

PROFITING FROM PIRACY

HOW CORPORATIONS ENABLE DIGITAL THEFT

2011
GLOBAL
Forum

PREPARED FOR:

CANADIAN MUSIC WEEK

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Global Forum 2011

Executive Summary

"Piracy is profitable."

"We're not demonizing the end user; we're talking about people stealing...and then making money off of what we've created."

These are the words of filmmaker Ellen Seidler, who delivered an electrifying opening address on content piracy – i.e. digital theft – at the fifth Global Forum event held at Canadian Music Week 2011.

With the near-immediate posting of her film, *And Then Came Lola*, to a series of cyberlockers filled with illegally acquired content, Seidler – a 25-year veteran of the film and broadcasting business – laments that she experienced firsthand "what it's like to have your work stolen from you." Her subsequent research and investigations into digital theft led her to become, "a reluctant anti-piracy advocate".

Seidler's opening remarks formed the core of discussion for more than 170 international music industry leaders who attended the Canadian Music Week 2011 Global Forum held in March, in Toronto.

Her presentation provided a compelling description of the economics of piracy. By following the trail left by the piracy of her own film, she illustrates how money is earned by both those who illegally acquire content and by legitimate businesses that enable piracy. Specifically, sites that host illegal content raise money in two ways:

- Through subscriber fees that can be charged to users for faster downloads, facilitated by some of the world's major financial companies such as PayPal, MasterCard, Visa and American Express; and
- Advertising revenue which funnels money to both the content pirates and ad service providers – of which search engine giant Google is the largest in the world.

In the chain of events that provides stolen content to consumers, the creators of that content are the ones who lose.

Through roundtable discussion and survey responses that followed Seidler's remarks, Global Forum participants expressed overwhelming support for action that can be summarized in the following recommendations.

1. Whereas advertising revenue facilitates the online piracy of copyrighted materials and ad service providers are integral to this transaction, ad service providers should be required by law to prohibit the use of their services on websites hosting infringing content.
2. Whereas pirate websites sustain their operations in part through subscriber fees and the payment of these fees is made possible through financial institutions, these financial institutions should be required by law to deny their services to websites trafficking in illegal content.
3. Whereas search engines have the capability to filter their search results, search engines should be required by law to block search results to illegal content or products.

Global Forum 2011

Executive Summary

4. Internet service providers should be required by law to participate in a graduated response system that identifies and removes illegal content.

The Canadian Music Week Global Forum is now in its fifth consecutive year, and has established a tradition of bringing together some of the international music industry's leading thinkers for a morning of discussion about the most important challenges of the day and their possible solutions.

Content piracy, also referred to as digital theft, remains among the most pressing of these challenges.

As testimony to the pervasive nature of piracy, this year's event opened with a compelling presentation from a creator and anti-piracy advocate representing the film industry which has also experienced rampant digital theft on a global scale.

Ellen Seidler is a 25-year veteran of both the film and broadcasting industries, and has worked as a cinematographer, producer and director on a number of independent feature films, shorts and videos – including as writer, producer and co-director of the 2009 film *And Then Came Lola*, the illegal use of which sparked Seidler's passion for investigating and fighting piracy.

Seidler's anti-piracy crusade has led her to take on some of the world's most powerful corporations – including major advertisers, financial institutions, and advertising service providers such as Google.

Following Seidler's opening remarks and presentation, she was joined by Graham Henderson, President of the Canadian Recording Industry Association, and John Lewis, Vice-President and Director of Canadian Affairs for the International Alliance of Theatrical Stage Employees (IATSE) for a panel discussion on digital theft and ways to combat it.

Following the panel discussion, 170 Forum participants were divided into 20 roundtables for discussion and debate on the issues. Each roundtable discussion was led by a music specialist facilitator.

At the conclusion of each roundtable discussion, participants were asked to complete a brief survey designed to gather views on piracy and other opinions and perspectives on the state of the music industry in Canada and around the world.

The Canadian Music Week Global Forum 2011 Report is based on (i) scribe notes taken during roundtable discussions, (ii) survey results and (iii) observations of roundtable proceedings.

Our Report is divided into three parts, with each part based on a summary of opening remarks, panel remarks, roundtable discussions and survey results.

