

中国数字音乐版权保护

Copyright Protection of Digital Music in China

腾讯音乐娱乐

Tencent Music Entertainment

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2018-12-17 Guangzhou

7 COUNTRY FOCUS:

CHINA



Chinese consumers are highly engaged with licensed music.

Base: All participants surveyed in China (n=2,000)



96%
of consumers in China listen to licensed music



89%
of music consumers in China listen to licensed audio streaming



15.4hrs
listening to music each week

TOP LISTENING

Relaxing at home

74%

In the car

50%

Going to sleep

49%

Exercising or at the gym

49%

Commuting to work

42%



96%

of consumers in China listen to licensed music



89%

of music consumers in China listen to licensed audio streaming



15.4hrs

listening to music each week

CHINA'S FAVOURITE GENRES

01

C-Pop

02

Pop

03

Folk

04

05

06



RIGHT REPORT 2018 | Tili

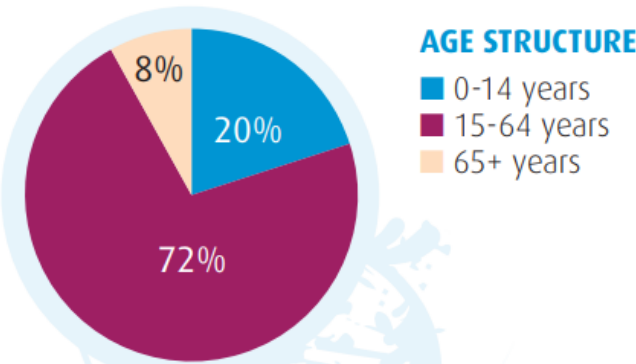
中国数字音乐现状
Digital Music In China in
2018

96%的中国音乐用户正聆听正版授权音乐

96% of the consumers in China are
listening to licensed music

Source: IFPI Music Consumer Insight Report 2018

Asia China



COUNTRY DATA

Population (million) : 1,330.3

Median Age (years) : 33

Currency : Renminbi (RMB) also know as Yuan (CNY)

US\$ Exchange Rate (2007) : 7.61

Chart Compiler : -

Chart Links : -

DIGITAL INDICATORS (millions)	
Internet users	221.0
Broadband lines	66.5
Mobile subs	565.2
3G subs	-

WORLD RANKING	
Physical sales	34
Digital sales	9
Performance rights	-

China has the biggest mobile and the second biggest broadband subscriber base in the world. The digital music market has so far been stunted by mass digital piracy, with over 99% of all music downloads being illegal. IFPI estimates that deep-linking music sites represent 50% of online music copyright infringement in China, in contrast to Europe and North America where P2P networks dominate. Of all internet users as many as 71% have downloaded music within half a year (CNNIC, Jan 2008).

