

# 2010 PIRACY STUDY

MAY 2011

## IN BRIEF

The commercial value of PC software piracy leapt 14 percent globally in 2010 to \$59 billion. This figure has nearly doubled in real terms since 2003. The driving force behind the trend is piracy in the world's emerging economies, where the personal computer market is growing fastest.

### Key findings:

- The global piracy rate dropped by 1 point from 2009 to 42 percent — which remains the second-highest global rate in the study's history.
- Half of the 116 economies studied in 2010 had piracy rates of 62 percent or higher, and two-thirds had at least one software program pirated for every one installed legally.
- Emerging economies now account for more than half the global value of PC software theft, \$31.9 billion.
- Public opinion strongly favors intellectual property (IP) rights: seven PC users in 10 support paying innovators for their creations to promote more technology advances.

- Many PC users lack a clear understanding of whether common ways of acquiring software are legal or illegal, especially in high-piracy markets.
- PC users around the world recognize licensed software to be better than pirated software, with 81 percent saying it is more secure and reliable.

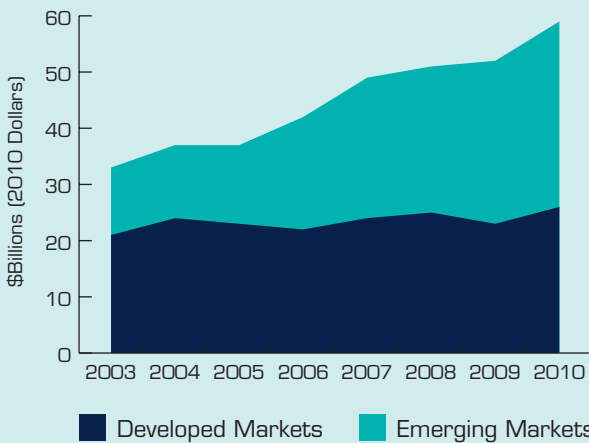
### HIGHEST PIRACY RATES 2010

RANK	COUNTRY	RATE
1	Georgia	93%
2	Zimbabwe	91%
3	Yemen	90%
	Bangladesh	90%
	Moldova	90%
6	Armenia	89%
7	Venezuela	88%
	Belarus	88%
	Azerbaijan	88%
	Libya	88%
11	Indonesia	87%
12	Ukraine	86%
	Sri Lanka	86%
14	Iraq	85%
15	Pakistan	84%
16	Paraguay	83%
	Algeria	83%
	Vietnam	83%
19	Zambia	82%
	Nigeria	82%
	Cameroon	82%
22	Guatemala	80%
	El Salvador	80%
	Bolivia	80%
25	Kenya	79%
	Ivory Coast	79%
	Botswana	79%
	Nicaragua	79%
	Montenegro	79%
30	China	78%
	Senegal	78%

### HIGHEST COMMERCIAL VALUE OF PIRATED SOFTWARE 2010

RANK	COUNTRY	VALUE \$M
1	United States	\$9,515
2	China	\$7,779
3	Russia	\$2,842
4	India	\$2,739
5	Brazil	\$2,619
6	France	\$2,579
7	Germany	\$2,096
8	Italy	\$1,879
9	United Kingdom	\$1,846
10	Japan	\$1,624
11	Indonesia	\$1,322
12	Mexico	\$1,199
13	Spain	\$1,105
14	Canada	\$1,066
15	Thailand	\$777
16	South Korea	\$722
17	Argentina	\$681
18	Venezuela	\$662
19	Australia	\$658
20	Malaysia	\$606
21	Netherlands	\$591
22	Ukraine	\$571
23	Poland	\$553
24	Turkey	\$516
25	South Africa	\$513
26	Switzerland	\$424
27	Saudi Arabia	\$414
28	Vietnam	\$412
29	Sweden	\$411
30	Chile	\$349

### COMMERCIAL VALUE OF PIRATED PC SOFTWARE



Developed markets include: AU, CA, JP, NZ, SG, SK, TW, US and Western Europe. Emerging markets include all others studied.

