Content Industry

Current Status and Direction of Future Development

April, 2016

Media and Content Industry Division
Commerce and Information Policy Bureau
Ministry of Economy, Trade and Industry
JAPAN
I. Current status of Japanese Content
The content industry deals with production and distribution of videos (movies, animation, TV programs), music, games, books, etc. As Japanese content is highly evaluated overseas as a part of “Cool Japan”, Japan’s content industry has great potential to penetrate foreign markets further.

The market size of Japan’s content industry is around JPY 12 trillion, which is second only to the USA (2013). Currently, the growth rate is moving sideways due to the decreasing domestic population.

For sustainable growth of Japan’s content industry, it is important to gain profits from foreign markets by taking advantage of Japanese content value.
### Potential of Japanese Content

#### Popularity of the content of Japan, Korea, USA and Europe in major Asian cities

**2014 FY**

- **Which countries’ animation and comics are familiar?**
  - Taiwan: 68% Japan, 15% USA & Europe, 4% Korea
  - Hong Kong: 79% Japan, 22% USA & Europe, 7% Korea
  - Shanghai: 24% Japan, 6% USA & Europe, 9% Korea
  - Bangkok: 26% Japan, 6% USA & Europe, 6% Korea
  - Jakarta: 32% Japan, 11% USA & Europe, 2% Korea
  - Singapore: 26% Japan, 15% USA & Europe, 7% Korea
  - Ho Chi Minh: 33% Japan, 10% USA & Europe, 8% Korea
  - Mumbai: 3% Japan, 100% USA & Europe, 0% Korea

- **Which countries’ drama is familiar?**
  - Taiwan: 43% Japan, 50% USA & Europe, 47% Korea
  - Hong Kong: 50% Japan, 52% USA & Europe, 61% Korea
  - Shanghai: 18% Japan, 30% USA & Europe, 54% Korea
  - Bangkok: 11% Japan, 12% USA & Europe, 28% Korea
  - Jakarta: 9% Japan, 15% USA & Europe, 5% Korea
  - Singapore: 13% Japan, 45% USA & Europe, 39% Korea
  - Ho Chi Minh: 17% Japan, 28% USA & Europe, 38% Korea
  - Mumbai: 3% Japan, 100% USA & Europe, 0% Korea

- **Which countries’ music is familiar?**
  - Taiwan: 42% Japan, 84% USA & Europe, 26% Korea
  - Hong Kong: 46% Japan, 75% USA & Europe, 47% Korea
  - Shanghai: 18% Japan, 30% USA & Europe, 54% Korea
  - Bangkok: 5% Japan, 39% USA & Europe, 17% Korea
  - Jakarta: 7% Japan, 51% USA & Europe, 11% Korea
  - Singapore: 11% Japan, 69% USA & Europe, 28% Korea
  - Ho Chi Minh: 12% Japan, 36% USA & Europe, 35% Korea
  - Mumbai: 9% Japan, 100% USA & Europe, 0% Korea

- **Which countries’ movies are familiar?**
  - Taiwan: 41% Japan, 74% USA & Europe, 33% Korea
  - Hong Kong: 36% Japan, 62% USA & Europe, 42% Korea
  - Shanghai: 11% Japan, 30% USA & Europe, 36% Korea
  - Bangkok: 17% Japan, 9% USA & Europe, 5% Korea
  - Jakarta: 32% Japan, 5% USA & Europe, 4% Korea
  - Singapore: 12% Japan, 69% USA & Europe, 26% Korea
  - Ho Chi Minh: 19% Japan, 12% USA & Europe, 12% Korea
  - Mumbai: 21% Japan, 100% USA & Europe, 0% Korea

**Source:** Hakuchoo Global HABIT Research 2015.2
Total sales ratio of Japanese content in foreign markets is around 2.5%, $13.8 billion.

