

CEA OUTLOOK

KEEP UP WITH THE CREATIVE ECONOMY FUTURE TRENDS | JULY – DECEMBER 2020

04

THAILAND'S MUSIC INDUSTRY

Creative Economy and the Development of Music Industry



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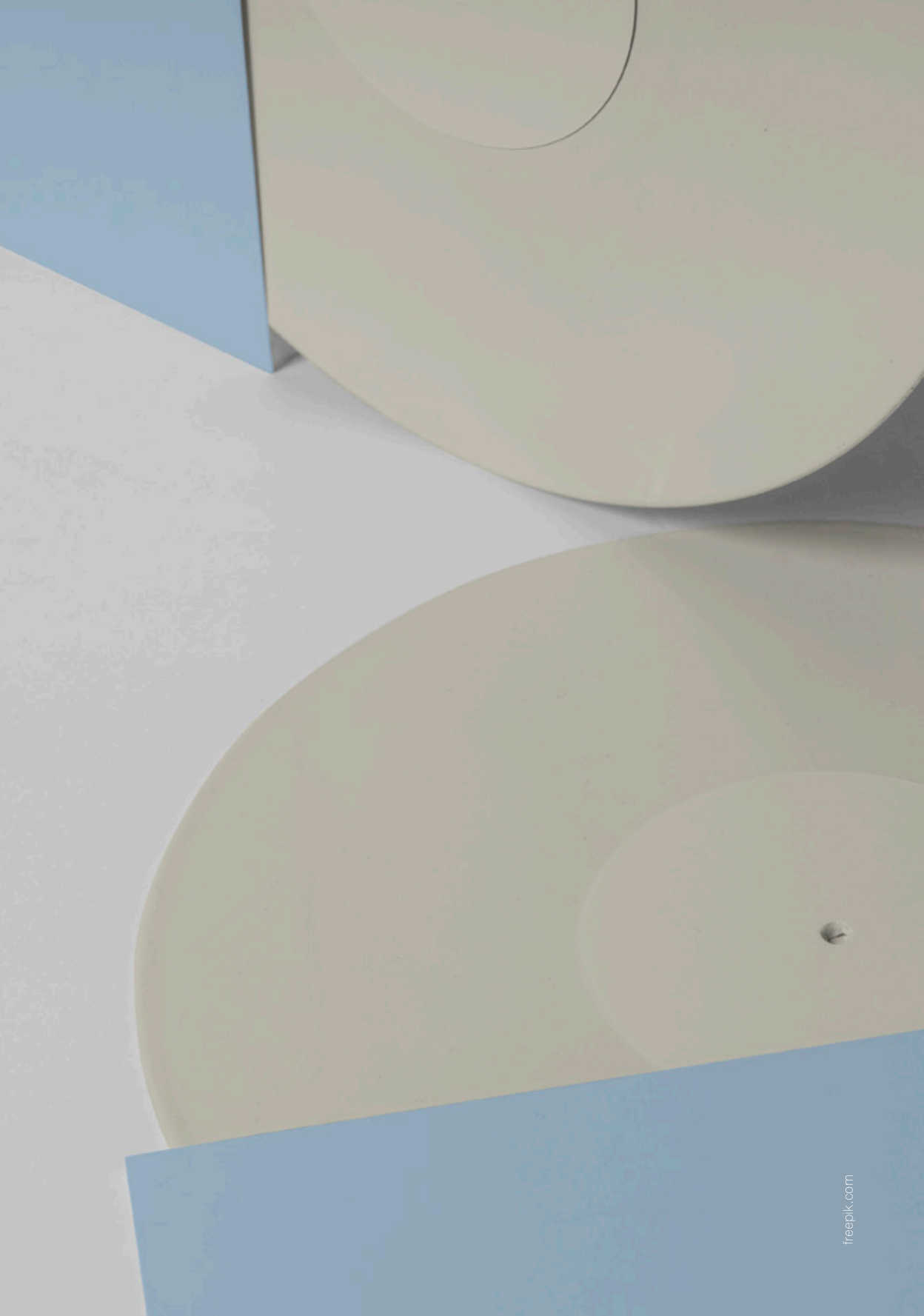
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ABOUT CEA

In accordance with a Royal Decree effective as of 14 August 2018, Thailand Creative and Design Center (TCDC) has been elevated as the Creative Economy Agency (Public Organization) under the Office of the Prime Minister of Thailand. The Creative Economy Agency (Public Organization) or CEA tasked with engaging with entrepreneurs whose businesses leverage innovation and creativity tools to offer products and services that enhance the prominence and competitiveness of Thailand's intellectual property on the global market.

To that end, the CEA uses a variety of approaches to help make creative and digital economy development a pillar of our national future. Through the provision of timely and useful data, the CEA assists in the formulation of policy whilst also establishing creative districts where the government's agenda can be put into action. The CEA also offers training and support to aspiring creatives in conjunction with educational institutions and private sector entities at TCDC branded business incubation centers, where future luminaries of the Thai creative economy can make a start for themselves.

Additionally, the CEA also serves as a repository of statistics and information that can be leveraged by domestic and international stakeholders seeking to help make Thailand a leader of the creative economy in the twenty-first century.



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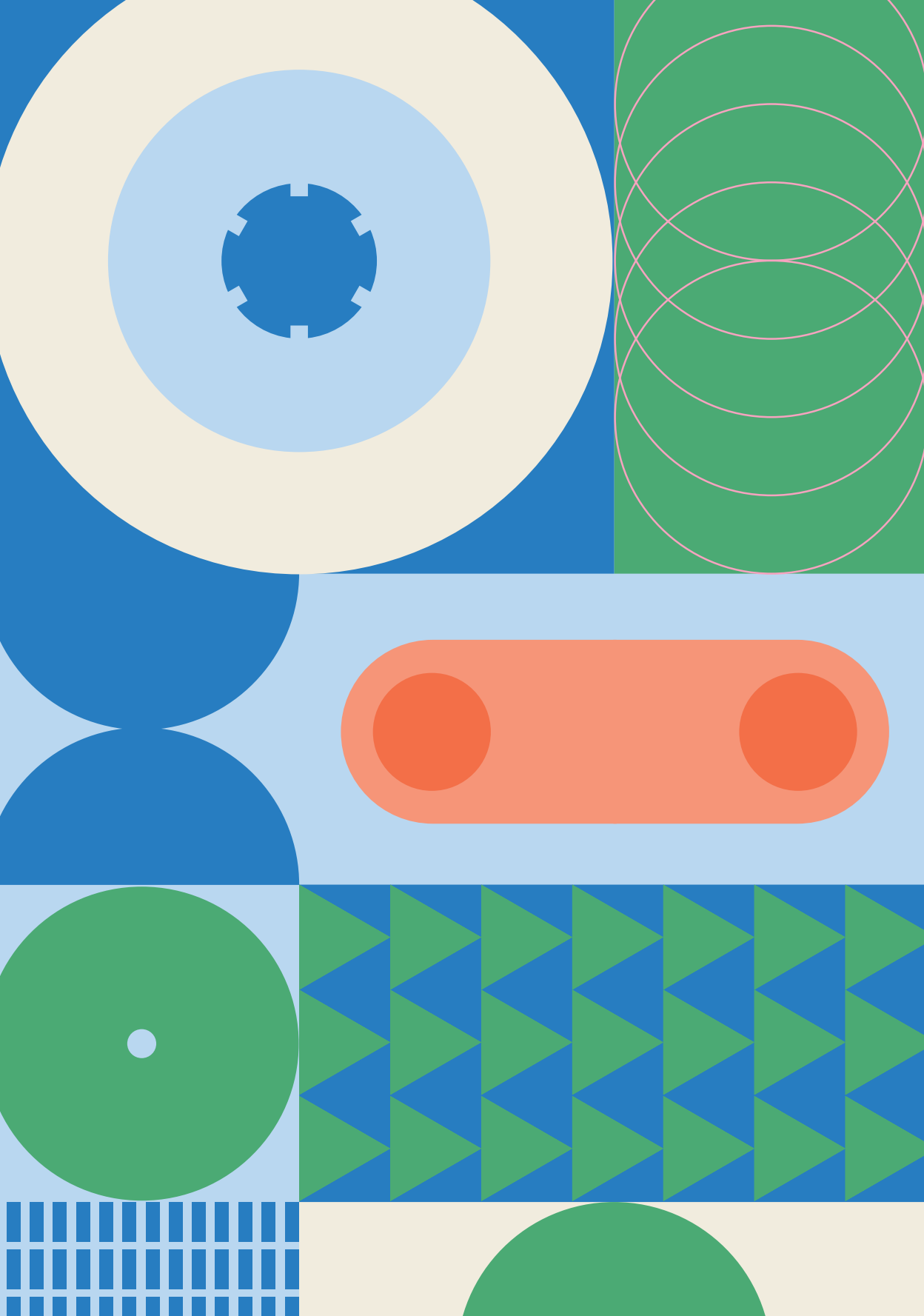
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PREFACE

When it comes to aesthetics, one of the most appreciated areas would be music; it has been embraced as a crucial part of human culture and society for as long as we could recall. Music has been created, practised, and developed in parallel with the growth of human civilizations worldwide throughout our history. It is considered both art and science that has been a subject of knowledge exchange between cultures. Humans, therefore, tend to be more open to music diversity either in terms of culture or style. It is, as they say, internationally accepted that "Music is the universal language of mankind."

Apart from its aesthetic value, music also shows its significant economic potential in the era where business and trading play an essential role in national developments and quality of life improvements. At the same time, it nourishes our minds, body, and soul. When the concept of the creative economy has emerged, music is, without a doubt, considered one of its primary genres. Despite its popularity, the music industry cannot avoid challenges of the world capitalist economy's highly competitive markets, facing the same fate as its peers.

The Creative Economy Agency (Public Organization) or CEA, with its mission to

promote the creative economy of Thailand, aims to equip Thai people with a good understanding of industry-specific challenges and to offer solutions for such issues. CEA focuses its efforts on exploring the creative industries context - industry characteristics, business models, stakeholders, as well as business obstacles and limitations - to collect relevant data and formulate strategic plans for the development of each genre of creative industries. Our research lays strong emphasis on the Thai creative economy's current situation compared to successful international cases to gain lessons and seek opportunities compatible with Thai context.