# PC SOFTWARE PIRACY RATES AND COMMERCIAL VALUE OF UNLICENSED SOFTWARE

	Piracy Rates					Commercial Value of Unlicensed Software (\$M)				
	2010	2009	2008	2007	2006	2010	2009	2008	2007	2006
<b>Asia Pacific</b>										
Australia	24%	25%	26%	28%	29%	\$658	\$550	\$613	\$492	\$515
Bangladesh	90%	91%	92%	92%	92%	\$137	\$127	\$102	\$92	\$90
Brunei	66%	67%	68%	67%	—	\$19	\$14	\$15	\$13	—
China	78%	79%	80%	82%	82%	\$7,779	\$7,583	\$6,677	\$6,664	\$5,429
Hong Kong	45%	47%	48%	51%	53%	\$227	\$218	\$225	\$224	\$180
India	64%	65%	68%	69%	71%	\$2,739	\$2,003	\$2,768	\$2,025	\$1,275
Indonesia	87%	86%	85%	84%	85%	\$1,322	\$886	\$544	\$411	\$350
Japan	20%	21%	21%	23%	25%	\$1,624	\$1,838	\$1,495	\$1,791	\$1,781
Malaysia	56%	58%	59%	59%	60%	\$606	\$453	\$368	\$311	\$289
New Zealand	22%	22%	22%	22%	22%	\$85	\$63	\$75	\$55	\$49
Pakistan	84%	84%	86%	84%	86%	\$217	\$166	\$159	\$125	\$143
Philippines	69%	69%	69%	69%	71%	\$278	\$217	\$202	\$147	\$119
Singapore	34%	35%	36%	37%	39%	\$233	\$197	\$163	\$159	\$125
South Korea	40%	41%	43%	43%	45%	\$722	\$575	\$622	\$549	\$440
Sri Lanka	86%	89%	90%	90%	90%	\$83	\$77	\$97	\$93	\$86
Taiwan	37%	38%	39%	40%	41%	\$252	\$227	\$201	\$215	\$182
Thailand	73%	75%	76%	78%	80%	\$777	\$694	\$609	\$468	\$421
Vietnam	83%	85%	85%	85%	88%	\$412	\$353	\$257	\$200	\$96
Other AP	91%	90%	91%	91%	86%	\$576	\$303	\$69	\$56	\$148
<b>TOTAL AP</b>	<b>60%</b>	<b>59%</b>	<b>61%</b>	<b>59%</b>	<b>55%</b>	<b>\$18,746</b>	<b>\$16,544</b>	<b>\$15,261</b>	<b>\$14,090</b>	<b>\$11,718</b>
<b>Central and Eastern Europe</b>										
Albania	75%	75%	77%	78%	77%	\$6	\$8	\$9	\$11	\$11
Armenia	89%	90%	92%	93%	95%	\$23	\$14	\$7	\$8	\$8
Azerbaijan	88%	88%	90%	92%	94%	\$57	\$52	\$55	\$50	\$51
Belarus	88%	87%	—	—	—	\$126	\$55	—	—	—
Bosnia	66%	66%	67%	68%	68%	\$13	\$14	\$15	\$13	\$14
Bulgaria	65%	67%	68%	68%	69%	\$113	\$115	\$139	\$63	\$50
Croatia	54%	54%	54%	54%	55%	\$70	\$71	\$77	\$68	\$62
Czech Republic	36%	37%	38%	39%	39%	\$195	\$174	\$168	\$161	\$147
Estonia	50%	50%	50%	51%	52%	\$23	\$19	\$21	\$20	\$16
FYROM	66%	67%	68%	68%	69%	\$19	\$15	\$14	\$11	\$10
Georgia	93%	95%	95%	—	—	\$46	\$54	\$59	—	—
Hungary	41%	41%	42%	42%	42%	\$131	\$113	\$146	\$125	\$111
