



中国音像著作权集体管理协会
CHINA AUDIO-VIDEO COPYRIGHT ASSOCIATION

技术驱动，提升著作权集体管理水平

Moving towards Technology-driven
Collective Management of Copyright

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1 市场的规模和使命 Market Size and Mission





中国独具特色的卡拉OK市场，是以卡拉OK场所为主体，以包房内的电视屏幕为终端，由经营者提供歌曲点唱服务的地面实体店构成的庞大的音乐娱乐消费市场。

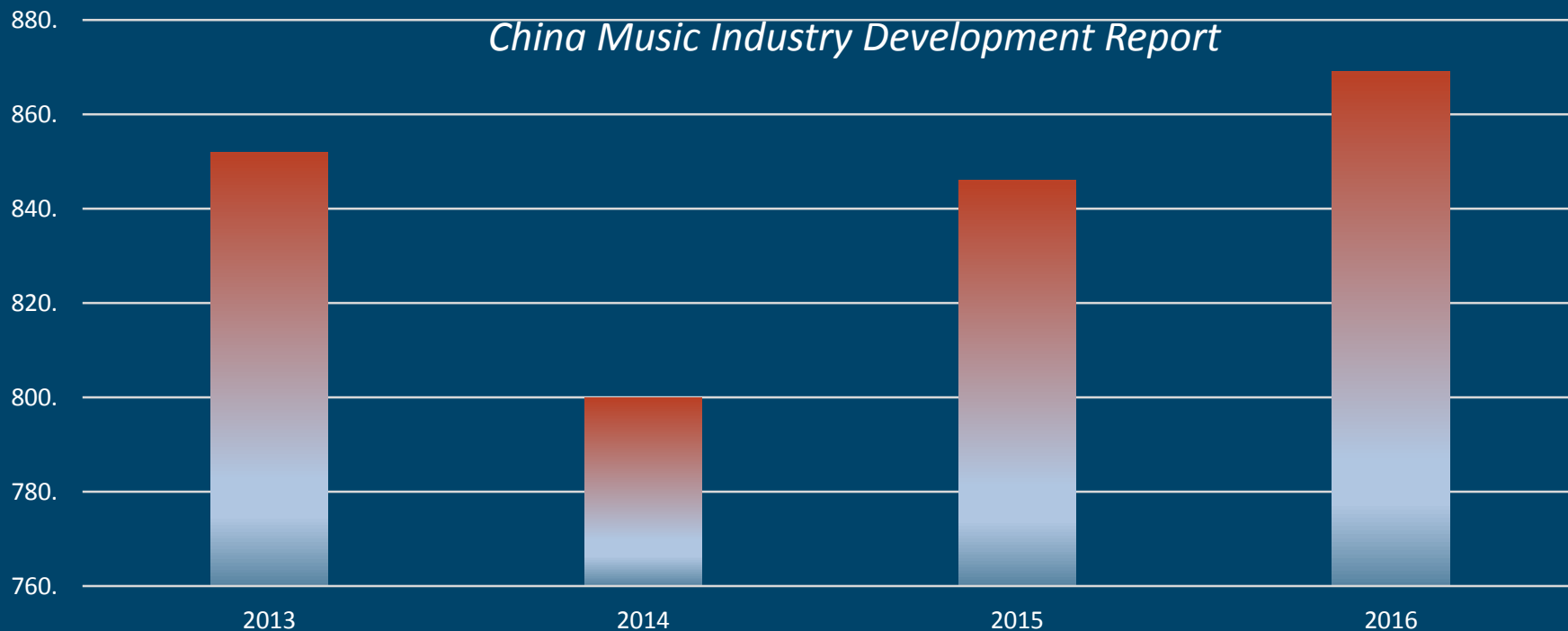
The largest music entertainment consumption market, China's unique market is one with karaoke bars, TV screens in private rooms and brick-and-mortar stores with on-demand services provided by site operators.

卡拉OK这种娱乐形式是上个世纪90年代初由日本传入中国，今天已经成为最普及的大众娱乐消费形式，中国也成为了世界上最大的卡拉OK消费市场。全国卡拉OK歌厅约有五万余家，包房200余万个。

Karaoke was introduced to China from Japan in the early 1990s. Today, it is one of the most popular mass entertainment consumption activities. China has also become the world's largest karaoke consumer market. There are more than 50,000 karaoke bars in China with over 2 million private rooms.

《2017中国音乐产业发展报告》公布的数据 Data from the 2017

China Music Industry Development Report



据中国音像与数字出版协会音乐产业促进工作委员会发布的《2017中国音乐产业发展报告》公布的数据，2016年全国卡拉OK总营收约人民币¥869亿元。

According to the data released in the 2017 *China Music Industry Development Report* by the Music Industry Promotion Working Committee of the China Audio-Video and Digital Publishing Association, the total revenue of China's karaoke market in 2016 was around RMB 869 million.



