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FACT SHEET

Singapore: A Global Node for Digital Media and Entertainment

The iN2015 vision for Digital Media and Entertainment

With the convergence of media, telecommunications and computing, the Digital Media and Entertainment (DME) sector has undergone rapid changes in the last decade. As it stands today, the DME sector is experiencing significant impact from technology advancement across the areas of production, management, and distribution. In Singapore, the outlook of the DME sector looks promising. The digital business revenue[1] of the DME sector has grown 14 per cent from S$1.8 billion in 2005 to S$2.06 billion in 2006[2].

The Infocomm Development Authority of Singapore (IDA) aims to develop Singapore into a top location for the trade and distribution of digital media and entertainment by 2015. This is built on IDA's Intelligent Nation 2015 (iN2015) efforts for the DME sector to establish Singapore as a digital media and entertainment capital offering innovative content and services to the world.

The Digital Marketplace and Connected Games are two new programmes that have been identified as a means to propel the iN2015 DME vision forward and to contribute towards the overall growth of the DME sector.

1) **Digital Marketplace** Programme – to develop a trusted and conducive environment with capabilities and services for digital media businesses to hub, manage, trade and distribute digital media assets such as libraries of movies, video programmes, advertising, music and mobile content through and from Singapore.

2) **Connected Games** Programme - to further develop Singapore as the leading regional centre for developing, managing and distributing games content and related services.

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[1] The DME digital business revenue includes revenue in storing, managing, trading and distribution of digital media assets.

[2] Frost and Sullivan - Digital Media and Entertainment: The Way Forward 2007

iN2015 IMAGINE YOUR WORLD

Creating a Vibrant Digital Marketplace by 2015

Technology has advanced the way media content is produced, processed, distributed and consumed. As technology transforms the media sector from analogue to digital over the years, there is an increasing trend of content owners producing and storing content first in the highest resolution digital master, and thereafter repurposing it into multiple formats and resolutions for different consumption devices such as television and handhelds. This presents opportunities for the development of innovative infocomm solutions and services to store, manage, trade and distribute an ever growing complex library of digital assets.

Furthermore, in the traditional media world, the majority of buying and selling of media assets are mostly done at annual physical trade events. However, as the libraries of digital assets grow, it becomes increasingly inadequate to broker these asset sales primarily through buying and selling at physical trade events which typically takes place once a year. This gives rise to a compelling value proposition to extend the trade capabilities onto an "always-on" digital environment to complement physical trade events. In the long term we envisage such digital extensions of the physical events will offer cost savings, efficiencies and new service offering for the sellers and buyers of digital assets. For a start, IDA will be working with the industry to develop the digital extensions of media trade events such as Singapore's Asia Media Festival.

The Digital Marketplace Programme

As part of iN2015 DME vision, IDA aims to develop Singapore into a global Digital Marketplace with its conducive environment, infrastructure and services to attract global media businesses to hub, aggregate, trade and distribute digital media assets from and through Singapore.

The Digital Marketplace programme seeks to bring about the following desired outcomes:
   a) A vibrant business-to-business (B2B) marketplace by 2015 through the increase of digital business activities in digital hubbing, management , trade and distribution
   b) Recognition for Singapore as a key proponent of international best practices, governance and policies for trading digital assets and
   c) Singapore to be globally connected to other major digital media hubs to facilitate international trade of digital assets.

An overview of the Digital Marketplace is shown in Figure 1 below and includes the following components:

Figure 1: Overview of the Digital Marketplace

1) **Best Practices, Governance and Policies:** Practices that govern the provision of services pertaining to the storage, management, distribution and trade of digital assets will be developed. Issues such as technical standards recommendations and inter-operability will be developed with inputs from the international community to enable content exchange and global digital assets trading.

2) **Ecosystem:** For Singapore to succeed as a Digital Marketplace, it needs to hub a community of digital assets buyers, sellers and service providers across the DME sectors including the broadcast, film and video, advertising, music, mobile and online media sub-sectors. It will be necessary to attract major global and regional players to Singapore, as well as to grow capabilities in the local ecosystem.

3) **Key Functions** of the Digital Marketplace include strategic components such as:

   a. *Digital Vault* for digital asset sellers to store, manage and account for their digital assets and resources;

   b. *Digital Key* for digital asset sellers to manage security functions to safeguard their digital assets and manage licensing and usage rights, and;

c. *Digital Courier* for end-to-end delivery, payment management and sales fulfilment of digital assets.

4) **Trading Platform Services:** For Singapore to be a vibrant Digital Marketplace, it needs to develop trusted services to enable worldwide buyers and sellers to locate and trade digital assets in a secured environment.

Strategic Thrusts of the Digital Marketplace Programme

Development of the programme rests on the following three strategic thrusts:

1) Strategic Thrust 1 - Architecting the Digital Marketplace
To establish a robust framework of best practices and technical standard guidelines to facilitate international digital media asset exchange and trade. To achieve this, IDA will be initiating an industry roundtable comprising key local and global infocomm and media industry players to jointly develop such a robust best practices framework, as well as to forge international business opportunities for Singapore's Digital Marketplace. The roundtable will focus initially on developing security best practices for Digital Vault component of the Digital Marketplace.

2) Strategic Thrust 2 - Growing the Digital Marketplace Ecosystem
To grow the ecosystem, its capabilities and service offerings through a two-prong effort of attracting major global media players and growing local capabilities in areas of digital assets storage, management, trade, distribution and other value-added localisation services.

3) Strategic Thrust 3 - Developing Trading Platform Services
To develop services and capabilities that will enable the industry to engage in the listing, search, trade and distribution of digital media assets. These services are intended to be complementary extensions of existing physical media trade events. We will commence this effort by developing relevant digital trading platform services to complement media trade events such Singapore's Asia Media Festival.