Global Forum 2011

Executive Summary

Part I of our Report summarizes the perspectives of Forum participants on **The State of the Music Industry – Canada and Worldwide.**

Part II summarizes Ellen Seidler's key messages, the views of the panel and points raised during roundtable discussions concerning **Digital Theft: Google, Advertising and the Growth of Content Piracy.** How has content piracy become so pervasive? How do pirates make money? What are the implications for success on the piracy battlefield when the likes of Google assume the role of opponent?

Part III examines perspectives on **The Role of ISPs, Government and Creators in Anti-piracy Action,** i.e. in bringing about solutions to content piracy. Who is responsible? Who should take the lead? Are there other effective models?



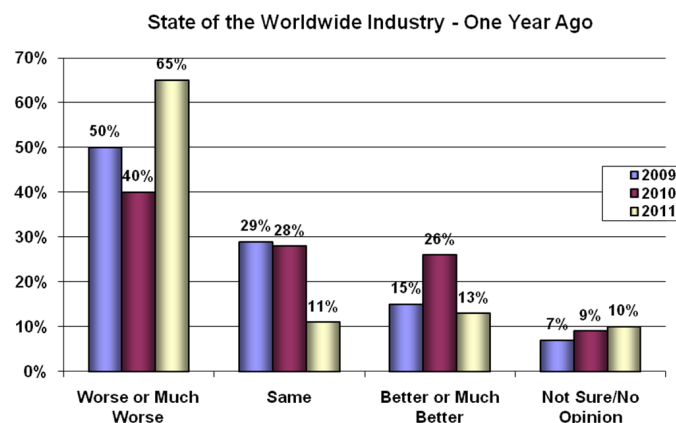
**PART I:
THE STATE OF MUSIC INDUSTRY
IN CANADA AND THE WORLD**



Part I: The State of Music Industry in Canada and the World

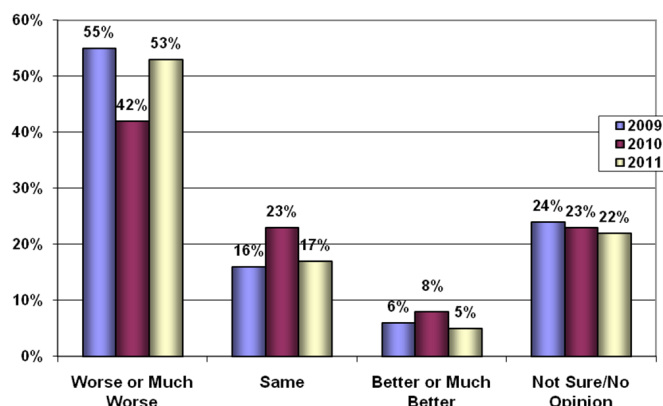
As was the case for Global Forum workshops held in each of the four previous years, participants are deeply influenced by current events in the economy, public policy and technology development. Discussion at this year's Forum took place as new Canadian copyright legislation – Bill C-32 – was winding its way through the federal legislature with a very real prospect of dying on the order paper with an election call.¹

On the question of the state of the worldwide music industry we are able to compare the assessment of Forum participants over the last three years. As demonstrated below, throughout that timeframe Forum participants have observed significant decline in the state of the music industry around the world.



In 2009, 50 percent of respondents suggested that the worldwide music industry was either 'worse or much worse' than a year prior. Just 40 percent of respondents felt that way in 2010 but this year, respondents perceive a more rapid decline in the 12 month period preceding the survey with 66 percent – fully two-thirds – of respondents suggesting that things in the worldwide music industry were either 'worse or much worse'. By contrast, just 13 percent of participants indicated that the industry has improved since 2010 – one-half of the 26 percent that indicated improvement in the 2010 survey.

State of the Canadian Industry - One Year Ago



In the view of the 2011 Global Forum participants, the state of the Canadian industry has also declined over the past year. In 2010, 42 percent of participants viewed the Canadian industry as in 'worse or much worse' shape, compared with 53 percent this year. Those who indicated an improvement made up only 5 percent of respondents this year while in 2010, 8 percent of participants indicated they felt there had been an improvement over the previous year.

Participants were also asked to project their views on the state of the industry one year from now. The prospects, participants suggested, are gloomier than they were one year ago.

