The 10th National Economic and Social Development Plan and Creative Economy

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Deputy Secretary General,
Office of the National Economic and Social Development Board
Presented at Thailand Creative and Design Center, 30 May 2008
Agenda

1. Importance and Definition of Creative Economy
2. The 10th National Plan and Government Policy
3. Characteristics of the Creative Economy in Thailand
4. Progress of Promoting the Creative Economy in Thailand
5. Critical Issues and Next Steps
Creative economy

- No unique definition, but it is being shaped.
- UNCTAD (2008) defined the creative economy as “An evolving concept based on creative assets potentially generating economic growth and development.”


Creative economy/industries

Industries that include the *cultural industries* plus all cultural or artistic production, whether live or produced as an individual unit. The creative industries are those in which the product or service contains a substantial element of artistic or creative endeavor.


Note: WIPO’s view focuses solely on economic activities that give rise to ‘intellectual property rights’
Existing Classification Systems for the Creative Economy

Symbolic texts Model

UK Dept. of Culture Media and Sports (DCMS) model

Classification systems for the creative industries/economy

UNCTAD Model

Concentric circles Model

WIPO copyright Model

Source: Creative Economy Report 2008
Details of the 5 Classification Systems

<table>
<thead>
<tr>
<th>UK DCMS model</th>
<th>Symbolic texts Model</th>
<th>Concentric circles Model</th>
<th>WIPO copyright Model</th>
<th>UNCTAD Model</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Advertising</td>
<td>Core Cultural Industries</td>
<td>Core Creative Arts</td>
<td>Core Copyright Industries</td>
<td>Heritage or Cultural Heritage</td>
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<tr>
<td>3. Art and antique market</td>
<td>2. Film</td>
<td>2. Music</td>
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<td>6. Design</td>
<td>5. Publishing</td>
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<td>7. Film and Video</td>
<td>6. Television and Video</td>
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<td>8. Music</td>
<td>Peripheral Cultural Industries</td>
<td>Other Core Cultural Industries</td>
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<td>9. Performing Arts</td>
<td>7. Creative Arts</td>
<td>5. Film</td>
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<td></td>
<td>15. Fashion</td>
<td>Related Industries</td>
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<td>12. Advertising</td>
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<td>13. Architecture</td>
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<td>14. Design</td>
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<td>15. Fashion</td>
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<td>Interdependent Copyright Industries</td>
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<td>10. Blank Recording material</td>
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<td></td>
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<td>11. Consumer Electronics</td>
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<td>12. Musical Instruments</td>
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<td>13. Paper</td>
<td></td>
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<td></td>
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<td>14. Photocopiers, Photographic equipment</td>
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<td></td>
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<td>Partial Copyright Industries</td>
<td></td>
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<td>15. Architecture</td>
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<td>16. Clothing, Footwear</td>
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<td>17. Design</td>
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<td>18. Fashion</td>
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<td>19. Household Goods</td>
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<td>20. Toys</td>
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<td>Functional Creation</td>
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<td></td>
<td></td>
<td>7. Design</td>
<td></td>
<td></td>
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<td>8. New media</td>
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<td></td>
<td></td>
<td>9. Creative services</td>
<td></td>
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</tbody>
</table>

Source: Creative Economy Report 2008
World’s Creative Economy
Developed countries have dominated export flows, especially the flows of services

Export of Creative Services USD 89 billion, in 2005
Creative Industries: Export of creative service by economic group, 2005

Export of Creative Goods USD 336 billion, in 2005
Creative Industries: Export of creative goods by economic group, 2005

Note: There is no national Thai statistics for classification of creative goods and services.

