

Interactive & Digital Media

Factsheet 2010

Singapore ~ Digital Media Capital of Asia

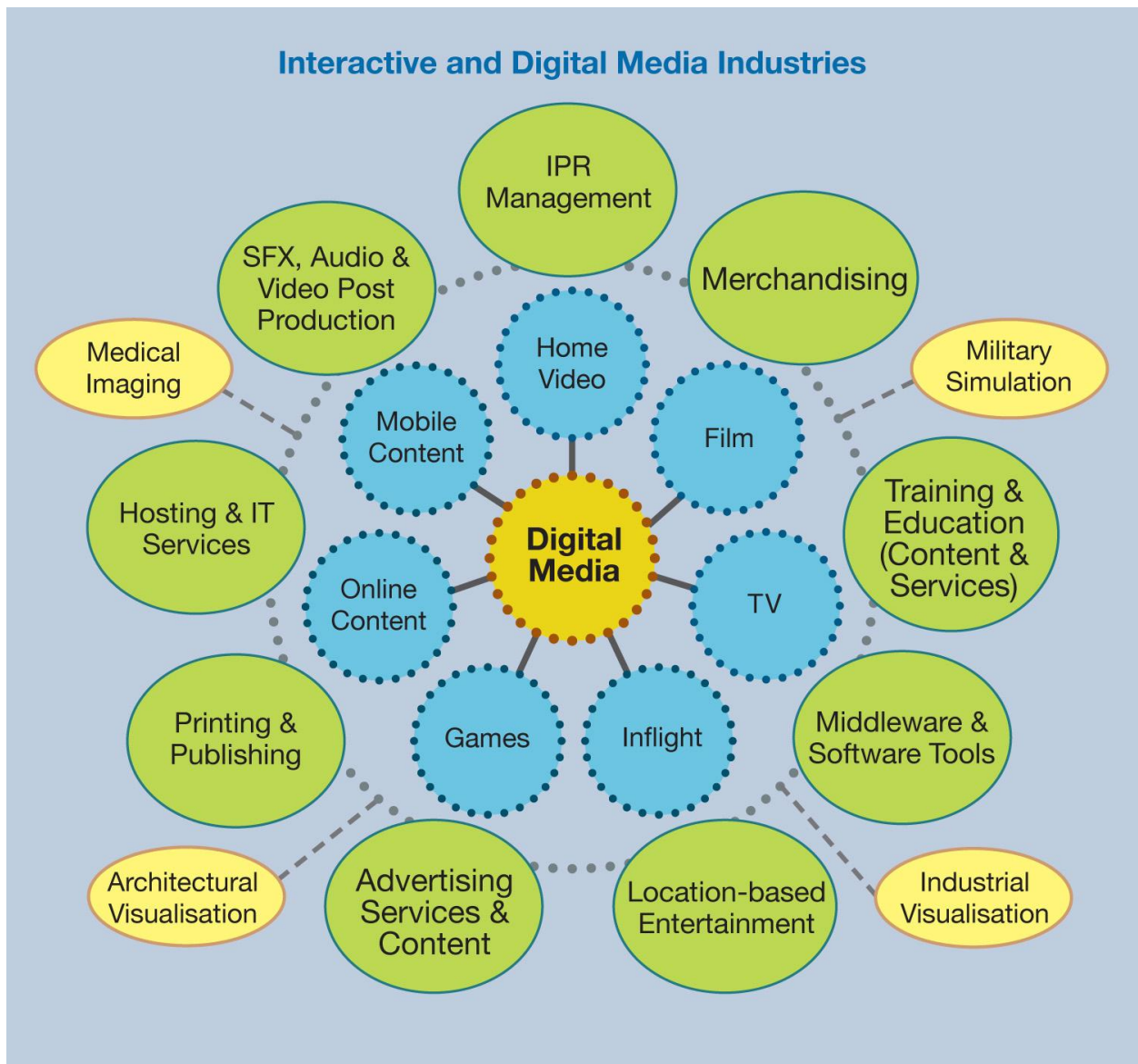
At a Glance

The Interactive and Digital Media industry is a dynamic and growing part of the Singapore economy. EDB aims to make Singapore an Interactive and Digital Media capital, where Singapore creations are made for global consumption. The industry is targeted to generate 10,000 new jobs and create S\$10 billion worth of value added by 2018.