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困境 Challenges





困境 Challenges

一直以来，卡拉OK的版权费靠委托第三方人工谈判收取，谈不下来就通过诉讼强攻推进，这样往往使权利人和使用者处于对立的状态，而且带来了成本高、效率低、增长慢、周期长等问题，更重要的是由于没有作品使用数据，使得合理分配成为一大难题。况且这样的委托第三方人工收费方式由于信息不透明，也容易产生暗箱操作等作弊行为。但是在当时技术条件尚未能达到解决计次收费、精准分配的情况下，只能依靠人工收费方式维持着著作权集体管理组织的许可收费业务。但是这样的收费方式信息不透明，缺乏有效的监管，分配方式不科学，数据缺乏公信力，版权方、使用者都不满意，市场、媒体也颇多微词。长此以往，著作权集体管理事业会受到损害，卡拉OK市场也会陷入混乱无序的状态，为了改变这一切，我们一直在探索改革创新之路。

Karaoke copyright fees have always been negotiated and collected in-person through a third-party collection service. If negotiation fails, litigation ensues. This often leaves the rights holder and the user in opposition, which leads to high costs, low efficiency, slow growth and prolonged cycles of settlement. More importantly, with no data on the use of works, distribution of revenue becomes a problem. Moreover, the collection process is opaque and prone to fraud such as black-box operations. However, as pay-per-view charges and distribution schemes have not been possible given the available technologies, CMOs could only resort to labor-intensive payment collection. The process lacked transparency, and effective supervision, with little credibility in the available data. Neither the rights holder nor the user were satisfied and murmurs of discontent were common among markets and media outlets. If the situation continues, the development of collective management will be jeopardized and the karaoke market will be in chaos. We have been trying to make a difference by exploring ways to reform and innovate.



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3

方案
Plans

方案 Plans

03 方案

据我们观察，由于卡拉OK属于传统市场，是没有被互联网改变的产业，在科学技术一日千里飞速发展的当下，建立大数据著作权管理系统的条件已经成熟，再通过商业模式创新和行业资源的整合，著作权集体管理的各项要素有望通过技术的飞跃完美的实现。

From our observations, the karaoke market is part of the traditional market in the sense that it is an industry that has not been disrupted by the internet. The conditions for building a big data copyright management system have developed while technologies are becoming more sophisticated through innovative business models and the integration of industry resources, and with the help of advanced technology elements that support a copyright collective management system.

大数据著作权管理是一个系统工程，卡拉OK的市场与互联网在线音乐平台完全不同，它是由星罗棋布的数万卡拉OK经营场所、200多万间卡拉OK包房的庞大地面实体店组成，他的所有的点播系统是由不同的VOD设备商提供。因此，卡拉OK市场是一个各自为战的、分散的地面店群，它不可能像互联网那样一站式解决全部问题。我们除了技术手段来实现设计的功能外，最重要的工作是通过创新商业模式使各方在改革中获益，来整合包括VOD设备商、卡拉OK歌厅、迷你卡拉OK，音乐及版权公司等产业资源，使这个庞大的地面店群成整合成为一个巨大的网络，这个网络显然能产生新的价值。使我们在为他们提供著作权集体管理服务的同时，也能降低成本、提升效率、给他们创造新的赢利点，共同推进整个卡拉OK行业的持续繁荣。

