

IN BRIEF

Over half of the world's personal computer users — 57 percent — admit to pirating software. Thirty-one percent say they do it "all of the time," "most of the time," or "occasionally," and another 26 percent admit to having stolen software, but only "rarely." These are among the findings of a survey of nearly 15,000 computer users across 33 countries conducted as part of the ninth annual BSA Global Software Piracy Study. Among the findings:

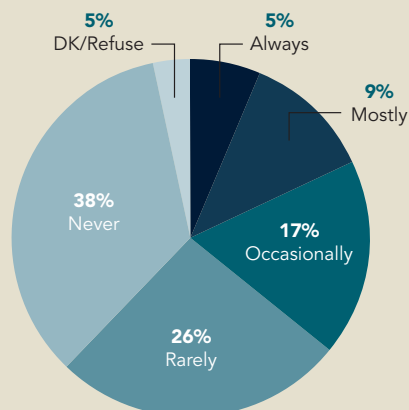
- The global piracy rate for PC software hovers at 42 percent.
- The commercial value of this shadow market of pirated software climbed from \$58.8 billion in 2010 to \$63.4 billion in 2011, a new record, propelled by PC shipments to emerging economies where piracy rates are highest.
- The gap in spending on legal software in emerging and mature economies is stubbornly persistent. China, for example, spends less than a quarter of the amount that Russia, India, and Brazil spend on a per-PC basis — and just 7 percent of the amount the United States spends.
- Users who say they pirate the most software are disproportionately young and male — and they install more software of all types on their computers than other users do.
- Business decision makers admit to pirating software more frequently than other computer users do.
- Public opinion continues to support intellectual property (IP) rights: Seven PC users in 10 support paying innovators to promote more technological advances.

Top 20 Economies in Commercial Value of Pirated PC Software, 2011

	Pirated Value (\$M)	Legal Sales (\$M)	Piracy Rate
US	\$9,773	\$41,664	19%
China	\$8,902	\$2,659	77%
Russia	\$3,227	\$1,895	63%
India	\$2,930	\$1,721	63%
Brazil	\$2,848	\$2,526	53%
France	\$2,754	\$4,689	37%
Germany	\$2,265	\$6,447	26%
Italy	\$1,945	\$2,107	48%
UK	\$1,943	\$5,530	26%
Japan	\$1,875	\$7,054	21%
Indonesia	\$1,467	\$239	86%
Mexico	\$1,249	\$942	57%
Spain	\$1,216	\$1,548	44%
Canada	\$1,141	\$3,085	27%
Thailand	\$852	\$331	72%
South Korea	\$815	\$1,223	40%
Australia	\$763	\$2,554	23%
Venezuela	\$668	\$91	88%
Malaysia	\$657	\$538	55%
Argentina	\$657	\$295	69%

Global Self-Reported Piracy

"How often do you acquire pirated software or software that is not fully licensed — all of the time, most of the time, occasionally, rarely, or never?"