Source: UNCTAD
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The 10th National Economic and Social Development Plan

Review the past to shape the future

Goal and Position of Thailand
“Green and Happiness Society”

Current Situation
- Society
- Community
- Economy
- Natural Resources and Environment
- Good Governance

Analyzing 5 Contexts of Development
- Globalization
- Social
- Natural Resources
- Capital Flows
- Technology

Economy
- Stability
- Equality/Ethnic

Society
- Knowledge
- Ethical conducts
- Health/Life Security

Natural Resources
- Biodiversity

Good Governance
- Public/Private
- Participation
- Transparency

Development Strategies
1. Improving Human quality
2. Strengthening Community & Society
3. Restructuring the economy
4. Conserving NR as based on Bio-diversity
5. Establishing Good Governance

Key Driven Mechanism
- Knowledge-based Learning
- Moral/Ethical
- Public/Private Collaborations

Development Stakeholders
- Public
- Private
- Local Community
- Politics
- Press
<table>
<thead>
<tr>
<th>Globalization</th>
<th>Knowledge Economy</th>
<th>Social</th>
<th>Natural resources &amp; Environment</th>
<th>Free flows of labor force</th>
</tr>
</thead>
</table>
| Asian Century, Free-flows of Goods & Capital | • Proactive trade policy  
• Competitive Business entities  
• Supervisory & regulatory regimes for in-out flows of capitals & financial market | Aging Society, Savings Problems, Changing Consumer Tastes | • Expand markets for good & services related to health care using indigenous knowledge in building value creation  
• Protect & safeguard for inappropriate foreign culture that would negatively affect the nation’s values | Global warming, Natural Disasters, Degraded Ecosystem & Biodiversity | • Raise stands on environmental management & protect natural resources & maintain the balance of ecosystem  
• Adjust to environmentally-friendly production process |
| Technology | Knowledge creation, innovation, knowledge commercialization  
• Increased learning opportunities (formal & informal education, life-long learning)  
• Appropriate technology with regard to Thai cultural strength & knowledge | | | Increasing borderless in movement of skills/entrepreneurs | • Set regulatory regimes for free flow of labor force and safeguard for negative impacts  
• Impose measures for free flows of labor that negatively affect the country’s security |
Economic restructuring:
To a More Balanced and sustained economy

Real-sector restructuring

- Supporting Factors
  - Knowledge
  - Infrastructure & Logistics
  - International Trade Policy

Equality & fairness
- Fair Competition
- Infrastructure
- Strong financial Institutions
- Income Distributed

Immunity
- Economic Stability
- Savings
  - Energy Efficiency
Measures for Economic Restructuring: Some Elements Related to “Creativity”

- **Restructuring in Agriculture**
  - Support R&D in agricultural products to be “kitchen of the world”
  - Promote value creation of non-food products in order to expand international market
  - Utilize “local wisdom” and “Thainess” as to generate “value creation” in products
  - Develop agricultural institutions, community plan, and community enterprises
  - Promote agricultural sustainability
  - Create brands and use marketing strategy to increase sales
  - Enhance productivity and efficient use of water resources and land management.

- **Restructuring in Manufacturing**
  - Support investment in “potential & new wave industries”
  - Set up a road map for “patent management”
  - Set up integrated the national R&D system to create innovation
  - Use cluster as a key-driven means through “Specialized Institutions”
  - Build and/or Support entrepreneurs to create innovation
  - HRD as a key to success
  - Employ cluster development particularly in potential industry
Measures for Economic Restructuring: Some Elements Related to Creativity

- **Restructuring in Services Sector:**
  - Preserve and rehabilitate tourist attraction destinations
  - Promote investment in tourism related business
  - Improve quality and standards of potential services business
  - Undertake market research to capture changing demand of customers
  - Improve enabling factors/infrastructure in service sector
  - Extend links of public & private co-operations to local community level.

- **Developing Enabling Factors:**
  - **Knowledge management**
  - HRD in S&T both quantity and quality
  - Develop knowledge and technology
  - Promote R&D and innovation for commercialization
  - Develop adequate infrastructure for S&T, R&D and innovation

  **Infrastructure/services in logistics**
  - Develop sufficient infrastructure in transportation and logistics management including telecommunication
Government Policy Statement Related to Creativity

- **Education Policy:**
  - Raise the quality of education in both formal and informal educational systems
  - Support production and development of workforce that is responsive to the structural changes in the manufacturing and services sectors
  - **Expand the role of CREATIVE learning through organizations such as OKMD, a modern library system, or knowledge parks, the National Discovery Museum Institute, TCDC...**