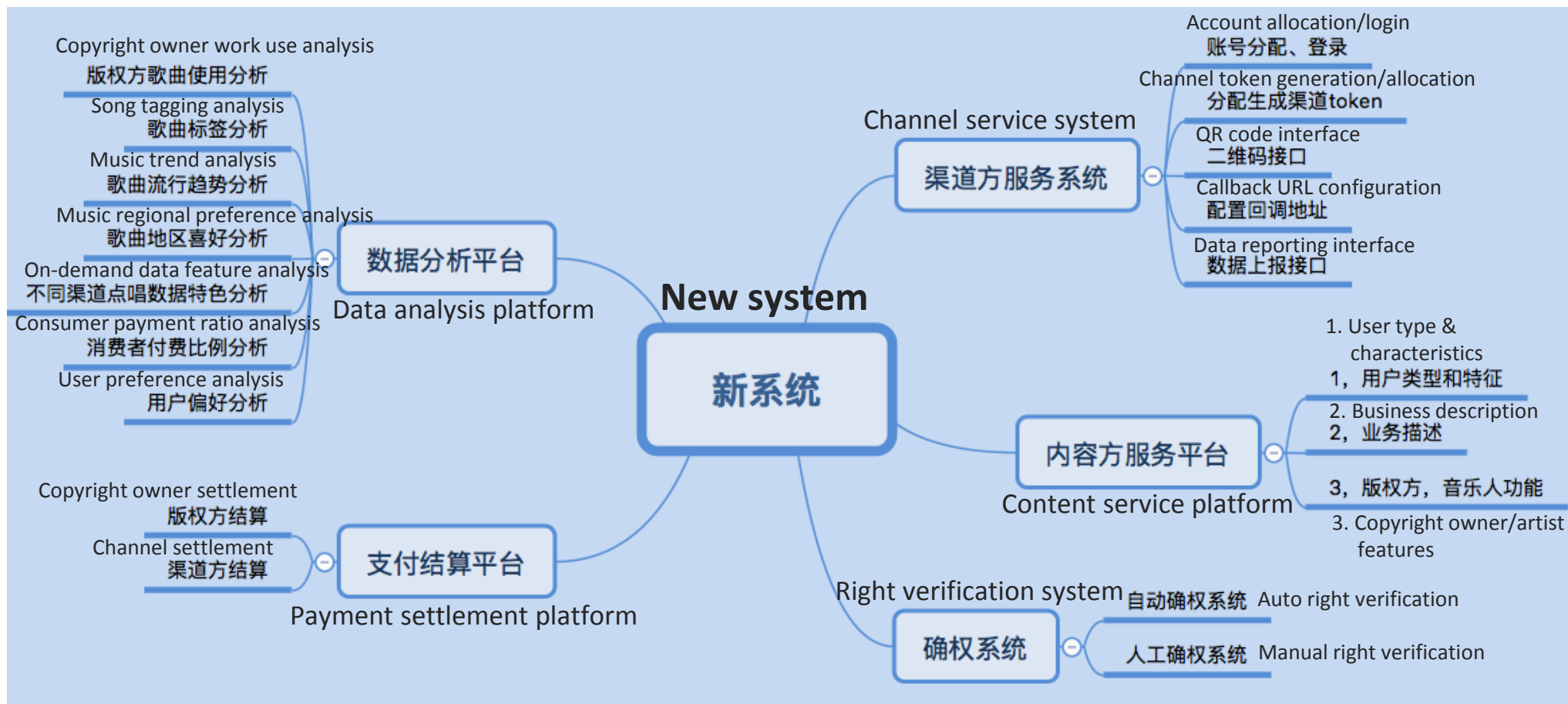
Big data copyright management is a systematic project. Completely different from online music platforms, the karaoke market is composed of tens of thousands of scattered and separate karaoke establishments with more than 2 million karaoke private rooms. All on-demand music systems are provided by independent video on-demand (VOD) equipment vendors, making it impossible to get one stop solutions to problems in the same way internet based sectors can. Once the technology is in place, the priority lies in how to benefit all parties, including VOD equipment vendors, karaoke sites, mini karaoke rooms, music and copyright companies through innovative business models, making this huge physical store cluster into a network that can create new value. With the services we have to offer, we are confident we can reduce costs, improve efficiency and create new drivers for all parties for the continued prosperity of the entire karaoke industry.



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4

大数据著作权管理系统 Big Data Copyright Management System



该系统包括渠道服务平台、内容服务平台、数据分析平台、确权系统和支付结算平台五个部分。

The system consists of five parts: channel service platform, content service platform, data analysis platform, right verification system and payment settlement platform.

