# **CHAPTER 1:** COMPETITIVE AND SUSTAINABLE INDUSTRY

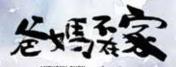
MDA aims to create a world-class media industry that produces globally-competitive content across various media sub-sectors, including film, broadcast, music, animation, publishing and games.

In the year in review, MDA supported 1,033 projects in total and committed S\$12.32 million through scholarships, production grants and more. These helped companies grow and produce higher quality content and allowed them to tap on traditional and emerging platforms to distribute and market their offerings. MDA also seeks to nurture the next generation of local media talents.



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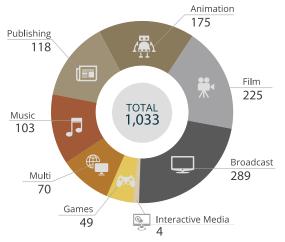
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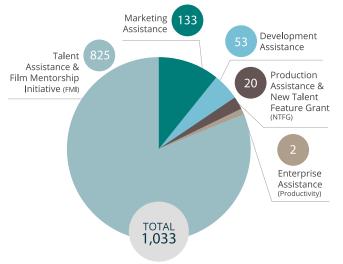
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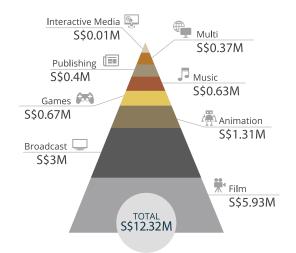
## NUMBER OF PROJECTS SUPPORTED UNDER EACH SECTOR:



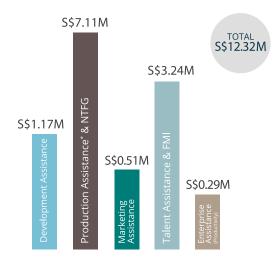
## NUMBER OF PROJECTS SUPPORTED UNDER EACH GRANT SCHEME:



#### AMOUNT COMMITTED FOR EACH SECTOR:



# AMOUNT COMMITED FOR EACH GRANT SCHEME:



\*For Production Assistance, MDA supports up to 40% of the project's total Singapore Spend. To encourage a sustained pipeline of projects, a further grant of up to 10% of the Singapore Spend on the current project can be used for the next project. The figures in the charts excluded the amount committed for these further (up to 10%) grant fund (S\$0.52m with Letter of Acceptance signed in FY13).

## SUPPORTING LOCAL CONTENT AND TALENT

A lynchpin of MDA's industry development strategy is to ensure a constant pipeline of new talent for our media industries. In the year under review, MDA ran several programmes to uncover new talent and nurture budding artists.

Last year, a total of eight individuals were supported under the Film Mentorship Initiative (FMI). FMI is aimed at grooming promising Singapore filmmaking talent by exposing them to inspiring and intensive environments where they can be coached and mentored by experienced screenwriters, directors, producers and script editors around the world. Filmmakers supported under FMI include Anthony Chen and Feng Kexin for Golden Horse Film Academy, Boo Junfeng for Jerusalem International Film Lab, as well as Tan Pin Pin and Tan Bee Thiam for Rotterdam Lab.



MDA and MediaCorp organised a second joint call-for-proposals for local composers to write TV theme songs for MediaCorp dramas.

On the music front, MDA and MediaCorp organised a second joint call-for-proposals for local composers to write TV theme songs for MediaCorp dramas. This initiative is part of MDA's efforts to develop the local music industry by giving local composers a chance to showcase their works. Successful proposals will also receive up to \$\$8,000 in funding under MDA's Development Assistance grant scheme. One of the selected works, (幸福不难) by Serene Koong, became the theme song for MediaCorp's Channel 8 mid-year blockbuster drama serial, *The Dream Makers* (志在四方). This song went on to win the 'MeRadio Top Downloaded Hit Award (Female Artiste)' at the 18<sup>th</sup> Singapore Hit Awards, held at Suntec Convention Centre on 22 November 2013. A third call-for-proposals was held in February 2014.

To nurture budding songwriters, MDA, together with the Singapore Workforce Development Agency (WDA), continued the partnership with Ocean Butterflies Music and Funkie Monkies Pop Music School to run Professional Music Career Programmes in 2014.