Sales ratio of Japanese content is different in each sector.
Manga > Game > Character Merchandise > Animation > Movie, Music, Broadcast

Size of foreign content market and sales ratio of Japanese content

(Unit: US$ Billion)

- Total: 2.5% (13.8)
- Broadcast: 0.1% (0.1)
- Game: 19.3% (11.0)
- Movie: 0.1% (0.0)
- Music: 0.1% (0.0)
- Animation: 1.4% (0.2)
- Character Merchandise: 7.9% (0.9)
- Manga: 24.1% (1.5)

<table>
<thead>
<tr>
<th>Year</th>
<th>Total Sales</th>
<th>Income from Overseas</th>
</tr>
</thead>
<tbody>
<tr>
<td>2002</td>
<td>1,366</td>
<td>224</td>
</tr>
<tr>
<td>2003</td>
<td>1,406</td>
<td>253</td>
</tr>
<tr>
<td>2004</td>
<td>2,084</td>
<td>290</td>
</tr>
<tr>
<td>2005</td>
<td>2,232</td>
<td>313</td>
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<td>2006</td>
<td>2,120</td>
<td>312</td>
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<tr>
<td>2007</td>
<td>1,872</td>
<td>268</td>
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<tr>
<td>2008</td>
<td>1,812</td>
<td>248</td>
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<td>2009</td>
<td>1,457</td>
<td>153</td>
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<td>2010</td>
<td>1,488</td>
<td>172</td>
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<td>2011</td>
<td>1,532</td>
<td>160</td>
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<tr>
<td>2012</td>
<td>1,643</td>
<td>144</td>
</tr>
<tr>
<td>2013</td>
<td>1,834</td>
<td>169</td>
</tr>
<tr>
<td>2014</td>
<td>1,847</td>
<td>195</td>
</tr>
</tbody>
</table>

**Total Sales**: Estimated total sales of all anime-production companies.

**Income from Overseas**: Overseas income from video sales, license fees and so on.

### Video game software

#### Unit: hundred million yen

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<thead>
<tr>
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</tr>
</thead>
<tbody>
<tr>
<td>Shipment Value (domestic + foreign)</td>
<td>4,729</td>
<td>5,377</td>
<td>5,669</td>
<td>5,628</td>
<td>5,779</td>
<td>5,174</td>
<td>4,747</td>
<td>4,299</td>
<td>4,685</td>
<td>4,871</td>
<td>6,742</td>
<td>8,486</td>
<td>10,240</td>
<td>7,586</td>
<td>6,706</td>
<td>5,309</td>
<td>4,244</td>
<td>14,306</td>
<td>15,596</td>
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<tr>
<td>Foreign Shipment Value</td>
<td>1,227</td>
<td>1,478</td>
<td>2,141</td>
<td>2,343</td>
<td>2,848</td>
<td>2,532</td>
<td>2,255</td>
<td>1,993</td>
<td>2,327</td>
<td>2,528</td>
<td>3,629</td>
<td>5,600</td>
<td>7,230</td>
<td>5,061</td>
<td>4,115</td>
<td>2,930</td>
<td>2,042</td>
<td>12,341</td>
<td>13,747</td>
</tr>
</tbody>
</table>

* From 2013, research method was changed.

Source: “White Paper of Game Industry”, CESA
### Income from Overseas

The income that the companies related to the Motion Picture Producers Association of Japan can get from the rights related to Japanese movie such as the rights of distribution, screen, remake, broadcast, secondary use and merchandising in foreign countries.

**Income from Overseas:** 1USD = 120JPY

<table>
<thead>
<tr>
<th>Year</th>
<th>Total Sales</th>
<th>Income from Overseas</th>
</tr>
</thead>
<tbody>
<tr>
<td>2000</td>
<td>1709</td>
<td>71</td>
</tr>
<tr>
<td>2001</td>
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</tr>
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<td>2002</td>
<td>1968</td>
<td>84</td>
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<tr>
<td>2003</td>
<td>2033</td>
<td>84</td>
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<tr>
<td>2004</td>
<td>2109</td>
<td>73</td>
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<td>2005</td>
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<td>2007</td>
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<td>2008</td>
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<td>2009</td>
<td>2060</td>
<td>68</td>
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<tr>
<td>2010</td>
<td>2207</td>
<td>79</td>
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<tr>
<td>2011</td>
<td>1812</td>
<td>69</td>
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<tr>
<td>2012</td>
<td>1952</td>
<td>64</td>
</tr>
<tr>
<td>2013</td>
<td>1942</td>
<td>78</td>
</tr>
<tr>
<td>2014</td>
<td>2070</td>
<td>91</td>
</tr>
</tbody>
</table>

**Unit:** JPY hundred million

Source: Motion Picture Producers Association of Japan, Inc.
II. Policies for the Content Industry
The Cool Japan Strategy aims to capture growing demand from emerging countries and activate Japan’s economic growth (reinforcing business activities and creating jobs), by turning the appeal of Japanese culture and lifestyle, not only animation, manga, drama, music, and other content but also Japanese “food”, “clothing” and “shelter”, into value-added.

