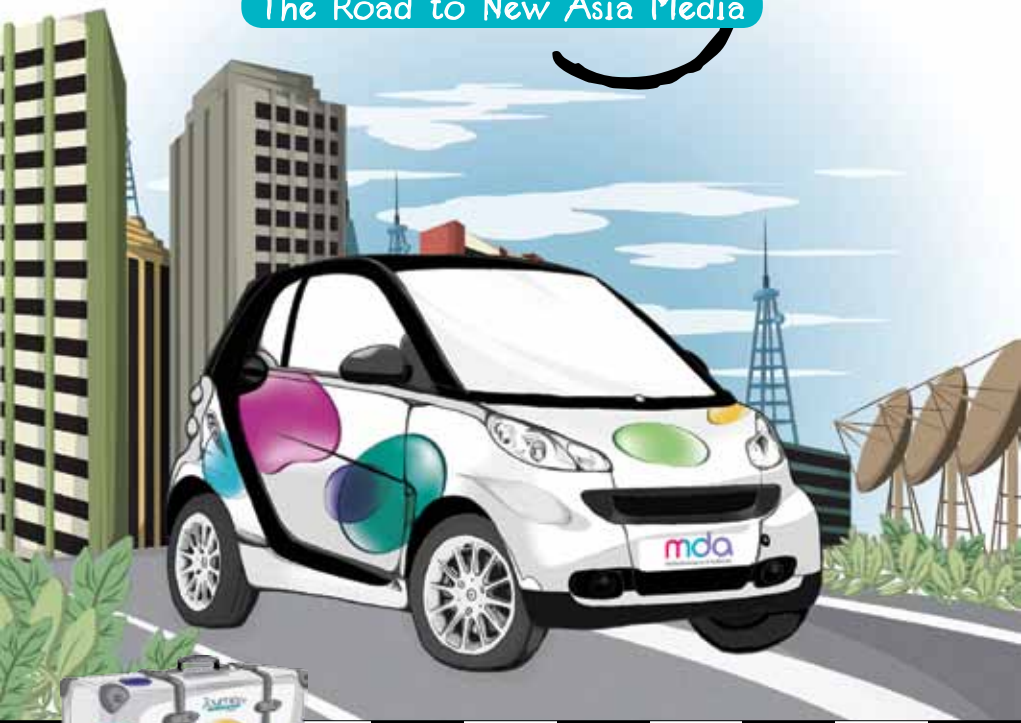


Journey.sg

The Road to New Asia Media

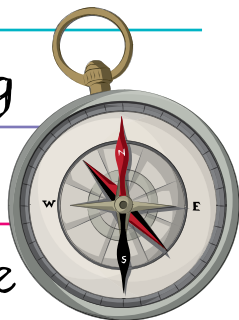


Exploring New Frontiers

Mapping the Next Big Thing


Exciting Destinations

Shaping the Media Landscape







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Just follow these simple steps:

1. Ensure that the *black MDA marker* , and not the front of the driving licence, is placed parallel to the webcam.
2. Do not block any part of the MDA marker's black square with your fingers.
3. Make sure the driving licence is not bent or folded. Markers with creases can impair detection.
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5. If you are still experiencing any issues with detection, please close and restart the application. Also, make sure your PC meets the minimum operating system requirements.

Experience our Annual Report 09/10 using Augmented Reality!

Just follow these simple steps:

1. Remove the driving licence  from the inner cover of this booklet (on your left). You'll find a *black MDA marker*  on the back. Also ensure your PC has a functioning webcam.
2. Insert the Annual Report DVD  found above the driving licence. Once the DVD flash menu has loaded, click on "Launch AR Application".
3. If this is the first time you are running the application, you will be prompted to install the programme. Follow the instructions on the screen.
4. The programme will then launch automatically. Your LCD monitor acts as a "magic mirror". Using the driving licence, face the *MDA marker*  towards the webcam. Hold it within the *selection circle* for three seconds and watch the magic unfold!



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Mission and Vision

The Media Development Authority (MDA) was formed in 2003 to champion the development of a vibrant media industry in Singapore.

A core function is nurturing homegrown enterprises and the export of quality Singapore content across different media sectors – TV, film, interactive media & games, music and publishing. At the same time, by putting in place pro-enterprise policies and enabling infrastructure, MDA helps to foster a vibrant and competitive sector, and increase media choices for consumers.

In 2009, Singapore embarked on a new five-year journey with the launch of the S\$230 million Singapore Media Fusion Plan (SMFP) that will chart the path towards the destination of making Singapore a Trusted Global Capital for New Asia Media 

The three desired outcomes are:

- Engaging Singaporeans

This includes creating new jobs, as well as developing better media content, innovative services and new applications that Singaporeans can enjoy.

- Boosting Industry

This encompasses nurturing all aspects of the media sector, from financing to producing, post-production and distribution, hence attracting leading international media companies and talents to Singapore.

- Transforming the Economy

This involves promoting the use of digital media in other sectors, propelling the growth of Singapore's creative economy, improving productivity, and fostering collaboration and innovation across the economy.

To achieve these outcomes, three strategies were identified:

1 Making Singapore the Best City for Business

- Investing in developing manpower and enterprise capabilities
- Setting up enabling infrastructure
- Anchoring media financing activities
- Embracing pro-business policies

2 Positioning Singapore to be on the Leading Edge of Digital Media

- Creating a critical mass of high value-adding enterprises
- Leveraging national research and development initiatives
- Encouraging creation of new media intellectual property

3 Remaining Connected to the World

- Enhancing the international appeal of Singapore's media content, tools and services
- Working with partners to expand Singapore's international networks and strategic media partnerships

Journey to the Trusted Global Capital for New Asia Media

Every journey begins with a step.

Since the inception of the Media Development Authority (MDA) in 2003, giant strides have been made to transform Singapore into a global media city. Our developmental efforts to nurture the creation of Singapore content, talents and enterprises have borne fruit, while significant inroads have been made into the international market. Today, Singapore-made content, services and applications are entertaining audiences and users worldwide.

But our quest is far from over.