Ocean Butterflies Music and Funkie Monkies have partnered MDA and WDA to run professional music courses in song writing and music arrangement. (Photo courtesy of Ocean Butterflies Music and Funkie Monkies Pop Music School)

MDA also identified and supported aspiring media professionals by sponsoring their studies. The Media Education Scheme (MES), which supports new talent in areas like filmmaking and producing, gave out four scholarships last year, bringing the total count of recipients to 186 since its inception in 2003. Two of the recipients, Daryl Bong Aik Tong and Louisa Tang Qianrou were co-sponsored by media companies (SingTel and MediaCorp), while another two, Chiang Wei Liang and He Shuming were supported under the MES (Film) category, which allows recipients to be mentored by local filmmakers for two years after their studies. Besides the Media Education Scheme, MDA also supported 175 media practitioners with work attachment programmes to gain on-the-job learning as well as 530 others for specialised media courses.

# Media Education Scholarship Realise your creative aspirations



(Left to right) Ms. Lee Lie Yen, Director (Industry Strategy & Resource Management), MDA; Mr. Chiang Wei Liang, MES (Film) recipient; Ms. Koh Lin-Net, Chief Executive Officer, MDA; Ms. Louisa Tang Qianrou, MES recipient; Mr. Daryl Bong Aik Tong, MES recipient and Ms. Valerie Cheng, Assistant Chief Executive (Corporate), MDA.



MDA believes that our high-quality local content deserves a broader audience, and continues to promote these stories in several high-profile industry events locally and abroad.

As part of MDA's market development efforts, MDA led delegations of local media companies to premier trade markets such as the Hong Kong International Film & TV Market (FILMART), China International Film & TV Programmes Exhibition (CIFTPE), as well as MIPCOM in Cannes.

30 Singapore media companies participated in the 18<sup>th</sup> edition of the Hong Kong FILMART and showcased more than 190 hours of locally-produced content, including films and television programmes at the Singapore Pavilion. MDA also supported 12 Singapore companies attending CIFTPE, a key Chinese trade market for foreign and domestic content held in Beijing from 22 to 24 August 2013. Participating media companies reported expected sales of more than S\$12 million and were able to meet new content buyers and explore collaborations with their Chinese counterparts.



30 Singapore media companies showcasing more than 190 hours of film and TV content participated at Hong Kong FILMART 2014.

In addition, MDA led a total of 24 local media companies to attend MIPCOM in Cannes from 6 to 10 October 2013, which resulted in over \$\$31.52 million of projected sales. The publishing sector also benefited from the Marketing Assistance grant scheme to attend key trade events, with 16 supported companies participating in the Frankfurt Book Fair, and nine supported companies attending the Beijing International Book Fair.

At home in Singapore, the highlight of the 2013 event calendar was the 14th edition of Asian Television Forum, which was held together with ScreenSingapore at the Sands Expo and Convention Centre, Marina Bay Sands. The two events garnered a record participation of more than 4,300 participants, 1,179 companies from 60 countries, with S\$271 million worth of business deals closed, an increase from S\$255 million in 2012. From Singapore, more than 80 film, television and animation companies brought over 600 hours of content to the Singapore Pavilion for sale and distribution. The Asian Television Awards (ATA), which was held during the same period, was aired for the first time on both local and regional broadcast platforms<sup>1</sup>, reaching out to some 28 million households in the region, including Hong Kong, Korea, Malaysia, Thailand, Indonesia, as well as the Middle East.



The launch of ATF and ScreenSingapore 2013 was officiated by Dr. Yaacob Ibrahim (centre), MDA CEO Ms. Koh Lin-Net (on left), President (Asia-Pacific), Reed Exhibitions Mr. Paul Beh and Managing Director of Reed Exhibitions Ms. Michelle Lim.

<sup>1</sup> These include StarWorld and Channel [V], Fox International Channels' leading general entertainment and music channels respectively.



The ASEAN Film Festival, which was organised by SFC and supported by the Ministry of Communications and Information, showcased eight notable films and saw the appearance of five filmmakers from ASEAN Member States.