PC SOFTWARE PIRACY RATES AND COMMERCIAL VALUE OF UNLICENSED SOFTWARE

	Piracy Rates					Commercial Value of Unlicensed Software (\$M)				
	2011	2010	2009	2008	2007	2011	2010	2009	2008	2007
Asia Pacific										
Australia	23%	24%	25%	26%	28%	\$763	\$658	\$550	\$613	\$492
Bangladesh	90%	90%	91%	92%	92%	\$147	\$137	\$127	\$102	\$92
Brunei	67%	66%	67%	68%	67%	\$25	\$19	\$14	\$15	\$13
China	77%	78%	79%	80%	82%	\$8,902	\$7,779	\$7,583	\$6,677	\$6,664
Hong Kong	43%	45%	47%	48%	51%	\$232	\$227	\$218	\$225	\$224
India	63%	64%	65%	68%	69%	\$2,930	\$2,739	\$2,003	\$2,768	\$2,025
Indonesia	86%	87%	86%	85%	84%	\$1,467	\$1,322	\$886	\$544	\$411
Japan	21%	20%	21%	21%	23%	\$1,875	\$1,624	\$1,838	\$1,495	\$1,791
Malaysia	55%	56%	58%	59%	59%	\$657	\$606	\$453	\$368	\$311
New Zealand	22%	22%	22%	22%	22%	\$99	\$85	\$63	\$75	\$55
Pakistan	86%	84%	84%	86%	84%	\$278	\$217	\$166	\$159	\$125
Philippines	70%	69%	69%	69%	69%	\$338	\$278	\$217	\$202	\$147
Singapore	33%	34%	35%	36%	37%	\$255	\$233	\$197	\$163	\$159
South Korea	40%	40%	41%	43%	43%	\$815	\$722	\$575	\$622	\$549
Sri Lanka	84%	86%	89%	90%	90%	\$86	\$83	\$77	\$97	\$93
Taiwan	37%	37%	38%	39%	40%	\$293	\$252	\$227	\$201	\$215
Thailand	72%	73%	75%	76%	78%	\$852	\$777	\$694	\$609	\$468
Vietnam	81%	83%	85%	85%	85%	\$395	\$412	\$353	\$257	\$200
Other AP	91%	91%	90%	91%	91%	\$589	\$576	\$303	\$69	\$56
TOTAL AP	60%	60%	59%	61%	59%	\$20,998	\$18,746	\$16,544	\$15,261	\$14,090
Central and Eastern Europe										
Albania	75%	75%	75%	77%	78%	\$6	\$6	\$8	\$9	\$11
Armenia	88%	89%	90%	92%	93%	\$26	\$23	\$14	\$7	\$8
Azerbaijan	87%	88%	88%	90%	92%	\$67	\$57	\$52	\$55	\$50
Belarus	87%	88%	87%	—	—	\$87	\$126	\$55	—	—
Bosnia	66%	66%	66%	67%	68%	\$15	\$13	\$14	\$15	\$13
Bulgaria	64%	65%	67%	68%	68%	\$102	\$113	\$115	\$139	\$63
Croatia	53%	54%	54%	54%	54%	\$74	\$70	\$71	\$77	\$68
Czech Republic	35%	36%	37%	38%	39%	\$214	\$195	\$174	\$168	\$161
Estonia	48%	50%	50%	50%	51%	\$25	\$23	\$19	\$21	\$20
FYROM	66%	66%	67%	68%	68%	\$22	\$19	\$15	\$14	\$11
Georgia	91%	93%	95%	95%	—	\$52	\$46	\$54	\$59	—