This edition of the CEA OUTLOOK illustrates the analytical results and worth-mentioning data from the report of strategic plans for music industry development, along with information of the relevant references. The results were unfolded to cover diverse topics - Thailand Creativity Index, Thai and global context of music industries, and the successful international cases, to name but a few. We strongly believe that a profound understanding of associated factors shall lead us to the sustainability of music industry development which will, in turn, drive the economy of Thailand.

APISIT LAISTROOGLAI

Executive Director,
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Volume 04

THAILAND'S MUSIC INDUSTRY

Creative Economy and the Development of Music Industry





PART
01

**THAILAND CREATIVITY INDEX AND
CAPABILITY OF THAI CREATIVE
INDUSTRY TO DRIVE ECONOMY**

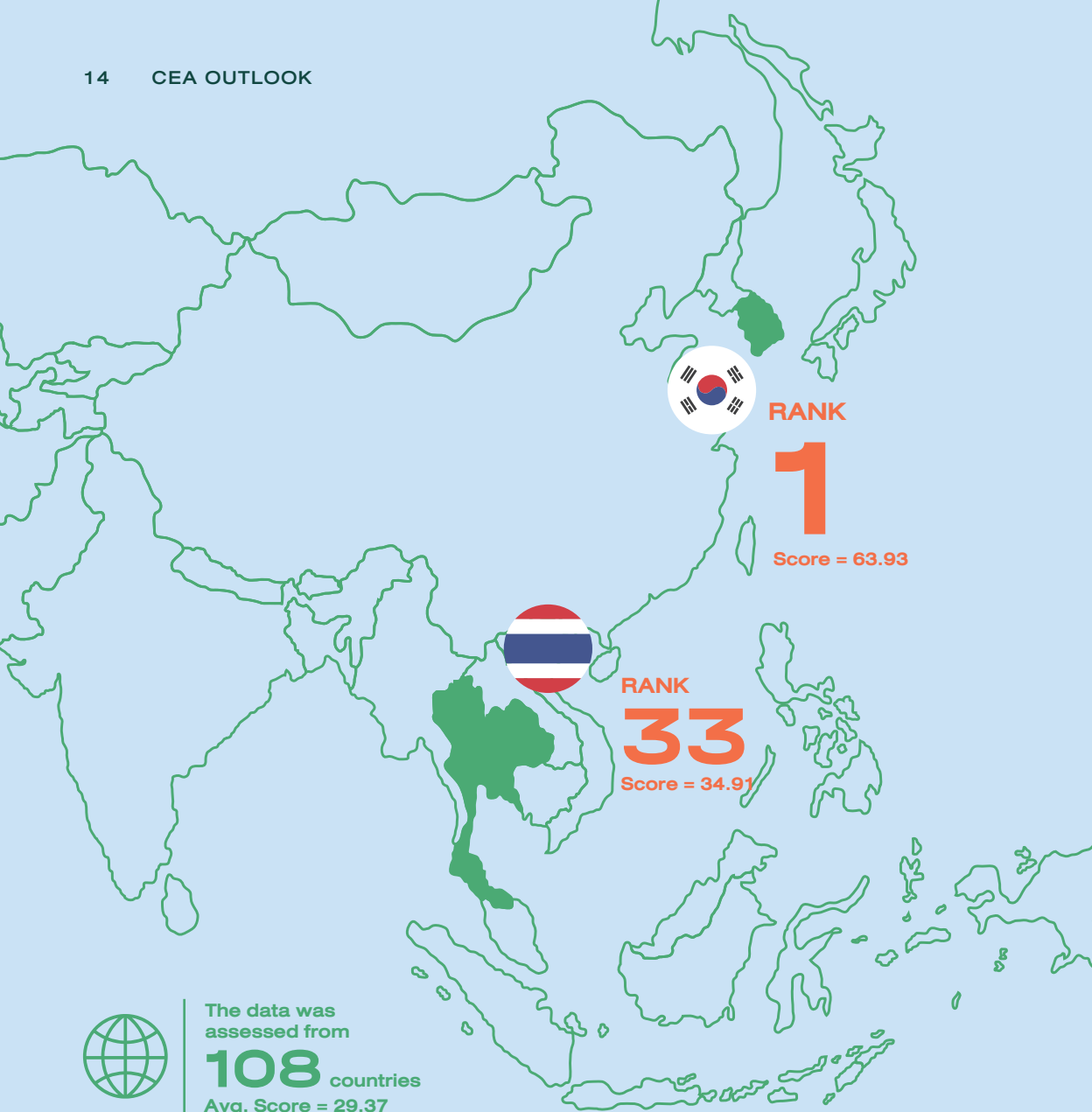
The Creative Economy Agency (CEA) has been taking an active part in developing strategies to drive new economies. The prime responsibilities are to promote and develop a creative economy and support innovation and creativity development. In addition, CEA has made effective use of data collection, statistics, and bodies of knowledge to enhance human resource abilities, international business, and creative industries developments for global competitiveness, which is the prime goal. The Office of National Economic and Social Development Council officially announces the list of Thailand's 15 creative industries, including ;



1. Crafts
2. Performing Arts
3. Visual Arts
4. Music
5. Film and Video
6. Publishing

7. Broadcasting
8. Software
9. Advertising
10. Design
11. Architecture
12. Fashion

13. Thai Cuisine
14. Cultural Tourism
15. Thai Traditional Medicine



International Level Index

The overview of Thailand's Creative Economy was accumulated and synthesized by the International level index. The data was assessed from 108 country profiles, and the results were processed from various indicators in all dimensions. Thailand's level of creative economy ranks 33rd worldwide with an index score of 34.91. South Korea takes the top spot with an index score of 63.93.

Country Ranking by Scores

★ VERY HIGH 8 countries		
Rank	Country	Score
● 1	Korea, Rep.	63.93
2	United States	61.04
3	Australia	58.74
4	Israel	56.93
5	Netherlands	55.38
● 6	Singapore	54.93
● 7	Japan	54.81

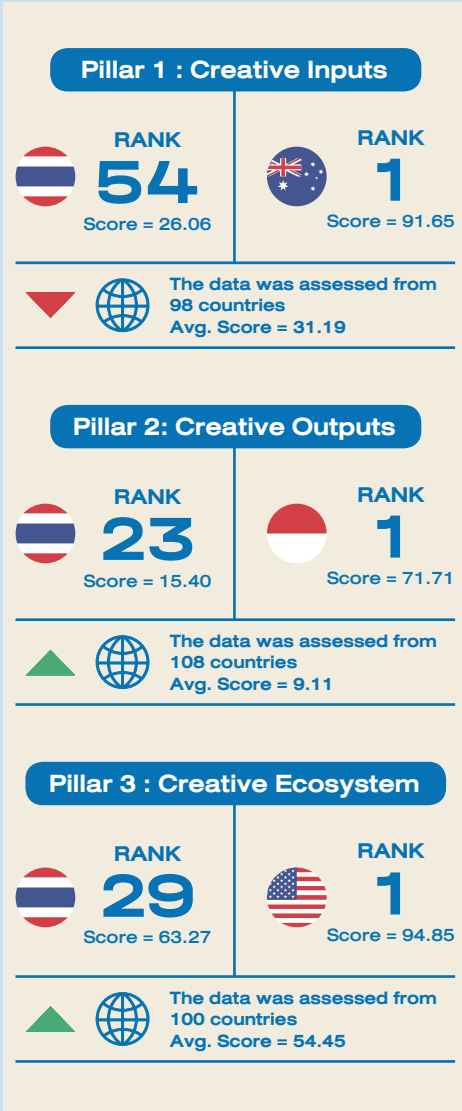
HIGH 20 countries		
Rank	Country	Score
9	Sweden	51.18
10	Denmark	50.43
11	Austria	48.94
12	Belguim	48.76
13	UK	48.72
14	New Zealand	48.24
● 27	Malaysia	41.83

MEDIUM 31 countries		
Rank	Country	Score
29	Portugal	38.10
30	Greece	38.00
31	Russia	35.76
32	Saudi Arabia	35.44
● 33	Thailand	34.91
34	Lithuania	34.85
35	Estonia	33.79

Considering the scores numerical order, Thailand's position among the other 31 countries is in the average score group. Portugal achieves the top rank of this group (score 38.10) while Thailand comes in fifth. Given the countries whose scores are higher than Thailand, it can be divided into two groups. The first group achieves 'excellent scores,' which consist of eight countries. Among these, there are three countries in Asia, namely South Korea, Singapore, and Japan. The second group, composed of 20 countries, earns 'good scores'; some notable countries belonging to this group are China, Hong Kong, and Malaysia.

According to the results, some of the ASEAN member countries are very well ranked. Yet, Malaysia, whose economic development level in the past was almost identical to Thailand, now moves to the 27th spot (score 41.83) in the ranking, up five higher than Thailand. Therefore, Thailand should consider and study the model of policy planning to leverage the creative economy from these prosperous countries and analyze strengths, weaknesses, and development opportunities to enhance future competition capability.

Result analysis and reports are categorized through the three main pillars as follows.



Pillar 1 – Creative Inputs. Thailand ranks 54th (score 26.06), while Australia reaches the top with a score of 91.65. Regarding the mean score of 31.19 calculated from 98 countries, Thailand’s score is lower than the mean. It relatively translates that Thailand still has room for development in terms of human capital and budget, which are the main inputs for fostering creative economy.

Pillar 2 – Creative Outputs. Thailand ranks 23rd (score 15.40), while Monaco is placed at the top rank with a score of 71.71. Since the mean score is 9.11, Thailand’s score is considered higher than the mean.

Pillar 3 - Creative Ecosystem. Thailand ranks 29th (score 63.27), while the USA ranks first with a score of 94.85. The mean score calculated on 100 countries is 54.45; apparently, Thailand’s score is higher than the mean.



Overall, Thailand is proved firm for Pillar 3, Creative Ecosystem, particularly the Business Dynamism, which ranks 20th globally, and Diversity of Workforce, which ranks 27th. For Pillar 2 – Creative Outputs, Thailand maintains the strength in exporting innovative products, placing them sixth in the world ranking. However, Thailand is relatively inept at exporting creative services and advocating registration of trademarks and patents. Thailand also has room for improvement within Pillar 1, Creative Inputs. The development of highly skilled laborers and budget allocation in research and development are correlated. The country still scores relatively low compared to the mean score. This is an urgent factor that needs to be improved.