As with any journey, unforeseen paths may emerge along the way. Travel plans have to be updated or refreshed to navigate through shifting

sands, uncharted waters and other challenges.

In this light, our launch of the Singapore Media Fusion Plan (SMFP) last year was a timely move. SMFP charts the way ahead for the media sector to thrive in a media landscape that is driven by convergence, rapid technological change and the historic rise of Asia; whilst leveraging on Singapore's strengths and strategic location as an East-West gateway.

Armed with SMFP as the roadmap, the media industry is charging full-steam ahead towards a new destination – to transform Singapore into a Trusted Global Capital for New Asia Media. And the year 2009 has, in many ways, seen many significant milestones achieved en-route to our goal.

KEY ATTRACTION

Trusted Global Capital for New Asia Media.

GETTING THERE BY THE SINGAPORE MEDIA FUSION PLAN

- Provide the best environment for media businesses
- Invest in R&D to exploit new opportunities in the digital media value chain
- Connect Singapore-made content, applications and services to the world



Going the Distance

The \$230 million SMFP sets out three strategies to propel the media sector forward. The first aims to provide the best environment for media business. The second leverages R&D to help the media sector exploit new opportunities in the digital media value chain. The third strategy calls for Singapore to remain connected to the world to enhance the international appeal of Singapore-made content, applications and services.

To date, we have made good progress. Last year, Singapore produced over 60 short and feature films and over 2,200 hours of TV content. In the fast-growing Interactive and Digital Media (IDM) space, a sector that was insignificant four years ago, some 600 companies are now operating and serving millions of users worldwide, according to a 2008 study by Deloitte.

The latest figures from the Department of Statistics show that employment figures in the media sector in 2008 were at least 63,000, which was a 16% increase over 2006. Other figures underscore the sector's

vibrancy. The media sector contributed S\$5.49 billion of value-added and S\$22.4 billion in revenue to the Singapore economy in 2008. Indeed, the media sector recorded a compounded annual growth rate (CAGR) of 6.8% in the decade starting from 1997 – higher than the growth rate of 5.9% for the overall economy over the same period.

The IDM sector alone has grown at an estimated 25% CAGR since 2005, adding some S\$360 million in VA and 3,500 new jobs in the process. Today, Singapore-built IDM applications and services are being used by more than 50 million users in over 200 countries around the world.



As testament to Singapore's status as a financial hub and trusted place to do business, new international funds were brought into our shores, including a landmark strategic alliance with Hyde Park Entertainment of Los Angeles and ImageNation Abu Dhabi. The alliance with MDA will result in a slate of cross-border feature films worth US\$75 million. In all, the value of private funds available for media projects has risen to S\$1.5 billion.

Despite the challenging economic conditions last year, the two stalwart shows on the media calendar – BroadcastAsia and Asian Television Forum – continued to draw thousands of trade visitors to buy and sell media equipment,



The Singapore Pavilion at the Asian Television Forum 2009.

technologies and content. Notwithstanding the recession, the Asian Television Forum closed with US\$88.7 million worth of programming sales, a 20% increase over the previous year's record of US\$73.7 million. The performance of these trade markets points to the resilience of the Asian content and technology industries, whilst underscoring Singapore's attractiveness as an Asian gateway to international finance and trade.

Uncovering New Territory

Continued investments in building an IDM community fuelled by research & development are paying off, with young Interactive Digital Media (IDM) companies becoming world-class

players in their fields. These include game company Garena, with more than 26 million users, and *Mozat*, a rapidly growing mobile social networking software platform company with a global user base of more than 10 million.

Increasingly, R&D is being embraced by the industry to spur growth. An example is Razer Asia-Pacific, the world's leading brand of gaming peripherals, which is setting up a 100-man US\$20 million lab here to undertake gaming R&D.

Last year saw the launch of our Future of Media initiative to drive the development and commercialisation of next-generation digital media solutions. The initiative marshalls industry resources through partner networks to collaborate, experiment and innovate, and puts Singapore in good stead to be the test bed for cutting-edge applications and technologies that enhance interactivity and personalisation in the consumption of media.

Greater emphasis was also placed on embedding

IDM in downstream industries. A new initiative – Media-In-Learning – was established to enhance learning and training through the use of digital media such as games.

Finally, MDA continued to build up the industry's capabilities in producing and post-producing 3D content. 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 such as BlackMagic Design and Widescreen Media are lending their skills and expertise to the filming and editing of 3D projects.

Passport to the World

Singapore media players are enlarging their global footprint through international collaborations, aided by government initiatives to boost the development and export of Singapore-made content and services.

One of our most successful animation properties is animated children's series *Dinosaur*



Dinosaur Train, by Singapore's Sparky Animation and The Jim Henson Company.

Train, by Singapore's Sparky Animation and The Jim Henson Company. It was the highest-rated series on the United States' PBS Kids Channel in December 2009, and has since been sold to Canada, United Arab Emirates and countries in Europe, with broadcasters such as Nickelodeon Australia, Germany's Super RTL, Discovery Kids Latin America and France 5 carrying the programme. Another landmark project was the first multiplatform Singapore-China drama, *A Starry Night* (星光依旧灿烂), which was broadcast simultaneously in trains, train stations, and through cable television, mobile

downloads, outdoor display screens and the internet, reaching out to over 15 million daily commuters and viewers in both countries.

Homegrown films continue to be well-received internationally, with *Here* by Ho Tzu Nyen selected for the Directors' Fortnight at the prestigious Cannes Film Festival. Giving a fillip to internationalization efforts was the launch of the International Film Fund with Distribution Workshop as distribution partner. Amongst its slate of projects is the first Singapore-China-Korea co-production *Neon Sign*.

Last year saw several Singapore media companies benefiting from our co-production treaties with Australia and Canada. These included the first Singapore-Australia co-production, the 3D action thriller *Bait* by Singapore's Blackmagic Design and Australia's Arlight Film, as well as animated TV series like *Rob the Robot* (Singapore's One Animation and Canada's Amberwood Entertainment).

