

Television Meets YouTube A New Zealand Perspective

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To Chris Lipscombe

Positively Wellington Business

PO Box 10 347

Wellington

New Zealand

www.positivelywellingtonbusiness.com

**Prepared by Clare O'Leary, Eve Bay Studio
in consultation with Glenis Giles, Oliver Giles Productions**

Eve Bay Studio

Creative Research & Digital Production

www.evebaystudio.co.nz

oclare@paradise.net.nz

Mobile: 027 311 0608

The Goodnight Kiwi



http://www.publicaddress.net/system/topic,26,good_night_kiwi.sm

Goodnight Kiwi – a nostalgic television viewer found this on YouTube and put it up on the new public address system site. Public Address has created 'OurTube' as a new online video sharing part of their site, where kiwis are starting to upload kiwiana, Flying Nun music videos and other moving images linked to stories of the moment in Public Address and/or pertinent to society, culture and storytelling.

www.publicaddress.net

Television Meets YouTube A New Zealand Perspective

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1.0 Introduction

This paper follows on from previous work completed on the television production sector in New Zealand, '*Identifying Economic Opportunities for the Television Production Industry*' by Ian Duncan of the New Zealand Institute for Economic Research (NZIER) in association with Dorothee Pinfold and Christina Milligan.

Its aim is to look at the next level of content creation driven by the digital age and to provide a framework that will assist economic development agencies to respond appropriately to the development in and around the sector. The overall objective is to assist key industry players in growing their businesses, particularly focused on global market development.

This paper and the previous work by NZIER have both been commissioned by Positively Wellington Business (PWB) acting on behalf of a group of economic development agencies and local bodies from Auckland and Wellington, and funded with the assistance of New Zealand Trade and Enterprise (NZTE) under their Regional Partnerships Programme.

2.0 The Brief

The brief as outlined by PWB includes:

- Provide a global snapshot of the 'television of the future' with specific reference to the potential for New Zealand content. This will include an overview of the opportunities and challenges facing the existing television sector in New Zealand with specific reference to a 'next steps' approach.

(Note: This will include a digital content value chain analysis in contrast to a traditional television value chain analysis).

- Identify new industry opportunities opening up due to digitisation and alternative digital design, production, marketing and distribution systems.
- Identify initiatives that could enhance the creation of content for global markets rather than focus on the local content domestic market.
- Provide a framework for making recommendations for Economic Development agencies as to the most effective forms of interaction with the industry and in association with the industry to promote growth in talent and skills, professional development, business acumen and sector growth.
- Identify alternative investment and funding options to implement the above initiatives (national/regional).

(Note: The issues of convergence of film, television, new media and computer games will be in the scope above.)

- Identify opportunities for television producers and the sector in the New Zealand digital content strategy currently being developed (with some reference to the effect of digital television being introduced over the next few years also; see www.digitalstrategy.govt.nz).

3.0 Television of the Future – Global Trends

The traditional TV market is not dead... multiple models will evolve. Broadband penetration and improvements in digital rights management are helping push content providers to look toward the Web. But there will always be people who want to subscribe to a traditional television service.

Scott Sahadi, VP of Corporate Development, www.Kontiki.com

The future of television is inextricably linked to the ubiquitous spread of broadband offering new opportunities and challenges to traditional media corporations and producers. Television is still a major force in the media world, turning over multimillion dollar budgets across the globe. However, the convergence of media and the multiple formats that content can now be created and distributed through is changing the way that media companies look at their intellectual property, where it is being seen, on what platform and by whom.

The 'C' generation (content creators, connectors and communicators) is switching off mainstream television in droves and seeking their entertainment on the internet – going to Google for information and to social networks and entertainment sites such as MySpace and Bebo and the ever increasing popular YouTube site. If they want to watch long-form programmes, they watch DVDs of movies they have rented or bought. The web is still not the medium of choice for long-form content.

The online content can be personalised, free (if you have a broadband connection already) and available 24/7. It is designed to be fast, interactive and engaging to specific audiences (youth, musicians, environmental issues, news and sports). The marketing is viral and open to interactive response through text or sound or audiovisual comment. It wants to know what the user base thinks so it can give them what they want, when they want it. Other trends include:

- Changing viewer behaviour – most importantly, the desire to interact
- New Technology Platforms – digital television, HDTV, set-top boxes, digital video recorders (DVRs), video on demand (VOD), wireless devices, broadband video and Internet TV
- Shifts in the advertising sector towards more mobile and web based media
- High growth in the mobile market
- New business models for content creation and distribution – media businesses globally are challenged by this and major mergers and acquisitions traditional media, web media and IT and Telco companies are being announced on a regular basis.

Digital television and the convergence of technology have coincided with an increase in global alliances, joint ventures and acquisitions. This is largely due to the fact that, as with the development of cable and satellite television in the 1980s, a single group cannot bear the cost of developing new media alone.

As technology develops, so do risks for producers and uncertainties for investors. As competition increases between market players, so does the unpredictability of the broadcasting field. As the field globalises and becomes dominated by transnational corporations and international consortia, which have the technological expertise to be competitive and the resources to afford the gamble, national public broadcasters are threatened by decline.

European Television in the Digital Age, Papathanassopoulos, p 61

In a sense this reaffirms the need for a strong public broadcasting presence to maintain the creation and distribution of local culture and society in New Zealand.

The new government announcement in November 2006 of the Digital Television package allows for some reconfirmation of the government's role in creating an infrastructure for 'public service content'. How this is manifested remains to be seen in the increasingly competitive commercial television environment in New Zealand.

This social/cultural imperative vs. the commercial imperative in state-owned television is not a new dilemma, but in the realm of digital television and new media it poses some new challenges for policy makers and content producers. Who is the audience now? As local content becomes more globally desirable – a process that one commentator has described as 'glocalisation' – localised products must remain authentic in cultural and geographical terms and at the same time acquire global reach and response characteristics.

4.0 IT Meets TV: Jumping on the Bandwagon

The convergence of media has seen a number of new acquisitions by mainstream media of new media and technology companies.

- Microsoft has made deals with CBS, MTVNetworks, Turner Broadcasting, Warner Bros. and Paramount to make their content available through the console. At least 750 hours of programming will be available to be downloaded through XBox by the end of 2006. TV shows will be available only for purchase, and movies only for 24 hour rental.
- Larry Page and Sergei Bryn established Google while studying. Unheard of six years ago, it now has overtaken the major industry leaders Ford and General Motors. Google now receives two hundred million inquiries every day and has over

The Digital Living Room

This Hollywood-based event is bringing together top television executives and new media and telecommunications companies looking to create new relationships across the creative content and ICT worlds. Global media giants alongside new start-ups are on the lookout for the next 'YouTube' phenomenon.

www.ihollywoodforum.com

3000 employees. 1000 employees with stock options became millionaires overnight when it went public. Google Print, Google Desktop, Google Keyhole (aerial photography), Google Earth, Google Scholar and most recently the Google acquisition of YouTube on 9 October 2006, just 18 months after start up.

