

FUTURETV CALL FOR PROPOSALS GUIDELINES

[Version 2.7]

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1. Introduction

- 1.1. MDA's "Future of Media" strategy aims to catalyse growth in the interactive digital media (IDM) sector by clustering our local industry to create leading positions in targeted areas to create a collective vision and leverage on one another's strengths to shape the media landscape.
- 1.2. The aim of the Future of Media strategy is to bring together complementary best-of-breed offerings, and to allow the industry to leverage on one other's customer base, market access, and partners. Through such interactions, we believe the industry will be inspired to new innovation.
- 1.3. FutureTV, the first of the Futures, is an industry initiative with a partner network of more than 10 founder companies, supported by MDA. The FutureTV Partner Network is coming together to shape the future of TV. It is co-chaired by Mr Shaun Seow, Deputy CEO of MediaCorp, and Mr Tan Tong Hai, COO of StarHub. Other founder companies include Glocal Media Networks, PGK Media, ServTouch-ETI, SingTel-BIC (Broadcast Innovation Centre), EON Reality, and Ufinity, as well as MNCs like Microsoft and Motorola. The FutureTV Partner Network hopes to grow its membership to between 50 to 100 companies who are engaged in visual media related businesses.
- 1.4. The FutureTV Partner Network aspires to turn Singapore into a trusted Visual Media Capital through a multi-faceted approach. For a start, the Partner Network will offer greater interactivity and personalization to the experience of consuming visual media. They aim to go beyond the traditional TV screen in the living room to enable the seamless consumption of rich visual media on multiple screens over the Internet, mobile devices and large format out-of-home displays. Eventually, the Partner Network intends to make Singapore a Visual Media Hub by building the capability to aggregate content from around the region, and re-distribute this content globally. New ways of monetizing this content (e.g. through inserting of digital advertising) will be explored.

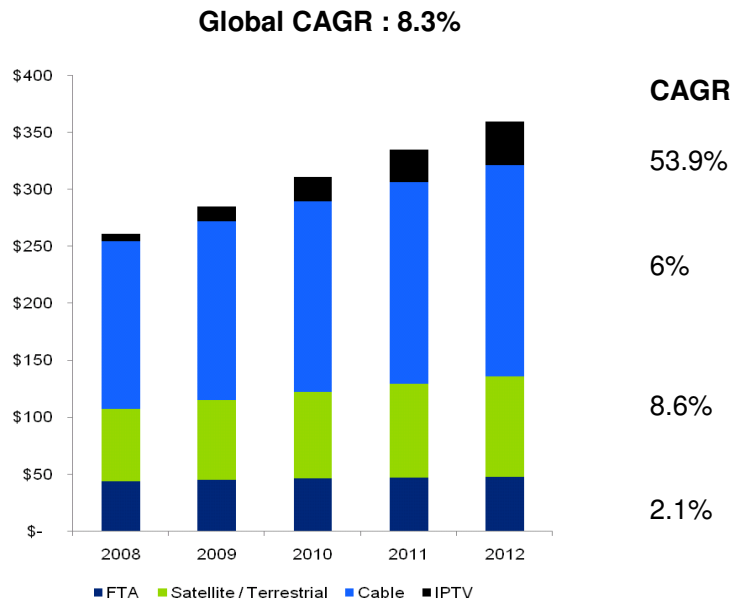
2. Background

- 2.1 TV is one of the world's most widespread media, reaching over 95% of households in the US and Europe and over 70% in the Asia-Pacific region. The global TV market was estimated at S\$250bn in 2008 growing to S\$350bn in 2012 at a CAGR of 8.3%. (Figure 1). In terms of revenues, cable is the largest TV medium but IPTV is the fastest growing access medium with an estimated 53.9% CAGR (2008 to 2012). Over the same period, the Asia-Pacific region (Figure 2) is expected to grow faster, at an estimated 10.9% CAGR, from S\$50bn to \$70bn, driven essentially by IPTV (59.1%) and satellite (30.6%).