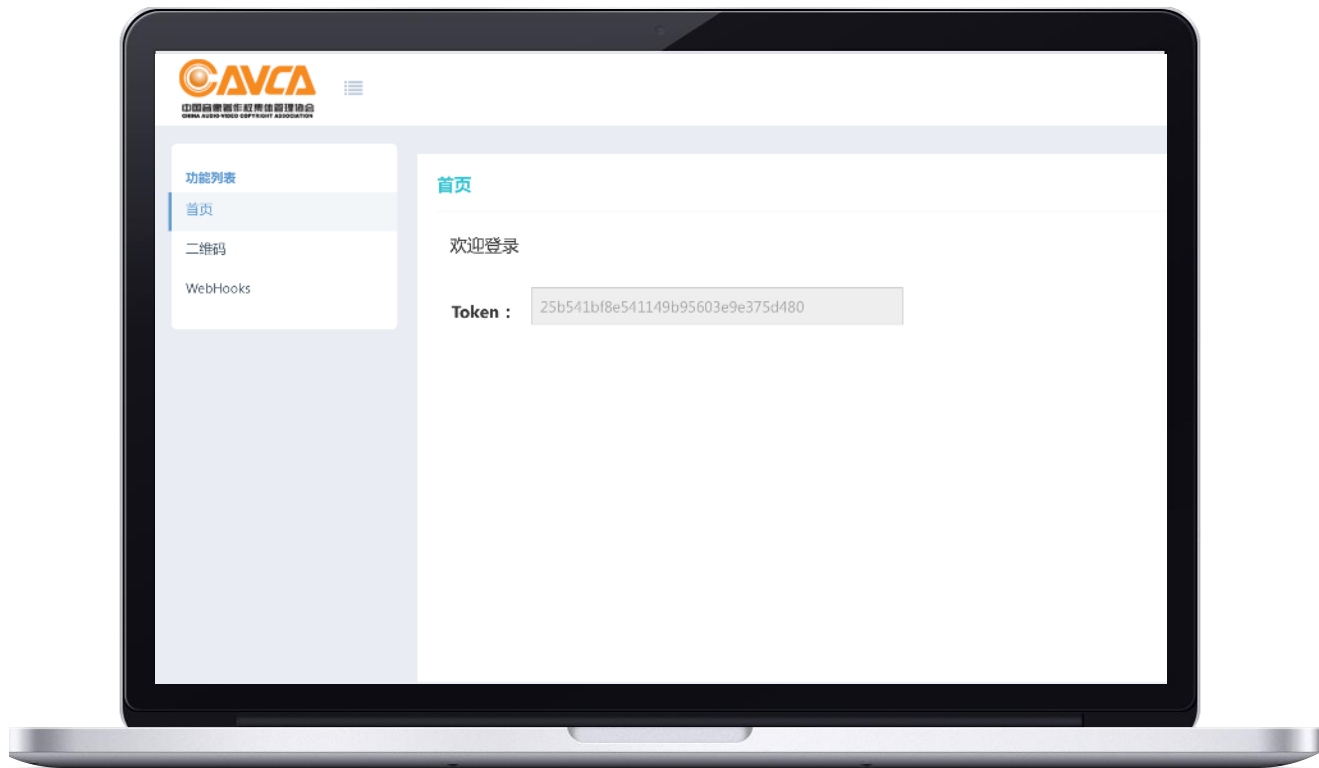


渠道服务平台

Channel service platform

通过渠道账号分配，登录、分配生成渠道Token、二维码接口、配置回调地址、数据上报接口等程序实现精准计费、移动收款等渠道服务功能。

Precise billing, mobile collection and other channel service functions are realized through channel account allocation, login, channel token generation/allocation, QR code interface, callback URL configuration, data reporting interface and other programs.





内容服务平台 Content service platform

权利人通过后台查询作品使用数据，查询账户的收益情况，可添加、提交审核、编辑或删除属于自己权利的歌曲信息。

The right holder queries the data for the use of their works at the back-end to check the account balance and is able to add, submit for review, edit or take down any song information of his/her own rights.



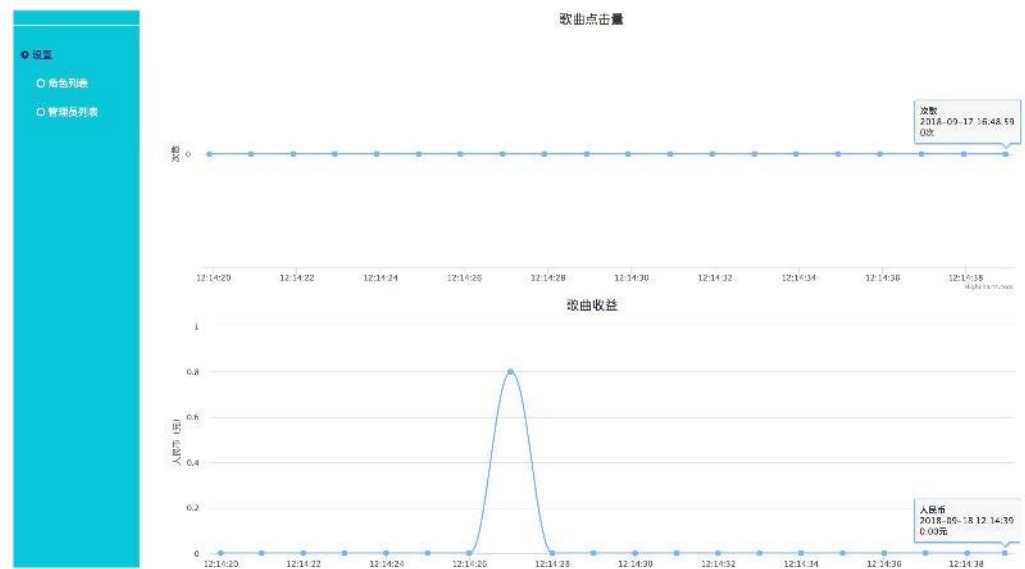


数据分析平台 Data analysis platform

权利人作品使用分析、歌曲标签分析、歌曲流行趋势分析、歌曲地区喜好分析、不同渠道点唱数据特色分析、消费者付费比例分析、用户偏好分析等数据分析给产业各方提供市场指引。

Tapping into work use analysis, song tagging analysis, music trend analysis, regional preference analysis, on-demand data feature analysis drawing from different channels, consumer payment ratio analysis, user preference analysis and other data analysis, right holders are able to deliver market guidance and insights for the industry.

歌曲点播统计			
歌曲名称	歌曲代码	点击量	收益
两分钟	FMLBJ1180911024956113368	0次	0元
美人鱼	FMLBJ1180911024346117940	0次	0元
梅花泪	FMLBJ1180911022508114793	0次	0元
莲	FMLBJ1180911021339112977	0次	0元
夜色天语	FMLBJ1180911020901111498	0次	0元
1898	FMLBJ1180911115625116133	0次	0元
太天真	FMLBJ1180911114008117145	0次	0元
Fly Away	FMLBJ1180903120557117345	1次	0元
公主	FMLBJ1180821120830113375	1次	0元
我们终究会牵手旅行	FMLBJ1180821115622111759	3次	0元
置大了爱伤了	FMLBJ1180821115502111513	0次	0元
那又怎样	FMLBJ1180821114207119073	0次	0元
其实我很在乎你(电影版)	FMLBJ1180821113243119071	0次	0元
你不配	FMLBJ1180821113105118152	0次	0元





支付结算平台

Payment settlement platform

收款之后，平台按照设置好的比例自动生成帐单由著作权集体管理组织按月分别与权利人及渠道方结算。

After the payment, the platform automatically generates the bill based on the set proportion, and the CMO settles the payment with the rights holders and the channels on a monthly basis.