- [CBS Digital Media](#) is changing its name to CBS Interactive, getting rid of division chief [Larry Kramer](#) and bringing in Quincy Smith, an [Allen & Co.](#) investment banker. [CBS' official announcement](#). His job is to acquire the 'the next YouTube'.
- Newscorp acquired MySpace showing the migration from linear to online television, increased emphasis on user-generated content and broadcasters such as BBC now thinking in terms of 360° commissioning (i.e. creating and commissioning content for all the different delivery platforms).
- Comcast, Time Warner, Cox Communications and Advance/Newhouse Communications announced they were forming a joint venture with Sprint Nextel to offer wireless telephone service. Also Cingular and parent AT&T are experimenting with their own wireless services. Adding satellite providers, mobile TV and dual-mode WiFi phones to the mix results in an entirely new package of services on offer.
- Energised by the success of its Live8 concert streaming worldwide last year, AOL presented another major initiative: In2TV, a broadband television network launched in partnership with Warner Bros. In2TV will offer the largest Online collection of free, on-demand TV shows, including full episodes of popular Warner Bros. programmes from the past 40 years, together with interactive features and viral videos that allow audiences to experience and interact with television programming in an entirely new way.
<http://television.aol.com/in2tv>
- Closer to home, Channel Seven (Australia) has announced it has formed a \$4 billion media joint venture with United States-based private firm Kohlberg Kravis Roberts (KKR). The joint venture, the Seven Media Group, will include Seven's television, magazines and online businesses. KKR will invest about \$735 million for a 50 per cent stake in the venture which will own Seven's television and magazines businesses and its 50% interest in the 'Yahoo!7' joint venture.

Telecom NZ announced in November 2006 that it will launch its own hybrid set-top box which they hope will be the single gateway householders will use to watch, record, download and play television and movies. Telecom NZ is in discussions with Freeview and both the free-to-air broadcasters and is also investigating what tools it can add to the boxes to help viewers download 'catch-up' TV or movies using the homes' existing copper wire broadband connection.

Philip King, the project director of audio visual services at Telecom stated that Telecom had no plans to get into the business of buying and producing content such as sports or entertainment programming, but would not rule it out long term...

The Independent Financial Review 22 November 2006

Telecom NZ announced (13 December) that Yahoo would replace Microsoft's MSN as its online partner for its internet service, Xtra. The partnership is with Yahoo!7 and will be called Yahoo! Xtra. Yahoo!7 and the Seven Network of Australia will have majority control of the venture with 51 per cent, while Telecom NZ will have 49 per cent. Telecom NZ said the partnership would provide an enhanced suite of online content and services.

A plethora of web based specialist 'tv' channels are also emerging. Interestingly, many are still using 'tv' in their brand names or their URL to transition the traditional television viewers onto the web. These sites all show the trend towards streaming content, the ability to upload your own content, share content and discuss it. It is also linked to the creative commons licence for commercial use or to reversion content on the web.



www.creativecommons.org



Stray Cinema

An online collaborative cinema by Wellington filmmaker, Michelle Hughes. A short film shot in London is uploaded to the web via a Creative Commons licence allowing others to reuse 80% of the content and add 20% of their own, creating new interpretations of the material which can then be uploaded for comparison and review.

www.straycinema.com
www.creativecommons.org

4.1 Television and the Web Combine – New Models

YouTube – YouTube founders, Chad Hurley and Steve Chen, announced the \$165 billion stock-for-stock deal with Google via a YouTube video reassuring their user base they would stay true to their vision and the user needs. It is an outstanding success story of online television where two developers joined forces to design a technology platform to easily access and share video on the internet. Their \$165 billion stock-for-stock deal with Google hit headlines throughout the world in October 2006. Their key point of difference was uploading of anyone's content, not produced programmed content.

www.youtube.com

Blip TV – American based but targeting niche interest areas e.g. which features specialist videoblogs such as Geek Entertainment TV, Treehugger TV, The Ministry of Unknown Science (comedy sketches), G Living Live, etc. The site is aimed at 'collectors' who are really into animation, sci-fi, stand up and is strongly led by a front person. www.blip.tv

Second Life is a virtual world where real brands are beginning to purchase real estate, retail space and online members are actually buying virtual goods and services. The first millionaire in Second Life is a young Chinese woman who started her own property

business inside Second Life buying and selling land and investment properties.

www.secondlife.com

The Infinite Mind created by Lichenstein Creative Media is a mixture of real and virtual entertainment, featuring for example a live interview with Kurt Vonnegut in an animated virtual theatre. Viewers can also assume a digital identity and form part of the real time audience in the virtual theatre – and ask questions. Kurt and the interviewer are in the same physical space, but have animated personas.

www.theinfinitemind.com <http://lcmmedia.com/mindprgm.htm> (the interview)

Secret TV <http://www.theseecret.tv> An Australian channel devoted to viewer interaction.

Uth TV with the by-line 'Rise Up' is 100% youth produced and targeting 'youth'

<http://www.uthtv.com/>

Select TV – Australian television channel offering a number of specialist channels

www.select.tv

5.0 Convergence in the New Zealand Scene

New Zealanders have historically been early adopters of new technology as reflected in the plethora of web based and digital technology start-ups during the 1990s. Web companies, software innovators and creative technology start-ups have been at the forefront of the digital age.

Some of these companies that have specialised in technology for the creative sector in particular have gone on to become world leaders in their specialist fields (e.g. Weta Digital, Massive Software, Right Hemisphere) influencing how others integrate digital technology innovation into their products and services.

Acquisitions have always been part of the growth strategy for most industries. In mainstream media however, growth has traditionally been achieved through buy-out of smaller firms by larger media firms. Increasingly those acquisitions are across sectors to include value chains and distribution networks driven by the user base, not the top down corporate direction as in the past. Many companies are struggling to keep up with this shift and therefore, are buying the skill base of others who are already there. Some examples:

- **Fairfax Media** acquired **Trade Me** for NZ \$700 million – not exactly another media company, but with access to over 60% of online users through its online trading network, the audience that Fairfax wants to attract. This not only astonished general investors in New Zealand but served as a wake up call to traditional investors and businesses to relook at the opportunities the internet and digital age could offer. www.trademe.co.nz
- New Zealand company, **42 Below**, established by ex-Saatchi & Saatchi creative director Geoff Ross, was acquired on 30 September 2006 by **Bacardi** for \$138 million. www.42below.com

- Rod Drury, recently named Hi Tech Entrepreneur of the Year sold his company, AfterMail for \$45 million dollars. www.roddrury.net.nz
- Stacey Gregg's online fashion blog **Runway Report**, billed as 'the online home of New Zealand fashion', was bought for an undisclosed sum in October 06 by Rupert Murdoch's multinational media company **ACP Media**.
<http://runwayfashion.com>
- A landmark partnership announced between director/producer Peter Jackson, and Microsoft Game Studios will create two new interactive entertainment series exclusively for XBox 360 and XBox LiveR. In addition, Microsoft Game Studios will partner with Jackson and Walsh to establish Wingnut Interactive, a studio dedicated to the creation of world-class interactive entertainment.
www.wingnutfilms.com

There are many other examples but these ones in particular have attracted a lot of media interest over the last few months and led to much discussion across both traditional and new media businesses about the effect that digital content industries may have on future investments in the content industries. These buyouts indicate a shift not only in the type of new media businesses emerging in the economy, but also in the way traditional business models are 'going digital' and the benefits that this move can bring to their growth and attractiveness in the international market.