- **Policy on Arts and Culture**
  - Revitalize and ensure the preservation and passing on of the diverse Thai culture and arts for learning and benefiting from value creation
  - Expand cultural learning and recreational spaces for Thai youth

- **Policy for Industrial and Services Sectors:**
  - **Improve the efficiency and productivity** by creation value of industrial products
  - **Create products of high value and standards** by utilizing of modern technology and building brand recognition
  - **Accelerate revenue generation from tourism** by improving tourism quality and standard; and establishing new tourist destinations in areas with potential arisen from nature, arts and culture
  - **Develop service business** with potential to create opportunities for expanding the manufacturing base in the region (i.e. healthcare, movie, sports and recreation)
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Overall Thai Economy and Creative Sectors

Sectorial GDP at Constant Price (Real Term)

Export Value (Million Baht)

Exports | '03 | '04 | '05 | '06 | '07 | growth
---|---|---|---|---|---|---
1. Computer and parts | 10.2 | 9.5 | 10.7 | 11.5 | 11.3 | 5.4
2. Auto and parts | 5.0 | 5.7 | 7.0 | 7.3 | 7.9 | 14.6
3. IC circuit | 5.8 | 5.7 | 5.4 | 5.4 | 5.3 | 3.9
4. Rubber products | 3.5 | 3.5 | 3.3 | 4.2 | 3.7 | -5.4
5. Jewelry and precious items | 3.1 | 2.7 | 2.9 | 2.8 | 3.5 | 32.4
6. Plastic resin | 2.7 | 3.2 | 3.8 | 3.5 | 3.4 | 4.8
7. Steel and iron products | 2.1 | 2.6 | 2.6 | 2.7 | 3.0 | 18.3
8. Machinery and parts | 1.6 | 1.7 | 1.9 | 2.0 | 2.9 | 48.6
9. Petroleum | 1.3 | 1.8 | 2.1 | 2.8 | 2.7 | 1.4
10. Chemical products | 2.0 | 2.1 | 2.4 | 2.6 | 2.6 | 3.6

- Sector share in GDP (Real term, 2007) is 9:41:50 (Agriculture : Industry: Services), it is noted that during 1980-2007 services share in GDP has gradually increased.
- Top 10 exports from Thailand are mainly from conventional commodities.
- At present, there is no national Thai statistics in the classification system that provides thorough figures of creative production in the Thai economy.
Thailand’s Creative Economy

- The statistics preliminarily show a part of Thailand’s creative economy.
- Definition and classification of ‘Creative industry/services’ need to be further verified.

Creative Industry, Value Added at Current Price

<table>
<thead>
<tr>
<th>Year</th>
<th>Audiovisual products (TSIC 9211-9212)</th>
<th>Architecture, Engineering, and other technical services (TSIC 742)</th>
<th>Publishing (TSIC 221)</th>
<th>Advertising (TSIC 743)</th>
<th>Radio and Television services (TSIC 9213)</th>
<th>Creative Industry per GDP</th>
</tr>
</thead>
<tbody>
<tr>
<td>2002</td>
<td>61,244</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2003</td>
<td>67,596</td>
<td></td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>2004</td>
<td>75,894</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2005</td>
<td>83,332</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>2006</td>
<td>91,631</td>
<td></td>
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</tr>
</tbody>
</table>

(Unit : Million Baht)

Sum of 5 selected creative goods/services

<table>
<thead>
<tr>
<th>Year</th>
<th>2002</th>
<th>2003</th>
<th>2004</th>
<th>2005</th>
<th>2006</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>61,244</td>
<td>67,596</td>
<td>75,894</td>
<td>83,332</td>
<td>91,631</td>
</tr>
</tbody>
</table>

Source: National Accounts Office, NESDB 2008
Thailand is considered to be culturally rich, however the development of cultural goods is still at initial stage.