歌曲点播统计			
歌曲名称	歌曲代码	点击量	收益
两分钟	FMLBJ1180911024956113368	0次	0元
美人酒	FMLBJ1180911024346117940	0次	0元
梅花泪	FMLBJ1180911022508114793	0次	0元
莲	FMLBJ1180911021339112977	0次	0元
茶色天涯	FMLBJ1180911020901111498	0次	0元
1898	FMLBJ1180911115625116133	0次	0元
太天真	FMLBJ1180911114008117145	0次	0元
Fly Away	FMLBJ1180903120557117345	1次	0元
公主	FMLBJ1180821120830113375	1次	0元
我们终究会牵手旅行	FMLBJ1180821115622111759	3次	0元
量大了受伤了	FMLBJ1180821115502111513	0次	0元
那又怎样	FMLBJ1180821114207119073	0次	0元
其实我很在乎你(电影版)	FMLBJ1180821113243119071	0次	0元
你不配	FMLBJ1180821113105116152	0次	0元



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5

关键功能与痛点解决

Key Features and Solutions to Challenges

- ❑ 支付：手机扫码支付
Payment: via QR code
- ❑ 数据收集：点唱数据精确收集
Data collection: precise collection of on-demand music data
- ❑ 版权收入分配：根据点唱数据精确分配
Copyright revenue distribution: precision distribution according to on-demand music data
- ❑ 透明：点唱数据、收入可视化
Transparency: on-demand music data with visible earnings
- ❑ 解决痛点：许可费收取成本高、收取、分配不透明
Pain points solved: high cost in license fee collection; opacity in payment collection and distribution





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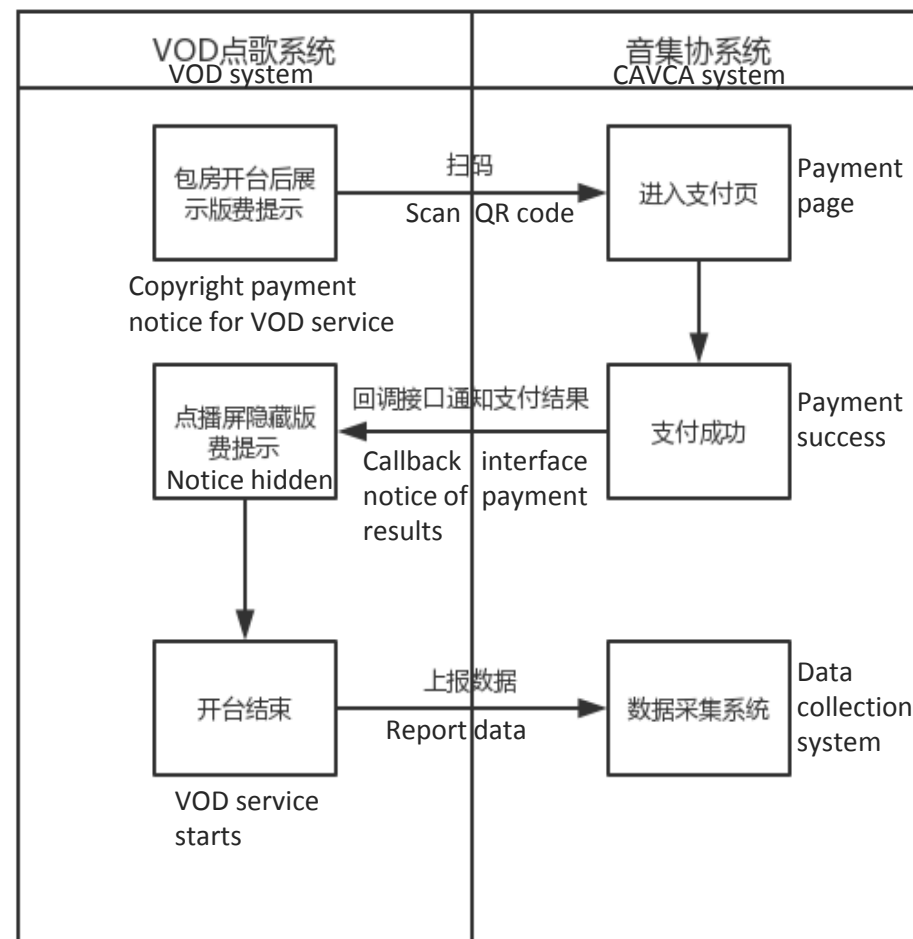
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落地方案
Implementation



首先需要设计共赢的商业模式，让产业各方经营主体愿意接受这样的系统。系统是通过VOD设备商的渠道下发到每一个场所的包房终端，需要考虑到渠道方的付出，也让渠道方通过这样的系统创造出新的获利点，使用者也会通过这样的系统使得缴纳的著作权许可费更为合理和科学。系统覆盖全国五万卡拉OK场所和200万间以上的包房终端将连成一个巨大的网络，会给使用者带来更好的服务和商业模式的提升。

First, a win-win model for all business entities is necessary. The system is designed for private room terminals of each karaoke site through the channels of VOD equipment suppliers. With the contribution of channel suppliers into consideration, new drivers for earnings will also be provided to them via this system. A more equitable, scientific system for copyright license fee payments enhances user experience.



