

IN BRIEF

Despite the global recession, 2009 proved to be a good year in the fight against software piracy. With personal computer software piracy rates dropping in almost half of the economies studied in this year's BSA/IDC Global Software Piracy Study, the report finds that momentum from years of anti-piracy efforts — by governments, law enforcement, software companies, and BSA — held firm through the economic downturn.

However, software theft remains an urgent issue. This year's report also shows that for every \$100 worth of legitimate software sold in 2009, an additional \$75 was stolen. Piracy also puts users at risk by compromising their computer security, since pirated software often contains malware.

Below are key findings from this year's study:

- **Commercial value of software theft exceeds \$50 billion:** the commercial value of unlicensed software put into the market in 2009 totalled \$51.4 billion.
- **Progress on piracy held through the recession:** the rate of PC software piracy dropped in nearly half (49%) of the 111 economies studied, remained the same in 34% and rose in 17%.
- **Piracy continues to rise on a global basis:** the worldwide piracy rate increased from 41% in 2008 to 43% in 2009; largely a result of exponential growth in the PC and software markets in higher piracy, fast growing markets such as Brazil, India and China.

HIGHEST PIRACY RATES 2009

RANK	COUNTRY	RATE
1	Georgia	95%
2	Zimbabwe	92%
3	Bangladesh	91%
	Moldova	91%
4	Armenia	90%
	Yemen	90%
5	Sri Lanka	89%
6	Azerbaijan	88%
	Libya	88%
7	Belarus	87%
	Venezuela	87%
8	Indonesia	86%
9	Iraq	85%
	Ukraine	85%
	Vietnam	85%
10	Algeria	84%
	Pakistan	84%
11	Cameroon	83%
	Nigeria	83%
12	Paraguay	82%
	Zambia	82%
13	Montenegro	81%
14	Bolivia	80%
	El Salvador	80%
	Guatemala	80%
15	Botswana	79%
	China	79%
	Ivory Coast	79%
	Kenya	79%
	Nicaragua	79%

HIGHEST COMMERCIAL VALUE OF PIRATED SOFTWARE 2009

RANK	COUNTRY	LOSSES \$M
1	United States	\$8,390
2	China	\$7,583
3	Russia	\$2,613
4	France	\$2,544
5	Brazil	\$2,254
6	Germany	\$2,023
7	India	\$2,003
8	Japan	\$1,838
9	Italy	\$1,733
10	United Kingdom	\$1,581
11	Mexico	\$1,056
12	Spain	\$1,014
13	Canada	\$943
14	Indonesia	\$886
15	Thailand	\$694
16	Venezuela	\$685
17	Argentina	\$645
18	South Korea	\$575
19	Australia	\$550
20	Netherlands	\$525
21	Poland	\$506
22	Malaysia	\$453
23	Turkey	\$415
24	Vietnam	\$353
25	Switzerland	\$344
26	South Africa	\$324
27	Chile	\$315
28	Sweden	\$304
29	Saudi Arabia	\$304
30	Ukraine	\$272

LARGEST INCREASES IN VALUE OF PIRATED SOFTWARE 2005-2009

RANK	COUNTRY	INCREASE (\$M)
1	China	\$3,699
2	United States	\$1,495
3	Brazil	\$1,488
4	India	\$1,437
5	Russia	\$988
6	Indonesia	\$606
7	Mexico	\$531
8	Venezuela	\$512
9	Argentina	\$463
10	Thailand	\$435
11	Vietnam	\$315
12	Malaysia	\$304
13	Spain	\$249
14	Japan	\$217
15	Chile	\$206
16	Australia	\$189
17	South Korea	\$175
18	Italy	\$169
19	Canada	\$164
20	Colombia	\$154
21	Turkey	\$147
22	Philippines	\$141
23	Iraq	\$129
24	Bangladesh	\$127
25	Saudi Arabia	\$126