6.0 A Digital Content Value Chain

Value-net innovators generally favour neither a pure Internet nor a pure bricks-and-mortar approach. They seek to combine the best of both worlds.

www.valuenets.com

One of the challenges of the digital age is defining the most effective business model for new and emerging industries. The value chain for digital content extends from content originators and artists through to production, post-production, and distributors to the end consumer, with communication service providers increasingly involved in the distribution of digital content.

New media producers and users are challenging the business models and power base of traditional content producers. In January 2006 a conference was held by the OECD, The Digital Economy, where major corporations presented their views on new users of media. It brought together entertainment leaders across television, film, computer games and new media and telecommunications to discuss trends in user behaviour and new business models. (www.oecd.org)

New business models are required to foster collaboration and efficiency throughout the value chain in order to ensure maximum revenue and profitability. However, sound business principles remain the same. Each owner of intellectual property has to be able to track and trace the IP through the creation and delivery of content to sales, channel management, billing, and third-party settlements. Therefore content producers and managers must be able to:

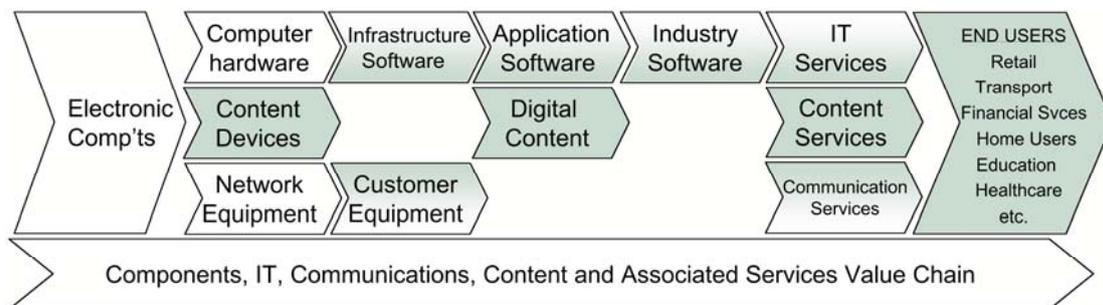
- Manage partners and channels efficiently
- Align incentive schemes for resellers and partners
- Handle third-party settlements

The Department of Trade & Industry in the U.K. has investigated this approach as part of their work on creative industries, specifically the digital content industries.

A commissioned report by OVUM revealed a digital value chain for the content sector that shows the interrelationships in the value 'net'. This networked version of a value chain is most common in web and internet transactions but is increasingly used to describe the 'web' of relationships developed by digital content industries to deliver their goods and services.

An example of a digital content value chain is outlined by OVUM in their study produced for DTI, the Department for Trade & Industry in the U.K. This model shows the interrelationships in the digital content sector and gives some indication of future pathways and business models that could be considered. www.dti.gov.uk

The digital value chain below describes how various specialist areas interrelate in order to support the design and delivery of digital content goods and services. This model can be applied to more traditional content industries as they venture into the digital world, and specialist roles ascribed to traditional content producers as designers of new and interactive media or traditional broadcasters as digital distributors.



Source: OVUM Consulting, www.dti.gov.uk

The challenge for each specialist area in this value chain or web is that each of these areas is constantly evolving. Entities in these specialist areas therefore need to have business models that can respond quickly and effectively to innovation, whether in digital technology, interface design, transaction processes, distribution networks or investment and ownership changes (through rollups, buyouts, acquisitions or mergers).

The digital content sector itself is constantly evolving. In 2006 alone there have been significant improvements in broadband speeds and this is being reflected by user demand for sharing video images and sound on the web. What began as podcasting has now moved into videocasting and sharing home made video as well as high production value video in a plethora of online sites mimicking the YouTube model.

With an overload of content, it's simple to see the mutually beneficial relationship between YouTube and Google, with Google as the specialists in search engine technology and platforms that can help the users to refine and filter their searches to get the kind of content they want as efficiently as possible.

In a study done by NZIER for the New Zealand government's digital content strategy a number of international initiatives around digital content were explored. In particular, the Irish strategy describes the new challenges ahead:

This new area of economic activity has been brought about through the convergence of previously distinct areas such as traditional content, media and entertainment, software and multimedia, and electronic hardware and telecommunications. Broadly, it encompasses the creation, design, management and distribution of digital products and services and the technologies that underpin them.

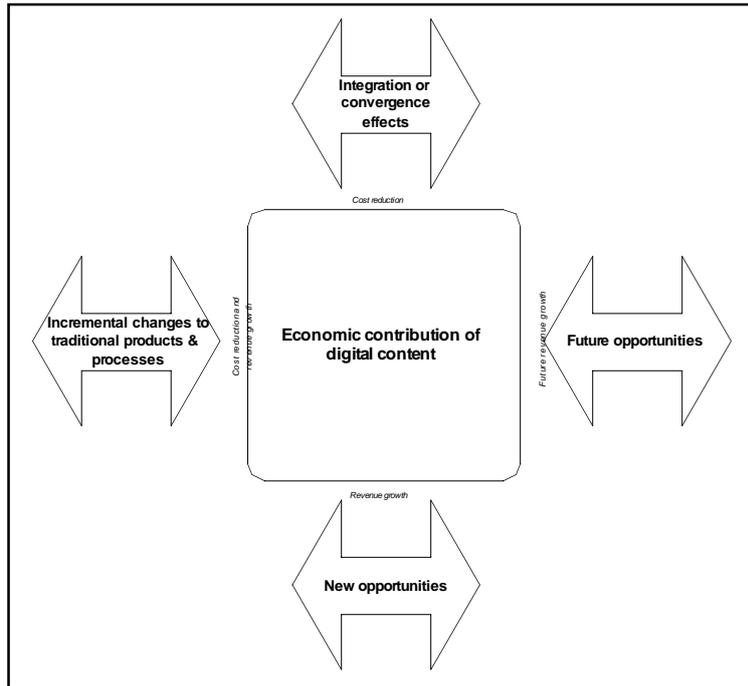
A Strategy for the Digital Content Industry in Ireland www.forfas.ie

Work done in the U.K. shows that the intersection between the creative industries and the ICT sector is crucial in the new emerging business models around digital content design and delivery. In New Zealand this same convergence is evident and two major themes are occurring:

1. An emerging creative digital content sector (games, animation, post-production, web, 3D design houses, scientific visualisation etc.)
2. Digital content creation that has a horizontal effect across sectors through the application of digital design processes (digital design and processes in manufacturing, publishing, research institutes etc.)

Source: NZ Digital Content, Economic Perspectives, NZIER & Eve Bay Studio

The diagram below illustrates how product and process improvements and integration or convergence effects act to reduce cost, while addressing current and future opportunities supports revenue growth.