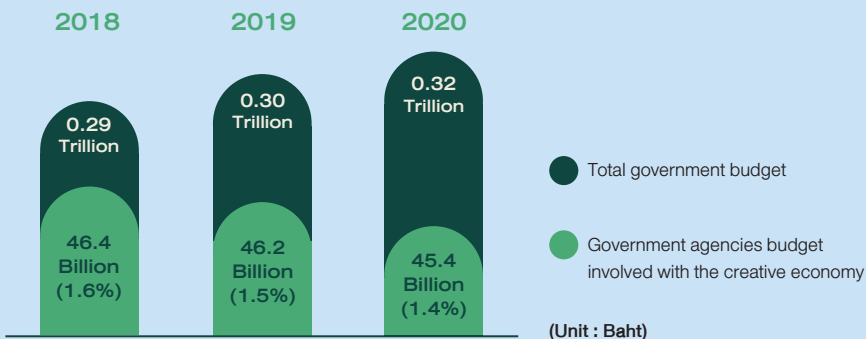
Country Level Index

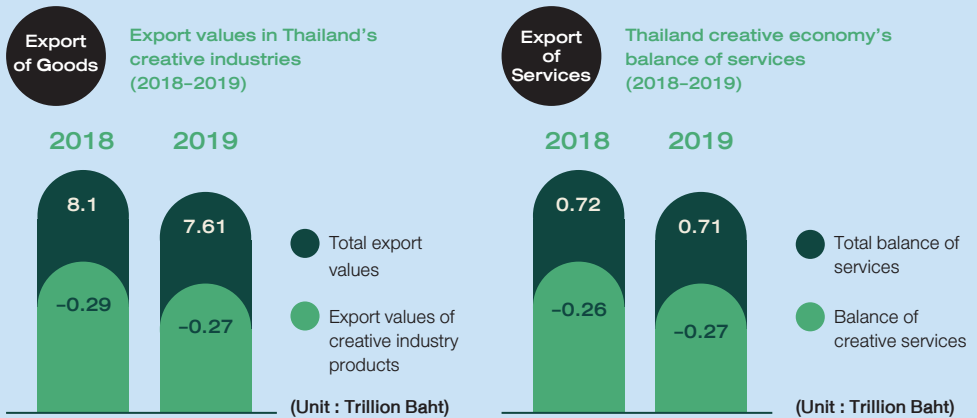
Apart from the International level index, the results represented by the country level index, in which the baseline data assessed from government agencies in alignment with the creative economy, are worth-mentioning. The results can be categorized into groups to clarify economic situations starting from Input, Outcome, and Impact. The results are shown in the following.

1. Data accumulated from the year 2014 - 2020 contained information regarding government expenditures and allocated budgets to 23 central agencies. These agencies work in alignment with the promotion and development of the creative economy. The agencies received the annual allocated government expenditure for 44 billion baht per year, which represents 1.6 % of total government expenditure.

2. Intellectual property indicator is collected and evaluated through registrations of intellectual property, including invention and product design patents, petty patents, trademark registration, and copyright registration. The data accumulated between 2014 - 2018 was analyzed; the results show that all types of registration had been increasing, particularly Thai trademark registration increased from 11,487 cases in 2014 to 15,358 cases in 2018. On the other hand, the copyright registration in music, fine arts, and literary works had been incessantly decreasing from 16,423 cases in 2014 to 10,779 cases in 2018.

Expenditure budget from government agencies that work in alignment with the promotion and development of the creative economy (2018–2020)

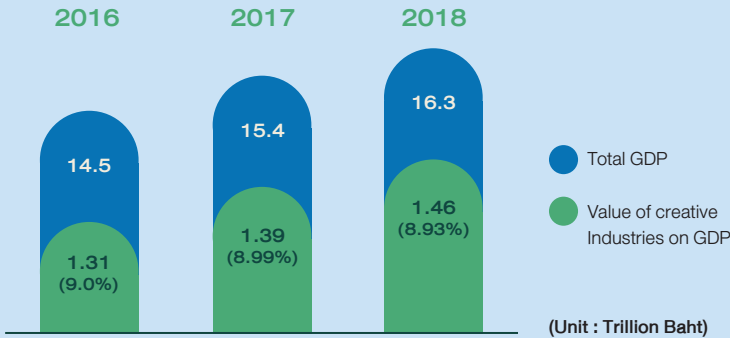




3. Export values in Thailand's creative industry products have been assessed based on HS-CODE categories; only the creative industry codes were used for data analysis. The results show that export values of creative industry products in 2019 surpassed 276 billion baht, equivalent to 3.6% of the total national export values. In comparison with the previous year, the export value had slightly decreased (292 billion baht). Regarding seven categories of creative industries (between 2018 - 2019), the Design category landed at the top as its export values worth 198 billion baht, followed by Visual Arts (38 billion baht) and Crafts (31 billion baht).

4. The balance of Thailand's creative services is assessed from service accounts, which is the net result of income and international services expenses. The four categories aligned with creative services are taken into consideration: intellectual property service charge, telecommunications service charge, computer and information service charge, personal service charge, culture and recreation service charge, and service charge for other businesses. According to the data accumulated between 2015 - 2019, Thailand earned an average revenue from the four groups of services of 372,973.71 million baht and the average expense was 593,942.31 million baht. As a result, Thailand faced a deficit of 220,968.60 million baht in the creative economy.

Thailand creative industry values (2016–2018)



5. In 2019, Thailand’s creative industry was worth 1.46 trillion baht, with the increasing value of 0.48 trillion baht in 2011 (worth 0.98 trillion baht); an average expansion ratio was 5.8% per year. However, the ratio of creative industry values compared with GDP in 2019 was 8.93; the highest ratio was 9.1 in the year 2015. Analyzed by classifications of industry between 2014 - 2019, the industry that had made it to the top and shown unceasing growth was the cultural tourism industry, with value worth 308 billion baht, followed by the food industry (271 billion baht), and advertising industry (195 billion baht).

6. In 2019, the total number of employees in creative-related professions in Thailand was 901,609. Nonetheless, between 2016 - 2019, the number of employments had gradually decreased by 100,000 each year. Half of the total number of employees in the creative profession comprises two professional categories – Craft (32%) and Advertising (23.24%). The fact that the number of people entering the workforce has decreased can result from the impacts of Thailand entering the Aging Society and the significant decline in economic growth during that period. Consequently, there was relatively less demand for workforces in creative-related careers. In addition, the creative industries had not been accounted for any significant government promotion policies, for instance, the 10 S-Curve and the Eastern Economic Corridor (ECC).



MUSIC INDUSTRY IN THAILAND

Entrepreneurs working in each genre of creative industries would exploit different strategies in conducting business and encounter diverse challenges and limitations. In order to determine and design effective strategic plans to foster entrepreneurs in the industry, it is required to have a firm foundation of knowledge regarding current situations, business challenges, and factors influencing business executions. CEA has initiated a project to develop a database and propose development plans for creative industries; studies of related fields and statistical data collection are the foundation of the industry database. CEA Outlook, Volume 4 aims to present analytical results of capabilities and potentials of entrepreneurs in the music industry, suggest promotion guidelines and effective measurement to formulate strategic plans which correspond to government policies and finally attempt to put the plans in practice which hopefully will be useful for entrepreneurs in the music industry.

In order to see the overview of the music industry before digging deeper into details regarding the current situation of the industry on both national and international scales, it is compulsory to understand the connection and correlation in the music industry in alignment with related business operations and other industries. The Department for Digital, Culture, Media & Sport in the United Kingdom studies 13 creative industries and publishes all information in "Creative Industries Mapping Documents 2001". Regarding the music industry, the activities are classified into two main groups: 1) Core Activities, and 2) Related Activities.

Core activities in the music industry comprise songwriting and composition, sound recording, production, distribution and retailing of sound recordings, live performance, copyright management, artist management, representation, and promotion, retailing and distribution of music. Related activities consist of music press, multimedia content and

public relations, content production and publishing, music festivals, arts and creative studios, music for games and films, production and distribution of musical instruments, photography, education and training.

The core and related activities clearly demonstrate the overview of bustles undertaken within the music industry.

Nevertheless, the operations in the music industry require involvement and cooperation with other industries, for instance television and radio industry, advertising industry, film, and video industry, performing arts industry, publishing industry, tourism industry, interactive leisure industry, fare and festival industry, and software and computer industry, to name but a few.

Activities and Related Industries to the Music Industry

Core Activities

- Songwriting and composition
- Sound recording
- Distribution and retailing of sound recordings (Physical Digital and Streaming Service)
- Live performance
- Copyright Management
- Management, representation and promotion

Related Activities

- Music press
- Fair and Festival
- Multimedia content
- Jingle production
- Art and creative studios
- Music for computer games
- Production, distribution and retailing of printed music
- Production, retailing and distribution of musical instruments
- Photography
- Education and training