Kazakhstan	76%	78%	78%	79%	81%	\$89	\$74	\$125	\$110	\$85
Latvia	56%	56%	56%	56%	56%	\$30	\$24	\$31	\$29	\$26
Lithuania	54%	54%	54%	56%	57%	\$38	\$31	\$40	\$37	\$31
Moldova	90%	91%	90%	92%	94%	\$36	\$28	\$40	\$43	\$56
Montenegro	79%	81%	83%	83%	82%	\$7	\$11	\$8	\$7	\$6
Poland	54%	54%	56%	57%	57%	\$553	\$506	\$648	\$580	\$484
Romania	64%	65%	66%	68%	69%	\$195	\$183	\$249	\$151	\$114
Russia	65%	67%	68%	73%	80%	\$2,842	\$2,613	\$4,215	\$4,123	\$2,197
Serbia	74%	74%	74%	76%	78%	\$95	\$67	\$99	\$72	\$59
Slovakia	42%	43%	43%	45%	45%	\$63	\$65	\$62	\$54	\$47
Slovenia	47%	46%	47%	48%	48%	\$47	\$39	\$51	\$39	\$36
Ukraine	86%	85%	84%	83%	84%	\$571	\$272	\$534	\$403	\$337
Rest of CEE	89%	88%	88%	88%	90%	\$118	\$56	\$191	\$173	\$166
<b>TOTAL CEE</b>	<b>64%</b>	<b>64%</b>	<b>66%</b>	<b>68%</b>	<b>68%</b>	<b>\$5,506</b>	<b>\$4,673</b>	<b>\$7,003</b>	<b>\$6,351</b>	<b>\$4,124</b>
<b>Latin America</b>										
Argentina	70%	71%	73%	74%	75%	\$681	\$645	\$339	\$370	\$303
Bolivia	80%	80%	81%	82%	82%	\$54	\$40	\$20	\$19	\$15
Brazil	54%	56%	58%	59%	60%	\$2,619	\$2,254	\$1,645	\$1,617	\$1,148
Chile	62%	64%	67%	66%	68%	\$349	\$315	\$202	\$187	\$163
Colombia	54%	55%	56%	58%	59%	\$272	\$244	\$136	\$127	\$111
Costa Rica	58%	59%	60%	61%	64%	\$55	\$33	\$24	\$22	\$27
Dominican Republic	76%	77%	79%	79%	79%	\$87	\$66	\$43	\$39	\$19
Ecuador	67%	67%	66%	66%	67%	\$79	\$65	\$37	\$33	\$30
El Salvador	80%	80%	80%	81%	82%	\$55	\$46	\$28	\$28	\$18
Guatemala	80%	80%	81%	80%	81%	\$106	\$74	\$49	\$41	\$26
Honduras	73%	74%	74%	74%	75%	\$22	\$17	\$9	\$8	\$7
Mexico	58%	60%	59%	61%	63%	\$1,199	\$1,056	\$823	\$836	\$748
Nicaragua	79%	79%	79%	80%	80%	\$8	\$5	\$4	\$4	\$4
Panama	72%	73%	73%	74%	74%	\$68	\$42	\$24	\$22	\$18
Paraguay	83%	82%	83%	82%	82%	\$55	\$29	\$16	\$13	\$10
Peru	68%	70%	71%	71%	71%	\$176	\$124	\$84	\$75	\$59
Uruguay	69%	68%	69%	69%	70%	\$78	\$40	\$25	\$23	\$16
Venezuela	88%	87%	86%	87%	86%	\$662	\$685	\$484	\$464	\$307
Other LA	84%	83%	84%	83%	83%	\$405	\$430	\$319	\$195	\$96
<b>TOTAL LA</b>	<b>64%</b>	<b>63%</b>	<b>65%</b>	<b>65%</b>	<b>66%</b>	<b>\$7,030</b>	<b>\$6,210</b>	<b>\$4,311</b>	<b>\$4,123</b>	<b>\$3,125</b>