Hungary	41%	41%	41%	42%	42%	\$143	\$131	\$113	\$146	\$125
Kazakhstan	76%	76%	78%	78%	79%	\$123	\$89	\$74	\$125	\$110
Latvia	54%	56%	56%	56%	56%	\$32	\$30	\$24	\$31	\$29
Lithuania	54%	54%	54%	54%	56%	\$44	\$38	\$31	\$40	\$37
Moldova	90%	90%	91%	90%	92%	\$45	\$36	\$28	\$40	\$43
Montenegro	79%	79%	81%	83%	83%	\$7	\$7	\$11	\$8	\$7
Poland	53%	54%	54%	56%	57%	\$618	\$553	\$506	\$648	\$580
Romania	63%	64%	65%	66%	68%	\$207	\$195	\$183	\$249	\$151
Russia	63%	65%	67%	68%	73%	\$3,227	\$2,842	\$2,613	\$4,215	\$4,123
Serbia	72%	74%	74%	74%	76%	\$104	\$95	\$67	\$99	\$72
Slovakia	40%	42%	43%	43%	45%	\$68	\$63	\$65	\$62	\$54
Slovenia	46%	47%	46%	47%	48%	\$51	\$47	\$39	\$51	\$39
Ukraine	84%	86%	85%	84%	83%	\$647	\$571	\$272	\$534	\$403
Rest of CEE	90%	89%	88%	88%	88%	\$127	\$118	\$56	\$191	\$173
TOTAL CEE	62%	64%	64%	66%	68%	\$6,133	\$5,506	\$4,673	\$7,003	\$6,351
Latin America										
Argentina	69%	70%	71%	73%	74%	\$657	\$681	\$645	\$339	\$370
Bolivia	79%	80%	80%	81%	82%	\$59	\$54	\$40	\$20	\$19
Brazil	53%	54%	56%	58%	59%	\$2,848	\$2,619	\$2,254	\$1,645	\$1,617
Chile	61%	62%	64%	67%	66%	\$382	\$349	\$315	\$202	\$187
Colombia	53%	54%	55%	56%	58%	\$295	\$272	\$244	\$136	\$127
Costa Rica	58%	58%	59%	60%	61%	\$62	\$55	\$33	\$24	\$22
Dominican Republic	76%	76%	77%	79%	79%	\$93	\$87	\$66	\$43	\$39
Ecuador	68%	67%	67%	66%	66%	\$92	\$79	\$65	\$37	\$33
El Salvador	80%	80%	80%	80%	81%	\$58	\$55	\$46	\$28	\$28
Guatemala	79%	80%	80%	81%	80%	\$116	\$106	\$74	\$49	\$41
Honduras	73%	73%	74%	74%	74%	\$24	\$22	\$17	\$9	\$8
Mexico	57%	58%	60%	59%	61%	\$1,249	\$1,199	\$1,056	\$823	\$836
Nicaragua	79%	79%	79%	79%	80%	\$9	\$8	\$5	\$4	\$4
Panama	72%	72%	73%	73%	74%	\$74	\$68	\$42	\$24	\$22
Paraguay	83%	83%	82%	83%	82%	\$73	\$55	\$29	\$16	\$13
Peru	67%	68%	70%	71%	71%	\$209	\$176	\$124	\$84	\$75
Uruguay	68%	69%	68%	69%	69%	\$85	\$78	\$40	\$25	\$23
Venezuela	88%	88%	87%	86%	87%	\$668	\$662	\$685	\$484	\$464
Other LA	84%	84%	83%	84%	83%	\$406	\$405	\$430	\$319	\$195
TOTAL LA	61%	64%	63%	65%	65%	\$7,459	\$7,030	\$6,210	\$4,311	\$4,123