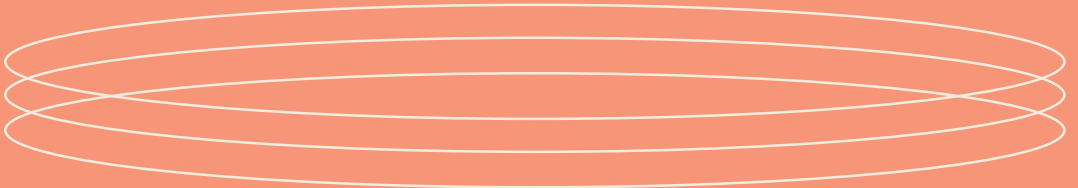
Related industries



Source: Creative Industries Mapping Documents 2001, GOV.UK

PART **03**

GLOBAL MUSIC INDUSTRY

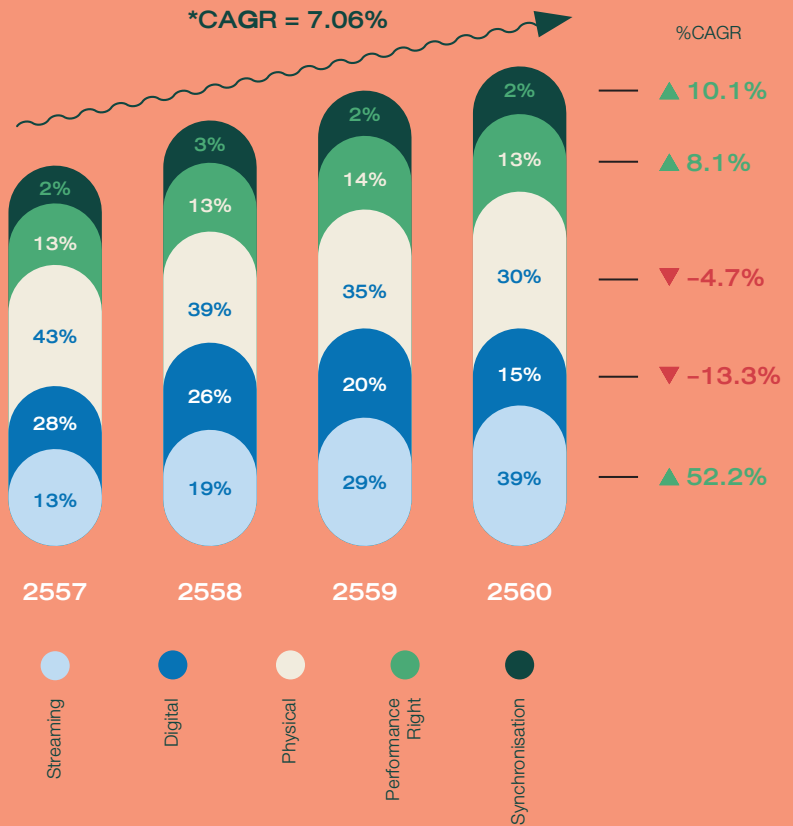


Economic Values of the Music Industry

The International Federation of Phonographic Industry (IFPI) reports the values of the global music industry by pointing out that the expansion rate is 7.06%

per year. The world music market was worth 17.4 billion dollars in 2017, increasing from 14.3 billion dollars in 2014 in its "Global Music 2019" report.

Market Values of the Global Music Industry between 2014 – 2017



Source: Global Music Report 2019, IFPI and the Analysis of the ASEAN Music Industry with a Focus on Thailand by Fungjai

* Compound annual growth rate

Looking at each classification, the results show that streaming revenue grew incessantly and made 39% of the total industry revenue in 2017. On the other hand, the gradual decline of physical revenue could also be observed, accounting for 30% of total recorded music revenue in 2017, followed by digital (15%), performance rights (14%), and synchronization (2%). It is interesting to note here that streaming services, apart from the fact that the services have been

rising in popularity globally, have proved to be one of effective solutions for the violation of music copyright.

According to the report in 2017, U.S.A made it to the top for the music industry's retail values with the gross of 5.9 billion dollars, followed by Japan (2.7 billion dollars) and Germany (1.3 billion dollars) respectively. The retailed value of Thailand's music industry was 0.27 billion dollars.

World Ranking of Values in the Global Music Industry in 2017

Ranking	Country Market	Retail value (Millions USD)	Population (Millions USD)	Spending per capita on music (Millions USD)
1	United States	5,916.1	328.1	18.0
2	Japan	2,727.5	126.5	21.6
3	Germany	1,323.1	80.6	16.4
4	United Kingdom	1,310.7	64.8	20.2
5	France	925.1	66.8	13.8
6	South Korea	494.4	49.2	10.0
7	Canada	437.2	35.6	12.3
8	Australia	412.9	23.2	17.8
9	Brazil	295.8	216.6	1.4
10	China	292.3	1,372.1	0.2
11	Thailand	0.27	68.7	0.004

Source: Global Music Report 2018 (IFPI), Geoba and the supervisor's analysis



Significant Trends in the Music Industry

The music industry has been continuously revolving with rapid changes in all dimensions, particularly in terms of music instruments, forms, standard, and broadcasting. One of the clear examples is the study of Soundcharts and Peex in the article stating the 5 changing trends which are now shaping the future of the music industry.

1. Artificial Intelligence (AI)

Artificial Intelligence or AI has taken up a vital role in the music industry both in terms of production and consumption. Roles of AI in the industry vary starting from song composition through programs and applications which lessens complicated processes in music creation and recording. Numbers of independent artists are soaring since they can produce their own music with much less dependency on record labels. Moreover, AI can assist in marketing plans and public relations via online advertising channels. It can effectively get access to consumers' personal information, particularly their artistic tastes, for example AI can create a playlist recommendation to suit consumer's music preference; the artists, therefore, will be able to get a hold of the right target group which shares similar artistic preferences.

2. Continuous Change in Music Consuming Behavior

One significant changing trend in the music industry is streaming services which have continuously risen to popularity. The service offers convenient accessibility as consumers can get easy access by using their mobile phones and other available tools. Also, diverse music styles are available in streaming services. Some studies pointed out that physical music has fallen out of consumers' favor in the completely opposite direction to the expansion of streaming music; however, physical music is still positioning in the market with specifically-designed products to respond to the demand of specific groups of consumers.

3. Borderless Music Industry

Walls between different music styles tend to be destroyed in the near future; there are no absolute definitions and styles of music anymore. The music style boundaries seen in the past are not as prominent as before as the diversity and mixture of music styles have become more common. Some applications, for example TikTok, become very popular because they provide song editing functions which allows people to design and edit their songs even more conveniently. New styles of music have emerged. Furthermore, collaborations and linkages across industries have become a new norm. For example, consumers can get access to view concerts via online games or E-Sport activities; these activities recently have become very successful. Many artists then turn to choose online games and E-sport as their new platform to introduce their new songs and get public exposure to the media.

5. Exclusive Experience with Virtual Concert

Virtual Concert refers to a concert performance broadcasting online; it has enjoyed a huge popularity in the past few years. The key feature is to apply innovations into a concert performance to introduce new experiences that people can never find from going to regular concerts. In some cases, virtual avatars or holograms of performers are projected onto a stage in the form of three-dimensional images. Another form of virtual concert is an online interactive concert in which the artists perform and respond with audiences interactively through online platforms. This type of concerts allows audiences to be able to interact and communicate with the artist directly while viewing the performance.

4. Freedom for Artists to Create Music

Because of the changing formats in the music business, it is most likely that artists nowadays will choose to become independent artists as they can produce, distribute, and make decisions for their marketing plans. In the past 4 - 5 years, there are numbers of new aspiring artists rising to fame from social media platforms and streaming services. Record labels therefore need to adjust their artist management plan to become more flexible in order to attract talented artists to sign a contract with them to increase companies' incomes. Some key factors influencing artists to make a decision to sign a contract with the record labels include money and music styles. Some particular music styles will do better under professional supervision and support from the record labels; however, for some styles, it is not a necessity.

PART **04**

**THE MUSIC
INDUSTRY IN THAILAND**




In general, the music industry holds two prominent characteristics. First, rapid changes in operation and administration including production, retailing and distribution, product forms and formats, and live performance, encourage and drive everyone working in the industry to always stay ready and be in adjustable mode. Second, consumers' behavior in the music industry is more or less resulted from fast-paced changes in telecommunication technology. Products and services can be classified into two key features: live performance and physical recording.



Thai Music Industry

- Artistic Music
- Folk Music
- Contemporary Music

Important Characteristics of the Music Industry



Rapid Changes
the industry changes rapidly in the production, distribution, and performance.




Consumer's Behavior
changes of consumers' behavior are common, resulted from telecommunication technology.

Products and Main Services of the Industry

1 Live Music Performance

- Competitive market – there are a lot of players in the market.
- Variety of Works
- Music Festival – another platform to introduce new faces to expand consumers market.
- Main venues include restaurants, pub, bar, and concerts/ festival

2 Physical Recordings

- Growing numbers of independent artists have contributed to diversity of music types.
- Roles of the record labels have been changed; the record labels are less necessary in music production.
- Popular platforms to release new music are on-demand streaming services such as YouTube, Joox, and Spotify.

Source: interviews of the stakeholders in the Thai music industry and the supervisor's analysis

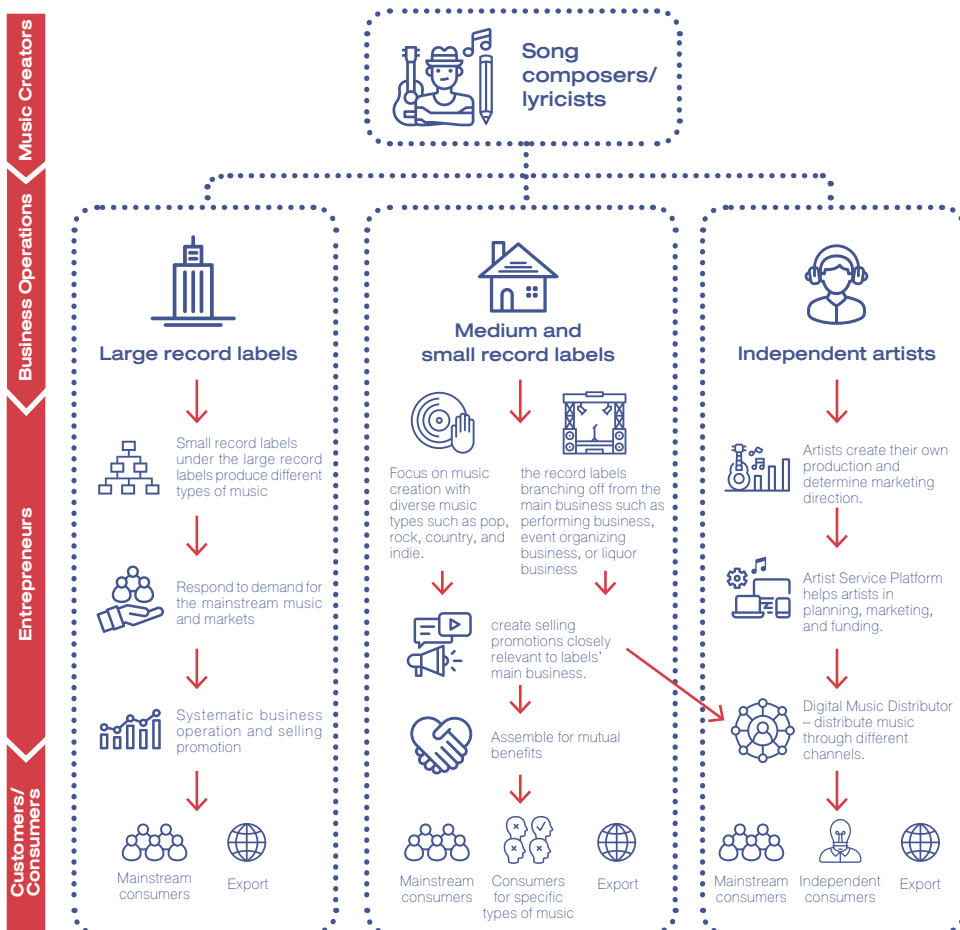
1. Live Concerts - live performance is a highly competitive market, resulting in highly competitive cost. In the past 3 - 5 years, numbers of concert organizers have been soaring, particularly newly establishing minor organizers. This is very different from the past which the market was controlled by a very few major organizers. However, it leads to some positive results; one of which is diversity in Thai live concerts in terms of concert size, forms and formats, and music styles. Cooperation across industries has become a new norm which brings in new innovations and creativities to dazzle audiences. Popular concert venues are pubs, bars, restaurants, and fully-functional concert arenas.