Also helping to boost more co-productions were joint calls by MDA and our partners from Western Australia (ScreenWest) and United Kingdom (Southwest Screen).

Buttressed by the on-going "I made it in Singapore" communications campaign, the media industry enjoyed enhanced visibility within and beyond our shores.

Paving the Way for Success

Besides growing Singapore content, capabilities and companies, MDA is putting in place a flexible and responsive

regulatory framework that encourages competition, promotes innovation and investment, whilst addressing consumers' concerns for more choice and convenience.

As the world gears up for digital broadcasting, MDA is putting in place plans to prepare Singapore's move to digital broadcasting, in

line with ASEAN's commitment to do so between 2015 and 2020. This switch will free up broadcast spectrum that will allow industry players to develop novel digital content and services, while enabling clearer and sharper wide-screen images, and more innovative and interactive content for consumers.



The 3D action thriller *Bait* is the first film co-production between Singapore and Australia.



The ongoing "I made it in Singapore" communications campaign raised the visibility of Singapore's media industry beyond our shores.

In 2009, MDA facilitated the introduction of more than 30 new TV channels and radio stations, 220 local publications, 16,000 films, videos and videogames, and 484 arts events offering a diverse range of content across all platforms. Today, consumers enjoy a choice of more than 340 TV channels and 46 radio channels, up from 57 and 28 respectively in 2002. Amongst other things, High Definition TV, IPTV and 3D movie viewing experiences are now available in the market. MDA will continue to support the growth of new and emerging media services through our licencing framework.

Conclusion

In the year since the unveiling of the SMFP, the media industry in Singapore has gone the distance to achieve the goals laid out in the plan. The road ahead promises to be filled with new opportunities and adventure. I would like to express my heartfelt appreciation to the MDA Board for their insights and guidance, and to the staff of MDA for their hard work. With continued support from all stakeholders, I am confident we are well on our way towards making Singapore the nexus for new media between East and West 🚗

Dr Tan Chin Nam
Chairman,
Media Development Authority

AUGMENTED REALITY VERSION OF CHAIRMAN'S MESSAGE

You are about to embark on a whole new Annual Report experience like never before!

To start, turn to the inside cover of this booklet and remove the accompanying DVD and card.

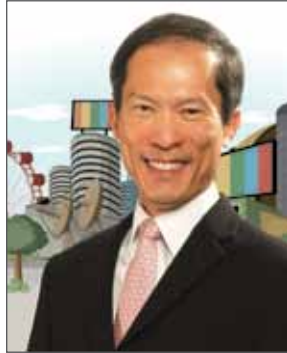
Plug in your webcam and install the programme from the DVD. Then flash the MDA sign on the card facing the webcam. Voila! Watch our Chairman's Message instantly come to life through augmented reality.



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 of Singapore



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Tham Wai Kin

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Talent Development

Tow Joon Lai

Director
Corporate Services



Destination Singapore

Amidst a challenging year, Singapore reinforced its reputation as a trusted place to do business.

Paving the Way

Singapore is emerging as a choice partner for media financing and distribution activities, with more than S\$1.5 billion worth of private funds anchored here to-date.

Last year, MDA drew a number of international funds to Singapore, including a strategic alliance with ImageNation Abu Dhabi, a wholly-owned subsidiary of the Abu Dhabi Media Company, and Ashok Amritraj's Hyde Park Entertainment Group. ImageNation and Hyde Park will fund three to four films a year, worth a total estimated production value of US\$75 million over five years. A US\$70 million Integrated Media Fund (IMF) managed by SIMF Management Pte Ltd, a Singapore-based subsidiary of Salon Films Hong Kong, was formally set up in Singapore in



MDA's landmark alliance with Hyde Park Entertainment of Los Angeles and ImageNation Abu Dhabi will result in a slate of cross-border feature films worth US\$75 million.

March 2010. The IMG targets to produce a slate of feature films, TV series, animation and related interactive game development content over a five-year period.

Separately, the US\$20 million production fund by digital media and visual effects company, Infinite Frameworks, has gone into production for two projects, *Future Earth* and *Anatomy of a Crime*. These projects have provided excellent opportunities for building capability and skills transfer, especially in the areas of post-production and visual effects.

Working with international partners such as IMG, Endemol, Darlow Smithson and AETN All Asia also enabled such Made-by-Singapore projects to obtain global reach and distribution.

Complementing these efforts is active business-and-investor-matching for local start-ups, reaching out to more than 300 international and local investors and financiers. Last year, more than 80 interactive digital media companies were given the opportunity to pitch or showcase their business products and services to international

media players and private investors such as Google, Intel, National Geographic and Benchmark Capital. In an affirmation of Singapore's reputation for its strong intellectual property rights regime, MDA partnered the World Intellectual Property Organisation Center to establish an international WIPO Mediation and Expedited Arbitration Scheme for film and media Disputes.

Levelling Up

Talents are 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. A key milestone was the launch of the Media Training and Attachment (META) Programme to provide hands-on training to local talents through attachments with companies both overseas and within Singapore for on-the-job learning.

Through META, more than 40 companies provided 160 trainees with practical learning while working on significant projects in the animation, broadcast, film, publishing, games and interactive media sectors.

Super Media Highway

Over the past year, discussions have been ongoing with international media companies regarding investments in production studios, broadcasting centres, R&D incubators and other facilities in Mediapolis@one-north, a 19-hectare state-of-the-art digital media hub. Construction

on the soundstage complex is expected to begin by late 2010. To enhance communication links at Mediapolis, MDA and Singtel have established a strategic partnership that will promote the strong linkage between Singtel's Broadcast Innovation Centre and Mediapolis via high-speed connectivity of at least 100mbps. Through this link, companies at Mediapolis will be connected to major media centres in the world via satellite and terrestrial fibre networks, extending their reach and facilitating worldwide access to Asian-produced content.



Companies at Mediapolis will be connected to major media centres in the world via high-speed satellite and terrestrial fibre networks.

Concurrently, a Media Technology Blueprint is being drawn up to ensure that Mediapolis is powered with the most comprehensive digital technology infrastructure to support the technology-intensive media activities of the future.