Alongside these events, the ASEAN Film Festival, which was organised by the Singapore Film Commission (SFC) and supported by the Ministry of Communications and Information (MCI), was held in Singapore from 3 to 6 December 2013. The event showcased eight notable films, including an Oscarnominated film for the Best Foreign Language award, *The Missing Picture* from Cambodia, and saw the appearance of five filmmakers from ASEAN Member States at Filmgarde, Bugis+. Looking ahead, Singaporeans can look forward to a bigger and better film and TV event in Singapore, the Singapore Media Festival, to be launched in December 2014. Our aim is to develop the Singapore Media Festival into a seamless, must-attend annual event where international participants gather to discover the latest trends, talent and content in Asia, making Singapore the choice destination for those in Asia's media business. It will bring together four complementary film and TV events under a single umbrella - Singapore International Film Festival; Asian Television Awards; Asia TV Forum & Market; and ScreenSingapore. This larger-scale, multi-faceted event will provide more benefits to regional and international trade participants, as well as capitalise on emerging opportunities from Asia's rise as a major media and entertainment market.





#### A Standout Year for Film

The year 2013 has been an exceptional one for Singapore's film industry, marked by local films gaining commercial momentum and critical acclaim. Ten local films were released in the year in review, with total box office takings for the year amounting to \$\$13 million, an increase of 10 per cent from 2012.



One of the most notable achievements was Anthony Chen's celebrated debut feature film, Ilo Ilo, a story of the relationship between a Filipino domestic worker and a Singaporean family. The heartwarming family drama won more than 30 awards internationally, including Best Feature Film at the 50<sup>th</sup> Golden Horse Awards and the Camera d'Or at the 66<sup>th</sup> Cannes Film Festival. It also came in fifth in France's box office, and has been sold to more than 17 territories around the world, including Benelux, France, Switzerland, USA, Australia, Hong Kong and Taiwan. MDA supported Chen since his early days of filmmaking when he was a student at Ngee Ann Polytechnic's School of Film and Media Studies. His short films were funded by MDA, and he subsequently completed his Masters in Film Directing at the prestigious National Film and Television School in the United Kingdom under MDA's Media Education Scheme scholarship. MDA also co-invested in Ilo Ilo under our New Feature Film Fund in 2011, which has now been replaced by the New Talent Feature Grant (NTFG), and supported the cast and crew to attend the Cannes Film Festival in 2013 under the Marketing Assistance grant scheme.

Besides Chen, a number of local first- or second-time feature film directors have also clinched international accolades recently. They include:

- Daniel Hui's *Eclipses* which won the Pixel Bunker Award for International New Talent at the Lisboa International Film Festival 2013. The prize is awarded to the Best First or Second feature-length film across all sections in the festival;
- Wong Chen Hsi, who won the Best Director award for her debut feature film *Innocents* at the 2013 Shanghai Film Festival;
- Amir Virmani's second feature film *Menstrual Man*, which was nominated for Best Documentary Feature Film for the Asia Pacific Screen Awards.

At home, Jack Neo's sequel to his national service comedy, Ah Boys to Men 2, broke box office records for a local film, raking in S\$8 million. Not only was it the second highest grossing film of 2013, just behind Iron Man 3, it also topped the earnings of Hollywood blockbusters such as Thor: The Dark World, Man of Steel and animated feature film Despicable Me 2 in the local box office takings.

2013 also saw the SFC celebrating its 15<sup>th</sup> Anniversary. Since its inception in 1998, the SFC, through MDA, has supported more than 600 short films, scripts and feature film productions. MDA remains committed to supporting the development of new films and emerging filmmakers. An example of a recent project supported is A Yellow Bird, directed by K. Rajagopal, under the NTFG. The film was selected to participate at the Cinefondation's prestigious L'Atelier section of the Cannes Film Festival 2014.

The SFC also continues to deepen the support and appreciation of local films in Singapore through the Watch Local initiative which was launched in October 2012. As part of this initiative, the SGFilm Channel on YouTube has promoted 50 short films and has attracted over 200,000 viewers to-date.



The Singapore Film Commission (SFC) wrapped up 2013 with a get-together to celebrate its 15<sup>th</sup> Anniversary and mark the end of a great year for local films.

#### **Delivering Quality International Productions**

In the year in review, local television production companies have gone from strength to strength, gaining recognition internationally and forging successful partnerships with international players such as Home Box Office (HBO) Asia, A+E Networks Asia, Discovery Networks Asia-Pacific and National Geographic Channel Asia.



**Serangoon Road** premiered on HBO Original in September 2013 and received the Digital and Film Award at the Australian Arts in Asia Awards.





**Asia's Underworld**, by Third Floor Pictures won Best Direction and Best Editing at the Asian Television Awards 2013.

I Wouldn't Go In There, a factual entertainment series for history buffs and urban explorers created by Infocus Asia for National Geographic Channel Asia.