YEAR
2007
2006
2005

曾经的尴尬处境

Digital Music in China Few Years
ago

2006 : 实体盗版猖獗

the largest physical pirate market and growing internet
piracy

2008: 数字盗版严重

serious market growth shackled by a rampant online piracy
rate

版权环境巨变原因

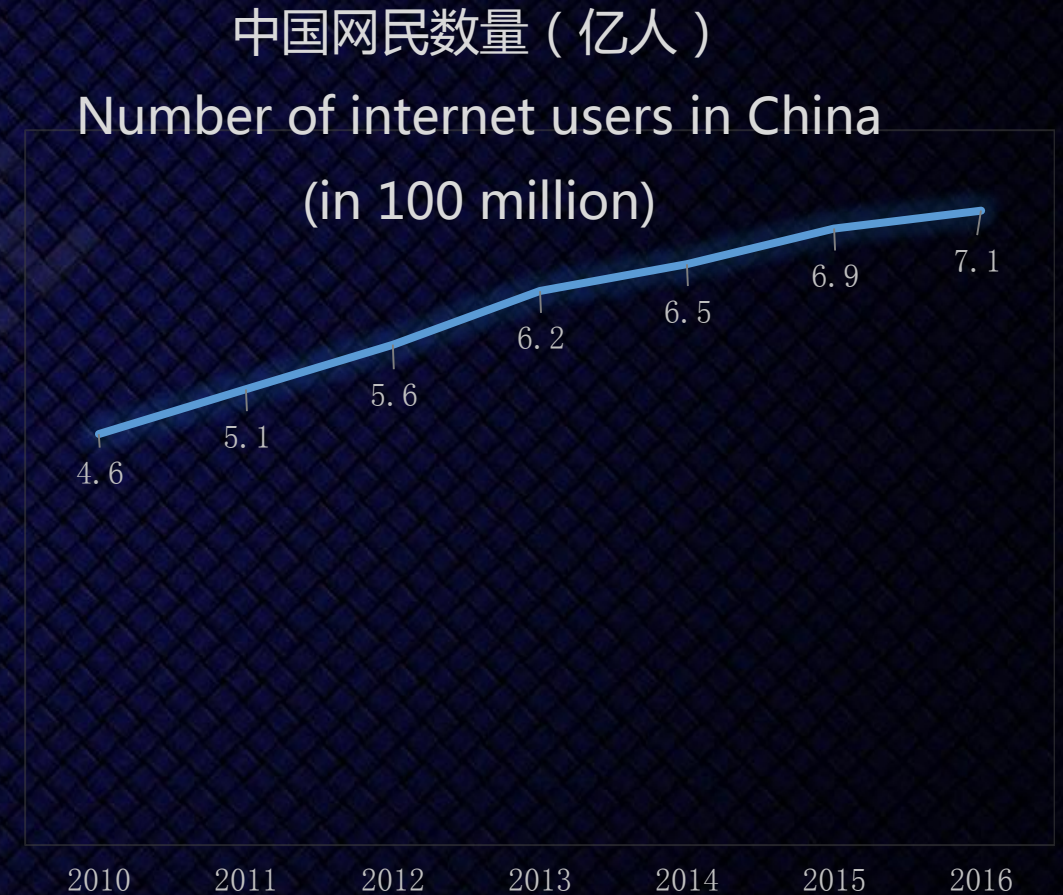
Reasons behind the Change of Copyright Environment in China

- 数字音乐时代到来
- Timing: the generation of digital music
- 良好政策引导及有力监管
- Key: guidance and governance from Chinese authorities
- 正版价值观之普及
- Core: support of licensed music from consumers to market players

数字音乐时代到来

The Generation of Digital Music in China

- 2010年中国进入移动互联网时代，移动音乐App逐渐成为主流音乐载体
- Roughly since 2010, we have seen a steady growth of internet users in China thanks to the popularity of smartphones and mobile internet. Consumption of digital music has become a trend ever since.
- 全球数字音乐市场从2009年的43亿美元增长到2015年的70亿美元
- Synchronously, the global market scale of digital music gross value nearly doubled from 4.3 billion USD in 2009 to 7 billion USD In 2015.



良好政策引导及有力监管 (1/4)

Milestone Guidance and Governance from Chinese Authorities (1/4)

- 2010年12月14日文化部发出通知，称为进一步规范网络音乐市场秩序，文化部决定进一步清理整治违规网络音乐网站。随后，多家网络音乐网站陆续关停，曾被国内外舆论多次批评的中国最大网络音乐搜索引擎亦开始其正版化整改。
- On December 14, 2010, Ministry of Culture of China announced that it will immediately reinforce its regulation and elimination of online music websites with illegal content in order to safeguard the copyright environment of digital music market in China. As a result, a large number of online music websites who used to have enormous visit traffic was shut down in succession. What's more, the largest online music search engine of that time, who has repeatedly been criticized by domestic and international public opinion for its long-term connivance of pirate music content, has announced to start its self-rectification.

良好政策引导及有力监管 (2/4)

Milestone Guidance and Governance from Chinese Authorities (2/4)

- 国家版权局于2015年7月8日发布《关于责令网络音乐服务商停止未经授权传播音乐作品的通知》，要求各网络音乐服务商于7月31日前将未经授权传播的音乐作品全部下线，被看作国内音乐史上最严厉的版权令。
- National Copyright Administration of China on July 8, 2015 issued a “*Notice on Ordering Online Music Service Providers to Stop the Dissemination of Unauthorized Music Works*”, ordering the providers to cease the provision of unauthorized music works with a deadline on the very last day of July in 2015. This documentation has been universally considered as the harshest one in Chinese music history.