2. Sound Recording – numbers of independent artists in the business have significantly grown resulting from the fact that the recording process today is very convenient and accessible. Today's music market welcomes music diversity; in a similar vein, record labels have become less active in producing music, which is totally different from the past. Music consuming platforms are as well diverse; some popular platforms include on-demand streaming services such as YouTube, Joox, Spotify and Fungjai.

Thailand’s Music Industry: Business Operation

Based mainly on size and operation, the businesses operating within the music industry can be categorized into three groups: large record labels, medium record labels, and small record labels. People working in the business consist of independent artists and composers who compose song melodies and lyrics. Their works will eventually be developed into music products of any forms. Artists and composers can be considered the original

source of products in the industry. In many countries, it has become a norm that composers will hold the copyrights of their creations. It is plausible that they may hire a ‘music publisher’ to help them with all copyright administration without relying any longer on the record labels. In Thailand, there are only a few music publishers, so Thai composers are still mainly dependent on record labels or organizations in charge of copyright administration.



Source: Interviews of Experts in the Music Industry and the Supervisor’s Analysis

1. There are only a few large record labels and they all share one similar operational aspect – having many small record labels under their supervision. Each small record label has their own creative aspect and music preference, so they produce different styles of music in accordance with their expertise. Overall, their creations still have to be in correspondence with the mainstream market. The large record labels always take mainstream consumers and international export possibilities as their business priorities.

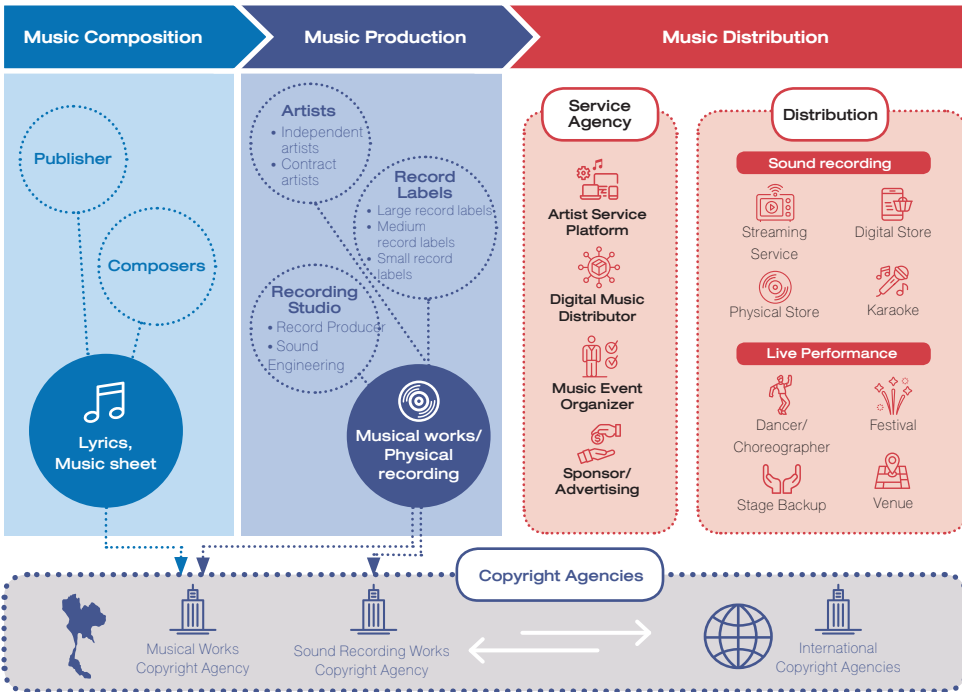
2. For medium and small record labels, these types of record labels outnumber the large ones and are more experimental in terms of business operations. They can be divided into two types based on operational styles. First, the record labels focus mainly on music creation. This type of label responds directly to the market demands. There is a big variety classified by music styles – indie music, hip-hop, isan (or northeastern Thai) folk music, etc. Second, the record labels branching off from the main business, for example, performing business, event organizing business, or liquor business.

These record labels share some similarities in terms of business operation. They usually create selling promotions closely relevant to the music style or labels' main business products. Their main target groups are the mainstream market, some specific groups of consumers, and the international export.

3. The group of independent artists has been drastically growing due to the fact that the production cost nowadays has become more affordable. Therefore, artists are capable of production and distribution of their own works. In addition, the artists enjoy freedom to express their artistic skills in music creation and determine their selling strategies. However, the availability of some "Artist Service Platforms" is the great support for artists as they provide assistance in marketing plans and funding. Furthermore, there are also some Digital Music Distributors offering assistance in music distribution to streaming services. The key goals and targets of independent artists include specific groups of music consumers, groups of independent music fans, and the international export.

Value Chain of Thailand's Music Industry

Regarding the value chain of Thailand's music industry, particularly production and performance, the process can be divided into three steps: 1) Music Composition, 2) Music Production, and 3) Music Distribution.



Source: Interviews and the Supervisor's Analysis

1. Music Composition – when a composer writes the arrangement of the music down in a material forms such as music sheet, broad-sheets or other notation, the work creation will be referred to as “musical works”. A copyright in musical works is generally owned by the creator or the composer. Under the Copyright Act, creators hold moral rights in their works,

including the right to be attributed as the owner. People using the works must acknowledge the composer or pay for ownership’s copyright. In the music industry, music ‘publishers’, or basically the music administrators, provide assistance in making deals with songwriters. Since there are only a few publishers in Thailand,

most Thai composers, unless independent ones, remain reliant on the record labels for administration.

2. Song production – the process concentrates on creating actual songs and music from melodies and lyrics. The copyright owners of musical works hold the right to reproduce so anyone who would like to reproduce the works must pay for the “reproduction right”. After that, musicians and singers can perform and record at the studio to produce any forms of sound recordings. After the production process is completed, those recording songs will be protected by the copyright law as “sound recording works”. In the case that the recording is conducted under the supervision of the record label, the production process will be closely directed by recording

experts such as producers and sound engineers. Nevertheless, artists today are capable of their own recording without the need for recording studios or record labels’ supervision as they did in the past.

3. Music Distribution – in this process, there are two key factors. 1) Service Agency – taking a vital role in distribution management; the services include Artist Service Platform (providing artists’ assistance in marketing and funding), Digital Music Distributor (distributing music via international streaming services), and Music Event Organizer (organizing live concerts and acting as the artists’ key contact representative for live performance gigs). 2) Distribution – the music will be distributed in two main forms: sound recordings and live performance.

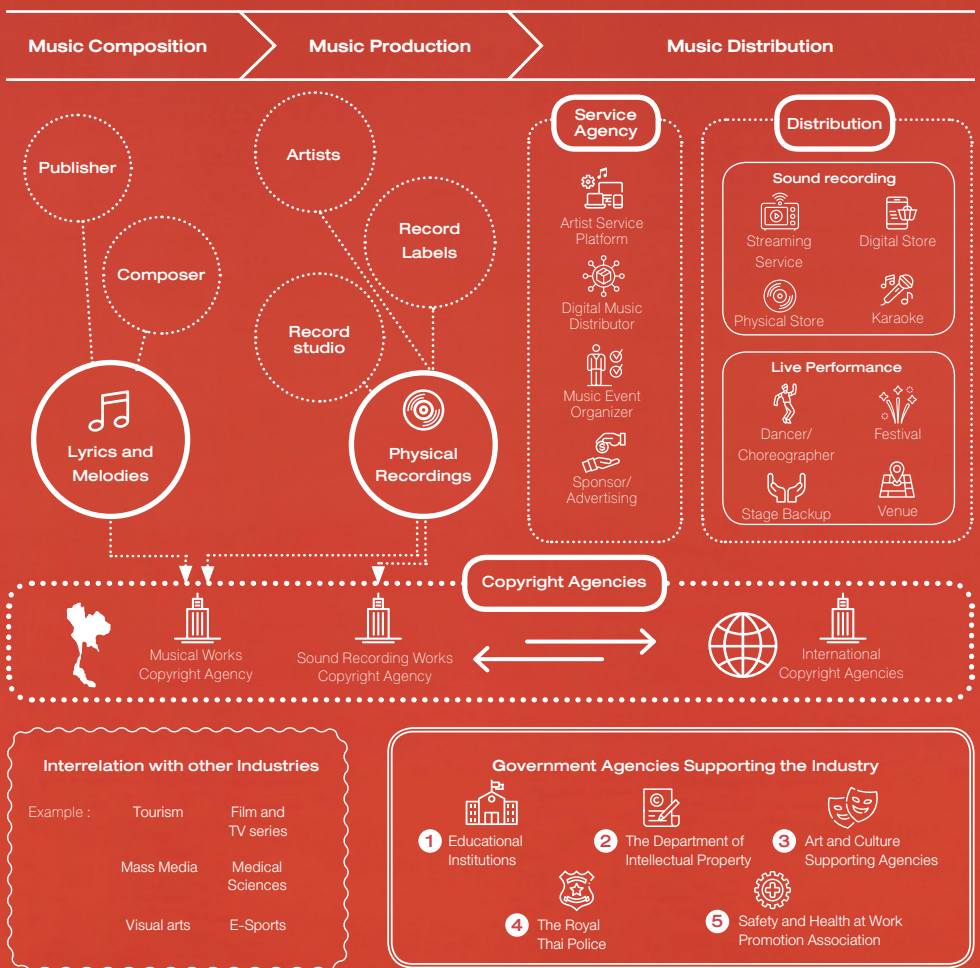
The sound recordings are distributed via different channels such as physical stores, online stores, and streaming services. Most of the music is sold in a form of “full ownership” except for streaming services which the service providers make profit from advertising and monthly service fee. In addition, some physical entertainment venues, for example, pubs, bars, karaoke bars, which play these music recordings are required to pay for “the copyright of sound recording works” and “the copyright of public performance” to the music copyright’s owners. For live performances both with or without admission fees, the event organizer or the concert venue are also required to pay for “the copyright of public performance”.



