

ANNEX C **State of Singapore's media sector**

Singapore-made content and applications are serving a global audience

Singapore's efforts to grow a vibrant media industry have made significant strides over the last few years. The content development industry, in particular, has shown marked progress, with over 60 short and feature films and some 2,000 hours of public service TV content produced last year alone. In the fast-growing Interactive Digital Media (IDM) space, a sector that was non-existent four years ago, some 600 companies are operating and serving millions of users worldwide, according to a 2008 study by Deloitte.

Today, Singapore-made content, applications and services are serving a global market, with our TV content exported to over 70 countries. Last year, *Dinosaur Train*, an animation series for children co-produced by Singapore's Sparky Entertainment and United States' The Jim Henson Company, was the highest-rated children's programme on the PBS's TV Network in the United States in December 2009.

Drama serial *Little Nyonya* by MediaCorp, a Public Service Broadcast (PSB) programme, was Singapore's highest-rated drama in 15 years. It won the "Best Drama Series" at the Asian Television Awards 2009 and has been sold to Cambodia, China, Malaysia and Hong Kong. Indeed, all the awards won by MediaCorp at the Asia Television Awards 2009 were PSB programmes, underscoring the ability of Singapore producers to produce quality, compelling and relevant content. On the film side, output is growing steadily, matched by growing commercial success. Singapore films are gaining international acclaim, with at least one title featured in the Cannes Film Festival for the last six consecutive years since 2005.

Singapore-built digital media applications and technologies are also reaching a global audience, fuelled by the five-year National Research Foundation-funded programme to promote R&D in the IDM sector.

Since the establishment of the multi-agency IDM Program Office (IDMPO) hosted within MDA in 2006, Singapore digital media companies, many of them start-ups, have tapped into new business opportunities. These range from popular mobile applications like *BuUuk*, which allows iPhone users to find any restaurant quickly and easily and Red Herring Global Top 100 company *Mozat*, which offers novel mobile social networking applications, to innovations like *Garena*, a gaming platform company, which is now the most-visited Singapore website, with 32 million users worldwide.

To date, the IDMPO has funded 330 R&D projects, registering a launch of some 160 new products and services and 28 patents filed. The top five projects funded by IDMPO now serve more than 55 million users in 210 countries, and the user base is growing at an average rate of two to three million users per quarter. Efforts to seed an innovation culture at the ground have nurtured some 170 start-ups, supporting some 583 entrepreneurs and helping to feed into the growing base of IDM talents to support the growth of the industry.

The IDM R&D ecosystem now comprises a network of 13 international research centers (IRC) and laboratories, supporting over 1,000 Researchers, Scientists and Engineers. The first IRC, GAMBIT, a collaboration between MDA and the Massachusetts Technology Institute, was recently named among the top eight game

design schools in North America by The Princeton Review. GAMBIT-developed *Carneyvale: Showtime* was the first Singapore game to clinch a distribution contract with Microsoft. Another IRC, the CUTE Centre, won the top prize for its social networking robot *Petimo* at InventiON, an international innovation competition in Italy.

Factors enabling growth

The S\$230 million Singapore Media Fusion Plan, launched in 2009, sets out three key strategies for growth: 1) making Singapore the Best City for Business; 2) staying on the Leading Edge of Digital Media; and, 3) remaining Connected to the World.

MDA has put in place over 20 funding schemes across the various media clusters under its development purview to support Singapore companies in the financing, making and trading of media content, applications and services. These are targeted at different aspects of the business value-chain; from upstream support for R&D particularly in the IDM sector, to content creation, to facilitating access to markets.

Government funding is geared towards exportability, and helping drive this outcome has been a strategy that actively encourages partnerships or co-productions. To-date, MDA has supported some 180 film and TV co-productions involving Singapore companies with their partners from more than 15 countries including the United States, United Kingdom, Australia and China.

Of these, 23 projects have been facilitated by the network of treaties and cooperation agreements between MDA and its governmental counterparts overseas, a key benefit of which is to open up market access for home-grown content. For instance, benefiting from the Canada-Singapore Audio Visual Co-production Agreement are animated TV series *Rob the Robot* by One Animation and Amberwood Entertainment (Canada), *Jack* by Sparky Entertainment and PVP Animation Inc (Canada) and *Zigby* by Big Animation and Zebra (I) Productions (Canada).