As an example, Singapore-based Infinite Studios worked with HBO Asia, Australia Broadcasting Corporation Television, Great Western Entertainment and ScreenWest on a co-production to create HBO Asia's first original series, *Serangoon Road.* Supported under the Production Assistance grant scheme, the ten-episode detective series premiered on HBO Original in September 2013 and received the Digital and Film Award at the Australian Arts in Asia Awards.

Another noteworthy co-production is *Gabung: Kisah Antara Dua Sungai* (Tales of Two Rivers), which is the first collaboration between independent producers from Brunei and Singapore. Produced by Brunei's Masscom TV Productions and Singapore's Mediamorphosis, the five-episode TV documentary focused on the transformation of two national rivers in Brunei and Singapore through the years of economic growth.

Meanwhile, *The Great Elephant Gathering*, a documentary produced by Beach House Pictures and shown on National Geographic Channel Asia, received a Silver Medal Award in the Nature & Wildlife category at the New York Festivals and *Asia's Underworld* by Third Floor Pictures for the Crime & Investigation Network won Best Direction and Best Editing at the Asian Television Awards 2013. *I Wouldn't Go In There*, a factual entertainment series for history buffs and urban explorers created by Infocus Asia for National Geographic Channel Asia was also well received.

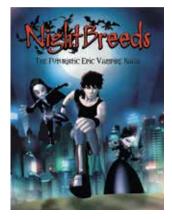
#### **Animation Industry in Sustained Growth Mode**

2013 was a year of steady growth for Singapore animation companies, with local animation productions making headway overseas and a number of companies embarking on international co-productions.

Two animation projects, *Silly Bitty Bunny* and *Franklin & Friends* (episodes 1-26) were recognised as Official Co-Productions between Singapore and Canada on 2 January 2014 and 18 February 2014 respectively. *Silly Bitty Bunny* was co-produced by Scrawl Studios Pte Ltd (Singapore) and CarpeDiem Film & TV (Canada), while *Franklin & Friends* was the co-production between Infinite Frameworks Pte Ltd (Singapore) and Nelvana Ltd (Canada).

Meanwhile, Monstrou Studio signed a deal with Spanish production company Sweatbox and Catalan TV network Televisió de Catalunya (TV3) to create CGI action-adventure series *Nightbreeds*, making it the first international co-production between Spanish and Singapore animation companies.

Singapore animation is also gaining more recognition in North America, as *Sleepwalking Jack*, an episode within the TV animation series *Jack* co-produced by Sparky Animation Pte Ltd (Singapore) and PVP Animation Inc. (Canada) won the prestigious Youth Media Alliance's Award of Excellence for Best Television Program, Animation (Ages 6-8 Category). The animation project was an official co-production between Singapore and Canada, under the existing Coproduction treaty.



**Nightbreeds** is a co-production between Singapore's Monstrou Studio and Spanish production company Sweatbox and Catalan TV network Televisió de Catalunya (TV3).



Jack (Sleepwalking Jack), a TV animation project co-produced by Sparky Animation Pte Ltd (Singapore) and PVP Animation Inc. (Canada).

#### **Gaming Goes Multi-Platform**

Rising mobile Internet adoption across Asia has opened up new opportunities for the sector, particularly in the area of mobile and Internet games.

Some local game developers have been harnessing opportunities in transmedia. Lewenhart Studios, which specialises in mobile game development, debuted their transmedia story-telling game *Weird Tales* this year at Casual Connect Asia, a major casual games event. Originally planned for a board game released three years ago, Lewenhart digitised the game on the mobile platform for iPhone, iPad and later Android.

Local game-makers have also been flying the Singapore flag abroad in various competitions. At the 5<sup>th</sup> annual Independent Games Festival in Shanghai, China, Singapore University of Technology and Design's Game Lab won the "Best Game" award for *One Upon Light*, and PD Design Studio's *Dusty Revenge* received the "Excellence in Audio" award. Vinova's castle defense game *Ultimate Arrow* won the "Best in Show" award in Indie Showcase in Casual Connect Asia 2013.



Singapore University of Technology and Design's Game Lab's **One Upon Light** and PD Design Studio's **Dusty Revenge** received awards at the 5<sup>th</sup> annual Independent Games Festival. (Image courtesy of SUTD Game Lab)



Vinova's castle defense game **Ultimate Arrow** won the "Best in Show" award in Indie Showcase in Casual Connect Asia 2013.