Source: NZ Digital Content, Economic Perspectives, NZIER & Eve Bay Studio

The diagram below shows the sub-sectors within the creative and ICT sectors that are increasingly converging in the digital world. To map these areas in any great depth in New Zealand requires an intensive mapping study. Whilst this has not been done to date, some work is currently being done by Statistics New Zealand to redefine some aspects of the ANZIC codes to understand more fully the contribution these emerging and converging sectors are playing in the greater economic picture.



Source: UK Department of Trade and Industry, 2002, page 4

The researchers involved in preparing the *NZ Digital Content, Economic Perspectives* report comment on the digital content sector as follows:

We note that they involve a transition in the kind of product exchanged and the way it is exchanged. (Dolfsma, 2004, p.1). And they tend to be part of the production and consumption spectrum most closely associated with the creative and ICT sectors.

An initial impression of the possible scale of the digital content sector can be gained by considering it as a sub-component of either the ICT sector or the Creative sector. Indicative information on the economic contribution of each of these is as follows:

- *ICT is an integral component of every sector of the New Zealand economy (as an 'enabler') and is also a sector in its own right. It currently accounts for approximately 2% of the workforce and generates in the order of 4.3% of New Zealand's GDP. (ICT Taskforce Report, 2003, p.10).*
- *These estimates put the economic contribution of the Creative Sector at about 3.1% of GDP and 3.6% of employment. (NZIER, 2002, p.19).*

The New Zealand television sector itself is a sub-sector of the above ICT/Creative industries and yet, when combined as part of the new and interactive media composite, will increasingly become a driving force in the high-growth digital content industry as it embraces digital television and new media formats.

At MipTV, the audiovisual and digital content marketplace in Cannes, senior executives finally came to accept that digital media may require a significant re-thinking of content formats and their associated business models. Retaining audiences and advertising revenue demands new rules of engagement, often involving decentralised format creation. The value-chain has become a 'meshed value-net'" where players are, in turn, customers, suppliers, partners and competitors. 'Cross-platform', 'interactive', and 'user-generated' are the new imperatives: the audience assumes an active role, and becomes a "content publisher" across multiple platforms, by means of user-generated content and interactivity. Whether in the open internet or a walled garden distribution environment, many new formats will emerge and strive to capture eyeballs.

www.spectrumstrategy.com

7.0 New Business Models

Value nets deliver new and unique levels of service and personalised products to customers. Value nets integrate the essential front-end understanding of customer needs with the crucial back end that precisely delivers on the front-end promise. Value nets are digital collaborative agile powerhouses that fuel business results.

Adrian Slywotzky, Value Nets, p viii

The internet has transformed how businesses are created but also how traditional businesses that integrate digital communications into their existing business models can

gain competitive advantage in the global economy. The value net takes a dynamic approach to the business value chain, reflecting the interactive nature of the internet, the businesses that rely on it and the communications possibilities with it.

Value nets are comprised of five main features:

1) Customer-aligned

Customer choices trigger sourcing, building, and delivery activities in the net.

2) Collaborative and systemic

Companies engage suppliers, customers, and even competitors in a unique network of value-creating relationships.

3) Agile and scalable

Responsiveness to changes in demand, new product launches, rapid growth, or redesign of the supplier network, are all assured through flexible production, distribution, and information flow design.

4) Fast flow

Order-to-delivery cycles are fast and compressed. Rapid delivery goes hand in hand with reliable and convenient delivery.

5) Digital

E-commerce is a key enabler. But beyond the Internet, it is the information flow design and its intelligent use that lie at the heart of the value net.

E-CAST

Established by veteran broadcaster Robert Boyd Bell and Gresham Bradley, e-cast provides an Internet TV service for New Zealand, delivering a range of digital services to the New Zealand education business and government sectors and the public.

E-cast digitises, stores and delivers television, video and multimedia content over the Internet. E-cast hosts video content for easy access through links on customers' websites, and delivers videos and television programmes to customers for both on-demand viewing and on-demand download.

The Format

E-cast uses Apple QuickTime's [new international standard "H.264" codec](#) that provides smaller files at astonishing quality – crisp, clear and brilliantly saturated.

The new H.264 video codec standard represents the next generation of video for everything from mobile multimedia through to broadcast, the Internet and high-definition (HD) video.

Downloaded files can be stored on computer hard drives. They may be transferred to personal storage drives and MPEG 4 devices such as the new 'iPod Video' for direct viewing on standard TV screens.

www.e-cast.co.nz

8.0 Interactive Television and the Computer Games Industry

Games are now netting audiences larger than TV... and as gaming audiences grow, our industry is going to attract more and more advertising dollars. A Ziff Davis survey found a quarter of those people who habitually play video games reduced their time in front of the television by more than 10 per cent in the past 12 months. In the UK, BBC1's share of viewing on Christmas Day fell from 42% to 32% in a year, and ITV1's share of viewing fell from 32% to 20% last year... Analysts are attributing the shift squarely at increased sales of videogames, as well as other forms of digital entertainment. And since the consumer base inside of the gaming communities are typically young, bright, modern customers with disposable income, that represents an attractive audience to a company building brand equity among its consumers.

Jens Uwe Intat, Vice President and General Manager Europe,
Electronic Arts www.ea.com

With the advent of digital television and offerings such as MySky that Sky Digital introduced this year in New Zealand, the interactive mode of television viewing will become the preferred viewer experience. As people become more familiar with interactive TV, it will in turn, provide opportunities for new interactive design and content creation to meet growing user demand.

Television producers looking at future focussed content could look no further than current trends in the games industry for the interactive media experience. Niche areas such as children's television and mobile content creation are growing as the technology becomes more user friendly and ubiquitous.

Outsourcing

In 2006, Screen Digest released a report on outsourcing of games design and development as a global trend in cost reduction. This trend represents a new market entry and relationship-building opportunity for New Zealand companies. Over time, successful outsourcing relationships may lead to original intellectual property production or co-production.

- The global market of games outsourcing will reach \$1.1 billion by the end of 2006 and is set to grow to \$2.5bn by 2010 representing 40% of total games development spend
- Outsourcing is already common – it is estimated that 60% of games studios outsource today, with this figure projected to rise to 90% by 2008
- If left unchecked, production of games developed for the new generation of games consoles will increase by 50%
- Demand for quality art and animation will soon outstrip supply by experienced outsourcing providers
- Undersupply of skills will result in rising prices and the continued suppression of the number of new titles in development.

Source: Outsourcing in Next Generation Games Development:
Delivering cost and production efficiency, March 2006
www.screendigest.com

The computer games industry, whilst still in early stages of development in New Zealand, is undergoing a high growth phase with a few companies now gaining a foothold with major international publishers. The largest games studio, Sidhe Interactive, currently employs approximately 60 people and is producing games for Xbox, PlayStation, PSP (PlayStation Portable) and other mobile devices. Other companies have focused on mobile content development such as flash games (Instinct, Lexaloffle). In Auckland, Metia Interactive has created its own intellectual property with CUBE, a game for the PSP.