PC Software Piracy Rates and Commercial Value of Software, 2005-2009

	Piracy Rates					Commercial Value of Unlicensed Software (\$M)				
	2009	2008	2007	2006	2005	2009	2008	2007	2006	2005
Asia Pacific										
Australia	25%	26%	28%	29%	31%	\$550	\$613	\$492	\$515	\$361
Bangladesh	91%	92%	92%	92%	—	\$127	\$102	\$92	\$90	—
Brunei	67%	68%	67%	—	—	\$14	\$15	\$13	—	—
China	79%	80%	82%	82%	86%	\$7,583	\$6,677	\$6,664	\$5,429	\$3,884
Hong Kong	47%	48%	51%	53%	54%	\$218	\$225	\$224	\$180	\$112
India	65%	68%	69%	71%	72%	\$2,003	\$2,768	\$2,025	\$1,275	\$566
Indonesia	86%	85%	84%	85%	87%	\$886	\$544	\$411	\$350	\$280
Japan	21%	21%	23%	25%	28%	\$1,838	\$1,495	\$1,791	\$1,781	\$1,621
Malaysia	58%	59%	59%	60%	60%	\$453	\$368	\$311	\$289	\$149
New Zealand	22%	22%	22%	22%	23%	\$63	\$75	\$55	\$49	\$30
Pakistan	84%	86%	84%	86%	86%	\$166	\$159	\$125	\$143	\$48
Philippines	69%	69%	69%	71%	71%	\$217	\$202	\$147	\$119	\$76
Singapore	35%	36%	37%	39%	40%	\$197	\$163	\$159	\$125	\$86
South Korea	41%	43%	43%	45%	46%	\$575	\$622	\$549	\$440	\$400
Sri Lanka	89%	90%	90%	90%	—	\$77	\$97	\$93	\$86	—
Taiwan	38%	39%	40%	41%	43%	\$227	\$201	\$215	\$182	\$111
Thailand	75%	76%	78%	80%	80%	\$694	\$609	\$468	\$421	\$259
Vietnam	85%	85%	85%	88%	90%	\$353	\$257	\$200	\$96	\$38
Other AP	90%	91%	91%	86%	82%	\$303	\$69	\$56	\$148	\$29
TOTAL AP	59%	61%	59%	55%	54%	\$16,544	\$15,261	\$14,090	\$11,718	\$8,050

Central and Eastern Europe										
Albania	75%	77%	78%	77%	76%	\$8	\$9	\$11	\$11	\$9
Armenia	90%	92%	93%	95%	95%	\$14	\$7	\$8	\$8	\$7
Azerbaijan	88%	90%	92%	94%	94%	\$52	\$55	\$50	\$51	\$40
Belarus	87%	—	—	—	—	\$55	—	—	—	—
Bosnia	66%	67%	68%	68%	69%	\$14	\$15	\$13	\$14	\$13
Bulgaria	67%	68%	68%	69%	71%	\$115	\$139	\$63	\$50	\$41
Croatia	54%	54%	54%	55%	57%	\$71	\$77	\$68	\$62	\$51
Czech Republic	37%	38%	39%	39%	40%	\$174	\$168	\$161	\$147	\$121
Estonia	50%	50%	51%	52%	54%	\$19	\$21	\$20	\$16	\$18
FYROM	67%	68%	68%	69%	70%	\$15	\$14	\$11	\$10	\$9
Georgia	95%	95%	—	—	—	\$54	\$59	—	—	—
Hungary	41%	42%	42%	42%	42%	\$113	\$146	\$125	\$111	\$106
Kazakhstan	78%	78%	79%	81%	85%	\$74	\$125	\$110	\$85	\$69
Latvia	56%	56%	56%	56%	57%	\$24	\$31	\$29	\$26	\$20
Lithuania	54%	54%	56%	57%	57%	\$31	\$40	\$37	\$31	\$25
Moldova	91%	90%	92%	94%	96%	\$28	\$40	\$43	\$56	\$44
Montenegro	81%	83%	83%	82%	83%	\$11	\$8	\$7	\$6	\$9
Poland	54%	56%	57%	57%	58%	\$506	\$648	\$580	\$484	\$388
Romania	65%	66%	68%	69%	72%	\$183	\$249	\$151	\$114	\$111
Russia	67%	68%	73%	80%	83%	\$2,613	\$4,215	\$4,123	\$2,197	\$1,625
Serbia	74%	74%	76%	78%	80%	\$67	\$99	\$72	\$59	\$95
Slovakia	43%	43%	45%	45%	47%	\$65	\$62	\$54	\$47	\$44
Slovenia	46%	47%	48%	48%	50%	\$39	\$51	\$39	\$36	\$33
Ukraine	85%	84%	83%	84%	85%	\$272	\$534	\$403	\$337	\$239
Rest of CEE	88%	88%	88%	90%	92%	\$56	\$191	\$173	\$166	\$145
TOTAL CEE	64%	66%	68%	68%	69%	\$4,673	\$7,003	\$6,351	\$4,124	\$3,262