**Pixel People** achieved steady revenue following its launch, garnering over two million downloads within three months from its release.



Opening address by Mr. Joachim Ng, Director of Industry Operations, at the Digital Life Awards to honour the best and the brightest in the games industry.



**Autumn Dynasty Warlords** by Touch Dimensions was the number one top grossing game on iTunes Store.

To honour the best and the brightest in the games industry, The Straits Times organised the Digital Life Awards in February 2014. Companies which received support from MDA such as LambdaMu Games clinched the Editor's Choice award for *Pixel People* while Gumi Asia's *Brave Frontier* won the Reader's Choice award in the Made-in-Singapore games category. As a testament to the quality and popularity of made-in-Singapore games, *Pixel People* achieved steady revenue following its launch, garnering over two million downloads within three months from its release, while *Autumn Dynasty Warlords*, a MDA-funded mobile game by Touch Dimensions was the number one top grossing game app on iTunes Store.

#### Interactive Digital Media (IDM) Scene Heats Up

The homegrown IDM industry has been experiencing steady growth, contributing S\$301 million to the national economy in 2012. From 2008 to 2012, employment in the IDM sector grew at a CAGR of 17.5 per cent, adding a total of 6,897 jobs during this period and resulting in a total sector employment of 14,510.

To help the sector achieve sustained growth, MDA, which hosts the Interactive Digital Media Programme Office (IDMPO), aims to interlock the IDM ecosystem by enabling academia, industry and public sector to collaborate and use Singapore as a testbed to develop innovative products and applications. This is achieved through:

- i.ROCK (IDM Research Oriented Centres of Knowledge) -Deepens local capabilities at local Institutes of Higher Learning (IHLs) in IDM through partnerships with renowned research institution<sup>2</sup>. To-date, eight International Research Centres (IRCs) have been established in Singapore as a result of these partnerships. Collectively, these IRCs have filed more than 60 patents as well as published more than 1,500 papers at top-level international scientific journals and conferences.
- Futurescape Spearheads the establishment of a network of innovation platforms to bring about multi-disciplinary collaboration and reduce the time taken for companies to bring their products and services to market. This programme also funds innovative services and applications as well as common infrastructure and testbedding services.
- c i.JAM (IDM Jumpstart and Mentor) Spurs grassroots innovation and entrepreneurship by supporting start-ups as well as innovation ideas and projects. Under this programme, promising startups are assisted with seed funding and access to entrepreneur-mentors. To-date, more than 200 startups and 1,000 entrepreneurs have been supported and a total follow-on funding of more

<sup>2</sup> These include Carnegie Mellon University; the Chinese Academy of Sciences (CAS); ETH Zurich; Fraunhofer Gesellschaft; the Indian Institute of Technology, Bombay (IITB); Keio University; Tsinghua University; the University of North Carolina; and Zhejiang University. than S\$20 million has also been raised by the i.JAM startup companies. A few success stories have already emerged from the i.JAM alumni. In the year of review, two of thei.JAM-funded start-ups, JamiQ and 2C2P were ranked 29<sup>th</sup> and 100<sup>th</sup> respectively in the Deloitte's 2013 Technology Fast500 Asia Pacific. The Deloitte Technology Fast500 programme, now in its 12<sup>th</sup> year, ranks the 500 fastest-growing tech firms in the Asia Pacific based on revenue growth over a three-year period.

On the education front, MDA has provided S\$5.69 million in funding under the Game Research, Education, and Training (GREaT) Funding Initiative, which comes under the i.ROCK Programme to support the Singapore University of Technology and Design (SUTD) Game Lab.

The SUTD Game Lab aims to train 500 interns for the industry over five years to help Singapore become a leading game design research hub, produce a pipeline of innovative games and nurture entrepreneurs. Specifically, under the Game Innovation Programme (GIP), the SUTD Game Lab trained 32 students in game development through a 14-week internship in 2013.

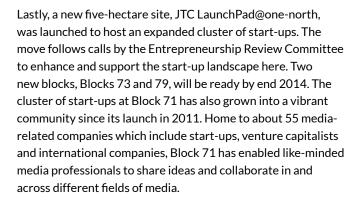


The SUTD Game Lab trained 32 students in game development through a 14-week internship under the Game Innovation Programme in 2013. (Photos courtesy of SUTD Game Lab)



Three key milestones took place at one-north in early 2014. First, Infinite Studios' multi-tenanted development, which houses two of the largest state-of-the-art soundstages in the world, opened officially in Mediapolis@one-north. The building, which has a floor area of 24,078 square metres, houses anchor tenant Infinite Studios and other companies such as broadcast operator Globecast Asia, channel provider Discovery Networks, Japanese game maker Namco Bandai and global media company Haymarket Media.