Ecosystem of the Thai Music Industry

Regarding the ecosystem in the Thai music industry, the four key issues are presented: value chain in production and distribution, copyright agency, service agencies, and connections with other industries. In Thailand, the Department of Intellectual Property is the government agency responsible for

intellectual property matters, including copyright matters and concerns. The department has worked in collaboration with international copyright agencies to administer and monitor the process of copyright charge between Thai and international music industries.



Challenges and Obstacles in Development of the Thai Music Industry

The key issues in challenges and obstacles in the Thai music industry mainly involve intellectual property administration, appropriate schemes to promote Thai music to international markets, and connections with other industries. Overall, challenges and obstacles can be classified into four issues: intellectual property, work creation, marketing and public relations, and government operation.

1. Intellectual Property

one of the key concerns regarding music industry is the violation of music copyright caused by consumers' behavior, inefficient monitoring system, and incompetent protection for music copyright. In Thailand, there are numbers of copyright agencies whose roles and responsibilities are sometimes repetitious and overlapping resulting in confusion among music composers and service consumers. Furthermore, people working within the business lack sufficient information and understanding about the copyright, resulting from limitation of public relations and information sharing.

2. Work Creation

another challenge in the Thai music industry is the fact that there is no official support to provide platforms for knowledge sharing and exchange, related-skills development, and some administration and management such as artists management, music work administration, and copyright administration. The industry also lacks preparation measures for music technology, innovation, and research fund for added-value expansion and development in the industry. Most importantly, professional codes of conducts

or working standards have not yet been institutionalized; as a result, it puts impacts and challenges on financial transactions within the industry.

3. Marketing and Public Relations

marketing and public relations schemes both for national and international markets are not well-structured, particularly 'Branding' which has become a vital challenge. Efficient work coordination is highly required, along with support for music diversity and linkage construction with other industries to open up new trading opportunities.

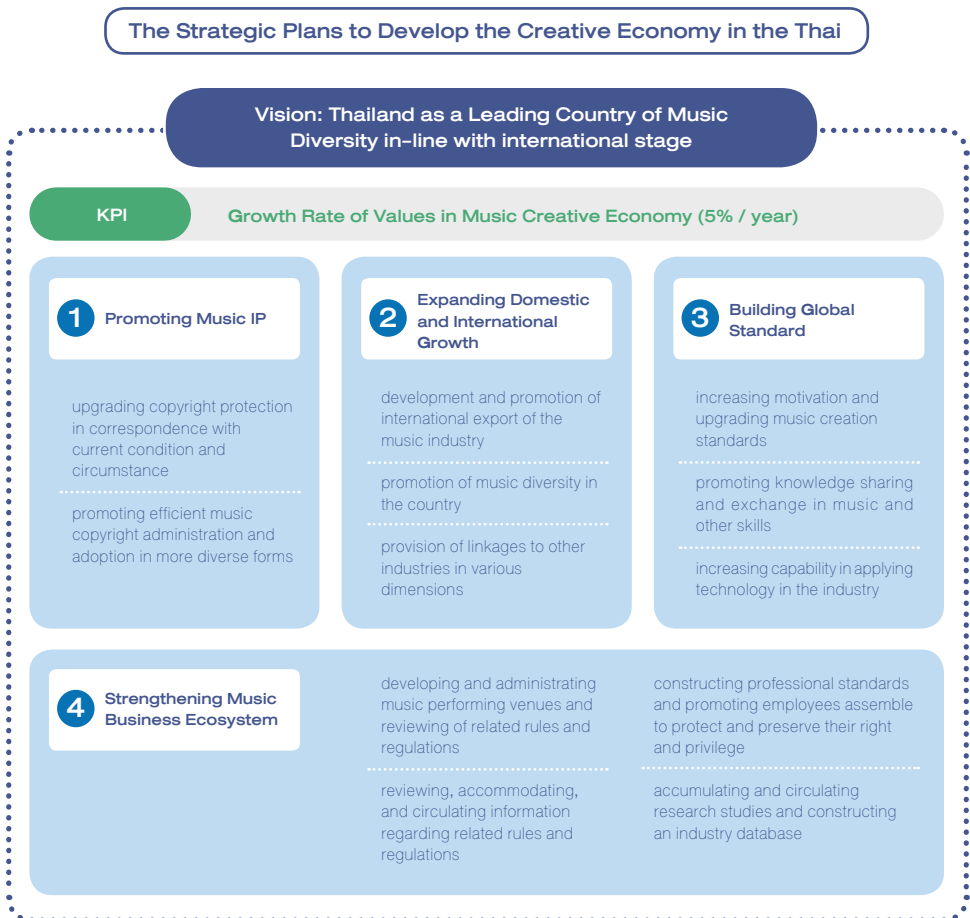
4. Government Operation

until today, there has not been any authorized government policies to support the industry, particularly with an attempt to expand cultural capital in music to drive the economy. Moreover, government officials and agencies working in the field have ambiguous roles and different standards in different areas. Some laws related to the music industry are also equivocal and unspecified which, in many cases, the decisions or final judgements totally come from officials' personal discretions.

Development Plans for Creative Economy in Music

The overview of challenges and obstacles in the music industry can lead to appropriate strategic plans in development of the creative economy with the primary aim to promote value adding in the economy and encourage music diversity in the country to be able to compete in the international markets. The vision of the strategic plans to develop the creative economy in the

music industry is stated here, "Thailand as a Leading Country of Music Diversity in-line with the international stage". The strategic plans focus on each sector working in collaboration to achieve the same goal in upgrading and developing the Thai music industry. The plan has involved the following four strategies:



Source: The Supervisor's Analysis

STRATEGY 1
Promoting Music Intellectual Property

Developing a copyright administrative system is a very significant strategy to promote long-term income distribution within groups of music creators. In addition, it will elevate direct and indirect income earning potentials in accordance with the right and privilege as provided by the law. Under Strategy 1, it involves the two actions: 1) upgrading copyright protection in correspondence with current condition and circumstance; and 2) promoting efficient music copyright administration and adoption in more diverse forms.

STRATEGY 2
Expanding Domestic and International Growth

This strategy aims to promote the expansion of the music industry both at domestic and international levels in determining direction, constructing overall image of the industry, and identifying public relations channels in conformity with current condition and circumstance. Under the Strategy 2, three actions are identified: 1) brand development and promotion of international export of the music industry; 2) promotion of music diversity in the country; and 3) provision of linkages to other industries in various dimensions.

STRATEGY 3

Building Global Standard

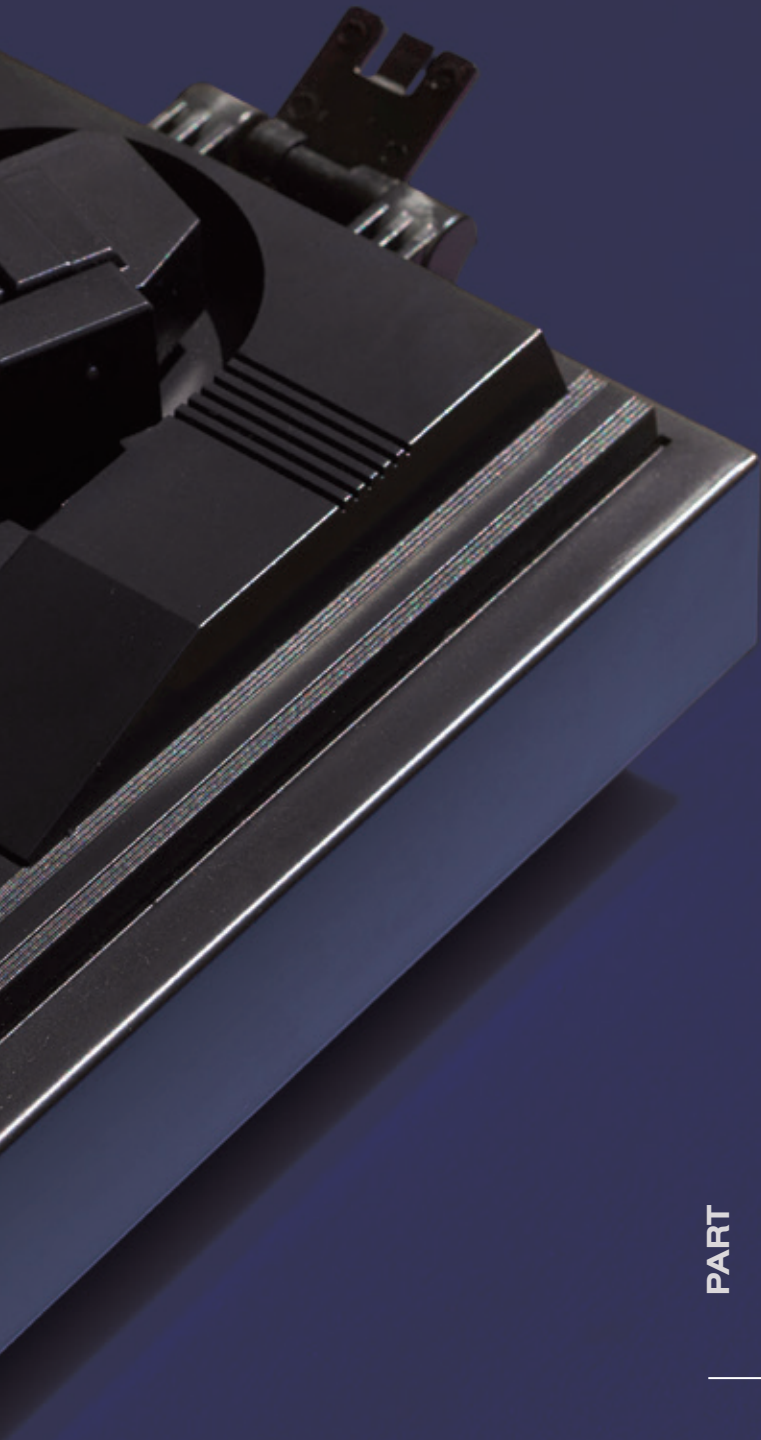
This strategy focuses on reinforcing music production capability to meet with the world standards and developing employees' capabilities both in music-related skills and other necessary skills to build up motivation to create music works. Strategy 3 consists of three actions: 1) increasing motivation and upgrading music creation standards; 2) promoting knowledge sharing and exchange in music and other skills; 3) increasing capability in applying technology in the industry.