Many of Singapore companies have worked with leading international media brands such as Discovery, National Geographic, BBC, Shanghai Media Group and Fremantle Media, enabling home-grown content to travel worldwide and raising the capabilities of local enterprises as a result. Several companies including the likes of Sparky Entertainment, Scrawl Studios and Peach Blossom, have evolved from being "fee-for-service" companies to Intellectual Property creators in their own right.

Increasingly, MDA is moving from ad-hoc, individual retail project funding applications and assessments to an industry-friendly process of batched calls for proposals across all clusters. This promotes greater transparency, healthy competition and a more level field for assessment. Alongside this is the successful co-opting upfront of industry players who provide avenues for international distribution. For example, international distributors Fortissimo Films and Distribution Workshop participate in evaluation panels on film projects and commit distribution before projects are green-lit, boosting chances of commercialisation and thereby increasing exportability of our content.

In line with its objective to instil a global mindset in local companies, every year, MDA leads some 80 companies to trade shows in Singapore and overseas like Broadcast Asia, Cannes Film Market, MIPTV and American Film Market, amongst others, to promote and sell Singapore content and services. Such internationalisation efforts was given a boost in 2006 with the introduction of the Singapore Media Fusion (SMF) brand, which acts as a united front to showcase the media sector's collective

richness and diversity. The SMF brand has helped to raise the visibility of Singapore at the crowded international marketplace.

Beyond content creation, Singapore is also emerging as a choice partner for media financing and distribution activities, with more than S\$1.5 billion worth of private funds anchored here. Firms involved in executive production, such as RGM Holdings and Hyde Park Entertainment Group, have set up media funds to finance slates of TV and film projects, some of them shot on location in Singapore and featuring Singapore talents both in front of and behind the camera. This has boosted efforts to build up our creative content industries while developing local creative and technical talent.

Talents are also being nurtured and matched to projects, fuelled by the presence of leading media schools including the Tisch School for the Arts, Digipen, Chapman University and complemented by MDA's ongoing programmes that have trained 30,000 professionals over the years. To nurture a critical pool of local media talents, MDA gives out, on an average, 20 Media Education Scheme scholarships per annum to support individuals pursuing a broad range of media-related courses from producing, directing, writing, animation, games to special effects, audio and set production, in both local and overseas institutions.

Another important initiative that will significantly add scale to the media industry is the development of Mediapolis@one-north, a 19-hectare state-of-the-art digital media hub for the creation, production and global distribution of media content and applications. Home-grown digital media and visual effects firm Infinite Frameworks will be building the first sound stage complex, with groundbreaking expected by early 2011.

Over the past year, discussions have been ongoing with international media companies regarding investments in production studios, broadcasting centres, animation studios, R&D incubators and other facilities in Mediapolis. Concurrently, a Technology Blueprint is being drawn up to ensure that Mediapolis has the most comprehensive digital technology infrastructure to enhance the hub's global connectivity.

MDA also has initiatives to spur innovation and growth in downstream industries. The Media-in-Learning initiative embeds digital media within other economic sectors to encourage innovation, enhance their business and spur productivity. Several educational institutions are working with MDA to facilitate a more extensive use of games and new media to boost learning and teaching.

Two years ago, MDA identified the nascent stereoscopic digital 3D technology as an area of growth and supported the 3DX: 3D Film & Entertainment Technology Festival. It drew a stellar cast of 22 international speakers and celebrities – Jeffrey Katzenberg (CEO, DreamWorks Animation), Jim Gianopulous (Fox Co-Chairman), Dan Glickman (Motion Picture Association of America Chairman), *Avatar* producer Jon Landau, amongst others – and crystallised Singapore as a global platform for bringing together and advancing the industry's stereoscopic 3D drive.

3DX provided an impetus to galvanise the media industry, aided by the establishment of a S\$10 million Stereoscopic 3D Development Fund to seed the production of stereoscopic 3D feature films and to boost local 3D capabilities. Today, Singapore is one of the first territories in the world with one-stop, end-to-end production and post-production capabilities in theatrical stereoscopic 3D. Local companies BlackMagic Design and Widescreen Media have upgraded their equipment and facilities and are

contributing to Singapore's first stereoscopic 3D action thriller, *Bait*, an official co-production with Australia. *BAIT*, which has been pre-sold to over 24 territories, will be shot in Australia with the production support of Widescreen Media while Blackmagic Design will manage the post-production and visual effects.

After 3DX, come June 2011, MDA will be hosting the inaugural SreenSingapore, an international cinema event showcasing the best of Asian and World cinema. The event will comprise a film and entertainment technology market, in addition to screenings and premieres of upcoming releases and conferences and workshops.