Thailand Competitiveness- Export of Cultural Goods*

UNESCO Institute for Statistics, Cultural Goods include Heritage goods, Books, Newspapers and periodicals, Other printed matter, Recorded media, Visual arts, Audiovisual media, Equipment material and Other related cultural goods.
In 2549, Thai Film shared market value of approximately 17,880 million bath

<table>
<thead>
<tr>
<th>Activity</th>
<th>2547</th>
<th>2548</th>
<th>2549</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pre-production</td>
<td>88</td>
<td>74</td>
<td>88</td>
</tr>
<tr>
<td>production</td>
<td>880</td>
<td>740</td>
<td>880</td>
</tr>
<tr>
<td>Post-production</td>
<td>132</td>
<td>111</td>
<td>132</td>
</tr>
<tr>
<td>Marketing</td>
<td>3,780</td>
<td>4,634</td>
<td>4,360</td>
</tr>
<tr>
<td>Distribution</td>
<td>4,500</td>
<td>4,644</td>
<td>4,520</td>
</tr>
<tr>
<td>VDO, VCD, DVD</td>
<td>15,100</td>
<td>11,840</td>
<td>7,900</td>
</tr>
<tr>
<td>Total</td>
<td>24,480</td>
<td>22,043</td>
<td>17,880</td>
</tr>
</tbody>
</table>

Source: The Federation of National Film Association of Thailand (FNFAT)

In 2549, Thai Television shared market value of approximately 10,000 million baht

<table>
<thead>
<tr>
<th>TV Production</th>
<th>2547</th>
<th>2548*</th>
<th>2549*</th>
</tr>
</thead>
<tbody>
<tr>
<td>Media of media</td>
<td>1,300</td>
<td>1,500</td>
<td>1,700</td>
</tr>
<tr>
<td>BEC tero</td>
<td>1,100</td>
<td>1,300</td>
<td>1,500</td>
</tr>
<tr>
<td>Kuntana Group</td>
<td>1,000</td>
<td>1,200</td>
<td>1,400</td>
</tr>
<tr>
<td>Workpoint</td>
<td>740</td>
<td>920</td>
<td>1,200</td>
</tr>
<tr>
<td>Grammy television</td>
<td>510</td>
<td>650</td>
<td>785</td>
</tr>
<tr>
<td>Macthing Studio</td>
<td>498</td>
<td>600</td>
<td>705</td>
</tr>
<tr>
<td>Other</td>
<td>1,452</td>
<td>2,330</td>
<td>2,665</td>
</tr>
<tr>
<td>Total</td>
<td>6,600</td>
<td>8,500</td>
<td>10,000</td>
</tr>
</tbody>
</table>

Unit: million baht

Remark * = Forecasted by Krung Thai Bank
In 2549, Music shared market value of approximately 7,300 million bath

<table>
<thead>
<tr>
<th>Company</th>
<th>2547</th>
<th>2548*</th>
<th>2549*</th>
</tr>
</thead>
<tbody>
<tr>
<td>GMM Grammy</td>
<td>3,200</td>
<td>3,600</td>
<td>4,000</td>
</tr>
<tr>
<td>RS Promotion</td>
<td>1,400</td>
<td>1,600</td>
<td>1,700</td>
</tr>
<tr>
<td>Other</td>
<td>1,400</td>
<td>1,500</td>
<td>1,600</td>
</tr>
<tr>
<td>Total</td>
<td>6,000</td>
<td>6,700</td>
<td>7,300</td>
</tr>
</tbody>
</table>

Remark  * = Forecasted by Krung Thai Bank

Exports of Thai multimedia rapidly grew from 1.7 bil.baht (2547) to 5.1 bil.baht (2549)

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<thead>
<tr>
<th></th>
<th>2547</th>
<th>2548</th>
<th>2549</th>
</tr>
</thead>
<tbody>
<tr>
<td>Export value</td>
<td>1,767</td>
<td>3,500</td>
<td>5,190</td>
</tr>
</tbody>
</table>

Source: Software Industry Promotion Agency

In 2549, Exports of Publishing and Printed were 3,938 million bath

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<tr>
<th></th>
<th>2547</th>
<th>2548</th>
<th>2549</th>
</tr>
</thead>
<tbody>
<tr>
<td>Export value</td>
<td>2,586</td>
<td>4,552</td>
<td>3,938</td>
</tr>
</tbody>
</table>