For the above purposes, overseas demand should be captured under the government initiative in the following three stages:
1. creating a Japanese boom in overseas markets by promoting Japanese appeal
2. selling relevant products and services in overseas markets
3. encouraging foreign tourists and business persons to purchase products and services in Japan by cooperating with Japan’s tourism policy.

“Cool Japan” Strategy

Effectively communicating the appeal of Japan

Building platforms for earning locally

Encouraging foreigners to come to Japan
Policies for Japan’s content industry conducted by METI

Support for Distribution

1. **Localization and Promotion Support (J-LOP)**
   Supporting localization (adding subtitles, dubbing, etc.) and promotion of Japanese content to foreign markets.

2. **CoFesta**
   Holding “CoFesta”, the combination of various content-related events, to appeal Japanese content.

3. **Cool Japan Fund**
   Supporting business activities aiming at promoting Japanese unique products, services and creativity in overseas market.

4. **Asia Content Business Summit (ACBS)**
   Holding the international conference combining public and private sectors of Asian countries/regions to discuss common issues of each content industry and to find solutions together.

5. **Anti-piracy Measures**
   Promoting anti-piracy measures by collaborating with the Content Overseas Distribution Association (CODA).

Support for Marketing

6. **Ambassadors by international students**
   Promoting Japanese content to foreign countries through international students who understand and love Japanese culture and content.

Maintaining Business Platform

7. **Development of Human Resources for Producer**
   Subsidizing the study in foreign film schools and conducting training at foreign private companies to produce experts in the content industry.

8. **Strategy for Content Technology**
   Promoting and cultivating digital content technology.
1. Localization support

**Television Channel**
- “Channel JAPAN”
  - Distribution: Asia region
  - Nikkei-TBS Smart Media
- “WAKUWAKU JAPAN”
  - Distribution: Indonesia
  - SKY Perfect JSAT Corporation
- “Chibi Maruko chan”
  - Distribution: China
  - Nippon Animation International
- “Doraemon”
  - Distribution: English-speaking countries
  - Fujiko F. Fujio Production

**Animation**

**Digital Comic**

2. Promotion support

**Sales Promotion**
- Doraemon x Home Electronics

**Trade Fairs**
- JAPAN EXPO

**Events**
- Festival De Cannes
- Tokyo Girls Collection

**Content Trade Fairs (BtoB, BtoC)**
- MIPTV, MIPCOM (France)
- AFM : American Film Market (USA)
- AFA : Animation Festival Asia (Singapore, Indonesia)
CoFesta is the largest comprehensive content festival in Japan. Events connected with the content industry, including games, animation, comics (manga), characters, broadcast, music and films, and content-related industrial events like fashion and design, are held in cooperation with each other. Various segments of the content industry work together to promote their content overseas with powerful public relations.

### Past CoFesta Events

- **CoFesta2008**
  - Official event (15), Partner event (10), Original event (11)
  - Participants: 820,000
  - Contract amount: USD19 million

- **CoFesta2009**
  - Official event (18), Partner event (16), Original event (6)
  - Participants: 1 million
  - Contract amount: USD45 million

- **CoFesta2010**
  - Official event (17), Partner event (9), Original event (2)
  - Participants: 1.3 million
  - Contract amount: USD38 million

- **CoFesta2011**
  - Official event (18), Partner event (14), Original event (2)
  - Participants: 2.3 million
  - Contract amount: USD45 million

- **CoFesta2012**
  - Official event (18), Partner event (12)
  - Participants: 1.80 million
  - Contract amount: USD52 million

- **CoFesta2013**
  - Official event (17), Partner event (11)
  - Participants: 2.0 million
  - Contract amount: USD65 million

- **CoFesta2014**
  - Official event (18), Partner event (15)
  - Participants: 1.34 million
  - Contract amount: USD51 million

### CoFesta 2015 Official Events

- **CoFesta 2015 Official Events**
  
  - **Official event (17), Partner event (11)**
  
  - **Participants:** 1.80 million
  
  - **Contract amount:** USD52 million

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Of the events shown, TIFFCOM and Japan Contents Showcase are held in cooperation with each other.