8.1 AnimfxNZ

In November 2006 PWB in association with the Visual Effects Society (VES) of Los Angeles organised New Zealand's first symposium on animation, games and special effects, AnimfxNZ in Wellington. The event was attended by over 150 industry professionals and 11 international plenary and keynote speakers.

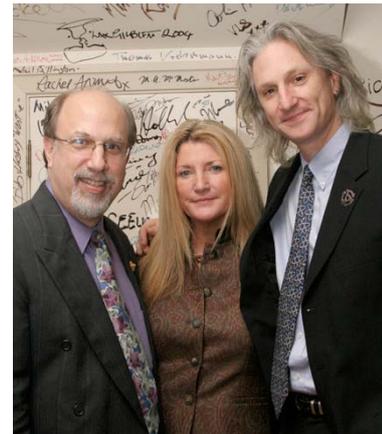
Interestingly, many of the international speakers had been or were currently involved in major projects creating feature animation for kids (e.g. A Bug's Life). This was seen as a growth market and studios were always on the lookout for good ideas to develop – it was stressed that these ideas could come from anywhere and that many of the major hits over the last five years had been originated from independent studios – but realized by major studios.

This bodes well for creative concept developers from New Zealand. However it is the act of getting in front of the studios with the potential to develop new ideas that is the challenge for the smaller independent companies in New Zealand.

One panel with digital fx specialist Mark Sagar from Weta Digital and Mario Wynands from games studio Sidhe Interactive discussed the cross-over of technologies being utilized in concept design and useability testing: for example, using green screen in game design and game console handheld devices for playing with facial animation techniques for feature film production.

The convergence of these two industries is being seen in acquisitions and mergers at the company level as well as the demand end where users and audience expect to see the film and the game released concurrently in the more sci-fi or animation and special effects-based titles.

Computer games is emerging as a rapidly growing sector in New Zealand. Globally it is superceding Hollywood in revenues streams and increasingly intellectual property created for film is also being produced with a companion game for console, PC or mobile devices (e.g. King Kong, A Bug's Life etc.). Computer games offer a new market and revenue stream for television producers looking to develop for multiple platforms to develop their



VES Society Executive Director Eric Roth with NZ Councillor Kim Lavery (from Weta Digital) and 'Mr Fixit' Jeff Okun at AnimfxNZ, Wellington 2006.

www.visualeffectssociety.com

intellectual property. Globally, 'new interactive experiences' are being reflected outside the museum and gallery environment also.

KINEAPOLIS

A new theatre run by Kineapolis (the company credited with building the first megaplex in Bruges, Belgium) [will be offering a service](#) where people can play video games on the big screen. The service will allow customers to play either their own PS2 games or one of the titles provided by the theatre in one of their digital-screen auditoriums.

www.cinematical.com/category/games-and-game-movies/ 17 November 2006

9.0 New Zealand Television in the Digital Age

In November 2006 Statistics NZ in association with the Screen Production and Development Association of New Zealand (SPADA) released highlights of the 2005 Screen Production Industry Survey. According to Statistics NZ, the New Zealand screen industry recorded gross revenue of \$2.6 billion in the 2005 financial year.

www.stats.govt.nz

- There were 2,058 businesses engaged in the screen industry.
- Individual contractors represented 77 percent of the production and post-production businesses.
- The feature film and short film sub-sector recorded the highest level of gross revenue, earning \$699 million.
- The television production sub-sector, with 1,125, employed the most businesses.
- \$592 million (or 62%) of gross revenue for production companies was received from other countries, with 88% of this total sourced from the United States of America.

In addition, the New Zealand government announced on 14 November 2006 a \$79 million dollar package to instigate Freeview, a free-to-air digital television initiative for New Zealand.

TVNZ CEO Rick Ellis noted that:

This is a momentous day for TVNZ. It is the key factor that will enable us to move confidently into the digital future, alongside the independent production community, to pursue our goal of providing the best New Zealand programming wherever and whenever New Zealanders want to see it.

Rick Ellis, Media Release, TVNZ , 14 November 2006

The package however had no new funding announcements for content creation as noted by the then SPADA Chairman Vincent Burke who noted that none of this money would be going towards innovative content design and development and that we may in fact see channels established for reruns of imported content.

'Going digital' will mean that more users who purchase the set top box (\$200) will be able to access two new channels: initially, 24 hours of news and sport.

New funding for digital content may be forthcoming in the newly announced Digital Content Strategy launched on 14 November 2006. This is currently a strategy for discussion and submissions are currently being sought. There is also some room for digital content experimentation in the Community Partnerships Contestable Fund for digital content innovation and design.

Multi-platform development of IP includes a production line of multimedia formats: the book, the game, the film, the television series, the website, the mobile content for phones and other mobile devices, the merchandise, the DVD etc.

Niche channels on multiple platforms include offerings that integrate the film theatre experience, television, web+ social network, game consoles and mobile devices, and cover such specialist areas as:

News, Sport, Kids TV, Documentary Channels, Green Screen/ Environmental Programmes, Maori/Indigenous/Multicultural, Anime, Animation, Games, Queer Content, Visual Arts & Artists, Music (different genres), Writers – reading works, performing work, interviews, Current Affairs – politics – the spectrum left to right (HardTalk) , Franchise Opportunities – Copycat TV – the NZ Version, creating IP that can travel, be customised across cultures.

The global trend towards niche channel development and alternative modes of distribution will force the traditional television sector to respond not only to technological shifts, but also to the needs and demands of the sophisticated viewer of content in the digital age.

10.0 New Modes of Engagement and Business Models

Value-net companies deliver convenience, reliability, speed, and customization – in varying degrees and combinations – to the delight of their customers.

www.valuenets.com

2007 has been designated as Export Year in New Zealand. Initiatives that could assist producers to be better informed about growing their export potential could offer targeted industry seminars in such areas as:

- Formatting and franchising intellectual property
- Acquiring rights to develop NZ (and AsiaPacific) versions of international formats
- Local to Global – Opportunities and Challenges (seminars with people who have done this already, e.g. The Gibson Group/Touchdown/Flux and emerging companies who want to or are almost ready to
- Matchmaking investors with creative entrepreneurs/producers
- The Death of Television – a debate?
- Funding new and innovative content on multiple platforms
- Value Nets – exploring business models that shift the paradigm of the linear value chain and go for the networked model www.valuenets.com

Companies worldwide are seeking new business models to reflect the shifting interrelationships created and enabled by the web. The Google/YouTube partnership has created a maelstrom of debate around the 'value' of these online businesses.

Two key models seem to be emerging, as commented on by analyst Michael Kende:

- *the first is where the gatekeeper is a network which finds and develops content and then provides it with a wide platform for viewers (in return for subscription and/or advertising) and*
- *the second is YouTube where there is effectively is no gatekeeper and thus anyone can post any content¹*

In this second environment there are no current guarantees for return on investment or that indeed your content will be viewed. However, as the environment matures, new business models will emerge.

There are some models in between, ranging from Video on Demand over IPTV, where there could be a gatekeeper in terms of allowing access to the VoD (thus screening content) or a more selective YouTube, with good filters, that enable good content to be seen.

Thus the business model is to find or create a site that acts as a gatekeeper (not necessarily to professional content, but at least good content), along with deals for advertising or some other way to monetize content.