Source: Department of Trade Negotiation
Thailand and Other Countries: Exports of Painting/Prints and Sculpture

Source: UN Comtrade 2008
Thailand and Other Countries: Exports of Toys and Ceramic Products

**Toys (HS 9502, 9503)**

- **Artisanal Products**

**Ceramic Products (HS 69)**

- **Artisanal Products**

Source: UN Comtrade 2008
Thailand and Other Countries: Exports of Audiovisual products (HS8524)

Source: UN Comtrade 2008
Selected Thai Creative Industry: Characteristic & Opportunity

Cultural tourism

**Strength**

- 3 UNESCO’s world cultural heritages
  (อุทยานประวัติศาสตร์อยุธยา, สุโขทัย-ศรีสัชนาลัย-กำแพงเพชร, และบ้านเชียง)
- Cultural Diversity
- Low cost of services

**Existing problems**

- Lack of staff (maintenance and information)
- Lack of facilities (clean toilet, etc.)
- Some tourist sites are promoted without sufficient potential and uniqueness

Source: NESDB and CMU 3, 2007
Selected Thai Creative Industry: Characteristic & Opportunity

Design goods

Strength
- Masterpiece handicraft with story to tell
- Processed with unique methods
- Widely supported by government programme

Existing problems
- Non-systematic collection of local wisdom
- Technique and knowledge transfer is time consuming and complicated
- Duplication of design and brand
- Lack of financial and marketing management

Source: NESDB and CMU 3, 2007
Selected Thai Creative Industry: Characteristic & Opportunity

Film

Strength
- Location advantage (climate, scenery)
- Quality works and personnel
- Widely supported by government programme (SIPA, BOI)
- Specialized in Comedy and Horror

Existing problems
- Violation of IPRs
- Lack of creativity and diversity: mostly made to meet trends and popularity
- Lack of personnel at all level
- Lack of appropriate R&D and knowledge collection systematically

Source: NESDB and CMU 3, 2007
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Development Path of Promoting the Creative Economy in Thailand

1911 Dept. of Fine Arts
1979 T.A.T
1960 - TPO ฉัตร
- Surin Elephant Show Festival
1976 The Foundation for the promotion of supplementary occupations and related techniques under the royal patronage of her majesty the queen (SUPPORT- ศูนย์วิจัยนิเทศสร้างสรรค์)
1952 Ministry of Culture (Dissolved in B.E. 2501)
1943 Silapakorn University
1982 “Baan Chiang” named UNESCO World Heritage archeological site
1984 Industry Village project
1985 “Phufah” Occupational Promotion Project
2002 Ministry of Tourism and Sport
Ministry of Culture
2003 OKMD and SIPA (สนง.ส่งเสริมอุตสาหกรรม
ของแผ่นดินแห่งชาติ)
2004 Thai Silk and Handicraft Promotion and Protection Project
2008 Creative Industry Master Plan (on preparing)
2001 OTOP Project
2005 Queen Sirikit Institute of Sericulture สถาบัน
พบฉันใหม่แห่งชาติ
2006 - National Outstanding Cultural Product
- Cultural Incubation Project for Enterprise
- Institute of OTOP wisdom management
Source: Adapted from The study on competitiveness management, 2007 commissioned by NESDB
Some Research Studies Done on Creative Industry

- Digital Content by Software Industry Promotion Agency สนง.ส่งเสริมอุตสาหกรรมซอฟต์แวร์แห่งชาติ SIPA (2007)
- Cultural Industry by NESDB & CMU (2007)
- Audio Visual by MOC, 2008 (work in progress)
Objective: Targeting value of Thai digital content worth up to 30,000 mil. Baht by 2010, and positioning as “Digital content and multimedia education hub in Asia Pacific”

Proposed Measures:
- Financial support on production and exhibition participation
- Non-financial support on marketing and trade negotiation
- Making use of the Northern Animation Studio in Chiang Mai and the Bangkok Digital Content Center in Bangkok
- Continue the Thailand Animation & Multimedia Award (TAM award)
- Continue the Thailand Animation Film Festival (TAFF)
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Korea