Traffic Stoppers

Despite the challenging economic conditions last year, the two stalwart shows on the local media calendar – BroadcastAsia and Asian Television Forum – continued to draw thousands of trade visitors to Singapore to buy and sell media equipment, technologies and content.

• BroadcastAsia 2009

Businesses continued to look towards Asia to drive the new wave of growth in the broadcast and media sectors. BroadcastAsia (BCA) 2009 returned with 647 exhibiting companies, of which 60 were new additions. In all, the event attracted more than 9,000 international and local trade visitors, underlining its relevance as a premium platform for international, regional and local players to source, purchase, network and seize new business opportunities.

Another successful track held parallel to BCA

was CG Overdrive – a computer graphics (CG) fiesta dedicated to CG professionals, enthusiasts, students, producers, vendors and buyers. Returning for its fourth edition, the conferences featured a stellar line-up of speakers from internationally renowned studios such as Double Negative, Lucasfilm Animation Company Singapore B.V. and Pixar Animation Studios.

• Asia Media Festival 2009

The Asia Media Festival (AMF) in December 2009 rounded up an eventful year with its line-up of premier trade



BroadcastAsia 2009 & Asia Media Festival 2009.

events, namely: the Asia Television Forum (ATF), the AMF Country Showcase, Asia Television Awards and the Asian Festival of First Films. Catering to various sectors of the industry, the umbrella of AMF events offered opportunities for the media industry to share best practices, forge strong business networks and foster international collaborations.

Into its 10th year, the Asia Television Forum, which is the trade market arm of the AMF, brought together over 700 companies from more than 50 countries, including first-time participants such as Discovery, HBO and Turner Entertainment and new country pavilions of Canada and Italy. Themed "Stereoscopic 3D and Beyond", the Singapore Pavilion featured the local media industry's capabilities in the pre-production and post-production of stereoscopic 3D content and animation.

Notwithstanding the recession, the Asia Television Forum witnessed an impressive jump in figures – in terms of participating countries,

companies, delegates and amount of deals closed. The event closed with US\$88.7 million worth of programming sales, a remarkable 20% increase over the previous year's record of US\$73.7 million.

• Serious Games Forum

In March 2010, Singapore held its inaugural Serious Games Forum, a two-day conference that saw 125 delegates forging links between the electronic games industry and projects involving the use of games in "serious" areas such as education, training, health and public policy.

Supported by the Singapore Government, regional trade associations and a rich panel of international speakers, the flagship event follows MDA's October 2009 announcement of its Media-in-Learning initiative to exploit the use of media such as games to enhance learning and teaching 🚗

KEY ATTRACTIONS

Singapore: the trusted place to do business.

GETTING THERE

- Landmark deals with international funds
- Partnership with leading media schools
- Ultra-speed connectivity



All Aboard the Media Express

Whether Made-in-Singapore or Made-by-Singapore, homegrown content and services are delighting audiences worldwide.

Movie Mileage

From just six films released in Singapore



Gurushetram, Singapore's first Tamil film, is the second film from the inaugural batch of selected New Feature Film Fund projects that have been screened theatrically.

cinemas in 2002, the film sector is burgeoning, with a Singapore film featured in the world-renowned Cannes Film Festival every year since 2005. Honoured last year was *Here*, by Singapore filmmaker and visual artist Ho Tzu Nyen, which was selected by Cannes for Directors' Fortnight.

On the home front, output has grown steadily, with at least 60 short and feature films made last year.

Alongside the launch of the Singapore Media Fusion Plan at the Cannes Film Festival, MDA unveiled the International Film Fund to attract international players to form creative partnerships with local companies. It provides co-investment of up to S\$5 million per project, covering all genres and types of feature-length films including animation, live action and stereoscopic 3D. *Neon Sign*, a Singapore – China – Korea co-



Neon Sign, a Singapore – China – Korea co-production.

production, is the first project supported under the Fund.

Equally significant was the move to set aside S\$5 million to seed the production of stereoscopic 3D films. Today, Singapore is one of the first territories in the world with one-stop, end-to-end production and post-production capabilities in stereoscopic 3D.

In the pipeline is the first Singapore-Australia co-production, the 3D thriller *Bait*. About a band of trapped Tsunami survivors faced with killer shark attacks, *Bait* has secured international

pre-sales to 24 countries, even before the start of production. Lending their expertise and skills to the production are local companies BlackMagic Design and Widescreen Media.

Animation Acceleration

Animation companies from Singapore are impressing worldwide audiences with quality work and compelling stories. With the introduction of the MDA International Animation Fund in partnership with distributor Fremantle

Media, which promises co-investment of up to S\$5 million for each qualifying project, the future looks bright for animators here.

A success story has been children's series *Dinosaur Train*, by Singapore's Sparky Animation and The Jim Henson Company. It was the highest-rated series on the United States' PBS Kids Channel in December 2009, topping even *Dora the Explorer*. Testament to the ability of Singapore companies to produce compelling content that resonate with world

audiences, *Dinosaur Train* has since been sold to Canada, United Arab Emirates and countries in Europe, with broadcasters such as Nickelodeon Australia, Germany's Super RTL, Discovery Kids Latin America and France 5 carrying the programme.

Closer to home, the animation feature *LaMB*, produced by Imaginary Friends Studios and Peach Blossom Media for Sony Pictures, went on to clinch the 2009 Golden Bell Award for Best Animation in Taiwan.

Underscoring the vibrancy of the sector is the high quality of animation work produced out of Singapore from leading studios. Since its establishment in 2006, Industrial Light & Magic Singapore, the only overseas studio of Light & Magic San Francisco under Lucasfilm, has worked on the visual effects for 12 Hollywood blockbusters. Its portfolio includes *Iron Man* and last year's *Star Trek*, both of which garnered Academy Award nominations for best visual effects.

The Singapore branch of Double Negative Visual Effects, Europe's largest provider of visual effects



Singapore's Tiny Island Productions and Thailand's Shellhut Entertainment will co-produce a 3D stereoscopic animated film based on popular TV series – Sheldon. Another Tiny Island title, *Zzz-Force*, was also promoted at MIPTV 2009.

for film, has also worked on high-profile movies such as *Prince of Persia* and *Kick-Ass* and *Iron Man 2*, despite having opened its doors less than two years ago.

