com  
Deezer  
Disquaire on line  
Dogmazic  
E-Compil  
eMusic  
Ezic  
Fnac.com  
Gkoot electronic  
iTunes  
Jamba  
Jamendo  
Jazz en ligne  
Last.fm  
Lazy Live  
MiooZic  
Mondomix  
musicMe  
Musicclassics  
Musiccovery  
Music Unlimited  
MyClubbingStore  
MySurround  
Neuf Music  
Nokia Music  
Nuloop  
Off TV  
Orange Music  
Qobuz  
rara.com  
SFR Music  
Spotify  
Starzik  
Virgin Mega  
YouTube  
Zaoba



**GERMANY**

7digital  
Akazoo  
Amazon MP3  
AOL Musik  
Artistxite.com  
Beatport  
boomkat  
Clipfish  
Dance All Day  
dancetracksdigital.com  
Deezer  
Deluxe Music  
digital-tunes  
djdownload  
djtunes  
elixic.de  
eMusic  
e-Plus unlimited  
Eventim music  
Finetunes  
Highresaudio  
iMusic1  
iTunes  
Jamba  
JPC  
Juke  
juno  
Justaloud  
Last.fm  
Linn Records  
Mediamarkt  
Medionmusic  
MP3.Saturn  
MTV/VIVA  
Musik-Gratis.net  
Musicload  
Musicbox  
Music Unlimited  
MyVideo  
Napster  
Nokia Musik  
o2 Music  
othermusic.com  
PlayNow  
primalrecords.com  
Putpat  
QTom  
rara.com  
Rdio  
shop2download  
Simfy  
soulseduction  
tape.tv  
T-Mobile Music  
trackitdown  
traxsource  
UMusic  
Videoload  
VidZone  
Vodafone  
Weltbild  
whatpeopleplay.com  
WOM  
Yavido  
Zaoza  
zero-inch.com  
Zune  
zwo3.net

**GREECE**

123play  
7digital  
Akazoo  
Cosmote  
eMusic

**GREECE CONT.**

EMI Downloads  
iTunes  
mpGreek  
Viva  
Vodafone  
Wind

**GIBRALTAR**

Deezer

**GUATEMALA**

iTunes

**HONDURAS**

iTunes

**HONG KONG**

3Music  
China Mobile HK  
CSL Music  
Eolasia.com  
hifitrack  
KKBOX  
Moov  
Musicholic  
MusicOne  
MusicStation  
Musicxs  
PCCW Mobile  
Qlala  
SmarTone iN  
YouTube

**HUNGARY**

7digital  
Dalok  
iTunes  
UPC Music  
Vodafone Live!

**ICELAND**

7digital  
Gogoyoko  
Tonlist.is

**INDIA**

7digital  
Artist Aloud  
Gaana  
In  
IndiaONE  
Meridhun  
My Band  
Nokia Music  
Raaga  
Radio One  
Saregama  
Saavn  
Smash Hits

**IRELAND**

7digital  
ArtistXite  
Bleep.com  
CD World  
Deezer  
Eircom MusicHub  
eMusic  
Golden Discs  
iLike  
iTunes  
Last.fm  
Meteor Music Store  
Music Unlimited  
MUZU.TV  
MySpace  
Nokia Music  
rara.com

**IRELAND CONT.**

Universal Music  
Vodafone Music  
We7  
YouTube

**ISRAEL**

YouTube

**ITALY**

7digital  
Azzurra Music  
Beatport  
Cubo Musica  
Deejay Store  
Deezer  
eMusic  
Esselunga MusicStore  
Fastweb  
GazzaMusic  
IBS  
InnDigital  
iTunes  
Jamba  
Last.fm  
m2o.it  
Mondadori  
MSN Music  
Music Planet 3  
Music Unlimited  
Net Music Media World  
Nokia Music  
Playme  
rara.com  
Sorrisi Music Shop  
TIM  
Vodafone Live  
YouTube  
ZED

**JAMAICA**

REGGAEinc

**JAPAN**

Aniloco  
Beatport  
Best Hit J-Pop  
clubDAM  
Dwango  
Hudson  
ICJ  
iTunes  
Lismo  
Listen Japan  
mora  
mora win  
mu-mo  
Music Airport  
Music.jp  
Musico  
Musing  
Naxos Music Library  
Oricon ME  
OnGen  
Reco-Choku  
Yamaha Music Media Corporation  
YouTube

**KAZAKHSTAN**

Yandex Music

**KOREA**

24hz  
Bugs  
Cyworld BGM  
Dal  
Daum Music

**KOREA CONT.**

Joos  
Melon  
Monkey3  
Musicsoda  
Naver Music  
Ollehmusic

**LATVIA**

7digital  
Deezer  
eMusic  
iTunes

**LIECHTENSTEIN**

7digital  
Deezer

**LITHUANIA**

7digital  
Deezer  
eMusic  
iTunes

**LUXEMBOURG**

7digital  
eMusic  
iTunes  
rara.com

**MALAYSIA**

7digital  
Celcom Channel X  
DigiMusic  
Gua Muzik  
Hypptunes  
Maxis Music Unlimited  
U Mobile Planet Music  
Wowload