良好政策引导及有力监管 (3/4)

Milestone Guidance and Governance from Chinese Authorities (3/4)

- 国家新闻出版广电总局于2015年11月17日发布《关于大力推进我国音乐产业发展的若干意见》，着重提出“加强版权保护和市场监管”作为中国音乐产业发展的保障措施，包括推动《著作权法》的第三次修订，加强对音乐作品特别是数字音乐作品的版权保护，严厉打击未经许可传播音乐作品的侵权盗版行为。
- State Administration of Press, Publication, Radio, Film and Television on November 17, 2015 issued the “*Opinions on Vigorously Promoting the Development of the Music Industry in China*”, with a focus on copyright protection and market regulation as a safeguarding measure. To be specific, the documentation includes pushing forward the third amendment to the Copyright Law of P.R.C., reinforcing the copyright protection of all music content with a focus of digital music content and severely cracking down on infringement and piracy of unauthorized dissemination of music content.

良好政策引导及有力监管（4/4）

Milestone Guidance and Governance from Chinese Authorities （4/4）

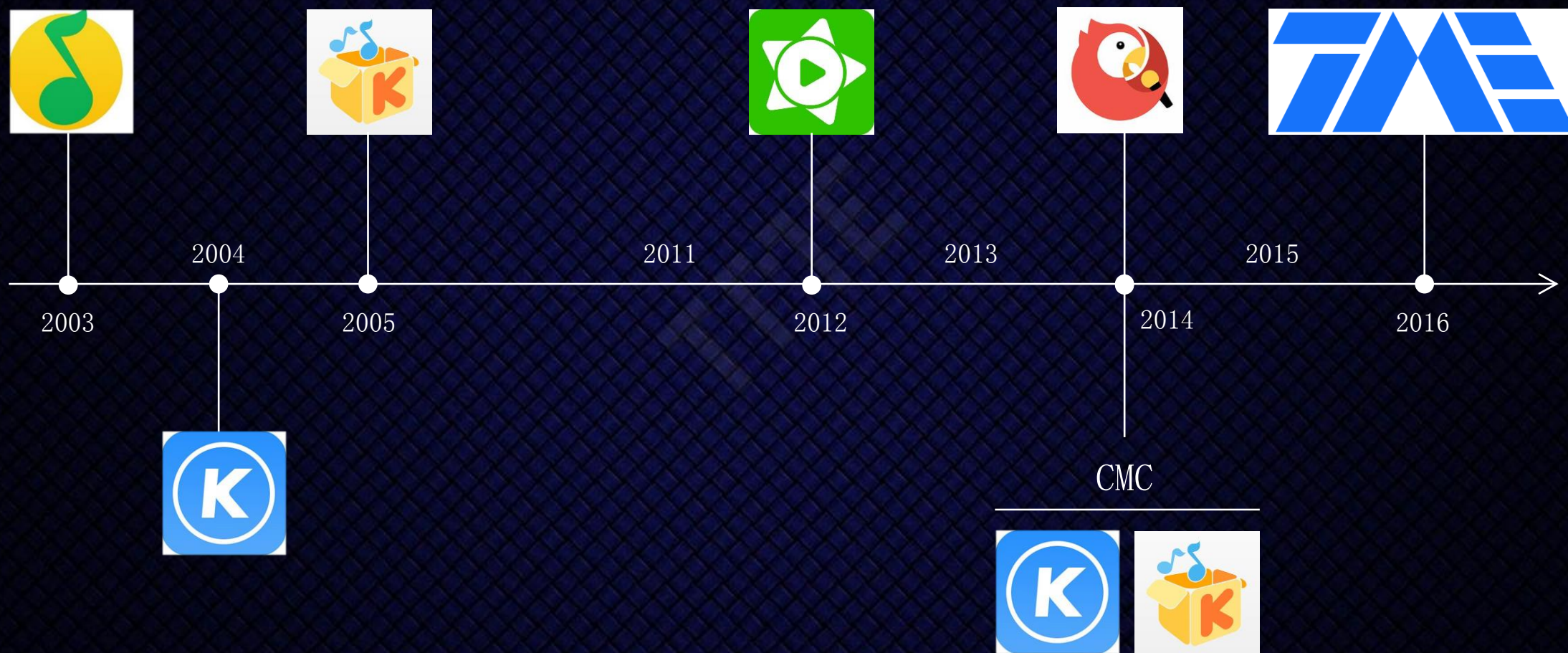
- 中国执法机关连续多年通过“剑网行动”对于互联网领域各类版权侵权行为进行联合专项严厉打击。“剑网行动”由国家版权局、国家互联网信息办公室、工业和信息化部、公安部联合组织，通常每年会持续四个月以上时间，其中支持依法维权、严惩盗版侵权是每年“剑网行动”的关键部分。“剑网行动”有力地推动了各类数字服务提供商增强其平台内部版权监管系统的运作以及整体版权合规的水平。
- For several years in a row, Chinese authorities have been proactively running a campaign called “Jianwang” against online copyright infringement. The campaign, jointly launched by the National Copyright Administration of China, the Cyberspace Administration of China, the Ministry of Industry and Information Technology and the Ministry of Public Security, usually lasts longer than four months in every year. Supporting anti-piracy efforts and cracking down copyright infringement constitute a significant part of the yearly campaign. During the campaign, service providers will be pushed to enhance their internal copyright supervision systems and overall compliance with regard to copyright protection.