**TIFFCOM**

- 2015
- Participants: 1 million
- Contract amount: USD45 million

**Japan Contents Showcase**

- 2015
- Participants: 1.3 million
- Contract amount: USD38 million

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**Partners:**

- **Official event:** 18
- **Partner event:** 15
- **Original event:** 2

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**TIFFCOM**

- 2016
- Participants: 2.3 million
- Contract amount: USD45 million

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**Japan Contents Showcase**

- 2016
- Participants: 2.0 million
- Contract amount: USD52 million

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**CoFesta 2016**

- **Official event:** 20
- **Partner event:** 18
- **Original event:** 4

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**TIFFCOM**

- 2017
- Participants: 2.3 million
- Contract amount: USD45 million

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**Japan Contents Showcase**

- 2017
- Participants: 2.0 million
- Contract amount: USD52 million

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**CoFesta 2018**

- **Official event:** 21
- **Partner event:** 19
- **Original event:** 5

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**TIFFCOM**

- 2018
- Participants: 2.3 million
- Contract amount: USD45 million

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**Japan Contents Showcase**

- 2018
- Participants: 2.0 million
- Contract amount: USD52 million

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**CoFesta 2019**

- **Official event:** 22
- **Partner event:** 20
- **Original event:** 6

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**TIFFCOM**

- 2019
- Participants: 2.3 million
- Contract amount: USD45 million

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**Japan Contents Showcase**

- 2019
- Participants: 2.0 million
- Contract amount: USD52 million

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**CoFesta 2020**

- **Official event:** 23
- **Partner event:** 21
- **Original event:** 7

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**TIFFCOM**

- 2020
- Participants: 2.3 million
- Contract amount: USD45 million

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**Japan Contents Showcase**

- 2020
- Participants: 2.0 million
- Contract amount: USD52 million

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**CoFesta 2021**

- **Official event:** 24
- **Partner event:** 22
- **Original event:** 8

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**TIFFCOM**

- 2021
- Participants: 2.3 million
- Contract amount: USD45 million

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**Japan Contents Showcase**

- 2021
- Participants: 2.0 million
- Contract amount: USD52 million

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**CoFesta 2022**

- **Official event:** 25
- **Partner event:** 23
- **Original event:** 9

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**TIFFCOM**

- 2022
- Participants: 2.3 million
- Contract amount: USD45 million

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**Japan Contents Showcase**

- 2022
- Participants: 2.0 million
- Contract amount: USD52 million

---

**CoFesta 2023**

- **Official event:** 26
- **Partner event:** 24
- **Original event:** 10

---

**TIFFCOM**

- 2023
- Participants: 2.3 million
- Contract amount: USD45 million

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**Japan Contents Showcase**

- 2023
- Participants: 2.0 million
- Contract amount: USD52 million

---

**CoFesta 2024**

- **Official event:** 27
- **Partner event:** 25
- **Original event:** 11

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**TIFFCOM**

- 2024
- Participants: 2.3 million
- Contract amount: USD45 million

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**Japan Contents Showcase**

- 2024
- Participants: 2.0 million
- Contract amount: USD52 million
International Content Fair “Japan Content Showcase (JCS)”

- Japan Content Showcase (JCS) is a comprehensive international content fair integrating films, broadcasts (TV and other programs), music and animation. This exhibition is held every October at Odaiba, Tokyo.
- JCS is held to communicate the appeal of Japanese content to the world, consolidate cooperation with other industries, strengthen its ability to deliver messages to the world, and further develop overseas market for Japan’s content industry.
- In 2015, 347 groups exhibited their works and 1,433 buyers visited the JCS (In 2014, 332 exhibitors and 1,160 registered buyers).