	Piracy Rates					Commercial Value of Unlicensed Software (\$M)				
	2010	2009	2008	2007	2006	2010	2009	2008	2007	2006
<b>Middle East and Africa</b>										
Algeria	83%	84%	84%	84%	84%	\$69	\$55	\$96	\$86	\$62
Bahrain	54%	54%	55%	57%	60%	\$22	\$21	\$27	\$27	\$23
Botswana	79%	79%	80%	82%	81%	\$15	\$11	\$14	\$14	\$12
Cameroon	82%	83%	83%	84%	84%	\$7	\$7	\$6	\$5	\$5
Egypt	60%	59%	59%	60%	63%	\$196	\$146	\$158	\$131	\$88
Iraq	85%	85%	85%	85%	—	\$147	\$129	\$205	\$124	—
Israel	31%	33%	32%	32%	32%	\$170	\$148	\$172	\$121	\$102
Ivory Coast	79%	79%	80%	81%	82%	\$13	\$14	\$15	\$15	\$16
Jordan	57%	57%	58%	60%	61%	\$28	\$26	\$22	\$20	\$19
Kenya	79%	79%	80%	81%	80%	\$85	\$66	\$31	\$28	\$22
Kuwait	60%	60%	61%	62%	64%	\$68	\$62	\$69	\$61	\$60
Lebanon	72%	72%	74%	73%	73%	\$49	\$46	\$49	\$44	\$39
Libya	88%	88%	87%	88%	—	\$74	\$25	\$22	\$22	—
Mauritius	56%	56%	57%	57%	59%	\$5	\$4	\$5	\$4	\$3
Morocco	65%	66%	66%	67%	66%	\$75	\$64	\$70	\$66	\$53
Nigeria	82%	83%	83%	82%	82%	\$225	\$156	\$132	\$114	\$100
Oman	62%	63%	62%	61%	62%	\$33	\$39	\$26	\$23	\$25
Qatar	49%	51%	51%	54%	58%	\$52	\$50	\$26	\$25	\$23
Reunion	40%	40%	40%	40%	40%	\$1	\$1	\$1	\$1	\$0
Saudi Arabia	52%	51%	52%	51%	52%	\$414	\$304	\$272	\$170	\$195
Senegal	78%	78%	79%	80%	81%	\$7	\$5	\$7	\$6	\$6
South Africa	35%	35%	35%	34%	35%	\$513	\$324	\$335	\$284	\$225
Tunisia	72%	72%	73%	76%	79%	\$52	\$44	\$48	\$54	\$55
Turkey	62%	63%	64%	65%	64%	\$516	\$415	\$468	\$365	\$314
UAE	36%	36%	36%	35%	35%	\$173	\$155	\$170	\$94	\$62
Yemen	90%	90%	89%	89%	—	\$12	\$10	\$14	\$13	—
Zambia	82%	82%	82%	82%	82%	\$3	\$2	\$2	\$2	\$2
Zimbabwe	91%	92%	92%	91%	91%	\$6	\$4	\$4	\$3	\$2
<b>Other Africa</b>	87%	86%	86%	85%	85%	\$418	\$260	\$95	\$76	\$49
<b>Other ME</b>	88%	88%	87%	87%	89%	\$630	\$294	\$438	\$448	\$423
<b>TOTAL MEA</b>	<b>58%</b>	<b>59%</b>	<b>59%</b>	<b>60%</b>	<b>60%</b>	<b>\$4,078</b>	<b>\$2,887</b>	<b>\$2,999</b>	<b>\$2,446</b>	<b>\$1,985</b>
<b>North America</b>										
Canada	28%	29%	32%	33%	34%	\$1,066	\$943	\$1,222	\$1,071	\$784
Puerto Rico	42%	46%	44%	44%	45%	\$42	\$46	\$36	\$33	\$31
United States	20%	20%	20%	20%	21%	\$9,515	\$8,390	\$9,143	\$8,040	\$7,289
<b>TOTAL NA</b>	<b>21%</b>	<b>21%</b>	<b>21%</b>	<b>21%</b>	<b>22%</b>	<b>\$10,623</b>	<b>\$9,379</b>	<b>\$10,401</b>	<b>\$9,144</b>	<b>\$8,104</b>
<b>Western Europe</b>										
Austria	24%	25%	24%	25%	26%	\$209	\$212	\$184	\$157	\$147
Belgium	25%	25%	25%	25%	27%	\$233	\$239	\$269	\$223	\$222
Cyprus	48%	48%	50%	50%	52%	\$17	\$16	\$15	\$14	\$12
Denmark	26%	26%	25%	25%	25%	\$208	\$203	\$215	\$193	\$183
Finland	25%	25%	26%	25%	27%	\$193	\$175	\$194	\$160	\$149
France	39%	40%	41%	42%	45%	\$2,579	\$2,544	\$2,760	\$2,601	\$2,676
Germany	27%	28%	27%	27%	28%	\$2,096	\$2,023	\$2,152	\$1,937	\$1,642
Greece	59%	58%	57%	58%	61%	\$301	\$248	\$238	\$198	\$165
Iceland	49%	49%	46%	48%	53%	\$16	\$11	\$23	\$33	\$32
Ireland	35%	35%	34%	34%	36%	\$137	\$125	\$118	\$106	\$92
Italy	49%	49%	48%	49%	51%	\$1,879	\$1,733	\$1,895	\$1,779	\$1,403
Luxembourg	20%	21%	21%	21%	—	\$31	\$30	\$21	\$16	—
Malta	43%	45%	45%	46%	45%	\$6	\$7	\$8	\$7	\$7
Netherlands	28%	28%	28%	28%	29%	\$591	\$525	\$563	\$502	\$419
Norway	29%	29%	28%	29%	29%	\$261	\$195	\$229	\$195	\$181
Portugal	40%	40%	42%	43%	43%	\$228	\$221	\$212	\$167	\$140
Spain	43%	42%	42%	43%	46%	\$1,105	\$1,014	\$1,029	\$903	\$865
Sweden	25%	25%	25%	25%	26%	\$411	\$304	\$372	\$324	\$313
Switzerland	26%	25%	25%	25%	26%	\$424	\$344	\$345	\$303	\$324
United Kingdom	27%	27%	27%	26%	27%	\$1,846	\$1,581	\$2,181	\$1,837	\$1,670
<b>TOTAL WE</b>	<b>33%</b>	<b>34%</b>	<b>33%</b>	<b>33%</b>	<b>34%</b>	<b>\$12,771</b>	<b>\$11,750</b>	<b>\$13,023</b>	<b>\$11,655</b>	<b>\$10,642</b>
<b>TOTAL WORLDWIDE</b>	<b>42%</b>	<b>43%</b>	<b>41%</b>	<b>38%</b>	<b>35%</b>	<b>\$58,754</b>	<b>\$51,443</b>	<b>\$52,998</b>	<b>\$47,809</b>	<b>\$39,698</b>
<b>European Union</b>	35%	35%	35%	35%	36%	\$13,458	\$12,469	\$13,981	\$12,383	\$11,003
<b>BRIC Countries*</b>	71%	71%	73%	75%	77%	\$15,979	\$14,453	\$15,305	\$14,429	\$10,049