In a year from today, do you think the situation in the music industry worldwide will have gotten worse, better or be more or less the same?



In 2010, participants were more optimistic, with 35 percent predicting improvement and just 26 percent suggesting things would get worse.

Overall, roundtable participants were less optimistic about the state of the music industry this year than they were in 2010. One issue clouding the future may be the critical and ever-growing challenge of content piracy – the core issue of the 2011 Global Forum.

¹ In fact, a federal election was called on March 26, 2011.



PART II:
DIGITAL THEFT: GOOGLE, ADVERTISING AND
THE GROWTH OF CONTENT PIRACY



Part II – Digital Theft: Google, Advertising and the Growth of Content Piracy

Keynote speaker, Ellen Seidler provided a compelling example of content piracy. Unauthorized copies of the film that she wrote, produced and co-directed, *And Then Came Lola*, were available online just 24 hours after its release on DVD.

One month later, some 35,000 links and streams for the film were available online. And as Seidler noted, “Those were just the ones we counted...and could be multiplied by hundreds or thousands...”

According to Seidler, the reason her film was so heavily pirated lay not in the quality of the film or its popularity with audiences but because, “*Piracy is profitable.*”

Piracy, she explained, is enabled by advancements in technology which allow HD streaming of movies, easy downloading from anonymous ‘cyberlocker’ websites, and, in turn, steady, low-risk income for content pirates.²

Income tends to be generated in two ways. First of all, visitors to the site can pay for faster downloading. A regular speed download might be available at no charge; but a number of sites offer a higher or premium speed download for a fee – typically, in the form of a subscription. As Seidler stated, “Easier downloads mean easier profits.”

The use of anonymous and easy-to-use payment processing from companies such as PayPal, MasterCard, American Express and Visa – who in turn earn a fee from processing subscription payments – makes this income stream possible and efficient.

The second and perhaps more lucrative income stream described by Seidler, is advertising revenue generated through the placement of advertising on websites that offer movies or download links to illegally acquired content. Pirates make money from advertisers who purchase clickable space on their site.

Once again these transactions are facilitated by a legitimate company, in this case, an ad service provider.

The biggest ad service provider in the world is Google. According to Seidler, in the last quarter of 2010 alone, 30 percent (or \$2.5B) of Google’s total revenues were generated from its advertising service arm, AdSense. As Seidler pointed out, at least some portion of Google AdSense revenues is generated by websites that provide access to illegal materials.

Through a video-assisted demonstration³ Seidler showed that when one visits a cyberlocker site and clicks on a link to a film, one typically ends up on another ad-filled site – with ads provided by Google or another ad service provider. The pirated content thus serves as the driver of traffic to ad-supported websites.

In fact, as Seidler pointed out, everyone makes money in the chain of events that offers stolen content to the public – with the exception of creators.

In Seidler’s experience, advertisers react in various ways when confronted with the knowledge that their ads appear on pirate sites. Some claim they have little control over the placement of their ads in the online environment while others will endeavour to remove their ads (just as they would from a site with links to pornography). As for the ad service providers that place the ads in the first place, Seidler’s experience leaves the impression that they have little if any motivation to alter their practices.

Moreover, Seidler says that remedies to date – such as issuing Digital Millennium Copyright Act (DMCA) Notices to these enablers appear largely ineffective. In the case of Google in the U.S., Seidler found Google reticent to accept responsibility or take action that could include deactivating ads on cyberlocker sites that have been reported for infringement.

²Based on a definition provided by Ellen Seidler during her remarks, a cyberlocker is a file-based storage site such as Megaupload that facilitates the anonymous distribution of pirated content. It is hard to know exactly how many cyberlocker sites are out there, as more appear everyday – and those that might be shut down soon re-appear under a different name.

³A video of Ellen Seidler’s presentation is available at <http://vimeo.com/fastgirl-films/whoprofitsfrompiracy>

Part II – Digital Theft: Google, Advertising and the Growth of Content Piracy

Nonetheless, Seidler noted some possible solutions:

- Enforcement through legislation - legal responsibility would be assigned to “ad providers and payment processors who are financing piracy”;
- More, and better, legitimate distribution of content to international markets; and,
- Consumer education.

In the meantime, pirates and others in the supply and distribution of stolen content continue to profit, while creators continue to lose.