正版价值观之普及

Support of Licensed Music from Consumers to Market Players

- 中国消费者正版观念逐渐形成。在正版化的行业环境下，年轻一代已经逐渐树立对正版内容的推崇、对创作和创造的尊重。
- The concept of anti-piracy in China is getting gradually recognized by Chinese consumers. With the help of a higher percentage of licensed digital content, the younger generation in China is forming the recognition towards licensed content and respect of creation and innovation.
- 在国家版权局的协调和敦促下，国内主要网络音乐服务商、唱片公司和版权公司共同签署了《网络音乐版权保护自律宣言》，促进音乐作品广泛授权和有序传播。
- Under the coordination and urging of the National Copyright Administration of China, the major domestic digital music service providers, major music labels and certain copyright companies jointly signed the "*Declaration on Self-discipline of Digital Music Copyright Protection*" to promote the wide range licensing and orderly dissemination of music content.

腾讯音乐娱乐 Tencent Music Entertainment



腾讯音乐娱乐的角色和使命 : 合法授权及行业合作(1/4)

Role and Mission of TME (1/4)

- 从QQ音乐作为独立产品推出起，腾讯一直是中国领先的提供合法授权内容、打击盗版侵权行为的数字音乐平台。
- Tencent was among the very first online music providers to provide licensed music and start its anti-piracy efforts in China dating back to the release of its first stand-alone product QQ Music.
- 2013年，腾讯联合7家唱片公司，组建了“数字音乐维权联盟”，并携手百位知名歌手开展“正版音乐 用聆听护航”行动，呼吁用户尊重知识产权。
- In 2013, Tencent teamed up with 7 music labels to form the “Digital Music Copyright Protection Alliance” and cooperated with hundreds of well-known artists to launch campaigns calling on Chinese consumers to pay respect to intellectual property rights.
- 2014年起，腾讯与全球三大唱片公司的华纳音乐和索尼音乐以及稍后的环球音乐达成版权战略合作。
- Starting from 2014, Tencent Music established copyright strategic cooperation relationship with Warner Music, Sony Music and later Universal Music.

腾讯音乐娱乐的角色和使命：集体管理组织合作(2/4)

Role and Mission of TME (2/4)

- 2013年起，腾讯开始与中国大陆地区唯一的音乐著作权集体管理组织——中国音乐著作权协会，达成一揽子合作并持续运作至今，借助其在音乐作品管理上的优秀经验，更好地保护音乐作品版权。
- Starting from 2013, Tencent has started the package cooperation with the one and only publishing rights collective management organization in Mainland China, Music Copyright Society of China, taking the advantage of rich managerial experience of the collective management organization to form better copyright protection.
- 双方的合作不仅为腾讯平台上的音乐内容提供了词曲作品的合法授权，更包括：打击互联网行业侵权行为，不让互联网成为法外之地；通过组织相关方座谈、主办行业研讨会等形式，提升行业及市场参与者的版权意识和合规意识；共同致力于音乐作品版权的保护，调动资源向中国数字音乐消费者推广支持正版、尊重原创的正确理念。
- The bilateral cooperation not only consolidates legitimate licensing of publishing rights for digital music on Tencent platforms but also has far-reaching influences including: i) forming joint efforts in cracking down online infringement and keep the Internet under the governance of law; ii) raising the sense of compliance and copyright protection by organizing roundtables or seminars with related parties in the music industry; iii) spreading the concept of copyright protection to a wider coverage of Chinese consumers.