On the Write Track

The publishing industry was augmented last year with the Spearheading Publishing Innovation for New Enterprise (SPINE) initiative. Aimed at nurturing the development of original publishing properties into international brands and franchises for multiple media platforms, SPINE has given new life to existing properties

in the form of Scrawl Studio's extension of its seminal *Nanoboy* animation property into e-learning and CR Media's transnational digital expansion of *August Man*. Giving a fillip to the publishing industry was MDA's Inaugural Graphic Novel Initiative (IGNITE!), a joint initiative with the Association of Comic Artists Singapore (ACAS) that supports Singapore talents in creating original intellectual property for multiple platforms.

In recent years, Singapore companies such as Imaginary Friends Studios and TCZ Studio have

made inroads into the fast-growing area of comics and graphic novel publishing.

Making waves internationally was local author Emily Lim, a recipient of support under MDA's First Time Writers and Illustrators Publishing Initiative (FTWIPI). Her children's picture book *Just Teddy* won the Bronze award at the 2009 Independent Publisher Book Award (IPPY) in the US, making her the first in Asia to win two IPPY in the children's book category following her earlier win for *Prince Bear & Pauper Bear*.



FY 09/10 saw the development of an interactive e-learning platform by Scrawl Studios based on *Nanoboy*, as well as CR Media's transnational digital expansion of *August Man*.



A gURLs wURld, a US\$9 million children's live-action series supported by MDA.

Television Navigation

Our co-production approach has reaped dividends for Singapore television producers, who have partnered leading international media brands such as AETN, BBC, Discovery, National Geographic, Shanghai Media Group and Fremantle Media to develop programmes that travel the world.

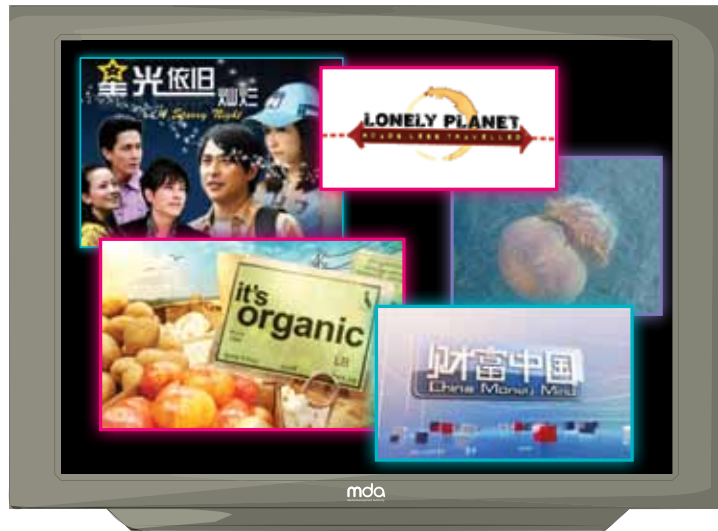
Last year, international distributors including Bomanbridge, Electric Sky, ID Distribution, Indigo Films and Looking Glass International acquired a slate of High Definition

programmes, totaling 17 hours, by Channel NewsAsia for international distribution.

Several joint calls by MDA and our counterparts from Australia (ScreenWest) and United Kingdom (South West Screen) have also resulted in funding for Singapore companies to co-produce projects with partners from these countries. Increasingly, more are developing projects with multi-platform appeal. An example is *A gURLs wURld*, a US\$9 million children's live-action series supported by MDA and produced by Southern Star

Singapore, Southern Star Entertainment (Australia) and Nord Deutscher Rundfunk (Germany). The producers have created specially-designed interactive web material for the show's audiences around the world.

Another project was *Starry Night* (星光依旧灿烂), the first Singapore-China subway drama that brought the best of Singapore's production capability, musical talents and picturesque locations to viewers in both countries. The short-form, multi-episode series was broadcast simultaneously in Singapore and China



Starry Night (星光依旧灿烂), the first Singapore-China subway drama, was one of the landmark television projects last year.

on subway platforms and trains as well as over other media such as the Internet and mobile devices.

Leveraging the growing global interest in China, Singapore home-grown media company MyChinaChannel also signed an agreement with Shanghai Media Group's distribution arm, Wings Media, to co-produce two infotainment television Series – China Trend and Foreigners in China.

The first-ever Singapore-China-United Kingdom HD documentary co-

production, *Monumental Challenge*, was announced at the start of the Asia Media Festival in December 2009. This six one-hour episode production, involving Singapore's Oak3 Films, MediaLab and the History Channel from the UK, and China Intercontinental Communication Centre (CICC) from China, will feature six of the world's greatest monuments that are being restored.

Game for the Next Stage

To take Singapore games to the next level, MDA implemented the GAME+

Programme, to address the needs of the entire games value chain. One initiative under the Programme is the provision of mentorship and guidance to aspiring game developers at GAME+ Development Centres, which are collaborations between MDA and institutes such as DigiPen and the School of Interactive and Digital Media in Nanyang Polytechnic.

Local game developers also benefited from participating and showcasing their prototypes at the Singapore Game Box,

a one-year pilot initiative run jointly by the MDA and the Infocomm Development Authority to place local games at LAN gaming centres. There, they were given the opportunity to promote and get public feedback on their games.

As part of the FutureGames initiative under the Future of Media vision, MDA joined hands with four local game publishing partners – IAHGames, Mikoishi, Garena and Activate – to provide newly-created game concepts direct access to publishers and boost

their commercialisation prospects. Five proposals have thus far been approved, with close to S\$5 million worth of investments committed over the next two years.

Efforts are underway to spur innovation and growth in downstream industries. Under MDA's Media-in-Learning initiative, educational institutions are working with MDA to facilitate more extensive use of games and new media to aid learning and teaching.