As Seidler stated, “Piracy erodes the fabric of creativity.”

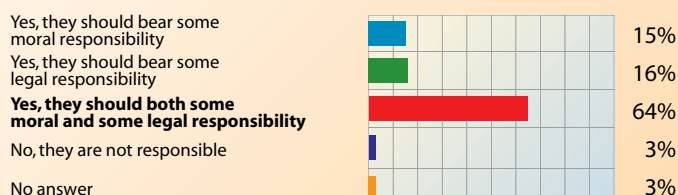
Discussion by Roundtable Participants and Survey Results

Roundtable discussion on Seidler’s presentation and remarks from the panel opened with the following question:

If these websites were offering porn and not pirated films, these ads would not be popping up, at least not for long. Do you think that Google and others will take action to reduce links to pirated material? What should we do as creators to convince companies to take responsibility for their ad dollars?

There was little doubt expressed among participants that Google and other ad service providers carry moral and/or legal responsibility if they are aware of the relationship between their ads and content piracy.

If Google and other ad service providers are aware that their ads help to sustain piracy, would that make them morally and/or legally responsible, in your view



However, roundtable discussion revealed a belief that Google and other ad service providers will not take any type of *voluntary* action to reduce links to pirated material. As noted by one participant and echoed by many more, “There is simply too much money at stake (for Google to take action).” There were also a number of participants who suggested that Google “... already thinks it’s complying” with legislation. Others suggested that in the absence of any type of action by ad service providers, cyberlocker sites are simply too massive in number to monitor.

A number of Forum participants also noted that the same companies prevent their ads from being displayed on pornography websites – i.e. this type of prevention could also be exercised for cyberlocker sites. Yet advertising support for pirate sites remains pervasive, which means that some type of action is needed to force advertisers and ad service providers to take more responsibility.

Several participants suggested that advertisers themselves are the key, and that a “campaign of embarrassment” would potentially convince companies to abandon cyberlocker support, “just as Air Canada is suggesting it will get out of advertising support for hockey, since this is hurting (Air Canada’s) brand.”

On this note, a number of participants echoed the theme that “a big company with big clout” needs to get involved in a very public way. Alternately, participants also suggested that a major international star such as Justin Beiber might have some influence in speaking out against piracy, and in pointing out the role of advertising in the economics of piracy.

However, while the suggestion of boycotting products or services that advertise on cyberlocker sites was raised at a number of roundtable discussions, this was viewed by most participants as largely unworkable due to the difficulty in generating public support for such an effort.

Education and awareness was also raised as an important element of any campaign to dissuade advertisers from

Part II – Digital Theft: Google, Advertising and the Growth of Content Piracy

seeking cyberlocker dollars. As stated by one participant, “The public is not really aware of Google’s involvement; probably Parliament isn’t aware either.”

This latter comment raises the most common suggestion for action identified by Forum participants: legislation. The general sense among participants was that neither advertisers nor ad provider services will take any type of action unless they are forced to do so.

Should ad service providers be compelled to stop placing ads on pirate websites?

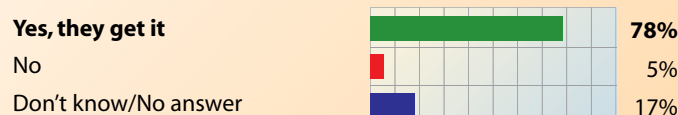


What is the most likely means by which ad service providers could be compelled to end this practice?



Participants responding to this year’s survey also suggested that payment processors have a responsibility to take action– but may also need to be compelled to do so.

What about payment processors like PayPal, MasterCard, Visa, American Express and Discover? Their provision of easy and anonymous payment processing also sustains cyberlockers and other sites hosting illegal content. Do you think they are aware that their services are being used to support piracy?



What is the most likely means by which payment processors could be compelled to end this practice?

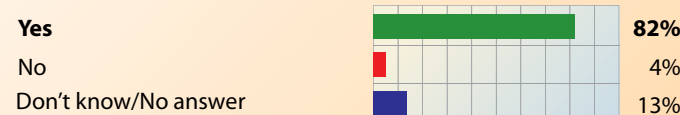


Of course, Google is best known for its search engine business. Together with ad service providers, advertisers and payment processors, participants strongly suggested that search engines must also be held at least partly accountable for providing access to illegal materials. Moreover, participants clearly believed that search engine companies possess the technical capability to take action.