User Benefits of the Digital Marketplace

Within the Digital Marketplace B2B environment, digital asset sellers and buyers will be able to locate service providers in the ecosystem who have adhered to a set of industry recommended best practices and received industry recognition as trusted service providers.

From a seller's perspective:
Digital asset sellers such as content owners, producers and studios can bring their assets such as movies, TV programmes, advertising content to Singapore's Digital Marketplace where they can work with trusted service

providers to ingest and convert their assets into different digital formats for various consumption devices, apply digital rights management (DRM) protection, store and manage the assets with a trusted Digital Vault provider. Sellers can also use Singapore as a base to distribute their digital assets worldwide through various distribution channels including satellite and internet distribution.

<u>From a buyer's perspective:</u>
Digital asset buyers such as broadcast operators, advertisers, and studios can come to Singapore's Digital Marketplace to search for their required assets, e.g. 2D and 3D models, video clips, TV programmes etc. Buyers can purchase the assets with the desired distribution platform rights and territory rights (for example, broadcast or mobile rights for a specific country), and have the assets securely delivered to them through the trusted service providers. Though the Digital Marketplace, buyers can also locate and engage service providers to provide value added services such as localisation.

Capabilities and services within the Singapore Digital Marketplace Ecosystem today

Several companies in Singapore have already begun efforts to develop services and solutions that will grow the Singapore Digital Marketplace ecosystem of capabilities. You can visit *IDA Pavilion at imbX (Hall 3, 3B1-01)* for a demonstration of these capabilities. These companies include:

1) 1-Net Singapore - showcasing NexMedia - which is a multi-platform assets management and distribution system that provides an integrated service that enables one-stop convenience for buyers and sellers in trading and managing digital media content distribution across multiple platforms including broadband, wireless, broadcast and IPTV.

2) Red Bee Media - showcasing Digital Hive - which provides solution that indexes, manages, stores, enhances and delivers content to multiple platforms (broadband, wireless, broadcast and video on demand).

3) Ascent Media - showcasing Global Media Exchange (GMX) platform which connects content owners to content buyers, facilitates trade, enables transactions and distribution across both traditional and new media platforms.

In addition, you can experience a 3D visualisation of the Digital Marketplace concept at the IDA pavilion at imbX. This 3D visualisation created by Interactive Digital Centre Asia (IDC Asia), is powered by EON Reality's TouchLight technology which allows users to physically interact with 3D visual content on a screen by hand.

Seeking Industry collaboration

IDA is seeking more local and international companies to collaborate with on the Digital Marketplace's programme.

Singapore – The Regional Connected Games Hub

As today's gaming devices are increasingly connected through wired or wireless access, the modern video gamer no longer needs to play alone. Whether he is playing on the PC or on other consoles, he can now connect with other players online and go on adventure quests together or compete with other players in a game. Portable game devices now come with wireless connectivity to enable a group of friends to play multiplayer networked games. The rise of such Connected Gaming experiences will result in consumers demanding more sophisticated and enriched experiences. Figure 2 below illustrates the concept of Connected Games.

Figure 2: Connected Games

The Connected Games Programme

As part of iN2015 DME vision, the Connected Games programme seeks to develop Singapore as the leading regional centre for developing, managing and distributing Connected Games content and services.

The Connected Games programme seeks to bring about the following desired outcomes:

a. To position Singapore as a regional Connected Games hub, managing at least 35 per cent of regional subscribers;
b. To grow infocomm capabilities in the Singapore's ecosystem in the areas of games development, management and distribution, and
c. To establish Singapore as a regional driver and adopter of emerging technologies such as virtual worlds and connected games platforms.

Strategic Thrusts of the Connected Games Programme

To achieve these desired outcomes, IDA will drive the implementation of the Connected Games Programme through three strategic thrusts:

Strategic Thrust 1: Deploy Connected Games Services
Leverage Singapore's robust infrastructure and intellectual property regime framework to attract international game service providers to choose Singapore as the location of choice to hub, manage and distribute their games for the region

Strategic Thrust 2: Build Infocomm Capabilities to Support Games Ecosystem
To accelerate the development of Connected Games, IDA will work with key game partners and institutes of higher learning to enable access to games engines, technologies and tools, technical expertise, shared facilities and talent locator services for the game development community.

Strategic Thrust 3: Anchor Market Leaders
IDA will work with key partners with branded intellectual property which are suitable for re-use in development, localisation, and repurposing of games in Singapore. This will provide opportunities for the rest of the Connected Games ecosystem to leverage upon.

Capabilities and services within Singapore's Games Ecosystem today

Several companies in Singapore have already begun efforts to develop their capabilities and services that will grow the Singapore Connected Games ecosystem. You can visit the *IDA Pavilion at imbX (Hall 3, 3B1-01)* for a demonstration of these capabilities. These companies include:

1) Asiasoft – showcasing massive multiplayer online games such as - Maplestory, Audition, GetAmped, Grand Chase, Cabal Online – which are being hosted in Singapore for the region.
2) Infocomm Asia Holdings – showcasing award winning titles that are hosted in Singapore for the region which include Dragonica, EA Sports™ FIFA Online 2, Granado Espada, Top Speed, Hellgate: London, and product lines from global publisher Take 2 Interactive.

3) Singapore Polytechnic – demonstrating the capabilities of the Microsoft XNA toolkit to show how gaming devices and games are increasingly connected, giving rise to Connected Gaming experience.

Seeking Industry collaboration

We are looking for more local and international companies to collaborate with IDA in the Connected Games programme.

FOR MORE INFORMATION
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