

APPENDIX

1. Research Framework

1.1. List of interviewees and basic questionnaire

Table 36 and Table 37 show the list of interviewees and questionnaire, respectively.

Table 36: List of interviewees

Country	Category	Interview
China	Government	The State Administration of Radio Film and Television (SARFT)
	Broadcast	China Central Television (CCTV)
	Internet	IQIYI.COM
Indonesia	Government	Kementerian Komunikasi dan Informatika (KOMINFO) *Ministry of Communication and Information Technology
	Broadcast	Telvisi Republik Indonesia (TVRI)
	Broadcast	Surya Citra Televisi (SCTV)
	Production	DNA
	Production	Avirga (Castle production)
Korea	Government	Korea Creative Content Agency (KOCCA)
Malaysia	Industry	Creative Content Association of Malaysia (CCAM)
	Production	Blue In Green Media
	Broadcast	Media Prima
	Production	Vision New Media
	Production	Les' Copaque Production
Philippines	Government	The National Economic and Development Authority (NEDA)
	Industry	Creative Economies Council of the Philippines (CECP)
	Broadcast	Light TV
	Internet	Razor Bite Solution
Singapore	Government	Ministry of Communications and Information (MCI)
	Broadcast	MediaCorp
	Production	Infinite Studios
	Production	Mm2 Entertainment
Thailand	Government	Ministry of Culture
	Government	Office of the National Broadcasting and Telecommunications Commission (NBTC)
	Industry	The National Federation of Thai Film Associations
	Industry	The Federation of Radio and Television Professionals Association
	Industry	Thai Animation & Computer Graphics Association (TACGA)
	Industry	Software Industry Promotion Agency (SIPA)
	Broadcast	Asia Broadcasting Television
	Broadcast	True Vision
Japan	Government	Ministry of Economy, Trade and Industry (METI)
	Industry	Major industry bodies
	Broadcast	Major broadcasters
	Production	Major production houses

Table 37: Questionnaire

Issues	Questionnaire
1. Status of the TV broadcasting and audiovisual content distribution industries	
Size of the broadcast and audiovisual content distribution markets	<ul style="list-style-type: none"> ● What are the changes in market figures in terms of distribution segment (Terrestrial, satellite, IPTV, etc)? ● What are the recent trends?
Broadcast-related laws and regulations, promotional measures, practices and habits, etc., by country	<ul style="list-style-type: none"> ● What are the general conditions in regulation? ● What are the major promotion policies and measures? ● Are there major policies & measures for content distribution over the internet? ● What are the outcomes (results / effects) or challenges regarding the above regulation and promotion policies?
Business operators and business models related to the broadcast and distribution industry in each country	<ul style="list-style-type: none"> ● Who are the major players in each segment of the value chain (ex. Production, Aggregation, Distribution), in terms of sales, subscribers, etc.? ● Are there any trends regarding development of new business models for new media? ● Are there standardized content format for broadcasting and for other content distribution?
Viewership by country of broadcast and distributed programs	<ul style="list-style-type: none"> ● What are the demands for programs? ● What are the preferences for foreign contents?
2. Production, acquisition, and exportation/importation of audiovisual contents	
Market structure and major players	<ul style="list-style-type: none"> ● How many, and who are the major players in the production (Pre-Production, Production, Post-Production) sector? ● What are the business/profit models of the major players?
Production of audiovisual contents	<ul style="list-style-type: none"> ● What are the practical processes of program (content) production? ● Figures regarding the cost of standard programs for each process of production.
Broadcasting of audiovisual contents	<ul style="list-style-type: none"> ● What are the practical programming and audience target? ● What are the practical processes for broadcasting a program?
Exportation/importation of audiovisual contents	<ul style="list-style-type: none"> ● Figures regarding import / export of audiovisual contents (TV programs in particular) ● Who are the major players engaged in exportation/importation of broadcast programs (buyers and suppliers) and other related business operators (Distributors, Interim management agencies, etc.)? ● What are the required processes, its costs, and roles of each player (ex. localization)? ● Are there any conditions (Form of licensing, difference in program genres and popularity) ● Are there any trends in demand? What are your current demands/needs? ● Are there best practices that you can share with us?