Latin America										
Argentina	71%	73%	74%	75%	77%	\$645	\$339	\$370	\$303	\$182
Bolivia	80%	81%	82%	82%	83%	\$40	\$20	\$19	\$15	\$10
Brazil	56%	58%	59%	60%	64%	\$2,254	\$1,645	\$1,617	\$1,148	\$766
Chile	64%	67%	66%	68%	66%	\$315	\$202	\$187	\$163	\$109
Colombia	55%	56%	58%	59%	57%	\$244	\$136	\$127	\$111	\$90
Costa Rica	59%	60%	61%	64%	66%	\$33	\$24	\$22	\$27	\$19
Dominican Republic	77%	79%	79%	79%	77%	\$66	\$43	\$39	\$19	\$18
Ecuador	67%	66%	66%	67%	69%	\$65	\$37	\$33	\$30	\$17
El Salvador	80%	80%	81%	82%	81%	\$46	\$28	\$28	\$18	\$8
Guatemala	80%	81%	80%	81%	81%	\$74	\$49	\$41	\$26	\$14
Honduras	74%	74%	74%	75%	75%	\$17	\$9	\$8	\$7	\$4
Mexico	60%	59%	61%	63%	65%	\$1,056	\$823	\$836	\$748	\$525
Nicaragua	79%	79%	80%	80%	80%	\$5	\$4	\$4	\$4	\$2
Panama	73%	73%	74%	74%	71%	\$42	\$24	\$22	\$18	\$8
Paraguay	82%	83%	82%	82%	83%	\$29	\$16	\$13	\$10	\$10
Peru	70%	71%	71%	71%	73%	\$124	\$84	\$75	\$59	\$40
Uruguay	68%	69%	69%	70%	70%	\$40	\$25	\$23	\$16	\$9
Venezuela	87%	86%	87%	86%	82%	\$685	\$484	\$464	\$307	\$173
Other LA	83%	84%	83%	83%	82%	\$430	\$319	\$195	\$96	\$32
TOTAL LA	63%	65%	65%	66%	68%	\$6,210	\$4,311	\$4,123	\$3,125	\$2,026

	Piracy Rates					Commercial Value of Unlicensed Software (\$M)				
	2009	2008	2007	2006	2005	2009	2008	2007	2006	2005
Middle East and Africa										
Algeria	84%	84%	84%	84%	83%	\$55	\$96	\$86	\$62	\$66
Bahrain	54%	55%	57%	60%	60%	\$21	\$27	\$27	\$23	\$22
Botswana	79%	80%	82%	81%	82%	\$11	\$14	\$14	\$12	\$12
Cameroon	83%	83%	84%	84%	84%	\$7	\$6	\$5	\$5	\$5
Egypt	59%	59%	60%	63%	64%	\$146	\$158	\$131	\$88	\$80
Iraq	85%	85%	85%	—	—	\$129	\$205	\$124	—	—
Israel	33%	32%	32%	32%	32%	\$148	\$172	\$121	\$102	\$84
Ivory Coast	79%	80%	81%	82%	82%	\$14	\$15	\$15	\$16	\$23
Jordan	57%	58%	60%	61%	63%	\$26	\$22	\$20	\$19	\$19
Kenya	79%	80%	81%	80%	81%	\$66	\$31	\$28	\$22	\$20
Kuwait	60%	61%	62%	64%	66%	\$62	\$69	\$61	\$60	\$65
Lebanon	72%	74%	73%	73%	73%	\$46	\$49	\$44	\$39	\$34
Libya	88%	87%	88%	—	—	\$25	\$22	\$22	—	—
Mauritius	56%	57%	57%	59%	60%	\$4	\$5	\$4	\$3	\$3
Morocco	66%	66%	67%	66%	68%	\$64	\$70	\$66	\$53	\$55
Nigeria	83%	83%	82%	82%	82%	\$156	\$132	\$114	\$100	\$82
Oman	63%	62%	61%	62%	63%	\$39	\$26	\$23	\$25	\$22
Qatar	51%	51%	54%	58%	60%	\$50	\$26	\$25	\$23	\$21
Reunion	40%	40%	40%	40%	40%	\$1	\$1	\$1	\$0	\$1
Saudi Arabia	51%	52%	51%	52%	52%	\$304	\$272	\$170	\$195	\$178
Senegal	78%	79%	80%	81%	82%	\$5	\$7	\$6	\$6	\$6
South Africa	35%	35%	34%	35%	36%	\$324	\$335	\$284	\$225	\$212
Tunisia	72%	73%	76%	79%	81%	\$44	\$48	\$54	\$55	\$54
Turkey	63%	64%	65%	64%	65%	\$415	\$468	\$365	\$314	\$268
UAE	36%	36%	35%	35%	34%	\$155	\$170	\$94	\$62	\$45
Yemen	90%	89%	89%	—	—	\$10	\$14	\$13	—	—
Zambia	82%	82%	82%	82%	83%	\$2	\$2	\$2	\$2	\$2
Zimbabwe	92%	92%	91%	91%	90%	\$4	\$4	\$3	\$2	\$6
Other Africa	86%	86%	85%	85%	84%	\$260	\$95	\$76	\$49	\$63
Other ME	88%	87%	87%	89%	91%	\$294	\$438	\$448	\$423	\$154
TOTAL MEA	59%	59%	60%	60%	57%	\$2,887	\$2,999	\$2,446	\$1,985	\$1,602
North America										
Canada	29%	32%	33%	34%	33%	\$943	\$1,222	\$1,071	\$784	\$779
Puerto Rico	46%	44%	44%	45%	47%	\$46	\$36	\$33	\$31	\$12
United States	20%	20%	20%	21%	21%	\$8,390	\$9,143	\$8,040	\$7,289	\$6,895
TOTAL NA	21%	21%	21%	22%	22%	\$9,379	\$10,401	\$9,144	\$8,104	\$7,686
Western Europe										
Austria	25%	24%	25%	26%	26%	\$212	\$184	\$157	\$147	\$131
Belgium	25%	25%	25%	27%	28%	\$239	\$269	\$223	\$222	\$257
Cyprus	48%	50%	50%	52%	52%	\$16	\$15	\$14	\$12	\$13
Denmark	26%	25%	25%	25%	27%	\$203	\$215	\$193	\$183	\$199
Finland	25%	26%	25%	27%	26%	\$175	\$194	\$160	\$149	\$156
France	40%	41%	42%	45%	47%	\$2,544	\$2,760	\$2,601	\$2,676	\$3,191
Germany	28%	27%	27%	28%	27%	\$2,023	\$2,152	\$1,937	\$1,642	\$1,920
Greece	58%	57%	58%	61%	64%	\$248	\$238	\$198	\$165	\$157
Iceland	49%	46%	48%	53%	57%	\$11	\$23	\$33	\$32	\$18
Ireland	35%	34%	34%	36%	37%	\$125	\$118	\$106	\$92	\$93
Italy	49%	48%	49%	51%	53%	\$1,733	\$1,895	\$1,779	\$1,403	\$1,564
Luxembourg	21%	21%	21%	—	—	\$30	\$21	\$16	—	—
Malta	45%	45%	46%	45%	45%	\$7	\$8	\$7	\$7	\$5
Netherlands	28%	28%	28%	29%	30%	\$525	\$563	\$502	\$419	\$596
Norway	29%	28%	29%	29%	30%	\$195	\$229	\$195	\$181	\$169
Portugal	40%	42%	43%	43%	43%	\$221	\$212	\$167	\$140	\$104
Spain	42%	42%	43%	46%	46%	\$1,014	\$1,029	\$903	\$865	\$765
Sweden	25%	25%	25%	26%	27%	\$304	\$372	\$324	\$313	\$340
Switzerland	25%	25%	25%	26%	27%	\$344	\$345	\$303	\$324	\$376
United Kingdom	27%	27%	26%	27%	27%	\$1,581	\$2,181	\$1,837	\$1,670	\$1,802
TOTAL WE	34%	33%	33%	34%	35%	\$11,750	\$13,023	\$11,655	\$10,642	\$11,856
TOTAL WORLDWIDE	43%	41%	38%	35%	35%	\$51,443	\$52,998	\$47,809	\$39,698	\$34,482
European Union	35%	35%	35%	36%	36%	\$12,469	\$13,981	\$12,383	\$11,003	\$12,048
BRIC Countries*	71%	73%	75%	77%	81%	\$14,453	\$15,305	\$14,429	\$10,049	\$6,841