This has been boosted by a S\$6 million programme to support the development and deployment of up to 24 game titles to boost learning in not only traditional school-based education, but also other domains such as defence and healthcare. Resource centres will also be set up with educational institutions to equip industry professionals with the right skillsets and training 🚗



Gaming title *Rocketbirds: Revolutions!* by Ratloop Asia was nominated for 3 awards in the San Francisco IGF 2010 (Excellence in Visual Art, Excellence in Audio, Seumas McNally Grand Prize).

KEY ATTRACTIONS

Local productions with global appeal.

RIDING HIGH

- Growing quantity and quality of movies
- Award-winning animation abroad and at home
- Higher incentives for writing and publishing
- Expanding TV reach via global partnerships
- Helping hand for budding game developers



Trailblazing

New business opportunities are opening up in the interactive digital media (IDM) sector, thanks to cutting-edge Singapore-built digital media applications and services.

Beyond the Beaten Path

A burgeoning IDM ecosystem fuelled by innovation is taking shape. Since its inception in 2006, the IDM Programme Office (IDMPO) has funded 52 industry R&D projects which resulted in 608 jobs created, 69 products and services commercialised and S\$65 million in total investments realised in Singapore. Significantly, the R&D programme has helped start quality projects addressing international markets, and establishing niche sectors for which Singapore can be a global or regional leader.

Efforts to seed an innovation culture at the ground have also fuelled more than 170 start-ups, supporting more than 550 IDM entrepreneurs and helping to feed the

growing base of IDM talents to support the growth of the industry.

In March 2010, *CarneyVale: Showtime* developed by the Singapore-MIT GAMBIT Game Lab made the headlines as the first Singapore game to seal a distribution contract with Microsoft's Games for Windows-LIVE on the PC platform. It was also one of the pioneering titles on Xbox LIVE Community Games (Indie Games) Channel, released in December 2008, and fully developed by Singapore talents.

Local digital media companies, many of them start-ups, have tapped into new business opportunities as pioneers or innovators of new media technologies, services and applications. These range from mobile applications like *BuUuk* which allows iPhone users to find any restaurant quickly and easily and *Mozat*, which offers novel mobile social networking applications, to innovations like Garena, whose gaming platform

became the most-visited Singapore website with over 40 million registered users, of which up to 450,000 users from all over the world would be online concurrently. In all, IDMPO's top five projects have grown a customer base of more than 55 million registered users from over 200 countries.

Some of the emerging new services that made an impact in Singapore and overseas include PGK Media's pioneering floating platform wishing wall used at Marina Bay during last year's National Day celebrations. It was named the Best New Outdoor Media at the Singapore Outdoor Advertising Awards 2009 (SOAA).

Crystal Graphics' *NCity* virtual world technology, which was built in Singapore, is the virtual world platform for the Shanghai World Expo. Its 3D building models are being used for YOG virtual world.

There is Ufinity Interactive Media's next-generation interactive online service,

which predicts users' interests and provides relevant and timely information. It was recognised by Suzhou Industrial Park as one of the 12 most promising enterprises for Innovations in Interactive Media.

In November 2009, Ufinity's Lansin.com (蓝心网) combined forces with Tianya.cn (天涯社区), the world's largest Chinese online community and social networking platform, to offer its psychological evaluation service on the latter's site. Lansin.com is the world's largest Internet psychological evaluation portal with the largest number of psychology related services online. Two R&D projects have been successfully commercialised in partnership with the National Heritage Board (NHB). Virtual Factory's *Cybermuseum*, together with Magma Studio's *World of Temasek*, were launched earlier this year.

Flight to the Future

Close collaborations continued to be fostered with research institutes to deepen R&D in various

aspects of IDM, including learning technology.

On the research front, GAMBIT closed the International Call For Proposals (CFP) in February, and the Local CFP in March (3 of 11 proposals selected for funding), in areas of artificial intelligence in games, memetic framework for real-time video games with animation. In total, there are 11 on-going international and local research projects. These funded research project will further contribute to the yearly GAMBIT Summer Game Development Programme (at MIT Lab) where students create prototype games to demonstrate key concepts behind the research.

Recently, there are more publications by the Singapore researchers, sponsored under the GAMBIT grant – a positive indication of game research maturing

in Singapore. To date, GAMBIT have published over 68 research papers in international journals/conferences and books, with 11 new papers this quarter.

More significantly, GAMBIT appeared in a list of "Top 8th Game Design School" by The Princeton Review. It surveyed 500 schools before arriving at its top 50 with game design studies (from American and Canadian undergraduate programmes) to highlight the best schools games students should attend.



Gaming title *Snap Escape* by Singapore-MIT GAMBIT Game Lab emerged runner-up in the Best Social Game category in the Mochis Flash Games Awards and also was nominated for People's Choice Award.

This year alone, 39 Singapore-based students are selected from among 250 applicants to the GAMBIT Summer Internship Program to work at GAMBIT-MIT lab, in Boston.

In November 2009, the MDA partnered the Singapore Centre for Chinese Language to launch a joint Call-for-Proposals to encourage local developers to research and develop innovative technology for the learning and teaching of Chinese in the areas of oral training, mobile learning and news education.

Another milestone was the move by Keio University to set up its first full-scale international research centre outside Japan. The S\$20-million Keio-NUS CUTE Centre, an interactive media lab, will focus on connected lifestyle media and Connective Ubiquitous Technology for Embodiments (CUTE). Japan's Technology Seed Incubation and Singapore's Thymos Capital also signed an MOU to identify and match-make promising media companies in Singapore and Japan

to co-develop and distribute mobile games and applications, new media technologies and animation co-productions, for the global market.

In an encouraging sign, IDM is being embraced by mainstream companies. Last year, leading gaming peripherals brand, Razer Asia-Pacific, jointly set up with the IDM Programme Office a US\$20 million lab to undertake R&D in interactive gaming technology and platforms, as well as create cutting-edge interactive gaming interfaces and devices.