The system connects more than 2 million private room terminals in 50,000 karaoke establishments across China to form a massive network with a better a service model.



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制度设计的优越性

Superiority of the System Design



只满足以上条件并不能完成整合这个产业，因为这个产业涉及到数万个经营主体，每一个经营主体都有其自主经营的权利，都面临着五花八门的个性化条件，把他们完全统一起来确实是一件非常困难的事情，效率和效果都很难做到让人满意。

As tens of thousands of businesses enjoy their own right to operate and are often faced with unique issues, the outlined conditions are not enough to lead to industry integration. It will be challenging to implement a uniform standard that is efficient and effective.

但是，我们国家在著作权集体管理制度设计层面对集体管理组织采取“唯一性”而不是“竞争性”的制度安排，这就对有效的调动全行业的资源起到了决定性的作用。当科学技术解决了著作权集体管理的公平、公正、透明、精准的问题时，著作权集体管理组织才有能力整合全行业的资源，使科学技术解决方案最高效的落地，实现著作权集体管理制度设计的本意。毫无疑问，面对着行业千千万万的著作权义务主体，只有通过著作权集体管理组织的统一协调，才能完成这一划时代的变革。

However, China has adopted an institutional arrangement based on “uniqueness” rather than “competitiveness” at the design level of the copyright collective management system, which has played a decisive role in effectively mobilizing resources across the industry. With technology addressing issues of fairness, justice, transparency and precision of copyright collective management, CMOs will be enabled to integrate resources, maximize the effect of technological solutions and realize the intent of the design. As they cover tens of thousands of copyright owners in the industry, landmark changes can only be accomplished through unification and coordination of CMOs.



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8

效益和问题 Benefits and Problems



短期效益 Short-term benefits

卡拉OK歌厅

会获得作品的实时更新和高品质的正版音乐，消费者可以像在互联网平台一样随时点唱到最新的流行歌曲，也更愿意走进卡拉OK场所进行消费。卡拉OK经营者也会认为版权费支付的更为值得和合理。

Karaoke establishments

Receive real-time updates and high-quality original version of the works. Consumers are able to select the most-trending hit songs at any time just as they are able to on internet platforms and can make more visits to websites. In turn, karaoke operators will receive benefits and see the value of copyright payments.



VOD设备商得益于著作权管理系统的落地使得卡拉OK场所联网或将普及，作品使用更加规范，卡拉OK行业能够健康发展，促进VOD设备商实现业务快速增长，扩大市场。

VOD equipment vendors also benefit from the launch of the copyright management system. Popularization of connected karaoke sites and standardization of work use are to be expected. The healthy development of the industry will enable vendors to grow business and expand market share with the system in place.

唱片公司及著作权人将获得高于以前的收入且更加透明，对制作的方向也会更有市场依据。

Record companies and copyright owners will be able to earn more in a more transparent environment, with better market-based guidance for music production.

著作权集体管理组织根据系统所掌握的点播数据，建立销量排行榜和传播者的贡献榜，这样可以有效地刺激行业良性的竞争和繁荣。

CMOs establish sales billboards and rankings of distributor contribution based on the karaoke data in the system, which can effectively stimulate benign competition and bring about better prospects for the industry.





短期问题 Short-term problems

由于中国音像著作权集体管理协会对各VOD设备商的曲库进行了统一的正版化系统管理，对于未加入集体管理组织的权利人的作品也不能排除在传播渠道之外，需要同时提供给消费者使用，这样就会存在很大的侵权的法律风险，纠纷肯定会时有发生。这也是集体管理制度在实践中经常会遇到的问题。我们目前的解决方案就是依据大数据将这一部分作品的收入提存，我们通过媒体或者公告的方式寻找权利人，或者等待权利人自己来认领，如果因此引发侵权诉讼，我们将根据数据和收益作为对权利人的赔偿，若权利人不允许继续使用，将在曲库中删除侵权作品。上述问题相信随着系统地推进会逐步解决。

Since the CAVCA has a unified original copyrighted music management system for all VOD equipment suppliers' music library, the works of non-member rights holders shall not be excluded from the communication channels and shall be provided to consumers with equal access. This may be subject to a legal risk of infringement and disputes may happen from time to time for collective management systems. Our current approach is to deposit a proportion of the works' income based on big data. We look for the right holders through the media or by issuing announcements, or we wait for the rights holders to claim the income. If infringement litigation occurs, we offer the deposited proportion as the rights holder's compensation based on data; if the works are not allowed for future use, we will take down the works from the music library. These problems can be resolved eventually as the system becomes more sophisticated.



长期效益 Long-term benefits

08
效益
和
问题

毫无疑问，由中国音像著作权集体管理协会管理的著作权管理系统的上线将会促使卡拉OK行业共同创造出了一个让消费者满意、使用者满意、权利人满意的新模式，实现全行业合作共赢、规范有序的新局面，从而促进音乐行业的健康发展。

Undoubtedly, the launch of the copyright management system managed by CAVCA will prompt the karaoke industry to jointly create a new model that caters to the consumers, the users and the rights holders. This mutually beneficial and standardized environment will ensure a sound footing for the music industry.