2. Reference Information

2.1. Classification Models of Content Industry

There is no single definition of creative industries that is universally accepted. Some examples of classification models that define content industry are shown below. These well-known models were taken up particularly in East Asia. Many Asian countries have developed analyses of their creative industries, based to a greater or lesser extent on these models.

Table 38: Example Models of Defining the Content & Creative Industry

Model	Scope & definition
UNCTAD model	Audiovisuals, New media, Creative services, Design, Publishing and printed media, Visual arts, Cultural sites. Traditional cultural expressions ,Performing arts (UNCTAD, 2008)
UK (DCMS ⁸) Model	Definition : “Those requiring creativity, skill, and talent, with potential for wealth and job creation through the exploitation of their intellectual property” Advertising, Architecture, Art and antiques, Crafts, Design, Designer fashion, Film and video, Interactive leisure software, Music, The performing arts, Publishing, Software & computer services, Television and radio (DCMS, 2001) *These categories are known as ‘DCMS 13’
WIPO Copyright Model ⁹	Core copyright Industries (Advertising, Collecting societies, Film and video, Music, Performing arts, Publishing, Software, TV and radio, Visual and graphic art), Interdependent copyright industries (Blank recording material, Consumer electronics, Musical instruments, Paper, Photocopiers, Photographic, Equipment), Partial copyright industries (Architecture, Clothing, Footwear, Design, Fashion, Household goods, Toys) (WIPO, 2003)

There has been growing demand for statistics related to information economy, in particular information & communication technology (ICT) sector and content & media sector. While activities related to the information economy have been described by, or been part of, ISIC (International Standard Industry Classification)

⁸ Department for Culture, Media & Sport

⁹ World Intellectual Property Organization

classes in a number of ISIC divisions (UN, 2008), the definition and classification has been subject to discussion. As an example, The Organisation for Economic Co-operation and Development (OECD) has taken a leading role in standardizing the definition of the ICT and content & media sectors. ISIC defines as follows:

“The production (goods and services) of a candidate industry must primarily be intended to inform, educate and/or entertain humans through mass communication media. These industries are engaged in the production, publishing and/or the distribution of content (information, cultural and entertainment products), where content corresponds to an organized message intended for human beings.”

Table 39 shows the list of ISIC (Rev.4) industries that comply with this definition.

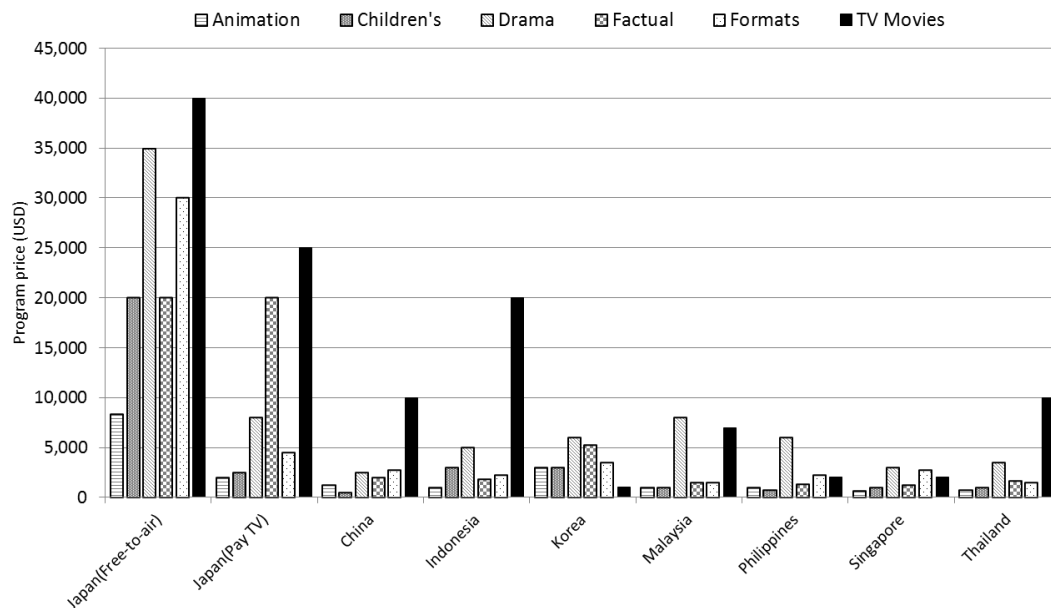
Table 39: Industry Classification for Content and Media Sector (ISIC)