The Future of Media initiative also rallied industry to collaborate and marshal resources to develop and commercialise innovative services, tools and applications in the areas of Games, TV, Books, and Virtual Worlds. Industry response to the series of calls for proposals (CFPs) was heartening, with over 150 proposals received from 14 CFPs from MDA as well as jointly with industry and demand drivers. For example, in November 2009, the MDA partnered the Singapore Centre for Chinese Language to launch a joint Call-for-

Proposals to encourage local developers to research and develop innovative technology for the learning and teaching of Chinese in the areas of oral training, mobile learning and news education 🚗

KEY ATTRACTIONS

Wider business opportunities from state-of-the-art digital applications.

PUMP UP THE VOLUME

- Focusing on innovation
- Enabling start-ups
- Experimenting with new experiences
- Gearing up for future needs



Passport to the World

A growing network of government treaties and collaborations is opening up new markets for the Singapore media industry, even as targeted promotions and publicity create greater visibility for Singapore companies overseas.

Venturing Far and Wide

Cross-border governmental collaborations have reaped co-production opportunities for Singapore companies. To-date, 15 film and TV projects have benefited from being accorded co-production status, a result of the treaties and cooperation agreements between MDA and its governmental counterparts overseas. A key benefit of this is the ability to tap into support reserved for national productions in the co-producing countries.

Last year, five Singapore companies benefited from our co-production treaties

with Canada and Australia. Besides the 3D film and Singapore-Australia co-production *Bait*, these included animated TV series *Rob the Robot* by One Animation and Amberwood Entertainment (Canada), *Jack* by Sparky Animation and PVP Animation Inc (Canada), *Silly Bitty Bunny* by Scrawl Studios and CarpeDiem Film & TV (Canada), *Mr Moon* by Sparky Animation and Title Entertainment (Canada) and *Zigby* by Big Animation and Zebra (I) Productions (Canada).

MDA forged new collaborations with Sweden's Business Region Goteborg and Brunei Darussalam's Ministry of Communications on new media, laying the foundation for joint projects on digital media technologies and policy exchanges respectively.



***Rob the Robot* by Singapore's One Animation and Canada's Amberwood Entertainment.**

Closer to home, homegrown software developer EyePower Games made waves when it introduced its ASEAN NewsMaker Project to more than 500 students and teachers across 10 ASEAN countries to produce and share informational video content on their rich and diverse cultures with their peers.

Next Stop: Singapore Media Fusion

Last year, MDA led some 95 local 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.

Singapore media content, companies and capabilities continue to be promoted at these markets, sustained by the Singapore Media Fusion communications campaign. New media icons – including Paul Barron, executive producer of Stormworld and Lisa Henson, CEO of The Jim Henson Company – joined the growing list of advocates for Singapore



Mr Moon by Singapore's Sparky Animation and Canada's Title Entertainment.

as an excellent media collaborator. For more information on Singapore Media Fusion, visit www.smf.sg

In all, the positive progress and developments of the media industry were covered in more than 6,000 tracked reports, worth \$34 million 🚗



Zigby by Singapore's Big Animation and Canada's Zebra (I) Productions.

KEY ATTRACTIONS

Essential links to the world and for the world.

STAMP OF CONFIDENCE

- Fostering inter-governmental collaborations
- Made in Singapore, entertaining the world



Driving Change

MDA is putting in place a flexible and responsive regulatory framework that encourages competition, promotes innovation and investment, whilst addressing consumers' concerns for more choice and convenience.

Ears to the Ground

Media regulation in Singapore is grounded on principles of consultation and co-regulation. While content management has gradually shifted from censorship to classification, media content and classification standards are continually reviewed by MDA's eight advisory committees to ensure that they reflect evolving community standards and social norms.

In 2009 a new consultative panel – the Political Films Consultative Committee (PFCC) – was formed to advise the Board of Film Censors on the approval of political films, following amendments to the Films Act in March 2009 to exempt certain categories

of party political films that are factual, objective and do not dramatise and/or present a distorted picture. These amendments give more room for political views and debate. Since the inception of the PFCC, some six films have been passed.

Further to that, the Censorship Review Committee (CRC) was convened in September 2009 to conduct a review of content policies and issues across broadcast, films, videos, publications, arts and new media. The CRC has held focus groups sessions with both industry and community groups and commissioned a nationwide survey to gather public views on content standards and areas where content regulation can be fine-tuned and revised.

MDA will continue to support the growth of new and emerging media services through our licencing framework. A major review is underway to facilitate cross-over of multi-platform content by harmonising

content standards and classification ratings across film, videos, cable, IPTV and VOD platforms.

In addition, as part of its regular review of content codes, MDA has revised its Subscription TV Programme Code and TV Programme Sponsorship Code. The former now gives Pay TV broadcasters the flexibility to carry rated programming on all channels except those targeting children and a younger audience. MDA is currently in the process of finalising its review of advertising guidelines for TV and radio. In 2010, it will be embarking on a review of the Free-to-Air TV Programme Code, and MDA intends to take a community-led approach in this review.

Gearing Up to the Next Phase

In order to address the imbalance in the pay TV market in Singapore, where over 90 of the top 100 channels are exclusively held, MDA introduced the cross-carriage measure in March 2010. Essentially,

it requires pay TV retailers to lease network equipment and infrastructure to deliver exclusive content onto another platform.

Beyond enhancing choice and convenience for consumers, the measure will open up for the industry access to an increased consumer pool and re-focus competition to other aspects such as service differentiation and competitive pricing and packaging, thereby creating a more vibrant TV market for all.

As the world gears up for digital broadcasting, MDA is putting in place plans to prepare Singapore's move

to digital broadcasting, in line with ASEAN's commitment to do so between 2015 and 2020. This switch will free up broadcast spectrum that will allow industry players to develop novel digital content and services, while enabling clearer and sharper wide-screen images, and more innovative and interactive content for consumers.

Spectacular Views

In 2009, MDA facilitated the introduction of more than 30 new TV channels and radio stations, 220 local publications, 16,000 films, videos and videogames, and 484 arts events offering a

diverse range of content across all platforms. Today, consumers enjoy a choice of more than 340 TV channels and 46 radio channels, up from 57 and 28 respectively in 2002. Amongst other things, High Definition TV, IPTV and 3D movie viewing experiences are now available in the market.