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未来展望
Future Prospects



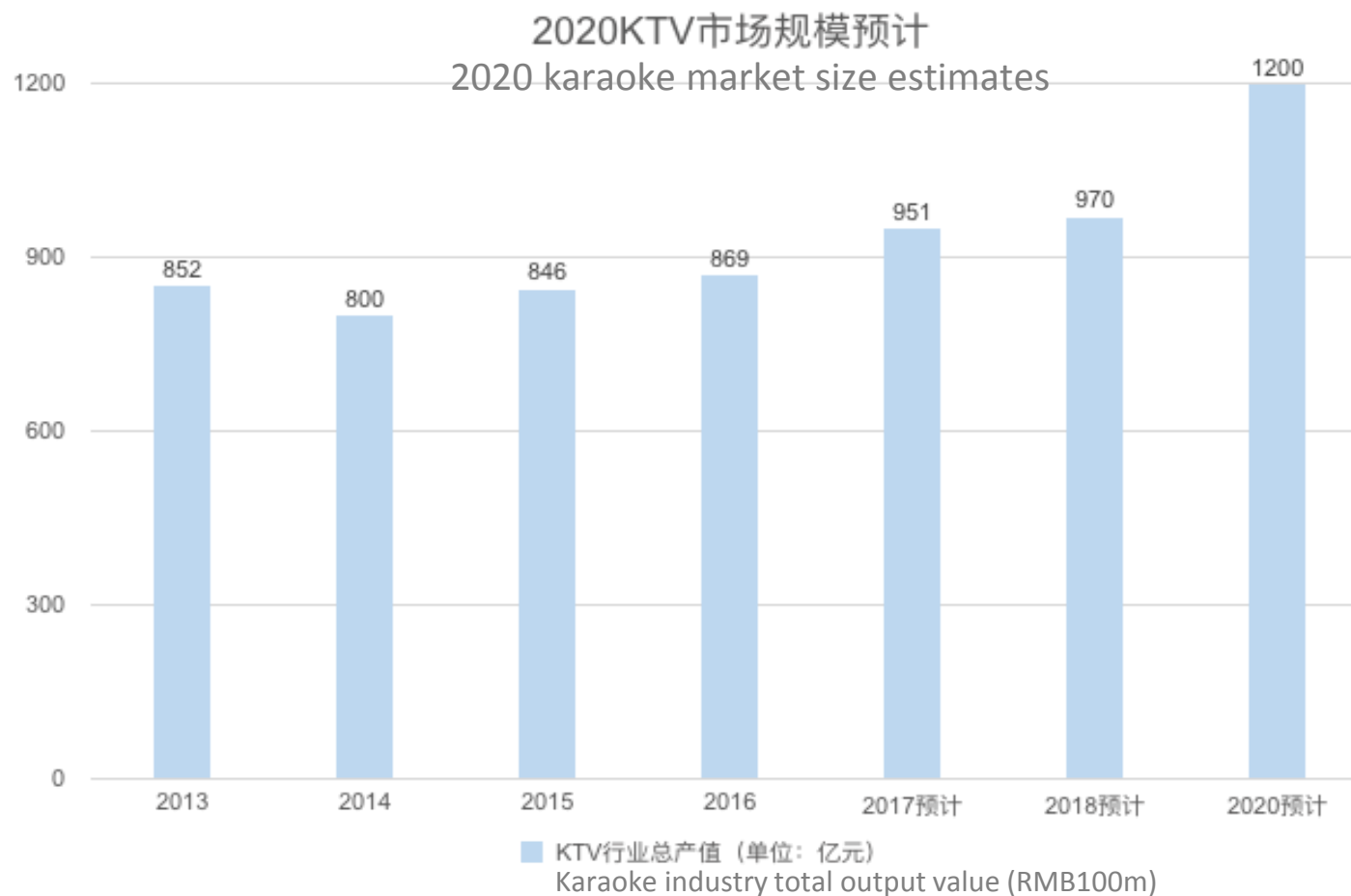
未来展望 Future Prospects

新系统将全面提升卡拉OK行业经营管理水平，优化行业生态环境。它会记录消费者的K歌习惯，消费习惯以及行为数据。随着运营的深耕和打破边界的尝试，线上卡拉OK、传统卡拉OK、迷你卡拉OK组成的线上线下联动的卡拉OK生态基础，服务将超过线上线下6亿的用户。围绕这一基础将衍生出更多的音乐、MV创作者，产业基础设施服务者，设备服务提供商，软件服务提供商和直面消费者的各大品牌卡拉OK经营机构等，新系统将作为基础数据提供者对整个生态系统服务。

The new system will improve management of the karaoke industry. It records consumer's singing habits, spending habits and behavioral data. With an emphasis on innovation, the ecosystem composed of online karaoke, traditional karaoke and mini karaoke will encompass over 600 million users. Built on such a foundation, all players including artists, music video producers, industrial infrastructure service providers, equipment service providers, software service providers and major brands of karaoke operators will enjoy the benefits and the fundamental data brought about by the new system.