Looking at the search engine business for which Google is best known, would you say it and other search engines bear some responsibility for illegal or infringing activities via their websites, or are they just neutral conduits?



Do you think it is technically feasible for Google and other search engines to shut down access to illegal materials?



Part II – Digital Theft: Google, Advertising and the Growth of Content Piracy

Participants also left little doubt that if search engine companies do not voluntarily remove links to illegal materials, they should be forced to do so.

Should Google and others be compelled to 'shut down' search engine links to illegal materials?





**PART III:
THE ROLE OF ISPS, GOVERNMENT AND
CREATORS IN ANTI-PIRACY ACTION**



Part III –The Role of ISPs, Government and Creators in Anti-piracy Action

The balance of this year's Global Forum focused on the role of Internet Service Providers (ISPs), government and artists in resolving the challenges of content piracy – and in particular the role that the Canadian creator base might play in generating more action. The Forum discussion panel also touched on these issues.

The second roundtable discussion question focused on the debate between voluntary action by ISPs and the need for legislative action by government.

Ellen Seidler about the U.S. Digital Millennium Copyright Act (DCMA): 'Not only can this be extremely time-consuming...but there's also no guarantee that it will even prove successful.' What should be done to make this process more effective? Could voluntary action by ISPs be a substitute for legislative action or will we ultimately require legislative solutions?

In general, Forum participants argued that legislative solutions are clearly needed, since ISPs will only respond if legally forced to do so. Participants further stated that any such legislation needs to be "strong and effective" – with many stating that Canada's proposed copyright legislation, Bill C-32, would be less effective than laws in other jurisdictions.

Participants also noted that the sheer size of ISPs such as Verizon and AT&T in the U.S. will not alter their practices without legislation – but when presented with legal guidelines they would "be willing to take down pirate websites".

A number of participants suggested that such legal guidelines could be modeled after the three-strike rule adopted in France, where an ISP would be required to take down a pirate website upon official notification. The proposed 'notice and notice' provision of Bill C-32 was viewed by participants as likely ineffective.

Other participants debated the merits of the three-strike rule, which targets heavy downloaders – users – of illegal

content. "Perhaps ISPs should target uploaders instead of downloaders," noted one participant. Either way, it was generally agreed that ISPs must be "compelled to care...or nothing will get done."

Still other participants noted that legislation is needed, but "at the end of the day, people need to be convinced that it is wrong to download illegal content".

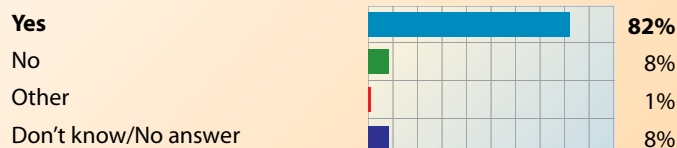
Nonetheless, participants responding to the survey clearly noted that ISPs have at least some role to play, voluntary or otherwise.

Do you think that ISPs should be encouraged to work with rights holders to reduce file sharing?



In addition, participants strongly agreed with a role for government in pushing anti-piracy action on the part of ISPs.

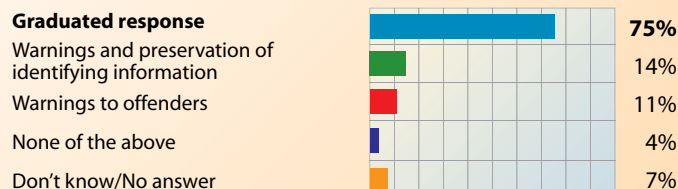
If necessary, should government get involved by encouraging an ISP anti-piracy role as it has in France with graduated response?



Participants were also encouraged by the graduated response, or three-strike, model that has been adopted by France – over and above any other anti-piracy action that might be undertaken by ISPs.

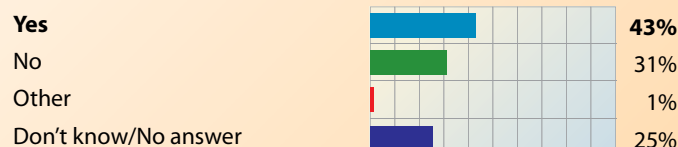
Part III –The Role of ISPs, Government and Creators in Anti-piracy Action

What kind of action by ISPs would you favour?