Second, Lucasfilm opened its new regional headquarters at Fusionopolis@one-north on 16 January 2014. This awardwinning building, named the Sandcrawler, which contains stateof-the-art digital production facilities, also houses Industrial Light & Magic Singapore, the Walt Disney Company (Southeast Asia) and ESPN Asia Pacific.









Minister for Communications and Information, Dr. Yaacob Ibrahim at the official opening of Infinite Studios.

# PRO-ENTERPRISE MEASURES FOR FILM AND VIDEO SECTORS

To ensure that the local film and video sectors remain competitive, MDA introduced a series of measures to help these businesses lower their operating costs and shorten their time-to-market.

A key initiative rolled out by MDA was the introduction of the Simultaneous Rating System, which allows different versions of a film with different ratings to be screened at the same time to cater to different audiences. Previously, such films could only be screened with a one-week window period between them. This new move allows distributors to shorten their time-to-market and lowers their operating costs by saving on advertising and promotional efforts, which can now be carried out in tandem. It also aligned the treatment for film distribution with the existing practice for video distribution, where different versions of a title can be available simultaneously.

MDA also introduced on 15 November 2013 a waiver of Security Deposits (SD) lodged by Film Distribution and Exhibition licensees with a good track record. As of 25 March 2014, MDA has disbursed SD refunds amounting to S\$6.91 million to 288 qualifying licensees or 98% of Film Distribution and Exhibition licensees. This is an example of an initiative which MDA implemented, in response to industry feedback on the SD regime.

Lastly, MDA conducted a review of its list of content that can be exempted from classification for video distribution in 2013. Exemptions are possible only through a co-regulatory effort between the MDA and the industry, where players may distribute titles falling within the exempted categories from classification without submitting them to the MDA. Over the years, the MDA has progressively exempted more categories of content and genres of videos such as educational, training, community or cultural programmes, karaoke sports and pre-1966 movies, subject to certain conditions. In 2013, MDA further expanded the list of exemption categories to include pre-1980s TV series.

### LOOKING AHEAD - INFOCOMM MEDIA MASTERPLAN

While the industry has witnessed some successes this year, MDA is committed to ensuring that the industry continues to thrive in the longer term. In 2013, MCI announced the formation of the 14-member steering committee to develop the ten-year Infocomm Media Masterplan. This is a privatesector led effort which seeks to establish Singapore as a Smart Nation that leads the world in tapping the potential of Infocomm and Media (ICM), and nurtures innovative talent and enterprises to bring about economic growth, social cohesion, and better living for our people up to 2025. The Steering Committee is supported by five Working Committees with representatives from MDA and Infocomm Development Authority (IDA) to develop each of the following strategies:

- a. Establish agile, pervasive and trusted ICM infrastructure;
- b. Build vibrant, strategic and enabled ICM sectors;
- c. Grow and retain passionate ICM human capital with required skills;
- d. Enable people and businesses to harness the power of ICM; and
- e. Build a Research & Development ecosystem that supports ICM innovation and commercialisation.

To fulfil this vision, MDA, together with the committees, MCI, IDA, the Economic Development Board (EDB) and the National Research Foundation is charting the next phase of the development of Singapore's ICM sectors into 2025. With this vision, we will contribute towards A Better Quality of Life for Singaporeans with innovative ICM solutions and Sustainable and Quality Growth using the ICM sectors to



**Smart Nation** 

optimise our national resources, drive productivity for critical industries, and build globally competitive Singapore-based ICM companies. A possible idea that is being explored under the Masterplan is to build local ICM capabilities to provide a targeted tech-enabled media service to improve the quality of lives of Singapore's next generation of seniors. Examples of services and technologies which could be developed include enhanced speech and visual recognition technologies, purposebuilt games to improve cognitive capabilities and personalised services to remind seniors about important daily routines based on their physical conditions. The final report of the Infocomm Media Masterplan is targeted to be launched in 2015.

To align development efforts for the media industry with the Masterplan, the funding period of Singapore Media Fusion Plan (SMFP) has also been extended from FY2013 to FY2015.