EDB's definition of the Interactive and Digital Media industry extends beyond games and animation. Interactive and Digital Media encompass sectors that create digital content for different genres, production of electronic games, animation, visual effects, licensing and merchandising, content-hosting and financing. There is increasing convergence between technology and content creation - be it television, film, online, mobile and music, which is causing the relationships between these sectors to become more intricate and interesting.

Singapore is game to play in this dynamic industry. The EDB and its partner agencies - the Media Development Authority and the Infocomm Development Authority - collectively promote Singapore as a compelling location for Interactive and Digital Media companies across the entire industry value chain. The city-state is cosmopolitan with a balance of Asian cultures and Western influences. Singapore also has an ideal combination of excellent telecommunications infrastructure and sophisticated IT network. Its robust intellectual property rights environment is ranked first in Asia, a vital advantage when a company needs to create, protect and exploit its properties. In addition, there are several hundred highly-skilled IT and media-trained graduates joining the industry each year.

Through this holistic approach, EDB aims to make Singapore a hive of activity for Interactive and Digital Media; creating a self-reinforcing, inter-dependent ecosystem that will continuously attract talent, ideas, capital and enterprises to create international products and services from Singapore.



Strategies for the Interactive and Digital Media Cluster

The EDB has outlined 3 key strategies to accelerate Interactive and Digital Media developments:

i) Attract top-tier Interactive and Digital Media companies and foster enterprise creation across the various sub-sectors.

These companies will undertake a full value chain of activities in Singapore. Fostering enterprise development will help nurture Singapore's home-grown Interactive and Digital Media brands.

ii) Build a world class talent base and position Singapore as a leading Interactive and Digital Media education centre in Asia.

The EDB will achieve this by attracting international speciality schools as well as ensuring relevance of local schools' curriculum. In the arena of speciality schools, the presence of Tisch School of the Arts and Digipen Institute of Technology in Singapore are some of the first fruits from this effort. The EDB also recognises that there is a need to attract top international talent to live and work in Singapore, thereby ensuring that there is relevant talent to fuel the growth of our Interactive and Digital Media industry.

Opportunities for overseas attachment training are available at leading international organizations for talented Singaporeans. For instance, EDB collaborated with Double Negative - a London-based visual effects house which has worked on films like *Batman Begins* and *Harry Potter and the Order of the Phoenix* - to send Singaporeans for a 12-month overseas attachment.

iii) **Attract and invest in leading technology R&D activities to maintain Singapore's position at the cutting edge of Interactive and Digital Media technology.**

EDB recognizes that technology plays a critical and integral part in the development of the IDM industry. The IDM Programme Office was established in 2006, with the mission of spearheading efforts to boost R&D in the IDM industry. A S\$500 million budget has been earmarked for this purpose over the next five years. This will help ensure that Singapore remains an influential trend-setter for the sector.

Successes in Interactive and Digital Media

Games

Electronic Arts, the world's largest developer and publisher of interactive entertainment, established its Asian Regional Headquarters (RHQ) and online game development studio in Singapore in 2007. The studio has localised and customised popular EA games for the Asian markets, distributing them in at least eight different languages.

Ubisoft, one of the world's leading video games publishers, has opened a full-fledged development studio in Singapore, with plans of becoming 300-strong.

Koei, a leading game developer from Japan, set up its first overseas studio in Singapore in 2004. Koei was also one of the first international game companies to establish itself here. The company has announced plans to expand the Singapore studio from the present strength of about 50 by another 30-60 staff within the next two years.

Rainbow S.p.A, Italy's foremost animation studio and the creator of the highly successful *Winx Club* franchise, established its new video games global headquarters and development studio in Singapore in 2008. Its inaugural Massively Multiplayer Online Game (MMOG) project is a virtual world for *Winx Club*.