Participants further suggested that this type of legislative remedy may be taking root in other jurisdictions.

Deborah Spar asserted at CMW 2008 that the age of piracy in digital goods would end with the reassertion of the rule of law, which would rein in digital piracy. Do you think that we are now beginning to see the 'rule of law' imposed on digital piracy in leading industrialized nations other than Canada?



The third discussion question centered on the role of artists and filmmakers in taking action against piracy, and the risk that might be involved.

The experience of Ellen Seidler is not much different than musicians and songwriters. She has chosen to be very vocal. Do you think artists and filmmakers can influence corporate and/or individual behaviour? What risks do artists and filmmakers face in speaking out and now do we mitigate the risks?

On this front, participants were more split on (i) the value of musicians taking anti-piracy action and (ii) the effectiveness that such action may have.

As noted by one participant and echoed at a number of roundtable discussions, "Musicians feel ill-informed about

the issues...and may not want to speak out if it might turn fans against them (because of) the 'Metallica' effect."

Nonetheless, a number of participants pointed to the U.K.'s 'Music Matters' campaign and to the public anti-piracy pronouncements by some American artists as helpful – but not likely to be reproduced in a market the size of Canada. In addition, there is only a small community of artists occupying "the sweet spot of having enough money plus popularity plus having fans that won't leave them."

It was also noted that Canada's artistic community is "highly subsidized...which has a chilling effect on artists speaking out as they fear they will be seen as speaking out against the government." Alternately, successful artists that do speak out may not generate public support: "No one will ever feel sorry for Céline Dion."

Others noted that even if artists can be mobilized to speak out, the message to be conveyed – whether to the public, the media or to politicians – can sometimes lack clarity. "Politicians would care more if they heard the message in terms of jobs or GDP," suggested one participant.

Yet another approach suggested by several participants echoed the view of Ellen Seidler: since all content industries can be damaged by piracy, then those industries "should band together...to create a louder voice."

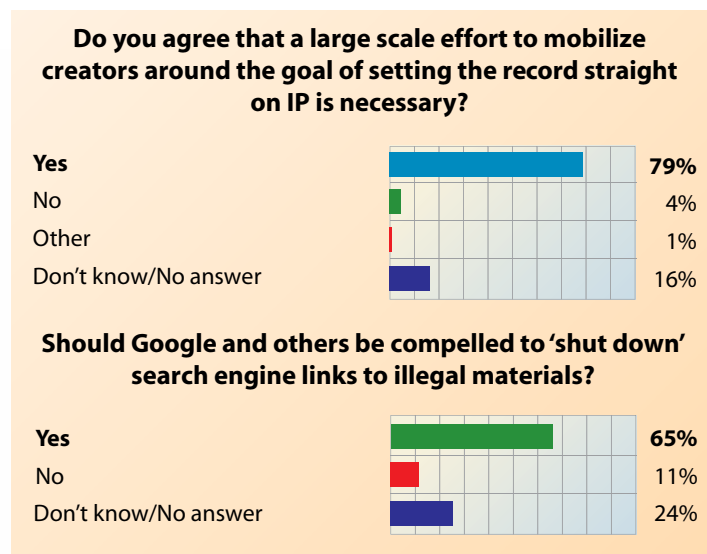
The final discussion question posed at the 2011 Global Forum picked up on the need to activate the creator base as a counter-measure to the decision-making that takes place at the political level.

At the 2010 Global Forum, participants agreed that the 'digitally connected mobs' control important aspects of political decision-making in Canada through social media sites like Facebook. Should we radicalize and activate our base to provide an equal and opposing influence on the political decision-making process in Canada? Can we afford not to?

Part III –The Role of ISPs, Government and Creators in Anti-piracy Action

Participants responding to the survey seemed to agree with the notion of larger scale effort aimed at educating the public – which might have beneficial results. While participants were of the view that the Canadian music industry would benefit from grassroots activation, there was less agreement on how this might be achieved, who the target of such a movement would be, and what outcomes might be legitimately expected.