*BRIC Countries are Brazil, Russia, India, and China.

The BSA Blueprint for Reducing Software Piracy

The progress made in 2009 — in the midst of a global recession — validates the effectiveness of long term efforts to reduce software theft. There are proven steps that governments around the world can take to effectively reduce software theft:

- Increase public education and awareness, by governments, law enforcement and industry.
- Implement the World Intellectual Property Organization's (WIPO) Copyright Treaty to create an effective legislative environment for copyright protection.
- Create strong and workable intellectual property (IP) enforcement mechanisms, as required by the World Trade Organization's (WTO) Trade-Related Aspects of Intellectual Property Rights Agreement (TRIPS).
- Strengthen enforcement of IP law with dedicated resources, including specialized intellectual property enforcement units and improving cross border cooperation among law enforcement agencies.
- Lead by example by demonstrating a commitment to legal software use through active software asset management (SAM) policies.

About the Study

The 2009 BSA/IDC Global Software Piracy Study covers piracy of all software that runs on PCs, including desktops, laptops, and ultra-portables (including the new netbooks). The study measures operating systems, systems software, such as databases and security packages, and applications software. Legitimate free software and open source software are covered by the scope of the study. Software that runs on servers or mainframes is not included.

Determining the global PC software piracy rate requires collecting 182 discrete data inputs and evaluating PC and software trends and data in each of 116 economies. This work takes more than 6 months, involves IDC proprietary statistics for software and hardware shipments, surveys of 10,000 consumers and business users, and the work of more than 60 IDC analysts from around the world.

For more information about the methodology and a copy of the complete BSA/IDC Global Software Piracy Study, visit www.bsa.org/globalstudy.

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