市场规模和版权收益预计

Market size and copyright earnings estimates

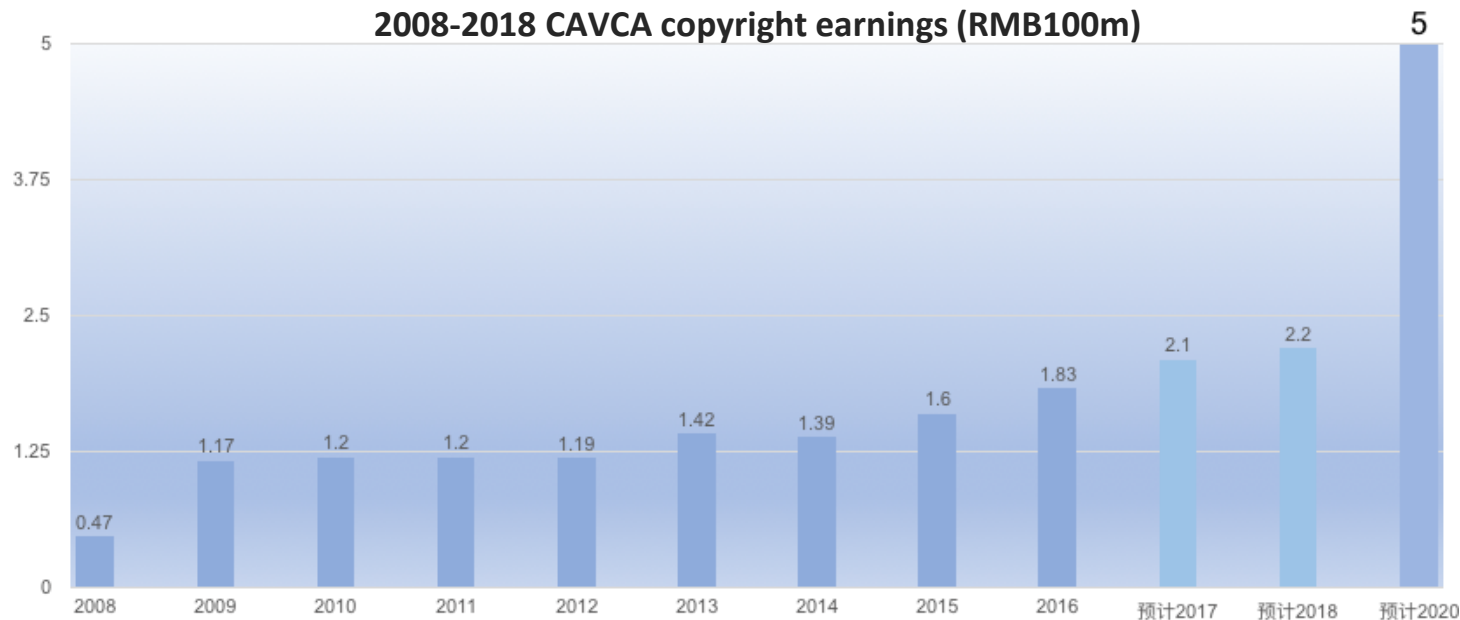




新系统上线的两年后，得益于新系统的上线和运营，会给卡拉OK行业带来新的繁荣，2020年卡拉OK行业总产值预计有望达到1200亿元人民币。

The system is expected to bring promising results to the karaoke industry within two years of its launch. In 2020, the total output value of the karaoke industry is expected to reach RMB 120 billion.

2008-2018年音集协版权收益（单位：亿元）
2008-2018 CAVCA copyright earnings (RMB100m)



而由于采用新的收费模式，实现精准化，大幅度提高收费覆盖面，中国音像著作权集体管理协会著作权许可费收益将在2020年较2018年实现超过100%的增长。

Due to the adoption of the new charging model and substantial increase in fee coverage, the copyright license fee of the China Audiovisual Copyright Collective Management Association will reach a 100% increase in 2020 compared to 2018.



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总结
Conclusion



著作权集体管理制度设计就是基于海量的使用者和海量的权利人通过著作权集体管理组织这个桥梁优化授权成本，使得抽象的著作权权项变成看得见的财产利益。而通过技术驱动实现对庞大资源的快速整合，实现交易的公平、透明及扁平化，实现财务成本极大地降低、效率极大地提升，是满足著作权集体管理组织实现管理目标的最佳方式。

The design of the copyright collective management system is based on massive data sets from users and rights holders in order to reduce cost of authorization through CMOs, turning the abstract concept of copyright into tangible rights. The best way to meet the objectives of CMOs is through rapid integration of resources with technology, so as to ensure fair, transparent and flat transactions, reducing financial costs and improving efficiency.

毫无疑问，新技术、新模式可能给我国的著作权集体管理制度设计提供了一条切实可行的健康发展的思路，也启迪我们通过技术手段对各类著作权集体管理的权利实现精准管理，让著作权集体管理制度在著作权实践中发挥更重要的作用，让我国的著作权集体管理制度跃上一个新的台阶。



Undoubtedly, new technologies and new models will give us practical ideas on the design of copyright collective management mechanism and achieve precise management, taking China's management system to new heights.



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Thanks
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