[FR] HADOPI study on the pirating of cultural goods

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Amélie Blocman
Légipresse

France's high Authority for the Broadcasting of Works and the Protection of Rights on the Internet (Haute Autorité pour la Diffusion des Œuvres et la Protection des Droits sur Internet - HADOPI) has updated its analysis of the piracy ecosystem that it first undertook in 2012. The new study covers all services that enable or facilitate illegal access to copyright-protected cultural goods, not only in the audiovisual sector (films, series, television programmes, music), but also in the e-book and video-game industries. Services offering the retransmission of sports events are also analysed. A number of lessons emerged from the study. For example, many different stakeholders are now involved in the piracy ecosystem and the interactions between them are becoming increasingly numerous, reducing the transparency of how they operate. Whereas hosting providers and referencing sites were at the heart of the system in 2012, many more stakeholders now appear to be involved. The key players have been joined by upstream providers of the services that they use, such as technical intermediaries and payment services. A new category of stakeholders has also emerged: downstream services used by consumers to access pirated works more easily or to bypass anti-piracy measures (VPN, seedbox).

Moreover, while the economic model used by referencing sites and hosting providers remains largely based on advertising and subscriptions, new income streams (which are still relatively small) are emerging.

Lastly, although the illegal streaming of live television is growing, it remains limited. These sites offer programme streams or illegal packages, often containing hundreds or even thousands of television channels from all over the world. Packages can be put together and offered to Internet users directly by the illegal services that distribute them. They can also be offered by "assemblers" who sell them to illegal services, which in turn become simple distributors. There can therefore be financial links between package "assemblers" and "distributors", and in some cases suppliers of multimedia boxes who tend to sell their devices by offering subscriptions to illegal packages (either directly or via illegal package distributors). The study also concluded that the economic model adopted by providers of illegal live television streaming packages is the most complex. As well as the money paid to technical and advertising intermediaries, the interactions between hosting providers and package distributors result in numerous cross-financing flows, since they are able to buy and sell content (package subscriptions) among themselves. The economic models for these

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services are mainly based on viewer subscriptions and the audience generated.

L'écosystème illicite de biens culturels dématérialisés, Hadopi, janvier 2019

https://hadopi.fr/sites/default/files/sites/default/files/ckeditor_files/2019_01_22_Hadopi_etude_modele_economique_1.pdf

The illicit ecosystem of dematerialised cultural goods, HADOPI, January 2019

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