2.2 In 2008, the Singapore Interactive Digital TV sector (Figure 3) generated around S\$307m revenues having grown at an estimated 29% from the previous year. In terms of VA, the sector has generated an estimated S\$217m (CAGR 24.1%) and was employing around 1,965 staff (CAGR 22.4%).

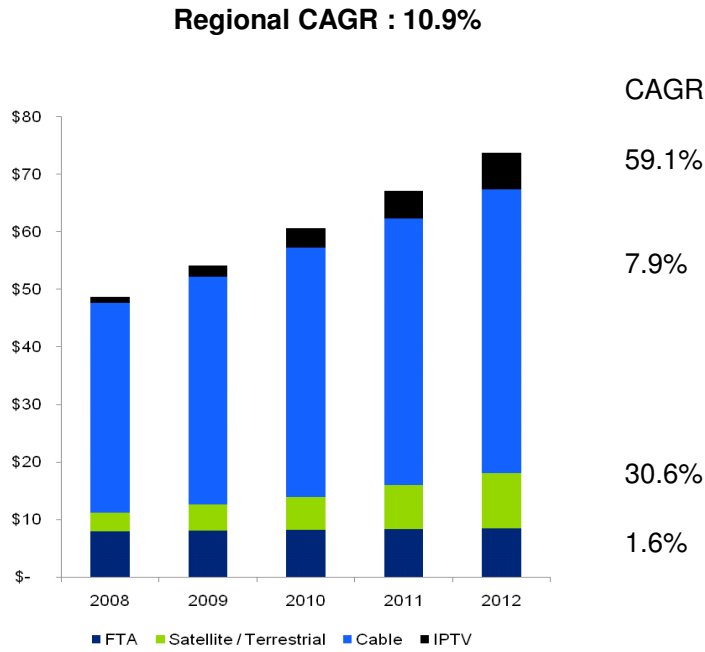
2.3 With about 3 billion population, the Asia Pacific region offers a tremendous field of opportunities to develop the next generation of visual media. The FutureTV ambition is to capture an audience of potentially 200 millions users in this wider region.

Figure 1: Global TV Industry by Type 2008 -2012 (\$\$ bn)



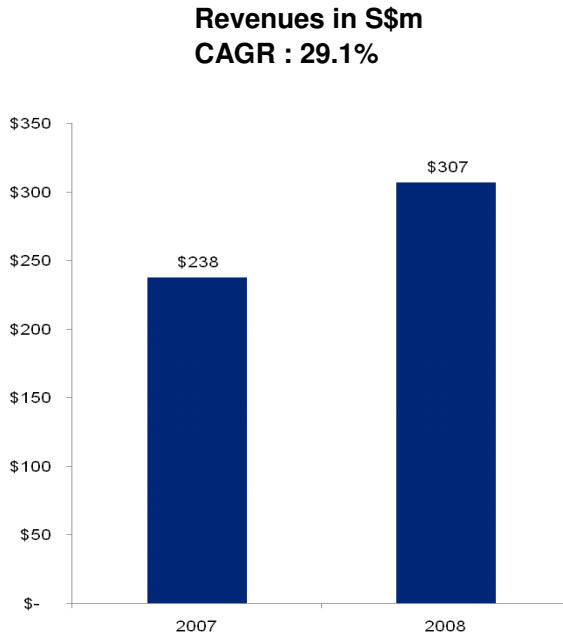
Source: PWC 2008-2012

Figure 2: Asia Pacific TV industry by type 2008 - 2012 (S\$bn)



Source: PWC 2008-2012

Figure 3: Singapore Interactive Digital TV Sector Performance



Source: Deloitte primary market research "IDM study, 2007 and 2008

3. Objectives

3.1. The Call for Proposals (CFP) aims to look for applications and services that :

- Enhance and enrich the consumption experience of visual media through greater interactivity, customization and personalization.
- Contribute to establishing Singapore as an international hub for the aggregation, management, publication, distribution and monetization of visual media content.
- Enable the seamless consumption of rich visual media on multiple screens over the internet, mobile devices and large format out-of-home displays.
- Other innovations that have a strong contribution to the FutureTV ecosystem and the potential to take a leading position regionally and globally.