腾讯音乐娱乐的角色和使命：转授权模式形成(3/4)

Role and Mission of TME (3/4)

- 2015年，腾讯向网易云音乐转授了150万首歌曲的版权，标志着“转授版权”模式的诞生。其后，腾讯陆续与阿里音乐、太合音乐、唱吧、映客、快手以及Apple Music、Spotify、KKBOX等十余家平台达成音乐版权转授权合作。
- In 2015, Tencent took the lead to sublicense 1.5 million songs to NetEase Music, which was later considered as a positive signal of the start of music sublicensing in China. In the following years, Tencent reached similar sublicensing agreements with Ali Music, Taihe Music, Changba, Yingke, Kuaishou, Apple Music, Spotify, KKBOX and others, totaling more than 10 other digital music providers.
- 2017年，腾讯音乐娱乐、阿里音乐、网易云音乐在国家版权局的指导下达成两两相互交叉转授权的相关安排，使中国数字音乐达到了高度竞争但同时高度开放的行业环境，其中99%的数字音乐内容中国消费者均可通过三家主流音乐提供商中的任何一家进行访问获取。相互转授权的模式在稳固正版化成果的基础上，促进了数字音乐的广泛传播，也基本满足了用户希望通过尽可能少的app聆听大部分音乐的需求。
- In 2017, Tencent Music Entertainment, Ali Music, and NetEase Music have successfully agreed on cross licensing of digital music with each other following the guidance of National Copyright Administration of China, which contributes to a highly competitive but widely open industrial environment of digital music with 99% of the digital music content can be accessed by Chinese consumers through any of the major providers. Such practice has led to a wider range dissemination of digital music on the basis of adequate music licensing, and also facilitated the practical consumer needs of listening to music using as few Apps as possible.

腾讯音乐娱乐的角色和使命：版权管理能力建设(4/4)

Role and Mission of TME (4/4)

- 腾讯音乐娱乐一直致力于开发并建立技术平台，目前已实现超千万量级曲库的自动化版权管理，包括以下功能：
- Tencent Music Entertainment has developed and established a technical platform to achieve automatic copyright management of music library with tens of millions tracks capability, some of the functions include:
 - ◆ 具备大规模正版内容通过ddex协议自动解析对接入库功能，保证数据的权威性和准确性
 - ◆ automatic analysis and library access through ddex protocols on a large scale basis.
 - ◆ 具备安全扫描管理功能，对版权方提供内容提前根据敏感字库、图片分析等自动识别政治、色情等敏感内容
 - ◆ automatic scanning and screening of sensitive and inappropriate content based on given commands.
 - ◆ 具备版权到期内容智能提前预警、自动下架管理功能
 - ◆ intelligent early warning of expiring license and automatic removal of content under an expired license.
 - ◆ 具备转授权记录智能管理功能以及内容分发功能
 - ◆ intelligent management of sublicensing records and content distribution capabilities.
 - ◆ 具备丰富完整的版权信息记录，例如版权方信息、授权时间、录音、词曲权利份额、授权区域、词曲作者、表演者、ISRC、UPC、ISWC等
 - ◆ complete records of copyright information, such as licensor information, licensing term, licensing territory, share of rights, songwriter information, performer information, ISRC, UPC, ISWC and etc.

腾讯音乐娱乐的企业社会责任感体现 Social Responsibility of TME

尊崇法律、打击盗版

Respect laws and regulations; make consistent anti-piracy efforts

参与竞争、开放生态

Engage in active competition; form an open licensing environment

造福用户、回馈音乐

Focus on consumer welfare; give back to music industry

多谢您的时间！
Many thanks!

腾讯音乐娱乐

Tencent Music Entertainment

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