**MALTA**

7digital  
eMusic  
iTunes

**MEXICO**

BBM Music  
Coca-Cola FM  
Entretonos Movistar  
EsMas Movil  
Flycell  
Ideas Music Store Mexico  
Ideas Radio Mexico  
Ideas Musik  
Ideas Telcel  
iTunes  
Mientras Contesto de  
Iusacell  
Mixup Digital  
Nextel Shotsonline  
Nokia Music  
Seven 7 Music Shop  
Sigue Tu Música Corona  
Music  
Terra Sonora  
Terra TV  
Universal Music Magazine  
YouTube

**MONACO**

Deezer

**NETHERLANDS**

7digital  
Countdownload  
Dance-Tunes  
Deezer  
Downloadmusic.nl  
eMusic  
GlandigoMusic

**NETHERLANDS CONT.**

iTunes  
Jaha  
Jamba  
Last.fm  
legal download  
Mediamarkt  
Media Gigant  
Mikkimusic  
MP3 Downloaden  
MSN Muziek Downloads  
MTV  
Muziek.nl  
Muziekweb  
Nokia Music  
Radio 538  
rara.com  
Saturn  
Sony Ericsson PlayNow Plus  
Spotify  
Talpadownloads  
TMF  
TuneTribe  
Vodafone  
You Make Music  
YouTube  
zazell.nl  
Zoekmuziek

**NEW ZEALAND**

7Digital  
Amplifier  
Bandit.fm  
Digirama  
Flybuys Music  
iTunes  
Marbecks Digital  
Music Unlimited  
MySpace Music  
rara.com  
Telecom Music Store  
The In Song  
Vodafone  
YouTube

**NICARAGUA**

iTunes

**NORWAY**

7digital  
Beat.no  
Bulls Press  
CDON.com Norway  
Deezer  
iTunes  
Jamba  
MTV  
Music Unlimited  
Musikkonline  
Musikkverket & Playcom  
NetCom  
Nokia Music  
Platekompaniet  
rara.com  
Spotify  
Telenor Musikk  
WIMP

**PANAMA**

iTunes

**PARAGUAY**

Claro  
FeelMP3  
iTunes  
Personal  
Tigo



**PERU**

iTunes

**PHILIPPINES**

Globe  
myMusic.ph  
Smart  
Star Music  
Star Records

**POLAND**

7digital  
eMusic  
iplay.pl  
iTunes  
Last.fm  
mp3.pl  
Muzodajnia  
MySpace  
Niagaro  
Nokia Music  
Orange World  
Soho.pl  
YouTube

**PORTUGAL**

7digital  
Beatport  
Deezer  
eMusic  
iTunes  
Jamba  
Music Box (TMN)  
Myway  
Nokia Music  
Optimus  
Qmúsica  
SAPO/ Musicaonline  
Vodafone

**ROMANIA**

7digital  
Best Music  
Cosmote  
Dump.ro  
eOk  
Get Music  
iTunes  
Music Mall  
Music Nonstop  
Orange  
Trilulilu.ro  
Vodafone

**RUSSIA**

Beeline  
Deezer  
Fidel  
iviMusic  
Megafon  
Mp3.ru  
MTS  
Muz.ru  
Nokia Music  
Tele2  
Yandex Music  
YouTube

**SAN MARINO**

Deezer

**SINGAPORE**

7digital  
M 1 Music Store  
Nokia Music  
OBuddy  
Samsung Mobile  
Singtel AMPed  
Singtel Ideas

**SINGAPORE CONT.**

Starhub Music Store  
YouTube

**SLOVAKIA**

7digital  
eMusic  
iTunes  
Music Jet  
Nokia Music  
Orange  
YouTube

**SLOVENIA**

7digital  
eMusic  
iTunes  
mZone

**SOUTH AFRICA**

DJs Only  
Jamster  
Just Music  
Lookandlisten.co.za  
MTN Loaded  
Music Station  
Nokia Music  
Omusic.com  
Pick n Play  
Rhythm Online  
ThatGig  
Vodafone Live

**SPAIN**

7digital  
Beatport  
Blinko (Buongiorno)  
Dada  
Deezer  
eMusic  
Fnac  
IbizaDanceClub.com  
iTunes  
Jamba  
Last.fm  
Los40.com  
Magnatune  
Media Markt  
Movistar  
MTV  
MUZU.TV  
Music Unlimited  
MySpace  
Nokia Music  
Olemovil (Jet Multimedia)  
Orange  
rara.com  
Rockola.fm  
Spotify  
Tuenti  
Vodafone  
Yes.fm  
Yoigo  
YouTube  
Zune