Email from Michael Kende to Clare O'Leary, 22 November 2006 www.analysys.com

These new business models are still forming globally. New Zealand companies are as likely as any to create or discover successful business models and local support for experimentation in this field could be one way to fast track the process.

11.0 Funding and Marketing Content Creation in New Zealand

A recurring theme of content producers in New Zealand is the restrictive nature of the cultural/commercial imperatives attached to the majority of government based funding programmes. Whilst local content is important in the telling of our own stories, when faced with an increasingly global market the potential to create content for international audiences may offer opportunities outside NZ-specific cultural parameters.

On the other hand, 'glocalisation' has also created a demand for local stories that have specific connections to local communities or cultures. Films such as *Whale Rider*, although strongly featuring Maori mythological content and New Zealand relationships, also touched a chord in the international market because of its underlying universal story of family and tribal relationships under pressure.

¹ YouTube does require content creators to agree to a statement that they will not upload content that is offensive, racist, sexist etc.

This lends itself to discussion on the need for a new funding model specifically designed to encourage intellectual property development created in New Zealand for the international market – without constraint.

One of the main observations that came out of AnimfxNZ was that international buyers can only buy what they see – and if NZ content is not being put in front of them on a regular basis then it is a gap that needs to be filled.

There is interest internationally with New Zealand creative work, not only from the success of Lord of the Rings and King Kong, but also from the success of more independent feature films and television work such as *Jane and the Dragon*, *Out of the Blue* and *Whale Rider* and the work of New Zealand directors such as Jane Campion, Andrew Niccol, Vincent Ward and Niki Caro.

Leveraging existing funding through an independent distribution entity could be a way forward. This could be developed in partnership with industry players and/or investors so that relationships could be forged and renewed on a regular basis – and content producers need only make their content available through publicity kits, electronic press kits and showreels for distributors to showcase.

12.0 The Role of Economic Development Agencies in Sector Growth

The Digital Content Industry, while still at a relatively early stage of development is emerging as an area of significant global opportunity, valued at over \$172 billion in 2001 and forecast to grow to more than \$434 billion by 2006 – an average annual growth rate of almost 29%.

A Strategy for the Digital Content Industry in Ireland, Foreword.

Economic development agencies have a unique role to play in fostering growth in their own regions, but increasingly looking to global linkages to assist that process. The role of the economic agencies falls into some generic themes that foster economic growth:

- To attract skilled talent into the region
- To attract investment and investors into the region
- To foster relationships across the world (e.g. sister cities)
- To grow local industries (sector growth, skills development)

The Irish Development Board FORFAS, recently commissioned a study on the future skills needs for the Irish economy. The study outlines a number of global initiatives where economic development agencies in partnership with universities and polytechnics and industry have formed alliances to prepare the workforce of the future.

In Texas a digital media cluster has formed crossing usual sector boundaries to include science and technology innovators with digital media production companies. This includes making more out of the 'South by Southwest' Music Festival by adding industry workshops and seminars around interactive media whilst so many producers and creators will be in the region.

The Digital Convergence Initiative (DCI) is an example of a 'mediating organisation' facilitating the creation of digital media clusters in Texas. This public/private venture facilitates the growth of the digital oriented industrial and scientific base of Central Texas in order to:

- Create regional and U.S. competitive advantage in the international digital market
- Advance economic opportunities for regional business with attention to small business growth
- Align institutional and private sector digital oriented research and development with consumer demands and government requirements

By connecting the regional entities and leveraging the convergence of these separate industries the DCI claims to be creating 'super economic clusters' in Central Texas.

<http://dcitexas.org/why.php>

For example, the South by Southwest music festival has extended its events to both film, documentary and short film festivals as well as mobile media festivals and competitions and other interactive media. <http://2007.sxsw.com/film/click/>

Digital media is pervasive in all sectors but the content producers are increasingly making links across film, television, mobile media, games and other publishing and merchandising areas.

The Gibson Group (Wellington) has been at the forefront of innovation in television in this cross-platform development. The Gibson Group has a portfolio that started in mainstream television (kids drama, comedy, documentaries), expanded into digital media for museums and exhibition installations in early internet days, and now has a new media and mobile content production stream creating a mobile mini-series.

Firehorse Films, the production house that created Bro' town, are also diversifying into multi-platform development, creating mobile games with Ignite Studios, designing extensive interactive web experiences that build the Bro' town community and developing merchandising as a large part of the business.

There has been an upsurge in children's animation for international markets in New Zealand with a number of projects in development:

- Auckland based Flux Animation – children's animation series
- Weta Workshop, co-producing *Jane and the Dragon* – developed from the book by award winning NZ author Martin Baynton, in association with Canadian Children's Television
- Warkworth-based Huhu Studios designing animation for The Disney Channel
- The Simmonds Brothers creating 'documentation'
- Many more small animation studios working on short films, animation series, web based projects and animation excerpts for games, advertising and educational content.

Funding animation is often more difficult in the current New Zealand domestically driven sector, but international partners are increasingly looking to New Zealand studios for a creative competitive edge and a cost effective solution.

These production houses are responsive to user demands and needs and have a keen ear to the ground, picking up developments in popular culture and the types of interactive experiences their audiences want.

13.0 Conclusion

This paper builds on research completed by Ian Duncan of NZIER in association with Dorothee Pinfold and Christina Milligan, and published as *Identifying Economic Opportunities for the Television Production Industry*. It outlines some of the influences on television production in New Zealand linking it to trends and patterns emerging in global markets.

The paper provides an overview of current data showing the status of the industry and points to new directions and opportunities driven by user experience and demand, innovative interactive technologies and new platforms of delivering content.

The paper also describes how converging content, information and technology and IT industries can be seen collectively as a newly emerging industry, and outlines some of the challenges and opportunities arising from this convergence.

13.1 Television of the Future – Global Trends

Major global trends include:

- Demands for personalised interactive access to content
- New technology platforms for content that are constantly evolving (digital television, IPTV, TIVO, webtv, mobile devices)
- New business models emerging challenging traditional media power base
- User generated content

This state of flux is global and New Zealand producers and content creators have the opportunity to respond through early adoption of new technology platforms and by creating innovative content that responds to the multi-platform approach.

Multinational companies are forging new alliances worldwide to gather together the networked value chain, from telecommunications providers and IT companies to entertainment and digital distribution entities.

13.2 A Changing Scene in New Zealand

The New Zealand market, whilst dominated by the public broadcasting network is changing rapidly as new commercial broadcasters form alliances and build audiences. Sky Television with its digital offering has already gained a high percentage of early adopters to its service.

The recent announcement of Freeview, the governments \$79 million investment in digital television has also highlighted the opportunities of convergence and this has been matched by other companies wanting to become involved (e.g. Telecom NZ).

This Freeview platform for digital television will offer new challenges and opportunities for television producers in the New Zealand market. The real challenge is to create content that can not only fulfil the needs of the New Zealand audience but also content that speaks to a global audience. This is where a sustainable future television market lies – whether for traditional broadcast, digital broadcast or other interactive media.