Several participants suggested that the resources required to develop such a movement would be better spent targeting the advertisers who make money from digital theft. Other participants noted that legislation is required to drive concrete action by ISPs – hence the political level is the obvious target. A number of participants once again referenced the relatively solid effectiveness of the Music Matters movement in the U.K.



There was also a sense conveyed by participants that such a movement would need the appropriate coordination, both as an industry and in concert with other cultural industries such as film and publishing. One participant suggested a push “to radicalize as an industry, not as individuals”. Another suggested that while younger artists should likely be the public face of any such movement, those same artists “run the risk of not being played on the radio” given the vertical integration of ISPs with more traditional distribution platforms.

Many participants suggested that the Canadian government needs to be sensitized to the challenges confronting the domestic music industry – and some lengths should be taken to explain that the industry is “a legitimate business”. Participants noted that, at the end of the day, other means of distribution are needed, and government really needs to pass and then enforce copyright legislation that will protect creators more effectively.

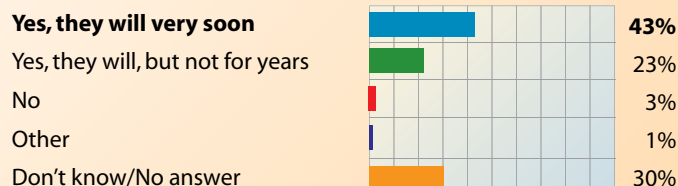
As noted by Graham Henderson during the discussion panel, the “anti-copyright” crowd that seeks to undermine legitimate consultation with decision-makers has become extremely active. When mixed with the challenges in motivating the base to take action, it can be extremely difficult to move forward.

To this end, panel members noted the importance of using social media for mobilizing creators, and then for taking action on piracy by “influencing the influencers”. Among the messages that can be put forward: piracy kills jobs, a concern which has generated some anti-piracy momentum in the U.S.

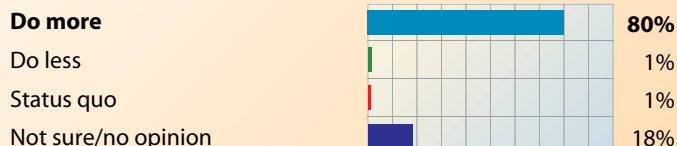
With respect to the expansion of distribution opportunities, participants were modestly optimistic that this may be around the corner.

Part III –The Role of ISPs, Government and Creators in Anti-piracy Action

Do you think that Canadian mobile carriers will soon enable a variety of legitimate businesses based on the authorized distribution of music to their subscribers and compensation of participating rights holders?

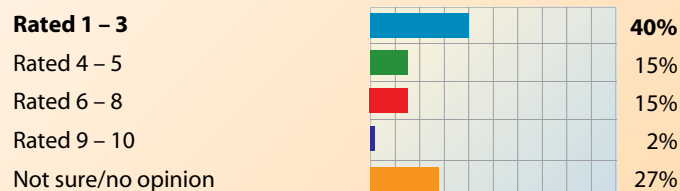


Do you think Canadian government should do more, do less or stick with the current program to protect music and other copyright industries?



But based on participant survey responses, it is evident that from the perspective of the international music industry, governments are simply not doing enough.

How would you rate the performance of the G7 governments in the past 12 months when it comes to dealing with copyright issues on a scale of 1 (couldn't be worse) to 10 (couldn't be better)?

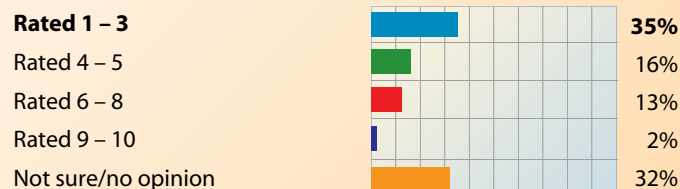


Still, while governments play a potentially critical role, many Forum participants came back to a similar thread of argument: that those who profit from digital theft need to be stopped through a combination of legislative action and an exposé of piracy practices that renders this socially unacceptable. As suggested by one participant,

Google needs to get punk'd. Get a viral video by a high profile artist to use Google's own tools against them – like the guy whose guitar was busted on American Airlines. Within hours, his guitar was replaced, because their public reputation was in jeopardy. The public is simply not aware of the real problem.