4. Scope

4.1. FutureTV looks beyond the traditional broadcast television model into a world of interactive rich media experiences and digital advertising. The areas of interest include R&D and market development of new applications and services such as new distribution channels like IPTV / Internet TV, platforms for supporting user generated content, new generation interfaces, widgets, digital banners & signage, contextual advertising, 3D TV and video / image search.

4.2 The FutureTV Partner Network aims to pull together companies and combine their user base, distribution networks, development platforms, marketing resources collectively with a common goal of accelerating the path of access to global markets. The proposals that are selected can look forward to leveraging on the resources of the FutureTV Partner Network.

4.3 The Future TV Partner Network provides a comprehensive list of consolidated offerings both locally and globally. This includes :

- The ability to touch every Singaporeans and a global customer base of more than 100 million..
- Market access in South East Asia, China, Europe and USA.
- Access to partners for customer base, market access, access to advertisers and partnership and infrastructure.

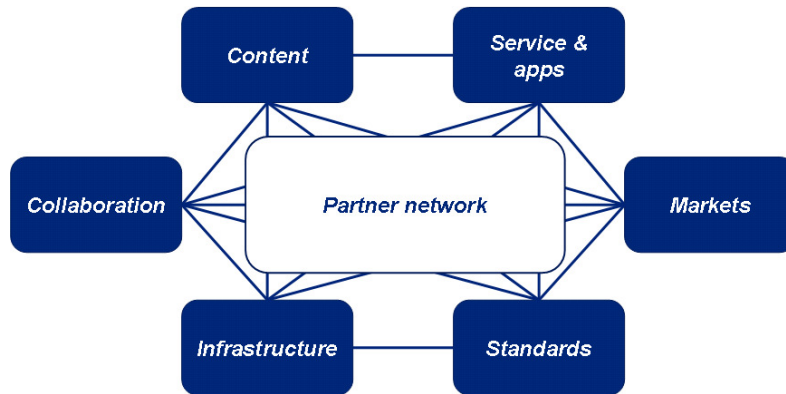
The details are provided in Appendix A.

NOTE: The Partners offerings in Appendix A may be updated periodically as the founding partners may refine or add more offerings. Also, new partners may join the FutureTV Partner Network. Please check back regularly.

4.4 Among the areas of technologies, applications, and services that the FutureTV Partner Network is interested in are:.

- Media Search: Non-text-based search of video, image, and audio
- Advertising Engines: For ad insertion, contextual advertising, etc
- Personalization: Ability to have more personalized applications and services
- Distribution & Monetization: New means for distribution and monetization of content
- Others

Figure 4: FutureTV Partner Network Collaboration Framework



Source: Deloitte Consulting June 2009

4.4 We will accept individual and joint project submissions in the following areas :

- Companies wishing to join the FutureTV Partner Network and offer their customer base, market access, or partners as a contribution (no funding requested from MDA in this case).
- Collaboration with FutureTV Partner Networks members by leveraging on their offerings (no funding requested from MDA in this case)
- Support R&D into new FutureTV technologies that would contribute to the growth of IDM usage and industry in Singapore (open to all range of companies, from start-ups to more established companies – MDA will co-fund successful applicants).
- Support for Commercialisation of innovative FutureTV applications and services that have a good track record and are ready to scale internationally. (for applications and services that are already developed, with a good track record and are ready to scale internationally – MDA, will co-fund successful applicants with a returnable grant)

4.5 Each submission should focus on only ONE of the above three areas. We encourage all submissions to leverage on the offerings and partnership with the Partner Network members:

5. Project Evaluation

5.1. A joint panel from MDA and members of the FutureTV Partner network will evaluate all proposals submitted to this CFP. The projects will be evaluated based on the following criteria:

5.1.1 Technological Innovation (for R&D projects)

- Problem to be addressed
- Key R&D breakthrough expected
- Impact or benefit resulting from the R&D breakthrough

5.1.2 Market Potential

- Market size of proposed content/applications/services
- Addressable Market
- Potential contribution to the FutureTV industry
- Competitive Strength of Singapore
- Competitors Landscape

5.1.3 Business Plan

- Proven commercial viability; success of content/applications/services with committed customer base
- Competitive advantage and barriers to entry by competitors
- Business and marketing plan
- Potential to scale regionally or globally
- Proposer's capabilities and related experience to execute project

5.1.4 Financial Standing

- Projected investments, revenue and Total Business Spending in Singapore
- Cost realism of project
- Ability to co-fund projects

5.1.5 Returns (for Commercialisation projects)

- Companies who propose some form of sharing of the returns from the project revenues will be evaluated favorably on this.

5.2. If an applicant does not wish to have his proposal evaluated by a specific member of the FutureTV Partner Network, this should be stated explicitly in their submission, naming the specific company in the Partner Network.

6. Types of Outcomes

6.1. These are various possible types of outcomes arising from the CFP:

- Participation: Companies join the FutureTV Partner Network and offer their customer base, market access, or partners as a contribution. There is no need for MDA funding support.
- Company to Company Partnership : Proposals make direct use of the FutureTV Partner Network's resources and offerings. As such, there is no funding support required.
- Request for R&D Funding of new innovations for FutureTV Applications & Services: Successful proposals will receive MDA co-funding.
- Request for Commercialisation Funding of new FutureTV Applications & Services: Successful proposals will receive MDA co-funding in the form of a returnable grant.

6.2. The following are broad guidelines for MDA funding support:

- 6.2.1. Generally, MDA's funding does not exceed **50%** of the total qualifying project cost.
- 6.2.2. Qualifying costs refer to Local Manpower (for activities in Singapore), Equipment & Materials, and Professional Services.
- 6.2.3. For possible areas that qualify for funding, please refer to proposal template for details.

6.3. MDA maintains absolute discretion over the evaluation process. No questions on the evaluation process or disputes on the final funding quantum will be entertained.

6.4. The funding is disbursed to the successful applicant on a reimbursement basis. Applicants must submit along with their claim form, receipts of their expenditure. At the end of the project, the applicant must submit an audited statement for

verification. MDA would disburse funds according to the receipts and audited statement submitted.

- 6.5. MDA will not limit the number of projects awarded under this CFP. Notwithstanding the aforesaid, MDA reserves the right not to award any projects under this CFP. Successful applicants will be notified by MDA.

7. General Requirements

- 7.1. This call is for industry proposals for FutureTV Applications & Services.
- 7.2. The applicants must be registered as a legal entity and incorporated in Singapore, with the IP generated from the proposed project(s) owned in Singapore.
- 7.3. MDA welcomes submissions from **individual** commercial companies, **and industry consortia**.
- 7.3.1. For individual companies : they must be Singapore-based and the project must be conducted in Singapore.
- 7.3.2. For the purposes of industry consortia: Each participating consortium must include at least one Singapore-based member organization and the project must be conducted in Singapore.
- 7.3.3. Each participating consortium is to appoint a lead partner to manage the proposed project. The roles and responsibilities of every participant must be clearly defined in the submission.

8. Selection Process and Timeline

- 8.1. The Project Timeline which may be amended where necessary at any time and at MDA's discretion.