This may come from new forms of distribution co-owned by traditional broadcasters. As with other media entities we may see content being made available on television and concurrently on the web through the same brand – for example, YouTube derivatives as seen on the new Public Address System 'OurTube'.

There could be more emphasis on marketing of New Zealand created content to global markets and this could be factored into budgets to stretch to global reach and onselling of product beyond the NZ channels. The international sales department at TVNZ is relatively small and investment in this area could be developed further. Other privately owned broadcasters are linked into their own global chains through ownership (e.g. TV3/CanWest, Sky – Sky Global).

13.3 Value Nets and New Business Models

Television in the future needs to consider itself part of a larger digital media sector that demands a rethink of television formats and their associated business models.

One of the major concerns for television is the shift in advertising revenues to the web and therefore this is a challenge to confront new rules of engagement, involving a more networked and decentralised process of creation, marketing and distribution.

The value-chain has become a "meshed value-net" where players are, in turn, customers, suppliers, partners and competitors. 'Cross-platform', 'interactive', and 'user-generated' are the new imperatives: the audience assumes an active role, and becomes a "content publisher" across multiple platforms, by means of user-generated content and interactivity.

This opens new doors for cross-platform design and development, but does require a rethink about existing funding models in New Zealand. Business models will need to encompass the full spectrum of traditional and interactive media with full production budgets, including marketing and distribution.

Building understanding of these new trends is an essential role for sector leaders, producers and content creators in order to fully exploit their intellectual property, particularly into global markets. Companies such as Google, YouTube, Revver, Second Life and Trade Me indicate the way forward in the interactive space. The television model to deliver content will survive, but be enhanced by linking into the new networked and interactive space.

13.4 Interactive Television and Computer Games

Interactive television has been on the horizon for some time and its transformational qualities have not exactly arrived as yet. However, Sky TV has picked up some early adopters in this space and the new digital television platforms will prepare the groundwork for interactive content.

The emerging games industry in New Zealand offers a snapshot of what this interactive space looks like for more traditional producers. It opens new paths to market through international electronic publishers and direct-to-digital routes of marketing and distribution connected to online user groups. There are also major shifts taking place in the global market as users demand more emotionally driven gaming experiences and content that will reach a broader demographic than the traditional 'gamer' stereotype.

New Zealand game developers are beginning to work together as an industry and are starting to build a strong student base. They have forged links across government, industry and academia but still require formal recognition as a serious business – both in terms of policy development and sector strategy and growth. Linking traditional producers of film and television with game developers will go some way towards addressing these silos of specialization in New Zealand.

13.5 New Zealand Television in the Digital Age

2007 will usher in a new era in television in New Zealand. The digital television platform will force the creation of new content creation for traditional and interactive formats. Independent producers and directors will require some significant upskilling to meet the challenges ahead and the international competition for interactive television content. It will however, also provide opportunities for experimentation in narrative, form and delivery linking into social networks and dialogue with the user/audience. It will also see an upsurge in content created for mobile content on phones and other mobile devices.

Diversifying into a global market will also benefit the industry – this may require some rethinking in terms of current funding constraints, particularly in regard to marketing and distribution, not only new or enhanced production budgets. Digital content industries are growing exponentially throughout the world and their contribution to economic transformation and GDP is being recognised globally.

New Zealand is in a good position with its creativity and its record of digital technology innovation, to embrace that trend and produce innovative content for television and other formats for global markets.

The challenge now is around useability. How do you make it easy for people to access high-quality video content over the internet while satisfying the rights of content owners and keeping networks safe from viruses? That's what we're trying to do.

Scott Sahadi, VP of Corporate Development, Kontiki

Appendix A References

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Appendix B New Zealand Websites

B.1 Broadcasters in New Zealand

TVNZ (Public broadcaster and commercial channels TVOne and TV2)
www.tvnz.co.nz

Maori Television
www.maoritelevision.com

TV3 (owned by CanWest)
www.tv3.co.nz

Sky Digital
www.skydigital.com

ONFILM (film and television industry magazine)
www.onfilm.co.nz

Public Address (Russell Brown's online news and views)
www.publicaddress.net

Stuff (online news – increasingly using video blogs)
www.stuff.co.nz

Scoop
www.scoop.co.nz

Indymedia
www.indymedia.org.nz

B.2 Independent Production Houses

The Gibson Group
www.gibson.co.nz

Eyeworks (previously Touchdown – established by Julie Christie)
www.eyeworks.com

Firehorse Films (Bro'Town – animated comedy series)
www.brotown.com

Greenstone Pictures
<http://greenstonepictures.com>

Natural History New Zealand (was previously government owned, sold to Fox Media)
www.nhnz.co.nz

OliverGILES Productions

www.olivergiles.co.nz

South Pacific Pictures

www.spp.co.nz

Weta Workshop

www.wetaworkshop.co.nz

Weta Digital

www.wetafx.co.nz

B.3 Industry Organisations and Networks

SPADA (Screen Production and Development Association of New Zealand)

www.spada.co.nz

The Screen Directors Guild of New Zealand

<http://www.sdgnz.co.nz/>

The Writers Guild

www.nzwritersguild.org.nz

The Data Book

A comprehensive database of production houses and producers/directors

<http://www.databook.co.nz/>

AnimfxNZ, Animation and VFX Symposium (inaugural event, November 2006)

www.animfx.co.nz

The New Zealand Game Developers' Association

www.nzgda.com

The Big Idea

www.thebigidea.co.nz

Idealog (new magazine on the creative economy, Auckland based, established by Vincent Heeringa, founder of Unlimited Magazine)

www.idealog.co.nz

B.4 Government Strategies, Ministries and Agencies

The Digital Television Strategy and Package (released 14 November 2006)

www.mch.govt.nz

www.tvnz.co.nz

The Digital Strategy (Ministry of Economic Development – released May 2005)

www.med.govt.nz

www.digitalstrategy.govt.nz

The Digital Content Strategy discussion document (launched 14 November 2006)
www.digitalcontent.govt.nz

The E-Government Strategy
www.ssc.govt.nz

New Zealand On Air
www.nzonair.govt.nz

Ministry of Culture & Heritage
www.mch.govt.nz

Creative NZ (arts funding in NZ which includes some film and interactive media)
www.creativenz.govt.nz

The New Zealand Film Commission
www.nzfc.co.nz

Film New Zealand
www.filmnz.org.nz

New Zealand Trade & Enterprise
www.nzte.govt.nz

Better by Design – design-led companies initiative
www.betterbydesign.org.nz

Foundation for Research Science & Technology (Technology Innovation Funding)
www.frst.govt.nz

B.5 Digital Innovators in New Zealand

Aftermail (established by Rod Drury, now acquired by Quest Software)
www.quest.com