Participants shared a similar view of the Canadian government's performance when dealing with copyright issues – and further, that much more needs to be done.

To the best of your knowledge, how would you rate the performance of the Canadian government in the past 12 months on a scale of 1 (couldn't be worse) to 10 (couldn't be better) when it comes to dealing with copyright issues?



Part III –The Role of ISPs, Government and Creators in Anti-piracy Action

Conclusion

Content piracy continues to downgrade the outlook for the music industry, both internationally and in Canada. In fact, piracy is undermining jobs and creativity throughout the creative industries, including the film industry.

While efforts continue to educate consumers, and to develop new innovative digital services, there is a consensus among leading music industry thinkers that something must be done to reduce the lucrative nature of piracy, and that governments play an important role in achieving that end. Four clear recommendations gained support in the 2011 Global Forum:

1. Whereas advertising revenue facilitates the online piracy of copyrighted materials and ad service providers are integral to this transaction, ad service providers should be required by law to prohibit the use of their services on websites hosting infringing content.
2. Whereas pirate websites sustain their operations in part through subscriber fees and the payment of these fees is made possible through financial institutions, these financial institutions should be required by law to deny their services to websites trafficking in illegal content.
3. Whereas search engines have the capability to filter their search results, search engines should be required by law to block search results to illegal content or products.
4. Internet service providers should be required by law to participate in a graduated response system that identifies and removes illegal content.

The prevailing sense at the 2011 Global Forum was that it will take a concerted and joint effort by ISPs, government and the music industry – and a significant education effort – to effectively challenge pervasive digital theft.



Appendix – 2011 Global Forum Attendee List

Susan Abramovitch Gowlings, Canada	Laurent Bonnet Atmosphériques, France	Michael Christophe Transportation Label, France
Jamil al Jabri Mobile Roadie, USA	Audrey Bouc Record Makers, France	Michael Chugg Chugg Entertainment, Australia
Marcie Allen MAC Presents, USA	Jeff Brabec Chrysalis Music, USA	Steve Coady Warner Music, Canada
Kevin Arnold IODA, USA	Todd Brabec Music, Money & Success, USA	Barry Coburn Ten Ten Music Group, Inc., USA
Paavo Backman Mobile Backstage, Finland	Nicole Brant-Zawadski Association of Artist Managers, Australia	Ted Cohen TAG Strategies, USA
Marisa Bangash Uncensored Interview, USA	Rob Brooks EMI Music Canada, Canada	Barbara Cole MIAC, Canada
Vince Bannon Getty Images, Canada	Quentin Burgess CRIA, Canada	Mamie Coleman Fox Broadcasting Company, USA
Eric Baptiste SOCAN, Canada	Ron Burman Roadrunner Records, USA	Xavier Collin WTPL Music, France
Vivian Barclay Warner Chappell, Canada	Christian Castle Christian L. Castle Attorneys, USA	Russ Crupnick NPD Group, USA
David Basskin CMRRA, Canada	Richard Cavanaugh Connectus Consulting, Canada	Damian Cunningham Peats Ridge Festival, Australia
Anderson Bell Fanfeuled, Canada	Sylvana Chan Sony Music, Canada	Dave Curtin DeepMix, USA
Aziliz Benech MaMA Event, France	Marie-Alicia Chang MusicMetric, England	José Dasilva Lusafrica, France
Maryse Benge Ontario Ministry of Culture & Tourism, Canada	Brian Chater Avenue Road Music Group, Canada	Arjen Davidse MCN Muziek Centrum Nederland, Netherlands
Sat Bisla A&R Worldwide, USA	Sundeep Chauhan Gilbert's LLP, Canada	Shauna de Cartier Six Shooter Records, Canada
David Bland PMD Plus Co. Ltd., Thailand	Nikki Chee Swat Enterprises Pte. Ltd., Singapore	Susan de Cartier Starfish Entertainmnt, Canada
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The Canadian Music Week 2011 Global Forum Summary and Analysis was compiled and written by Richard Cavanagh, Partner, CONNECTUS Consulting Inc. He has extensively researched and analyzed issues in the Canadian and international music industry, and has recently completed a major year-long study on the impact of digital technology on the value networks of the arts and cultural industries in Canada.