- Established financial supporting agency: Korea Culture and Arts Foundation
- Local community to participate in promotion program, financially supported by central government
- Launched “Five Year Plan for New Korea Culture”
Lessons from Overseas Best Practice

Japan

- Self reliance of local community under OVOP (one village one product) principles:
  1. Think Globally, Act Locally
  2. Self reliance and creativity
  3. HR development

- Consistent plan and promotion since 1961
- Local cluster development
- New generation leader training
- Marketing by central government

Source: NESDB and CMU 3 Analysis
Hong Kong

- Specialize in **Film** and **Design**

- One-stop **complex** to support Film and Design such as HKDC (Hong Kong Design Centre and Cyber Port)

Source: NESDB and CMU 3 Analysis
Lessons from Overseas Best Practice

UK

- Started from “cultural advantages” to “contemporary creativity”
- Took 150 years to be a creative consumption society
- Took 10 years to develop creative entrepreneur to be able to respond to creative consumer
- Creative Economy Mapping by 3 parties (Government, Local community and Entrepreneur)

Source: NESDB and CMU 3 Analysis
Singapore

- Turning from “Information Economy” to “Creative Economy”
- Established “Mediapolis@one-north”, a creative industry complex
- Created value from 0.8 billion US in 1986 to 4.8 billion US in 2000
- Created employment from 30,700 persons in 1986 to 72,200 persons in 2000

Targets for 2012

1. Double GDP contribution of creative cluster from 3% in 2000 to 6% by 2012
2. New Asia Creative Hub:
   - A Renaissance city (Arts and Culture)
   - A Global Cultural and Business Hub for the Design (Design)
   - A Global Media City (Media)

Source: NESDB and CMU 3 Analysis
Lessons from Overseas Best Practices

China

- Principle legal to protect cultural heritage
- Zoning to separate old town from modern town
- Established design complex in Beijing and Shanghai
- Host to one of the world fashion exhibitions: China Fashion & Design Expo

Source: NESDB and CMU 3 Analysis
### Proposed Thailand’s Strategic Mapping for Creative Industry

<table>
<thead>
<tr>
<th>Build</th>
<th>Cultivate</th>
</tr>
</thead>
<tbody>
<tr>
<td>Promote domestic market</td>
<td>Promote exports</td>
</tr>
<tr>
<td>- Exhibition</td>
<td>- Thai Food</td>
</tr>
<tr>
<td>- Cultural tourism</td>
<td>- Decoration</td>
</tr>
<tr>
<td></td>
<td>- Thai Silk</td>
</tr>
<tr>
<td></td>
<td>- Spa</td>
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</table>

<table>
<thead>
<tr>
<th>Incubate</th>
<th>Differentiate</th>
</tr>
</thead>
<tbody>
<tr>
<td>Promote domestic market and build up competitiveness capability</td>
<td>Promote exports and build up competitiveness capability</td>
</tr>
<tr>
<td>- Exhibition</td>
<td>- Wooden Furniture</td>
</tr>
<tr>
<td>- Cultural tourism</td>
<td>- Film</td>
</tr>
<tr>
<td></td>
<td>- Animation</td>
</tr>
</tbody>
</table>

Source: NESDB and CMU 3 Analysis
10 Trends which may affect Thai economy, and create new opportunity for development of the creative economy

**External Forces:**
1. Regional Integration
2. Brazil Russia India China (BRIC)/US/Japan
3. Global Finance
4. Aging World
5. Technology
6. Energy
7. Global Warming

**Internal Forces:**
8. Economic Restructuring
9. Aging
10. Urbanization and Regional Development
Critical Issues for Development of Creative Economy:

- Infrastructure for Creativity
- Creative Cluster both at national and local level
- Human Resource Development
- Finance and Investment
- Marketing
- Intellectual Property Rights (IPRs) and related laws
- Data Systematic Collection
- Integrated Policy to cover R&D, Production, Marketing, HR and Cultural Restoration and Inheritance

A Next Step to Further Develop the Creative Economy:

- Creative Industry Development Master Plan: as a guideline framework for cooperation between relevant government and private agencies.
Thank you

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Back up
Vision to 2012
“a vibrant and sustainable creative cluster to propel the growth of Singapore’s Creative Economy.”