STRATEGY 4

Strengthening Music Business Ecosystem

This strategy concentrates on establishing an ecosystem which fosters diversity in music business by constructing infrastructures in all dimensions, for instance, music performing venues, data and research studies accumulation, forming groups of experts, reviews of rules and regulations related to music industry development. Under Strategy 4, four actions are identified: 1) developing and administering music performing venues and reviewing of related rules and regulations; 2) reviewing, accommodating, and circulating information regarding related rules and regulations; 3) constructing professional standards and promoting employees assemble to protect and preserve their right and privilege; 4) accumulating and circulating research studies and constructing an industry database.





PART

05

INTERNATIONAL
CASE STUDIES



The Republic of Korea

The Republic of Korea has achieved a huge success and proved itself one of the leaders in the world music industry. The K-pop music industry has become central compared to other profitable Korean industries. The "Korean Wave", known as "Hallyu", has become one of the biggest cultural phenomena across Asia. The huge success of Korean Wave can be seen through all Korean cultural entertainment products namely music, K-drama, and films. Their popular culture has been gaining worldwide recognition. For 20 years working in robust collaboration with highly effective private sectors, the government of South Korea has placed a great emphasis on the "soft power" of culture, which helped it shape a positive image, earn national revenues, and create its South Korean attractive brand on the world stage.

Korean music industry value has been incessantly expanding since 2014 at 265.8 million dollars and reached the peak of its growth in 2017 making 494.5 million dollars, equivalent to 23% of the growth rate. Consequently, the ranking of Korean music industry was moved up to 6th worldwide in 2018. The world music industry has been shifting its direction to enter a digital age, whereas Korean music industry, on the other hand, has grown in the opposite track. It has been making money, with the highest rate in the world, out of physical products such as CD and Vinyl. In 2017, their CD selling rate grew up to 47.6% while Vinyl selling rate impressively soared up to 124.5%. This resulted from Korean artists' super loyal fan-base and their norms to support their favorite artists by purchasing the physical products.



South Korea

a country in East Asia, constituting the southern part of the Korean Peninsula, and sharing a land border with North Korea, Japan, and China.



Population

51.6 Million



GDP

1.62 Trillion USD

GDP per Capita:

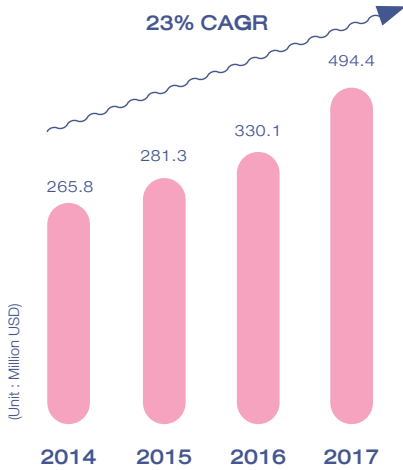
31,362.8 USD/ person



Number of Internet Users

96% of total population

Overview of the South Korea Music Industry



The ranking of Korean music industry was moved up to the **6th** worldwide in 2018

23% of the growth rate between 2014-2017

The highest rate in the world in selling physical products such as CD and Vinyl. In 2017, their **CD** selling rate grew up to 47.6% while **Vinyl** selling rate soared up to 124.5%.

Source: IFPI Global Report 2018-2019, World Bank 2018

The Driving Force Behind the Success of the Korean Wave

Korean government and private sectors have meticulously orchestrated their efforts in supporting the entertainment business, aiming to establish South Korea as "the New Center of Cultural Production in Asia". Private sectors view entertainment business as valuable products which can be developed and expanded to the global market. Most business sectors have made use of Korean popularity to promote their products. In a similar vein, Korean government strongly believes that the export of their culture can lead to huge national economic growth and values. With the export of Korean Wave, South Korea has successfully constructed their positive image and brand in the eyes of the global market.

With the same goal and mutual understanding, the two sectors – the government and the private sector, have been working hand in hand to promote Korean Wave.

The government takes supporting roles in facilitation. Two ministries, the Ministry of Culture, Sports & Tourism and the Ministry of Foreign Affairs, are assigned to take responsibility. While the Ministry of Culture, Sports & Tourism oversees artists development, supporting policy initiation, and public relations, the Ministry of Foreign Affairs concentrates on products promotion and export. By far, Korean cultural products are parts of Korean international affair schemes.



The private sector takes a primary role in driving the music industry by their investment, music production, artists and audience management, and public relations. The operation is done systematically. Korean private sectors taking the supporting roles in the creative industry and the music industry can be divided into three major groups:

1) Record labels - the record labels, takes active roles in artists selection, artists training, song production, public relations, and customer relations. In South Korea today, the four most prominent record labels include SM, YG, Big Hit and JYP. In 2018, SM Entertainment earned the highest market value with the selling gross of 532 million dollars.

2) Korean media and social media - Korean media and social media tend to promote Korean Wave in the view of positive nationalists. Social media has played a vital role to make artists and record labels accessible to public


audiences. YouTube is a major platform that has brought fame and popularity to K-pop by presenting K-pop music videos which exhibit astounding dance choreography, visual effects, sound engineering, fashion, and settings, distinguishing K-pop out of other types of music.

3) Other businesses - other businesses are the major source of financial support for the record labels and artists. They take an active role as the main concert sponsor and fan meeting organizer both for national and international levels. Furthermore, the companies have also effectively optimized the use of Korean pop idols and celebrities to represent their products. For example, Hyundai, a South Korean multinational automotive manufacturer, has initiated Hyundai membership cards which offer discounts and privilege to members participating in their music activities. Other companies which take very active roles in supporting Korean music industry include Samsung, LG, and Hyundai.

1. Record Labels

Record Labels	SM	YG	Big Hit	JYP
Revenue (Million USD)	532	248	196	109
Number of Employees	431	251	138	360
Average Employee's Salary per Year (USD)	33,400	35,400	37,600	31,760
Famous Artists YouTube	Girl's Generation, Super Junior, Shinee, f(x), EXO, Red Velvet, NCT	Big Bang, iKon, BLACKPINK, G Dragon, T.O.P., Taeyang	BTS, TOMORROW, X TOGETHER, Lee Hyun	2 PM, TWICE, GOT7, DAY 6
Subscribers (Million)	21.3	5.0	31.8	14.7

2. Media and Social Media

- Korean media and social media tend to promote Korean Wave in the view of positive nationalists
- Making Koreans proud of the nation and consume K-Pop
- Social Media is a very important platform for
 - MV launching
 - News and activities
 - Loyalty fee collection within groups of fans.
- Names of companies contributing to the success of K-pop 

3. Private Sectors

- Play a vital role in developing and promoting K-pop
 - Financial supports
 - Sponsors for fan meetings and concerts both domestic and international scales
 - Having K-pop idols represent products
- Activity example:
 - Hyundai membership cards offering discounts and privilege for "Super Concert" (concerts performed by Korean and international artists)
- Names of companies contributing to the success of K-pop 

Korean Government Policy in Supporting Music Industry Development

The South Korean government has been actively participating and providing unstinting supports for the growth of the music industry. The four primary goals are identified in promoting Korean music industry as follows:

1. The music industry is carefully fostered to ensure that it would become an efficient source of income; this does not aim only at the music industry to bring in the country's higher revenues, but also include other creative industries.

2. Korean Wave is adopted as the major scheme to reconstruct a

desirable image of South Korea from a small under-developed country to a wealthy well-developed country.

3. K-pop music skill, K-pop artists' performance skill, and Korean Wave are incessantly reinforced and promoted to make them the major profitable export products.

4. Korean influence and soft power are promoted and expanded across Asia and worldwide; the country's positive image is adopted as an effective tool replacing other forms of hard force or weapons.

Expanding Korean cultural influences across Asia and around the globe

Making K-pop, Hallyu, and Korean Culture export products

Rebranding national image of the country to become one of the wealthy developed countries

Earning huge income and promoting long-term national economy

1

Supporting music work creators

IP Protection

- Protecting intellectual property and prosecuting those who violate the copyright law.
- Increasing the severity of punishment for those who illegally share musical works by banning them from using the internet for 6 months.

Supporting musical works and work creators

- Providing trainings to creators in the music industry.
- Investing in Karaoke businesses (i.e., alcohol and non-alcohol selling permission bars, and woman host bar). The income will be shared with the artists.

2

Marketing promotion

Study and Research

- Planning on how to export Hallyu culture to global market by studying target countries and regions in terms of their economic, social, politic, and cultural contexts.
- Working in collaboration with research centers to encourage studies regarding Korean cultures.

Creating Hallyu Guideline

- Creating the guideline for Hallyu strategies is the key recommendation in exporting Korean culture.

3

Public relations promotion

Domestic Public Relations

- Publishing positive news regarding successes of K-pop idols and Korean artists in the international scale.

International Public Relations

- Organizing Korean pop idol concerts.
- Working in collaboration with pop idols to promote Korean tourism and charitable events.
- Establishing Korean Cultural Center.
- Updating news regarding K-pop idols in websites.

4

Infrastructure Development

Internet Network Supports

- Ensuring internet accessibility to poor people, senior citizen, and people with disabilities.
- Providing one gigabyte per second internet to all Korean citizen (200 times faster than the USA).

Promoting technology and innovation development in entertainment business

- Exploiting virtual reality technology and 3D hologram in live concerts.
- Cooperating with research centers to invent technology to support Korean culture.

5

Collaboration with Private Sectors

Fund allocation in partnership with the private sectors

- Establishing the Korea Creative Content Agency by a special allocated budget to promote Korean Culture export.
- Allocating budgets to promote cultural activities and Hallyu.

Partnership investment with the private sector

- Encouraging investments with the private sectors to build and open Hallyu World theme park comprising of concert arenas, hotels, and cultural shopping malls.

In order to achieve the goals abovementioned, the South Korean government has put the policy into action in 5 aspects.