SHADOW MARKET

2011 BSA GLOBAL SOFTWARE PIRACY STUDY

	Piracy Rates					Commercial Value of Unlicensed Software (\$M)				
	2011	2010	2009	2008	2007	2011	2010	2009	2008	2007
Middle East and Africa										
Algeria	84%	83%	84%	84%	84%	\$83	\$69	\$55	\$96	\$86
Bahrain	54%	54%	54%	55%	57%	\$23	\$22	\$21	\$27	\$27
Botswana	80%	79%	79%	80%	82%	\$16	\$15	\$11	\$14	\$14
Cameroon	83%	82%	83%	83%	84%	\$9	\$7	\$7	\$6	\$5
Egypt	61%	60%	59%	59%	60%	\$172	\$196	\$146	\$158	\$131
Iraq	86%	85%	85%	85%	85%	\$172	\$147	\$129	\$205	\$124
Israel	31%	31%	33%	32%	32%	\$192	\$170	\$148	\$172	\$121
Ivory Coast	81%	79%	79%	80%	81%	\$16	\$13	\$14	\$15	\$15
Jordan	58%	57%	57%	58%	60%	\$31	\$28	\$26	\$22	\$20
Kenya	78%	79%	79%	80%	81%	\$85	\$85	\$66	\$31	\$28
Kuwait	59%	60%	60%	61%	62%	\$72	\$68	\$62	\$69	\$61
Lebanon	71%	72%	72%	74%	73%	\$52	\$49	\$46	\$49	\$44
Libya	90%	88%	88%	87%	88%	\$60	\$74	\$25	\$22	\$22
Mauritius	57%	56%	56%	57%	57%	\$7	\$5	\$4	\$5	\$4
Morocco	66%	65%	66%	66%	67%	\$91	\$75	\$64	\$70	\$66
Nigeria	82%	82%	83%	83%	82%	\$251	\$225	\$156	\$132	\$114
Oman	61%	62%	63%	62%	61%	\$36	\$33	\$39	\$26	\$23
Qatar	50%	49%	51%	51%	54%	\$62	\$52	\$50	\$26	\$25
Reunion	40%	40%	40%	40%	40%	\$1	\$1	\$1	\$1	\$1
Saudi Arabia	51%	52%	51%	52%	51%	\$449	\$414	\$304	\$272	\$170
Senegal	78%	78%	78%	79%	80%	\$9	\$7	\$5	\$7	\$6
South Africa	35%	35%	35%	35%	34%	\$564	\$513	\$324	\$335	\$284
Tunisia	74%	72%	72%	73%	76%	\$51	\$52	\$44	\$48	\$54
Turkey	62%	62%	63%	64%	65%	\$526	\$516	\$415	\$468	\$365
UAE	37%	36%	36%	36%	35%	\$208	\$173	\$155	\$170	\$94
Yemen	89%	90%	90%	89%	89%	\$15	\$12	\$10	\$14	\$13
Zambia	82%	82%	82%	82%	82%	\$3	\$3	\$2	\$2	\$2
Zimbabwe	92%	91%	92%	92%	91%	\$4	\$6	\$4	\$4	\$3
Other Africa	86%	87%	86%	86%	85%	\$363	\$418	\$260	\$95	\$76
Other ME	87%	88%	88%	87%	87%	\$536	\$630	\$294	\$438	\$448
TOTAL MEA	58%	58%	59%	59%	60%	\$4,159	\$4,078	\$2,887	\$2,999	\$2,446
North America										
Canada	27%	28%	29%	32%	33%	\$1,141	\$1,066	\$943	\$1,222	\$1,071
Puerto Rico	42%	42%	46%	44%	44%	\$44	\$42	\$46	\$36	\$33
United States	19%	20%	20%	20%	20%	\$9,773	\$9,515	\$8,390	\$9,143	\$8,040
TOTAL NA	19%	21%	21%	21%	21%	\$10,958	\$10,623	\$9,379	\$10,401	\$9,144
Western Europe										
Austria	23%	24%	25%	24%	25%	\$226	\$209	\$212	\$184	\$157
Belgium	24%	25%	25%	25%	25%	\$252	\$233	\$239	\$269	\$223
Cyprus	48%	48%	48%	50%	50%	\$19	\$17	\$16	\$15	\$14
Denmark	24%	26%	26%	25%	25%	\$222	\$208	\$203	\$215	\$193
Finland	25%	25%	25%	26%	25%	\$210	\$193	\$175	\$194	\$160
France	37%	39%	40%	41%	42%	\$2,754	\$2,579	\$2,544	\$2,760	\$2,601
Germany	26%	27%	28%	27%	27%	\$2,265	\$2,096	\$2,023	\$2,152	\$1,937
Greece	61%	59%	58%	57%	58%	\$343	\$301	\$248	\$238	\$198
Iceland	48%	49%	49%	46%	48%	\$17	\$16	\$11	\$23	\$33
Ireland	34%	35%	35%	34%	34%	\$144	\$137	\$125	\$118	\$106
Italy	48%	49%	49%	48%	49%	\$1,945	\$1,879	\$1,733	\$1,895	\$1,779
Luxembourg	20%	20%	21%	21%	21%	\$33	\$31	\$30	\$21	\$16
Malta	43%	43%	45%	45%	46%	\$7	\$6	\$7	\$8	\$7
Netherlands	27%	28%	28%	28%	28%	\$644	\$591	\$525	\$563	\$502
Norway	27%	29%	29%	28%	29%	\$289	\$261	\$195	\$229	\$195
Portugal	40%	40%	40%	42%	43%	\$245	\$228	\$221	\$212	\$167
Spain	44%	43%	42%	42%	43%	\$1,216	\$1,105	\$1,014	\$1,029	\$903
Sweden	24%	25%	25%	25%	25%	\$461	\$411	\$304	\$372	\$324
Switzerland	25%	26%	25%	25%	25%	\$514	\$424	\$344	\$345	\$303
United Kingdom	26%	27%	27%	27%	26%	\$1,943	\$1,846	\$1,581	\$2,181	\$1,837
TOTAL WE	32%	33%	34%	33%	33%	\$13,749	\$12,771	\$11,750	\$13,023	\$11,655
TOTAL WORLDWIDE	42%	42%	43%	41%	38%	\$63,456	\$58,754	\$51,443	\$52,998	\$47,809
European Union	33%	35%	35%	35%	35%	\$14,433	\$13,458	\$12,469	\$13,981	\$12,383
BRIC Countries*	70%	71%	71%	73%	75%	\$17,907	\$15,979	\$14,453	\$15,305	\$14,429

*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.
- Modernize protections for software and other copyrighted materials to keep pace with new innovations such as cloud computing and the proliferation of networked mobile devices.
- Strengthen enforcement of IP laws with dedicated resources, including specialized enforcement units, training for law enforcement and judiciary officials, improved cross-border cooperation among law enforcement agencies, and fulfillment of obligations under the World Trade Organization's Agreement on Trade-Related Aspects of Intellectual Property Rights (TRIPS).
- Lead by example by using only fully licensed software, implementing software asset management (SAM) programs, and promoting the use of legal software in state-owned enterprises, and among all contractors and suppliers.

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 netbooks. 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.

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