Figure 5: Project Timeline

Date	Event
16 Jun 09	Release of CFP Guidelines & Submission Template
26 Jun 09 , 4.30 pm	Industry Briefing & Networking at Fusionopolis*
24 Aug 09, 4 pm	Submission Deadline
Late Aug – early Sep 09	Clarifications and Shortlisting of Proposals
Sep – Oct 09	Company Presentations to Joint Evaluation Panel
Nov - Dec 09	CFP Awards

* For CFP Industry Briefing & Networking on 26 Jun 09, please register at FutureTV@mda.gov.sg by providing your name, designation, & company

CFP Information

8.2. Details of the CFP, including the timeline for events leading to the final award of projects will be published at <http://www.idm.sg/> .

Confidentiality

8.3. Both the FutureTV participating partners and the Applicant undertake not to divulge or communicate to any third party any confidential information howsoever acquired in relation to or arising from the project and / or the CFP without first obtaining the written consent of MDA.

8.4. For the purpose of this CFP, all information furnished by MDA shall be deemed confidential unless otherwise indicated.

Disclaimer

8.5. MDA shall have the absolute discretion to accept or reject any submission made without being liable to give any reason thereof. MDA reserves the right to retain the proposals submitted by all applicants without liability for the costs of preparing these submissions.

9. Submissions

Submission Format

9.1. Details on the format and information to be included in the submission can be found in the CFP Proposal Submission Template and CFP Cost Breakdown Template available for download at: <http://www.idm.sg/> .

9.2. Project submissions must prescribe closely to the CFP Proposal Submission Template and CFP Cost Breakdown Template for further information. Failure to do so may result in disqualification from the CFP.

Place and Time of Submissions

9.3. A soft copy of the proposal must emailed to MDA at FutureTV@mda.gov.sg no later than 24 August 2009, 4 pm. All proposals shall be clearly marked as MDA (FutureTV CFP).

9.4. No late submissions will be entertained.

Contact Details

9.5. For questions regarding the CFP, please email : FutureTV@mda.gov.sg.

9.6. No questions regarding this CFP will be entertained after the closing deadline of this CFP.

10. Updates to CFP Documents

10.1. This document will be made available for download at <http://www.idm.sg/> .

10.2. MDA reserves the right to make changes and clarifications to the scope and requirements outlined in this document as and when such changes are deemed necessary and appropriate, and participants of this CFP should also check the MDA website for future updates to this document prior to proposal submission.

10.3. Updates will be made available for download as addendums to the initial document.

APPENDIX A

Offering	MediaCorp	StarHub	PGK
Customer Base		<ul style="list-style-type: none"> • Access to local Mobile, Pay TV and Broadband customer base subject to solution offering and scope. 	
Market Access		<ul style="list-style-type: none"> • StarHub's Mobile, Pay TV and Broadband customer base. 	
Access to Advertisers and Partners		<ul style="list-style-type: none"> • Access to triple play advertising platform. 	
Promotion	<ul style="list-style-type: none"> • Non-commercial usage of DVBT data-casting bandwidth • Total of up to 2 Mbps at a nominal fee (to be charged on a case by case basis) • Each project on trial should not exceed 3 months. • Offer valid for 1 year. 	<ul style="list-style-type: none"> • Interactive TV platform for development and testing subject to solution offering and scope 	<ul style="list-style-type: none"> • 1 hr/day cumulative on entire ADME network. • Access to virtual studio for non commercial productions
Infrastructure	<ul style="list-style-type: none"> • Interactive platforms for trial <ul style="list-style-type: none"> - Advanced video search - Contextual advertising - Extreme UI personalization • Data casting over DVB-T 	<ul style="list-style-type: none"> • Interactive TV • StarHub TV on Mobile • StarHub TV Online 	<ul style="list-style-type: none"> • ADME Digital Interactive billboards