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

## The BSA Blueprint for Reducing Software Piracy

The gradual progress many countries are making in lowering piracy rates demonstrates the value of sustained anti-piracy efforts that build equity over time. There are proven steps that governments around the world can take to effectively reduce software theft:

- Increase public education and raise awareness about software piracy and IP rights in cooperation with industry and law enforcement.
- Implement the World Intellectual Property Organization's Copyright Treaty to create an effective legislative environment for copyright protection.
- Create strong and workable IP enforcement mechanisms, as required by the World Trade Organization's agreement on Trade-Related Aspects of Intellectual Property Rights.
- Strengthen enforcement of IP laws with dedicated resources, including specialized enforcement units, training for law enforcement and judiciary officials, and improved cross-border cooperation among law enforcement agencies.
- Lead by example by demonstrating a commitment to legal software use through active software asset management policies.

## About the Study

The BSA Global Software Piracy Study, conducted in partnership with IDC and Ipsos Public Affairs, incorporates 182 discrete data inputs for each of 116 national and regional economies studied. IDC analysts in nearly 100 countries spend more than six months collecting and evaluating PC and software trend data, while Ipsos surveys approximately 15,000 consumer and business PC users around the world.

The study covers piracy of all software that runs on PCs, including desktops, laptops, and ultra-portables. It measures operating systems, systems software (such as databases and security packages), and applications software. Legitimate free software and open-source software are included.

For more information about the methodology and a copy of the complete report, visit [www.bsa.org/globalstudy](http://www.bsa.org/globalstudy).

### BUSINESS SOFTWARE ALLIANCE GLOBAL OFFICES

[WWW.BSA.ORG](http://WWW.BSA.ORG)

#### BSA WORLDWIDE HEADQUARTERS

1150 18th Street, NW  
Suite 700  
Washington, DC 20036  
T: +1.202.872.5500  
F: +1.202.872.5501

#### BSA ASIA-PACIFIC

300 Beach Road  
#25-08 The Concourse  
Singapore 199555  
T: +65.6292.2072  
F: +65.6292.6369

#### BSA EUROPE, MIDDLE EAST & AFRICA

2 Queen Anne's Gate Buildings  
Dartmouth Street  
London, SW1H 9BP  
United Kingdom  
T: +44.207.340.6080  
F: +44.207.340.6090

Bangkok, Thailand   Beijing, China   Brussels, Belgium   Hanoi, Vietnam   Jakarta, Indonesia   Kuala Lumpur, Malaysia  
München, Germany   New Delhi, India   São Paulo, Brazil   Taipei, Taiwan   Tokyo, Japan