Even as we embrace new media and digital technologies, the free-to-air television channels continue to play a primary role in entertaining and educating the wider public. Last year, MDA supported over 2200 hours of homegrown Public Service Broadcasting (PSB)



Reality documentaries *Lifewatch* and *The Work Goes On - Last Dignified Moment of Death* both won the CINE Golden Eagle Award Fall 2009 held in Washington DC.

programmes, in four languages, across seven free-to-air channels. These programmes highlight issues of relevance to our multi-racial and multi-cultural society, playing a critical role in building social cohesion and instilling national pride.

Last year, PSB programmes produced by independent production companies and MediaCorp's in-house production units garnered a total of 11 awards at various international awards shows and 21 nominations at the 2009 Asia TV Awards. These accolades were headlined by *The Little Nyonya* which beat entries from Japan and Australia to win the coveted Best Drama Series at the Asia TV Awards.

Beyond the region, PSB programmes too received their share of acclaim at various international awards, including the CINE Golden Eagle Award and the New York Film Festivals. The slate of achievements underscores the ability of Singapore producers to produce quality, compelling and relevant content both within and beyond the community 🚗

KEY ATTRACTIONS

A pro-business regulatory regime that also looks after consumers' interests.

DOING IT BETTER

- Enhancing choice and convenience for consumers



New Media, Ahoy!

Singaporeans are embracing the digital media age with gusto, thanks to initiatives that equip them with the skills to enjoy media in the way they live, work and play.

Bridging Gaps

Media Fiesta, a month-long festival of activities for Singaporeans to engage and interact with various forms of media, returned this year, bigger and better, spanning four anchor events and more than 40 partner events, attracting 108,000 participants and 63 partners and sponsors. Participants had the opportunity to enjoy a

buffet of Singapore films, past and present; learn new e-publishing tools through informative workshops; participate in an inter-generational game competition; and enjoy an exciting pop concert featuring the best of up-and-coming local talent, among other activities.

As part of its efforts to promote media literacy, MDA supported a total of 32 partner events last year, including the inaugural National Primary School Video Games Competition, Panasonic Kids Witness News, N.E.mation and License2Play, among others.



Media Fiesta returned this year, bigger and better.

Knowing Your Way

"A Day with the BFC" workshops continue to be well received by the community. To-date, more than 800 members of the public including community leaders, students and parents have participated in these educational workshops to learn how films and video games are classified. Conducted by our film classifiers, these talks focus on the importance of classification and how it allows Singaporeans to make informed media choices.

MDA is also leading efforts to promote cyber wellness in the face of the pervasiveness of new media in everyday life. As co-secretariat and member of the Inter-Ministry Cyber Wellness Steering Committee (ICSC), which was formed in February 2009, MDA is helping to develop and coordinate national strategies in support of cyber wellness public education for youths. Last year, the ICSC organised its first public call for proposals on



"A Day with the BFC" workshops have attracted more than 800 members of the public to date.

cyber wellness events and programmes. The Committee has set aside \$10 million for the next five years to support successful proposals.

Concurrently, MDA commissioned a special animation programme *Once Upon A Cyberspace* to educate young viewers and their families on cyber wellness values, highlighting everyday

situations where discerning and responsible use of new media and the Internet should be cultivated. The six one-minute interstitials ran on Okto for six weeks in April 2009, covering issues on cyber-bullying, games addiction, dangers of sharing personal information online, online socialisation, invasion of privacy and Internet viruses 🚗

KEY ATTRACTIONS

Enriching lives with integrated media.

WAY TO GO

- Bringing people together
- Promoting media literacy
- Enjoy media in everyday lives



WHAT LIES AHEAD

MDA has come a long way in establishing a vibrant media eco-system, but the journey is far from over. Armed with SMFP as a roadmap, we are well on course towards establishing Singapore as a Trusted Global Capital for New Asia Media, powered by the drive, passion and innovation of the Singapore media industry. In the year ahead, the MDA will continue to set its sights on taking Singapore forward on this journey through the strategies laid out in the SMFP blueprint. The possibilities are endless 🚗

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FINANCIAL PERFORMANCE REVIEW FOR THE YEAR ENDING 31 MARCH 2010

MDA registered a higher net surplus of \$39.8m, as compared to the net deficit of \$64.5m in FY08, mainly attributable to the higher net investment income following the market recovery.

Income & Expenditure	FY09/10 \$'000	FY08/09 \$'000
Operating Income	161,119	159,501
Net Investment income/(loss)	71,461	(45,365)
Operating Expenses	(173,558)	(160,878)
Surplus/(deficit) before industry development expenses	59,022	(46,742)
Industry development expenses	(36,263)	(33,992)
Surplus/(deficit) before grants	22,759	(80,734)
Government grants	17,056	16,274
Surplus/(deficit) before contribution to consolidated fund	39,815	(64,460)
Contribution to consolidated fund	-	-
Net surplus/(deficit) for the year	39,815	(64,460)

The better-than-expected investment position, which was represented by an increase in cash and investments of \$49.8m from 31 March 2009, improved MDA's accumulated surplus funds to \$144m as at 31 March 2010, from \$104.2m a year ago.

Financial Position	As at 31 Mar 10 \$'000	As at 31 Mar 09 \$'000
Fixed Assets	30,473	37,113
Cash and Investments	368,125	318,334
Receivables	42,989	30,372
Other Assets	4,272	3,302
Total Assets	445,859	389,121
Payables	59,104	64,756
Provisions	31,852	19,325
Advances and deposits	78,066	68,018
Net assets of Trust and agency funds	(552)	(1,941)
Total Net Assets	276,285	235,081
Capital	132,815	132,815
Accumulated Surplus	144,022	104,207
Total Capital, Funds and Accumulated Surpluses	276,837	237,022
Trust and agency funds ¹	(552)	(1,941)
Total Fund Position	276,285	235,081

¹ This refers to monies received from government and other organizations where MDA act as custodian, trustee or agent, and include Singapore Film Commission (SFC) film development funds, as well as Interactive Digital Media (IDM) R&D development funds.