Japan Content Showcase 2015

- Period: October 20-22, 2015 (3 days)
- Venue: Hotel Grand Pacific LE DAIBA
  - Zepp DiverCity TOKYO

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**Number of exhibitors and buyers**

<table>
<thead>
<tr>
<th>Year</th>
<th>Exhibitor</th>
<th>Buyer</th>
</tr>
</thead>
<tbody>
<tr>
<td>2013</td>
<td>Exhibitor 156</td>
<td>Buyer 160</td>
</tr>
<tr>
<td>2014</td>
<td>Exhibitor 186</td>
<td>Buyer 146</td>
</tr>
<tr>
<td>2015</td>
<td>Exhibitor 217</td>
<td>Buyer 130</td>
</tr>
</tbody>
</table>

- Japanese (Exhibitor 156, 186, 217), Overseas (Exhibitor 160, 146, 130)

**Number of business negotiations**

<table>
<thead>
<tr>
<th>Year</th>
<th>Business Negotiations</th>
</tr>
</thead>
<tbody>
<tr>
<td>2013</td>
<td>4,844</td>
</tr>
<tr>
<td>2014</td>
<td>5,699 (17% up)</td>
</tr>
<tr>
<td>2015</td>
<td>6,663 (17% up)</td>
</tr>
</tbody>
</table>

- Exhibitors 5% Buyers 24% up

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- **Japan Content Showcase (JCS)** is a comprehensive international content fair integrating films, broadcasts (TV and other programs), music and animation. This exhibition is held every October at Odaiba, Tokyo.
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- In 2015, 347 groups exhibited their works and 1,433 buyers visited the JCS (In 2014, 332 exhibitors and 1,160 registered buyers).
Cool Japan Fund

- **Launched in November 2013**

- **Target:**
  Business activities cultivating overseas demand for Japan’s creative and unique products or services

- **Investment Criteria:**
  Policy objective, profitability, possibility of ripple effect to other business activities (independently judged by a committee consisting of external directors from the private sector)

* Duration of the Fund: Expected to be around 20 years
At the 4th ACBS, ACBS members declared a Joint statement which indicated the activities ACBS members should work on together from now on. (Participants: Hong Kong・Japan・Korea・Malaysia・Philippines・Singapore・Thailand)

Outline of the Joint Statement of 4th ACBS

- To examine ways of continuously collecting statistics and data which enable cross comparison of each market and industrial structure in the region.
- To recognize the importance of cross-border content distribution and aim to alleviate regulations that can prevent promotion of content distribution.
- To work together to fight against pervasive piracy.
- To continue discussion on technology implementation, which can facilitate new businesses and give enhanced opportunities for young creators.
- To examine ways of promoting international cooperation such as international co-productions.
- To examine ways of mutual cooperation regarding human development.
- To invite non-member ASEAN states to join the ACBS (expansion of ACBS).
⑤ Anti-piracy measures

- The presence of pirated copies poses one of the most serious obstacles when we seek to develop content business in global markets.
- METI and Content Overseas Distribution Association (CODA) are developing countermeasures against pirated copies through cooperation with copyright holders, copyright protection groups and governments overseas.

Countermeasures against online copyright infringement

- A demonstration experiment conducted on video contribution sites mostly in China and Korea for the purpose of requesting them to delete illegal video content on the Internet.
  - Almost 100% of CODA’s deletion requests were met.
- A memorandum was executed between CODA and major video contribution sites in China for copyright protection on the Internet.
- CODA and Motion Picture Association (MPA) signed an agreement in March 2014 to develop countermeasures against online copyright infringement and reinforce copyright protection activities.
- Subject to cross-sectional sharing of pirated reproduction information within the content industry concerning comics and animation, three strategic initiatives has been implemented:
  1. Large-scale deletion
  2. Inducing users to shift to regular sites
  3. PR, promotion, and communication
- Implementing such measures as deleting pirated content from data retrieved by a search engine and regulating advertising on piracy sites.

Support in joint enforcement (exercise of rights)

For pirated DVDs/BDs, CODA helps copyright holders to exercise their rights through cooperation with local enforcement authorities in China and other countries.
  - About 6.85 million pirated DVDs were confiscated between January 2005 and March 2015.
What is Manga-Anime Guardians (MAG) Project?

- A project aimed strategically and consistently to implement three initiatives: (1) “deleting” pirated copies effectively, (2) building a scheme for “inducing” fans to shift from piracy sites to legitimate sites, and (3) “disseminating and raising awareness” concerning piracy issues to audiences at home and abroad.

- The Manga-Anime Anti-Piracy Committee, composed of 15 major manga publishers and animation companies, and the Ministry of Economy, Trade and Industry (METI bureau CODA) work together in one unified body.