Softworld, Taiwan's number one online game development studio, has a 30-man team developing Xbox360/PC/Online games for Southeast Asia.

Germany's **dtp entertainment** set up its online game development studio and Asian publishing hub, **Real U**, here in 2007. The 80-man studio is currently developing a Massively Multiplayer Online Role-Playing Game (MMORPG) based on Tad William's *Otherland* series of fantasy novels.



Animation

Lucasfilm set up its first facility outside the US in Singapore - Lucasfilm Animation Singapore. The 300-man studio does animation and game development as well as visual effects for Hollywood films.

The Southern Star Group, Australia's largest independent television production and distribution company, has an animation studio in Singapore.

Leading Korean animation studio **Sunwoo Entertainment** established its Asia-Pacific headquarters in Singapore to manage global distribution and intellectual property, develop content and produce animation.

EON Reality, the world's leading 3D visual content management and Virtual Reality software provider, set up its Asia-Pacific Headquarters and R&D centre in Singapore. It will be developing its next-generation innovative software solutions that allow online

user collaboration, user-generated content and interactive 3D streaming.

Visual Effects

Leading visual effects house **Double Negative** established a Singapore studio in 2009.

The Digital Artists Group of **Lucasfilm Animation Singapore** serves as both an extension of top visual effects company Industrial Light & Magic (ILM), contributing to ILM's work on feature film visual effects, as well as a support to LucasArts' video game productions.

Made-in-Singapore Products

The EDB is making steady strides to promote Singapore as the preferred location for companies to create content for global consumption. Recent developments include:

Ubisoft Singapore developed its first game title, *Teenage Mutant Ninja Turtles: Turtles in Time Re-Shelled*, for release on Xbox Live Arcade in July 2009. It has also contributed level design for *Assassins' Creed 2*, for release in November 2009.

Local games developer **Mikoishi** spent a year and US\$1 million to develop the game *Dropcast* - the very first made-in-Singapore video game for the popular Nintendo DS handheld which was launched worldwide at the end of 2008.

Leading Japanese game company **Koei** successfully developed an MMORPG titled *Romance of the Three Kingdoms Online (ROTK Online)* through its Singapore studio. *ROTK Online* was successfully launched in Japan in February 2008, and plans for launch in China, Korea, and Taiwan.



Anark, a US games middleware company, developed a game user-interface middleware called *Gameface* in Singapore. *Gameface* is currently being employed for development of top games on the latest next-generation console game platforms. Due largely to the success of *Gameface*, Anark's Entertainment Division, which was responsible for *Gameface*, has since been acquired by Nvidia.

The Game Group of **Lucasfilm Animation Singapore** conceptualized, designed and developed *The Clone Wars: Jedi Alliance* game for the Nintendo DS handheld platform. The studio also produced the 3D animated series *Star Wars: The Clone Wars*, which was the highest-rated premiere in the history of Cartoon Network.

Children's animation series, *Bottle Top Bill*, which was 100% produced in Singapore by **Southern Star**, has won a territorial prize at Digicon.

Tao Shu, a children's animated series created and produced by Singapore-based **Peach Blossom Media**, was listed as one of the "Greatest Products of 2007" in the US-based iParenting Awards. Peach Blossom Media is also producing the animation for *LaMB*, Animax's groundbreaking project that is spread across three screens - TV, online and mobile.

Singapore-based **Scrawl Studios** co-produced the animated pre-school series, *Milly Molly*, which was shortlisted in The Japan Prize 2008 for Best Programme in both the Audiovisual Division and TV Series categories. Scrawl Studio's original 2D animated series, *The New Adventures of Nanoboy*, has also been purchased by both UK and US broadcasters.

Singapore-based **Sparky Animation** was responsible for the full spectrum of animation studio work for *Big River Rescue* - part of the hugely popular *Veggie Tales* series in High Definition.

Education

DigiPen Institute of Technology opened its first independent campus outside the US in Singapore in 2008. DigiPen Singapore offers degree programs in Real-time Interactive Simulation and Production Animation, and will take in more than 500 students over five years.