Code	Classification
581	Publishing of books and other publishing activities
5811	Book publishing
5812	Publishing of directories and mailing lists
5813	Publishing of newspapers, journals and periodicals
5819	Other publishing activities
591	Motion picture, video and television programme activities
5911	Motion picture, video and television programme production activities
5912	Motion picture, video and television programme post-production activities
5913	Motion picture, video and television programme distribution activities
5914	Motion picture projection activities
592	Sound recording and music publishing activities
60	Programming and broadcasting activities
6010	Radio broadcasting
6020	Television programming and broadcasting activities
639	Other information service activities

2.2. Pricing of TV Programs

Figure 50 shows the price of typical TV program for different genres. Overall, Japanese TV program prices are the highest in any genres. For animation and dramas, the difference is 14 (Japan) to 1 (Singapore/China), and for children’s / TV Movies, it is 40 (Japan) to 1(China/Korea).

Figure 48: TV Program Price Comparison (2011)



Source: Television Business International Yearbook 2012.

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4. Currency Rate

The table below shows the currency rate used in this report, in particular market data described in Chapter 3.

Table 40: Currency Rate used in This Report

Country	Currency rate used
	[Local/USD] for 2011
China	6.31
Indonesia	8,595
Japan	79.81
Korea	1,108
Malaysia	3.06
Philippines	43
Singapore	1.26
Thailand	30.5

The table below gives an approximate USD size of local currency data referred in Chapter 5 and Chapter 6.

Table 41: USD Conversion of Local Currency

Chapter & Section	Local currency	USD
Chapter 5, Section 1.1	22.7 billion RMB	3.6 billion USD
Chapter 5, Section 1.1	2.046 billion RMB	0.324 billion USD
Chapter 5, Section 1.2	31.3 billion JPY	0.4 billion USD
Chapter 5, Section 1.4	6.2 million SGD	5 million USD
Chapter 5, Section 1.4	7 million SGD	8 million USD
Chapter 5, Section 2.2	30 million RMB	4.8 million USD
Chapter 5, Section 2.3	2,300 billion JPY	29 billion USD
Chapter 5, Section 2.4	1 trillion KRW	0.9 billion USD
Chapter 5, Section 2.4	12 billion KRW	10 billion USD
Chapter 5, Section 2.4	63 billion KRW	57 billion USD
Chapter 5, Section 2.5	33 billion KRW	30 million USD
Chapter 5, Section 2.5	15 billion KRW	14 million USD
Chapter 5, Section 2.5	62 billion 964 million KRW	57 million USD
Chapter 5, Section 2.5	27 billion 654 million KRW	25 million USD
Chapter 5, Section 2.5	1 billion KRW	0.9 million USD
Chapter 5, Section 2.5	5 billion KRW	4.5 million USD
Chapter 5, Section 2.5	1.5 billion KRW	1.3 million USD
Chapter 5, Section 2.5	2 billion KRW	1.8 million USD
Chapter 5, Section 2.5	47,600 KRW	43 USD
Chapter 5, Section 2.5	100,000 KRW	90 USD
Chapter 5, Section 2.7	1 billion RMB	0.16 billion USD
Chapter 5, Section 2.7	975 million RMB	154 million USD
Chapter 5, Section 2.7	727 million RMB	115 million USD
Chapter 5, Section 2.7	29.6 billion THB	0.97 billion USD
Chapter 6, Section 1	20 billion RMB	3.2 billion USD
Chapter 6, Section 1	610 million RMB	97 million USD
Chapter 6, Section 1	147 million RMB	23 million USD
Chapter 6, Section 1	546 million RMB	87 million USD
Chapter 6, Section 5	2.5 million MYR	0.8 million USD
Chapter 6, Section 5	5 million MYR	1.6 million USD
Chapter 6, Section 7	8.0 billion SGD	10 billion USD
Chapter 6, Section 7	25.7 billion SGD	32 billion USD
Chapter 6, Section 7	630 million SGD	793 million USD
Chapter 6, Section 8	200 million THB	6 million USD
Chapter 6, Section 8	17.6 billion THB	0.6 billion USD
Chapter 6, Section 8	165 billion THB	5 billion USD
Chapter 6, Section 8	77 billion THB	3 billion USD