Targets for 2012
- Double GDP contribution of creative cluster from 3% (estimated) in 2000 to 6% by 2012; and
- New Asia Creative Hub
- A Renaissance city (Arts and Culture)
- A Global Cultural and Business Hub for the Design (Design)
- A Global Media City (Media)
Thai Experiences: Creative Industry Supporting Agents in Thailand

**Policy**
- NESDB
- Ministry of Culture
- MOST
- MOE

**Production**
- **Finance**
  - MOF กระทรวง
  - Commercial Bank
  - BOI
  - OSMEP สำนักรายการพัฒนาชุมชน

- **Quality/Standard Control**
  - FDA อย.
  - NFAS ภาคเอกชน
  - NSTDA สำนัก
  - ISO สมอ.
  - TAT

- **Knowledge and Technology**
  - NSTDA สำนัก
  - TRF ศูนย์
  - TISTR วิว.
  - NRCT วิช.
  - OKMD
  - SIPA
  - R&D Inst.
  - Universities
  - DIP กรมทรัพย์สิน

- **HR**
  - CDD กรมการพัฒนาชุมชน
  - DOLA กรมส่งเสริมการปกครองส่วนท้องถิ่น
  - DSD กรมพัฒนาที่มีผล
  - TTC กรมพัฒนาที่มีผล

**Marketing**
- MFA กรมต่างประเทศ
- DEP กรมส่งเสริมการท่องเที่ยว
- DBD กรมพัฒนาธุรกิจการค้า
- TTC สภาอุตสาหกรรมไทย

**Source:** NESDB, *Cultural Capital Path: Building a social capital power 2006*
Culture in Economic and Social Dimensions

Culture for conservation and commercial value creation
Culture for occupational promotion and income improvement
Culture for competitiveness development
Culture for building the Pride of Being Thai
Culture for human development
Culture for education promotion
Culture for security promotion
Culture for moral arts & appreciation improvement
Culture for building local cooperation
Culture for tourism promotion
Culture for security promotion

Economy

Society

Source: Office of the National Culture Commission as cited in The study on competitiveness management, 2007 commissioned by NESDB
Selected International Experiences: Policy in Promoting Cultural Industry

**KOREA**
- Korea Culture and Content Agency (KOCCA)
  - Promote culture as an economic-driven factor
  - Use media for selling culture

**Export revenue from cultural industries rapidly increases**

**CHINA**
- Cultural Tourism of “Lijiang World Heritage Site”
  - Set zoning for the development of new and old areas
  - Develop the old city/area as it was in the old days

43% of Lijiang’s GDP is from tourism, of which partly contributes by this World heritages

**JAPAN**
- One Village One Product (OVOP)
  - Utilize local materials/knowledge
  - Support communities as required

People in communities are self-reliant & capable to generate revenue

**Revenue**

<table>
<thead>
<tr>
<th>Year</th>
<th>US$ Millions</th>
</tr>
</thead>
<tbody>
<tr>
<td>2000</td>
<td>400</td>
</tr>
<tr>
<td>2001</td>
<td>437</td>
</tr>
<tr>
<td>2002</td>
<td>458</td>
</tr>
<tr>
<td>2003</td>
<td>548</td>
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</tbody>
</table>

CAGR = 11%

<table>
<thead>
<tr>
<th>Year</th>
<th>Billions Yen</th>
</tr>
</thead>
<tbody>
<tr>
<td>1980</td>
<td>36</td>
</tr>
<tr>
<td>2001</td>
<td>141</td>
</tr>
</tbody>
</table>

CAGR = 18%

Sources: CMU3 Analysis
Difficulties in measuring creative services

- Not all creative products have creative content (blank CDs)
- Capturing figures for architecture, design and advertising services identifying and adding up physical and digital distribution?
- How to get reliable trade flows in broadcasting content in developing countries?
- Any universal alternative for EBOPS for trade in services?
- Film producers in developing countries no longer use 35mm, distribution problems, drop in figures captures shift to DVDs?
- How to distinguish standard computer services from creative or cultural digital services?