Trade Me (online trading site)
www.trademe.co.nz

Right Hemisphere
www.righthemisphere.com

Massive Software
www.massivesoftware.com

WETA Digital
www.wetafx.co.nz

Virtual Katy
www.virtualkaty.com

Creative HQ (creative technology incubator, Wellington)

www.creativehq.co.nz

Media Lab (ICT research and development lab Wellington)

www.medialab.co.nz

The Icehouse (hi-tech start-up incubator, Auckland)

www.icehouse.co.nz

The HITLab NZ (Human Interface Technology Lab, Christchurch)

www.hitlabnz.org

Upstage (Virtual theatre – cyberformance, Wellington)

www.upstage.net

Critical-Mas TV (established by Marcia Lyons, VUW Digital Media Lab)

www.critical-mas.tv

B.6 Related Organisations and Events

Internet Society of New Zealand

www.isocnz.org.nz

TUANZ

Telecommunications Users Association of New Zealand

www.tuanz.org.nz

Armageddon

A popular culture expo of games, sci-fi, animation, comics, anime

www.pulpexpo.com

Webstock

Web awards, seminars, workshops, speakers

www.webstock.co.nz

National Digital Forum

Held annually bringing together content creators, culture and heritage and library and information professionals in New Zealand.

www.natlib.govt.nz

Australian Game Developers Association (Australasian game developers)

www.agdc.com.au

Digital Media Festival (Sydney)

http://www.dmw.com.au/html/DMF/DMF_general.html

Appendix C International Websites

C.1 Events and Conferences of Significance in Convergent Media

Digital Hollywood

A three day conference bringing together traditional tv and film producers with new media digital content creators and designers. (now events are springing up regionally i.e. Digital Hollywood (America, England, Asia)

www.digitalhollywood.com

Ihollywood – a New York based event and website specialising in digital media convergence, business models evolving etc. between IT, Telcos and the entertainment industries.

www.ihollywoodforum.com

E3Expo

Electronic Entertainment Expo – the leading edge of games, interactive media and new technology in digital design, virtual and immersive technologies.

www.E3expo.com

Banff Television Festival (world leading television festival)

<http://www.bwtvf.com>

See also the newly announced interactive festival at Banff now calling for entries.

www.bwtvf.com/call.for.entries.php.

Cannes Film Festival

<http://www.festival-cannes.fr>

Mix06 (Mixed media and convergence dialogue conference)

www.mix06.com

Next Media (world leaders in digital content conference)

<http://www.nextmedia2006.com>

MIPCOM (international market place to buy/sell content)

www.mipcom.com

MIPDOC (specialist market for documentaries)

www.mipdoc.com

Next Wave Conference

<http://www.nextwave.org.uk>

<http://www.nextwave-interface.org>

SIGGRAPH (Special Interest Group on Computer Graphics)

www.siggraph.org

Ars Electronica

Leading edge digital arts festival and movement

<http://www.aec.at/en/index.asp>

Wired Magazine

www.wired.com

On the Edge – leading edge forum

www.csc.com

C.2 Leading Edge Companies

Apple

www.apple.com

Brightcove (video in a flash environment)

www.brightcove.com

Google

Search engine

www.google.com

YouTube

Online video sharing site

www.youtube.com

YouTube Announcement on YouTube!

http://www.youtube.com/watch?v=QCVxQ_3Ejkg

YouTube & Google Ecast of investors discussing their new relationship.

<http://www.earningscast.com/google-youtube-conference-call>

BEBO – social networking community

www.bebo.com

Habbo Hotel

3D virtual world inhabited by mostly teens

www.habbo.com

Second Life

A virtual world where you can actually buy virtual space with your credit card – and the big brands are going there to set up retail services, virtual hotels, concerts etc.

www.secondlife.com

MeeVee – are starting to bridge the gap between providing online television listing information and allowing people to actually view the content on their computers

<http://www.meevee.com>

Mobi-TV

www.mobi-tv.com

Orb (integrating the convergence of content and media, mobile carriers, device manufacturers, and wireless infrastructure companies.)

www.orb.com

Cozmo TV – Find it, watch it, share it – try it! Interactive downloadable tv

<http://cozmotv.typepad.com>

Microsoft

www.microsoft.com

Recently announced the new Zune, in competition with Apple's i-Pod

www.zune.com

C.3 Entertainment Giants (a selection)

Aardman (U.K. creators of Wallace & Grommit)

www.aardman.com

DreamWorks SKG

www.dreamworks.com

Electronic Arts

www.ea.com

Warner Bros

www.warnerbros.com

ILM Industrial Light & Magic

www.ilm.com

PIXAR

www.pixar.com

Weta Digital

www.wetafx.co.nz

C.4 Digital Innovation Labs and Experimental Sites

BBC Backstage

Online development community based around the BBC

www.backstage.com

Television Innovation Labs (new project facilitated by the BBC)

www.bbc.co.uk/innovation

MIT Media Lab (one of the founding members with Nicholas Negroponte was Paeroa born Dr Barry Vercoe who did groundbreaking research into MP3 Technology.
www.media.mit.edu

Banff New Media digital artists community
<http://www.horizonzero.ca>

Future Lab
www.futurelab.org.uk

The Banff Centre
www.banffcentre.ca/about

ITVT
Research and discourse on interactive television
www.itvt.com

Television for the Environment
Global network of filmmakers making content about social justice & environmental issues
www.tve.org

Uth TV (Rise UP, 100% Youth produced)
<http://www.uthtv.com/>

Select TV – Australian television channel offering a number of specialist channels
www.select.tv

Blip TV – Niche TV America
www.blip.tv

Participant Productions (producers of *The Inconvenient Truth* with Al Gore)
Ethical and social investment in the future – media, feature documentaries and feature film producers working collaboratively for the greater good of society and the environment.
www.participantproductions.com

The Infinite Mind created by Lichenstein Creative Media.
www.theinfinitemind.com

The interview with Kurt Vonnegut
<http://lcmmedia.com/mindprgm.htm>

TWIT TV
Netcasts from the people you trust
<http://www.twit.tv/>

C.5 Other Relevant Organisations and Resources

UNESCO
Public Broadcasting agenda and digital divide issues

www.unesco.org

HEAVY – owned by a kiwi

www.heavy.com

Current TV (new user focused web tv channel)

www.CurrentTV.com

Rocket Boom

www.rocketboom.com

Ryan's Blog

www.ryannesblog.com

Rehearsals site

www.rehearsals.com

The Emotional Web

www.wefeelfine.org

MTV online

www.mtv.com/overdrive (music)

MTV2

www.mtv2.com

Jibjab

Fastest growing animation company in the USA

www.jibjab.com

Tikibar TV

www.tikibartv.com

Pouring Down – new tv channel

www.pouringdown.tv/sevenmaps

Lost in Light – 8mm film enthusiasts digitising their films

www.lostinlight.com

2Advanced – studio with games design feel

<http://www.2advanced.com>

Creative Commons (open source content community)

www.creativecommons.org

Analysys – research in convergent sectors

www.analysys.com

QUT

Queensland University of Technology (Creative Industries Research Centre)
www.cirac.com.au

Innovation Insight – researchers and analysts in economic development
www.innovationinsight.com

Visual Effects Society
www.visualeffectssociety.com

Anne Sweeney - Co-Chair, Disney Media Networks & President, Disney-ABC Television Group "The Today & Tomorrow of TV & the New Entertainment Consumer" Presentation at MIPCOM, 2006. Available online at www.mipcom.com