1. Supporting music work creators – this is generally done by protecting intellectual property and prosecuting those who violate the copyright law. In addition, training and knowledge sharing platforms for new creators in the industry are regularly provided and hosted to ensure that these aspiring creators are capable and have all skills well-equipped to create efficient works with their full potential.

2. Marketing promotion – one of the vital tactics is the careful study of its target audiences to understand which Korean Wave products would have the best probability of success in different markets. Korean government focuses on scheme planning on how to export Hallyu culture to the global market by studying target countries and regions in terms of their economic, social, politics, and cultural contexts. Furthermore, the guideline for Hallyu strategies is published in a book “Global Market Finance and Investment Guide” which is equivalent to the key recommendation in exporting Korean culture. This is the guidebook, in which data and information had been accumulated from extensive studies, for exporting products into the global market.

3. Public relations promotion – domestic public relations concentrate on publishing positive news regarding successes of K-pop idols and Korean artists in the international scale; this is to make Korean people proud of their cultural

heritage and the nation. In foreign countries, Korean cultural centers have been established with the main aims to rebrand and leverage on the desirable image of the country and its culture; the activities include promoting K-pop music and organizing concerts abroad.

4. Infrastructure Development – the Korean government has been and is spending significant funds to develop high-tech internet infrastructure as they believe that Korean culture can be effectively disseminated worldwide by the high-speed internet. Every Korean citizen will also benefit from being connected to the global world. As a result, the government ensures internet accessibility to poor people, senior citizens, and people with disabilities by providing one gigabyte per second internet to Korean citizens (200 times faster than the USA). Moreover, the technology and innovation in the entertainment business are as equally fostered seeing examples from American entertainment business which has profited from film making, and British entertainment business from stage dramas.

5. Collaboration with Private Sectors – partnership funding projects for music industry development have been initiated in collaboration between the government and the private sectors, aiming particularly for cultural and Hallyu promotion. Furthermore, the Korea Creative Content Agency is

established by a special allocated budget in collaboration with the private sectors; within this agency, there are three sections in charge separately of video games, television, and cultural industry policies. The agency's key role is to provide facilities for creators and encourage investments with the private sectors to build and open Hallyu World theme park in which will comprise of concert arenas, hotels, and cultural shopping malls.

There is no doubt that the Korean music industry has catapulted Korea onto the global stage. With close collaboration between the government and the private sectors, systematic and well-structured music creation and artists development can be conducted. With concrete supports from the government, the growth of the Korean music industry in the global market has been a fascinating and effective one and it is still unfolding. This could further the success of the Korean economy and culture in the world stage.



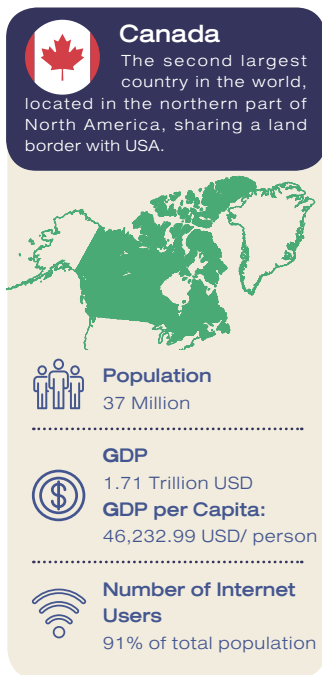


Canada

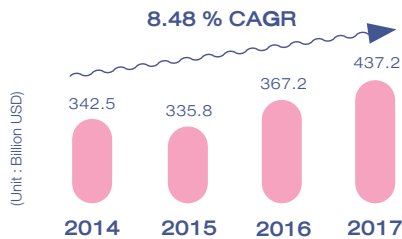
Canada is one of the countries that has been best equipped with a music industry ecosystem. The government is well aware of the importance of creative industry and its impacts to the country's economy, society, and culture. The government then initiates the systematic scheme to develop the music industry starting from the city level to national level. Canada's music industry has positioned among the top ten ranking worldwide; its ranking is movable between the fifth to the ninth, even though the country has a small number of populations for only 37 million people. In 2017, Canada made the third biggest music exporter

of the world with the total gross earned from music distribution and recordings at 561 million dollars, and 11,000 employments in the industry. Regarding famous artists, Canada has numbers of world-famous artists including Drake, Justin Bieber and The Weekend, to name but a few.

There is no doubt that the country has become one of the most successful music exporters in the world with a huge expansion and incessant growth of the business in the past decade. The increase of the industry value was obvious, from 342.5 million dollars in 2014 to 473.2 million dollars in 2017, with the growth rate of 8.4%.



Overview of Canada's Music Industry



Canada's music industry has positioned among the **top ten** ranking worldwide



The **3rd** biggest music exporter of the world in 2017



The total revenue earned from music distribution and recordings at **561 million dollars**, and 11,000 employments in the industry



3 out of 4 most successful artists in 2016 are Canadian (Drake, Justin Bieber and The Weekend)

Agencies Supporting the Music Industry

Canadian music industry is fully supported by the government, particularly the group of independent artists. The music industry development policies include various aspects with details since the national government of Canada is the federal government. For information, Canada has three levels of government: federal, provincial or territorial, and municipal. The federal government is in charge of the national policy planning. Regarding the creative industry, it is under supervision of the Ministry of Canadian Heritage whose major role is to support and promote creativities, uniqueness, norms, and cultural development

through all possible channels, for example, laws, national organizations, policies, and funds under the main policy commonly known as "Creative Canada".

Creative Canada is a new vision and approach to creative industries and to growing the creative economy by the Government of Canada. One aspect of the policy is to drive forward the music industry along three pillars: 1) Invest in Canadian creators, cultural entrepreneurs and their stories; 2) Promote discovery and distribution at home and globally; and 3) Strengthen public broadcasting and support local news.

Canada's Image and Works are globally acknowledged	Constructing the creative economy and the music industry	Canadians have access to trustworthy sources for updating news regarding local music
1. Invest in Canadian creators, cultural entrepreneurs and their stories	2. Promote discovery and distribution at home and globally	3. Strengthen public broadcasting and support local news
Promoting creative industry and equally supporting music creators of all types	Initiating agreements with online platform companies to invest, produce, and exhibit Canadian musical works	Working in partnership with CBC / Radio Canada as local partners
<ul style="list-style-type: none"> Investing in art organizations to keep up with the digital age. Supporting the use of English and French in the production. Promoting equality in ethnicity and gender by encouraging participation from ethnic groups and female creators. 	<ul style="list-style-type: none"> Launching "YouTube Canada", a platform to promote Canadian artists of all ethnic groups and languages. 	<ul style="list-style-type: none"> Promoting local public relations. Adopting innovations in music industry.
Promoting innovation development and Working in collaboration	New Investment in Creative Export Strategy	Working with Service Platforms Preparing for the Digital Disruption through the main local media channels
<ul style="list-style-type: none"> Providing "Creative Hubs" for artists to get access to tools, rehearsal space, and meet with other creators. Supporting creators to learn about business development and performance skills to get to the global market. 	<ul style="list-style-type: none"> Improving exports of Canadian artists' works to the global market Becoming the international leader in culture and diversity. 	<ul style="list-style-type: none"> Working in collaboration with digital entrepreneurs to promote broadcasting innovations. Working in collaboration with google to launch the program, "Canada News Work", to develop resources for national, regional, and local news reporters.
Improving Copyright Law	Establishing "Creative Council"	
<ul style="list-style-type: none"> Improving copyright measurement in correspondence with digital environment. 	<ul style="list-style-type: none"> Providing advice to the government regarding partnership with other industries and solving problems regarding music industry's growth. 	
	Becoming international strategic leader to promote online cultural diversity	
	<ul style="list-style-type: none"> New tax exemption for online services to promote Canadian music products to the global market. 	

Source: Creative Canada Policy Framework and the Supervisor's analysis

The Canadian private sectors have taken active roles in driving the music industry to success. Working in close partnership with the government in terms of supporting budgets, and inde-

pendent artists, there are numbers of private sectors contributed to the music industry's success including, non-profit organizations, copyright management companies, and musician associations.

	FACTOR The Foundation Assisting Canadian Talent on Recordings	MUSIC ACTION	SOCAN The Society of Composers, Authors and Music Publishers of Canada	CIMA Canadian Independent Music Association
1. Organization Type	Public-private partnership	Non-profit organization	Private sector	Non-profit organization / Association of Independent Artists
2. Source of Funds	Government operating through Canada Music Fund	Government operating through Canada Music Fund	-	Canadian owned companies or companies whose business related to the music industry
3. Organization's Goals	Supporting music development for independent artists whose album is in English	Supporting music development for independent artists whose album is in French	Administrating copyrights, providing Canadian license for performance and music production permission	Upgrading independent music both in Canada and International level
4. Policies / Activities	'Comprehensive Artist' Program to support production cost and marketing	Financial support (4,000 USD) for artists who perform in French in a national concert	Administrating reproduction copyrights and performance in the name of the copyright holder, producing license for reproduction to organizations such as record labels and digital service providers	Constructing online platforms to export Canadian music to the world market (music-exportcanada.com)

Source: The FACTORS, Music Action, SOCAN, CIMA

Music Industry Development under the 'Creative Canada'

The Creative Canada is an instrument to leverage Canadian creative industries, furthering and developing from preceding cultural policies. It is about positioning Canada as a world leader in putting its creative industries at the center of its future economy in the world market as well as protecting and promoting cultural uniqueness, language diversity, and relations with Aboriginal people. Creative Canada attentively focuses on five industries: music, film and television, books, video games, and virtual reality (VR).

Creative Canada has put in place a robust system of cultural measures including four measures.

1. Financial supports – some of which include Canada Music Fund to support artists to develop their business skill and polish their artistic skill to be able to compete in the world market, and Canada Cultural Space Fund to provide platforms and essential instruments for artists to become qualified entrepreneurs.

2. Legislative framework – for example, copyright acts and copyright committee whose major role is to determine tax revenue per capita for copyright owners.

3. Policies and regulations – some of which include tax exemption for new online services, and agreements with online platform companies to ensure the growth of the industry.



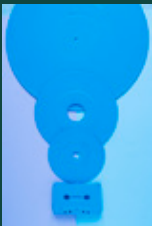
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4. National institutions – it refers to collaborations between government agencies to systematically support the music industry in solidarity, for instance, Canada Council for Arts providing funds and services for artists and art organizations, and National Art Centre taking the role of a mediator working in alignment with art organizations and artists around the country.



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