The **DigiPen-Ubisoft Campus** was established as a collaboration between DigiPen Singapore, Ubisoft Singapore and the Workforce Development Agency (WDA). With tuition fees subsidized by the WDA, qualified students are taught by DigiPen Singapore in Game Programming, Game Art or Game Design, with Ubisoft Singapore guiding the students in the game production process. This is the first such Ubisoft campus in Asia.

Tisch School of the Arts from the prestigious New York University opened its first satellite campus in Singapore, providing MFAs in Film Production, Digital Arts & Animation, and Dramatic Writing.

Hollywood concept designer Feng Zhu has launched the **FZD School of Entertainment Design** in Singapore to train students for the gaming, film and animation industries, offering a diploma in entertainment design.

3dSense Media School, CG Protégé and Egg Story Digital Arts specialize in enhancing the skills of existing industry professionals, providing further certifications in animation and games development that make their students highly sought after by the industry.

In 2009, local tertiary institution **Nanyang Polytechnic (NYP)** inked a strategic collaboration with **Sony Computer Entertainment Asia (SCE Asia)** and **Premium Agency Inc (PA)** to open a S\$4m Games Resource Centre at NYP. This makes NYP the first tertiary institution in Singapore to have a dedicated infrastructure to develop **PlayStation 3 (PS3)** and **PlayStation Portable (PSP)** games. The Centre, open to both students and industry professionals, will leverage SCE Asia's and PA's games development expertise to train talent in game development on the PS3 and PSP platforms.

Events

SIGGRAPH, the world's leading computer graphics and animation conference-cum-exhibition, held **SIGGRAPH Asia**, its inaugural Asian event in Singapore in December 2008.

Games Convention, one of the world's largest digital games exhibition, has chosen Singapore as the location to host **Games Convention Asia (GCA)**, the Asian edition of its event. Into its second year, GCA 2008 drew more than 92,000 attendees.

CG Overdrive is one of Asia's largest computer graphics events for CG professionals. This conference-cum-networking event attracts the leading animation, visual effects houses and game studios globally.

Singapore hosted **3DX: 3D Film and Entertainment Technology Festival** in November 2008. This was the first event of its kind, focused on 3D content production, development and technology. Hollywood luminaries Jeffrey Katzenberg, James Cameron and Brandon Fraser were among the prestigious guests who attended this event.

The **Asia Television Forum (ATF)** is a programming market held in Singapore annually where international and Asian media companies buy, sell and network. Notably, a record US\$47 million worth of deals were concluded during ATF in 2007. Animation studios here use it as a platform to exhibit and market their creations to an international audience.

Well-positioned for Future Growth

The success Singapore has enjoyed in securing a slate of IDM projects and playing host to some of the most exciting industry events in the region provides good momentum in Singapore's drive to become an Interactive and Digital Media Capital.

Leveraging the momentum of these successes, the EDB continues to promote the IDM cluster as a strategic growth engine of Singapore's economy through our commitments to develop talent and infrastructure, promote innovation and create a conducive environment where Singapore creations are made for global consumption.

About the Singapore Economic Development Board

EDB is the lead government agency for planning and executing strategies to enhance Singapore's position as a global business centre and grow the Singapore economy. We dream, design and deliver solutions that create value for investors and companies in Singapore. In so doing, we generate economic opportunities and jobs for the people of Singapore; and help shape Singapore's economic future.

'Host to Home' articulates how EDB is sharpening its economic development strategies to position Singapore for the future. It is about extending Singapore's value proposition to businesses not just in helping them improve their bottom line, but also in helping them grow their top line. EDB plans to build on existing strengths and add new layers of capabilities to enable Singapore to become a 'Home for Business', a 'Home for Innovation' and a 'Home for Talent'.

For more information on EDB, please visit www.sedb.com

For more information, please contact

Ms Khor Mi Mi
Assistant Head, Marketing & Communication,
Singapore Economic Development Board
DID: (65) 6832 6229; FAX: (65) 6832 6498
Email: mi_mi_khor@edb.gov.sg