**SWEDEN**

7digital  
Beatport  
Bengans  
CDON  
Check-in music  
Deezer  
eClassical  
eMusic  
Enjoy  
Gazell Digital Store  
iTunes

**SWEDEN CONT.**

Klicktrack  
Last.fm  
Mr Music  
Music Unlimited  
Musikbiten  
Musikshopen  
MySpace  
Nokia Music  
Omnifone  
rara.com  
Sound Pollution  
Spotify  
WiMP

**SWITZERLAND**

7digital  
AmazonMP3  
ArtistXite  
Cede.ch  
Deezer  
Ex Libris  
Finetunes  
Hitparade.ch  
iTunes  
Jamba  
Musicload  
Nokia Music  
Orange  
PlayNow Arena  
rara.com  
Simfy  
Soundmedia  
Spotify  
Sunrise Joylife  
Weltbild

**THAILAND**

AIS  
DTAC  
i-humm  
Music Combo  
Music One  
N-content  
Shinee  
ThinkSmart  
Total Reservation  
True Digital  
W Club

**TURKEY**

Avea  
Fizy.com  
Gncplay.com  
İzlesene  
Müzik İçin Efes  
Muzikin.com  
Mynet  
Nokia Music  
Orjinalindir.com  
TTnetmuzik  
Turkcell  
Vodafone  
YouTube  
Videonmusic  
Vidivodo

**UKRAINE**

Djuice  
MUZon  
Yandex Music  
YouTube

**UNITED KINGDOM**

3V Music Store  
7digital  
Amazing Tunes  
AmazonMP3

**UNITED KINGDOM CONT.**

ArtistXite  
Babelgum  
BBM Music  
Beatport  
Bleep  
Boomkat  
BT Vision  
Classical.com  
Classical Archives  
Classics Online  
Coolroom  
Deezer  
DJ Download  
Drum & Bass Arena  
eMusic  
Fairsharemusic  
Historic Recordings  
HMV Digital  
iLike  
Imodownload  
iTunes  
Jamster  
Jango  
Joost  
Juno  
Karoo  
last.fm  
Linn  
Mewbox (Android)  
mFlow  
Mobile Chill  
MSN  
MTV  
Music Anywhere  
Music For Life (Talk Talk)  
MusicStation  
Music Unlimited  
MUZU.TV  
Musiccovery  
MySpace  
Napster  
Naxos Music Library  
Nectar Music Store  
Nokia Music  
O2  
Ooizit  
Orange Music Store  
Orange Monkey  
Partymob  
Passionato  
Play.com  
PlayNow  
Pure Music  
rara.com

**UNITED KINGDOM CONT.**

Spotify  
Tesco Downloads  
Textatrack UK  
The Classical Shop  
T-Mobile UK  
Track It Down  
Traxsource  
TuneTribe  
Vevo  
Vidzone (PS3 only)  
Virgin  
Virgin Mobile  
Vodafone  
We7  
Yahoo! Music  
YouTube  
Zune

**URUGUAY**

Ancel Musica  
Butia  
Claro Music Store  
La Rocola  
Tmuy

**USA**

7digital  
AmazonMP3  
AOL Music  
Artist Direct  
BearShare  
eMusic  
iLike  
iMesh  
iTunes  
MySpace Music  
MOG  
MTV  
Music Unlimited  
Muxe Music  
Pandora  
rara.com  
Rdio  
Rhapsody  
Slacker  
Spotify  
Vevo  
Yahoo! Music  
YouTube  
Zune

**VENEZUELA**

iTunes  
Música Movistar

This is a list of digital music services from around the world that appears on the Pro-music website ([www.pro-music.org](http://www.pro-music.org)). Pro-music is endorsed by an alliance of organisations representing international record companies (majors and independents), publishers, performing artists, and musicians' unions.

The list is compiled by IFPI based on information from its national groups at time of publication. It does not purport to be exhaustive and IFPI cannot guarantee its 100 per cent accuracy. Readers should consult the [www.pro-music.org](http://www.pro-music.org) website for the most up to date information.

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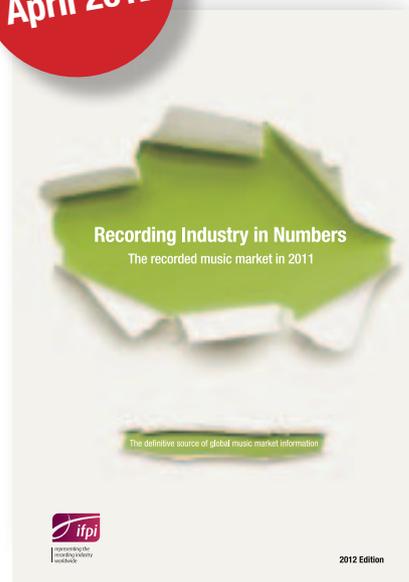
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- Features recorded music sales data for 2007-2011
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Available  
April 2012



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worldwide

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