MAGP initiatives for globally maximizing the value of content

1. Large-scale deletion

2. Legitimate-link collection site “Manga-Anime here” opened
   - manga-anime-here.com

3. PR, dissemination and awareness raising “Thanks, friends” distributed

Overseas audiences

Maximizing the value of content
METI has organized the group named “CoFesta Ambassador”, which consists of international students who love Japanese content.

Thanks to “CoFesta Ambassador”, CoFesta can be more productive because the international students take on the role of marketing and promotion. By supporting the expansion of Japan’s content industry to foreign markets, METI aims to promote Japanese content more effectively.

1. **Marketing**: to investigate and provide consumer needs which will be useful for planning promotion strategies.
2. **Promotion**: to set a network with influential business persons in foreign content industries through local events for buyers, media and influencers.

<table>
<thead>
<tr>
<th>Content</th>
<th>Report Style</th>
</tr>
</thead>
<tbody>
<tr>
<td>Investigation of consumer trends</td>
<td>• Report</td>
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<tr>
<td></td>
<td>• Seminar</td>
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<td></td>
<td>• Presentation</td>
</tr>
<tr>
<td>Investigation of consumer reaction</td>
<td>• Report</td>
</tr>
<tr>
<td>PR events in foreign countries</td>
<td>• Report</td>
</tr>
<tr>
<td>Invitation of international students to Japan</td>
<td>• Conducting a tour for the ambassadors at JCS (Japan Content Showcase) Report</td>
</tr>
<tr>
<td></td>
<td>• To invite influential ambassadors to CoFesta</td>
</tr>
<tr>
<td></td>
<td>• To expand information on Japanese content through SNS</td>
</tr>
</tbody>
</table>

Around 200 ambassadors have been appointed. (as of October 2015)
To promote the expansion to foreign markets and co-production in the content industry, METI aims to produce “international content business producers” who can deal with special tasks such as financing, contract and marketing.

METI subsidizes study overseas and conducts training at foreign private companies.

**Subsidy for overseas study (2010～)**
- METI subsidizes the study at US film schools where the participants can learn international practices cultivated in Hollywood studios.
- METI has subsidized nine participants so far.
- METI conducts comprehensive support for the participants such as preparing references for application and subsidizing a maximum of USD 30,000 per year per person.

(Reference) Schools: AFI (American Film Institute) USC (University of Southern California)

**Training at foreign private companies (2015～)**
- METI subsidizes internships relating to producers’ tasks (market research, marketing, promotion, script development, film production, etc.) in overseas content industry, such as Hollywood studios.
- METI conducts comprehensive support such as assistance for internship and subsidizing research costs.
- METI has subsidized one participant so far.

**Domestic development of human resources**
- In order to construct a human network to promote international co-production, METI provides young people with opportunities to interact with business persons in the content industry through training and group work.
Strategy for Content Technology

- Content Technologies, such as CG (Computer Graphics) and 3D imaging, are the basis for various content creation.
- With the aim of developing and spreading state of the art content technologies, METI sets a “Technology Map”, conducts activities to find, give awards to, and promote state of the art content technologies, and researches the platform for content producing.

Setting “Technology Map (Content Field)”

The “Technology Map” indicating the direction content technologies should follow was revised in 2014. Its purpose is to cultivate Japan’s content industry and create new industry through the development of content technologies.

Finding and promoting content technologies

- **DCEXPO**
  DCEXPO, which is held by METI and Digital Content Association of Japan (DCAJ), is an exhibition of content technologies. Its purpose is to contribute to further development of the content industry by exhibiting the latest content technologies and encouraging researchers, students and creators to interact with each other.

- **Innovative Technologies**
  Its purpose is to find, give awards to, and promote innovative technologies which will greatly contribute to the development of the content industry. 20 awarded technologies are exhibited at DCEXPO.

- **Features**
  Its purpose is to conduct a demonstration, seminar and workshop to introduce remarkable technology of the year. The theme of 2015 is “Content Technology which can change sport”.

Investigating content production platform

- **Platform for Manga production (2014)**
  To promote simultaneous online distribution of Manga content in both Japan and foreign countries to combat piracy, METI investigated in 2014 a new manga production process applying digital technologies which can make editing, translating and distributing easier. In 2015, METI conducted a seminar for publishers, online distribution companies, manga creators and students to introduce the result of this investigation.