What Partner is looking for ?	MediaCorp	StarHub	PGK
Innovative Solutions	<ul style="list-style-type: none"> • Interactivity with a social-network focus • Disruptive engine for serving contextual ads • Extreme personalization capability on-screen • Advanced video search. 	<ul style="list-style-type: none"> • Move eyeballs to 3 TV screens • Personalised TV <ul style="list-style-type: none"> - watching, socializing and interacting - what is recommended ? - what my friends watched ? - What I watched ? • Lean Back TV experience <ul style="list-style-type: none"> - Video search - Recommendation • How to monetize on services ? • One-stop interactive advertising and shopping 	<ul style="list-style-type: none"> • Applications to leverage on PGK ADME network <ul style="list-style-type: none"> - real time attention and emotion analyzing system - real time gender, age and race recognition system - Real time non invasive eye tracking system - Content filtering system based on a dictionary of audio, image and gesture.
Content for Partnership		<ul style="list-style-type: none"> • Interactive content, eg : instructional VOD • 3 screens content 	

Offering	Glocal	ServTouch-ETI	SingTel
Customer Base	<ul style="list-style-type: none"> • Access to 120M users and pay TV platforms 		<ul style="list-style-type: none"> • Local IPTV /Mobile customer base. • Access to the region for satellite broadcasters
Market Access	<ul style="list-style-type: none"> • Access to global multiple screen users 		<ul style="list-style-type: none"> • Managed MPLS connectivity nodes to more than 70 locations worldwide • Own satellite and transmission infra to access Asian market
Access to Advertisers and Partners	<ul style="list-style-type: none"> • Access to regional partners 		<ul style="list-style-type: none"> • Broadcast Innovation centre (BIC) for technology incubation and testing • Remote content management services for advertisers • Connectivity between BIC and Fusionopolis
Promotion	<ul style="list-style-type: none"> • No fee access to New Media platform users 		<ul style="list-style-type: none"> • Satellite and Transmission Teleport infra for testing and distribution of media applications
Infrastructure	<ul style="list-style-type: none"> • New Media platform for content management, publishing,CDN, distribution , monetization for music and video. 	<ul style="list-style-type: none"> • P2P network with 50K peers • APIs for STB and Podcast widgets for PC. 	<ul style="list-style-type: none"> • Satellite transmission infra for media distribution • MPLS connectivity for media contribution.

What Partner is looking for ?	Glocal	ServTouch-ETI	SingTel
Innovative Solutions	<ul style="list-style-type: none"> • Solutions for Glocal Asia Tunes. 	<ul style="list-style-type: none"> • Solutions to support mobile access to P2P network. 	
Content for Partnership	<ul style="list-style-type: none"> • Content producers/owners to distribute on New Media platform. 		

Offering	EON	Ufinity	Microsoft
Customer Base			
Market Access			
Access to Advertisers and Partners			
Promotion	<ul style="list-style-type: none"> • Free use of authoring tools 		
Infrastructure	<ul style="list-style-type: none"> • Full range of immersive and holographic display solutions. 	<ul style="list-style-type: none"> • Ufinity service delivery platform. (http://www.ufinity.com/SDPpartnership/) 	<ul style="list-style-type: none"> • Microsoft BizSpark program provides software and support to high potential startups.

What Partner is looking for ?	EON	Ufinity	Microsoft
Innovative Solutions	<ul style="list-style-type: none"> • Companies to develop application on top of EON Coliseum (a multi-modal communication technology platform which are aimed at: <ul style="list-style-type: none"> - delivering Media-rich virtual reality Environments. – inter-connected, collaborative 3D applications. 		<ul style="list-style-type: none"> • Startups to leverage on the available Microsoft software/tools through BizSpark to build the applications proposed by FutureTV partners. • R&D into new FutureTV technologies that would contribute to the growth of IDM usage and industry in Singapore. • Market Development of innovative FutureTV applications and services that are already developed, with a good track record and are ready to scale internationally.
Content for Partnership			

Offering	Motorola	MDA
Customer Base		
Market Access		
Access to Advertisers and Partners		
Promotion		
Infrastructure	<ul style="list-style-type: none"> • HD IP set top box with KreaTV application platform 	<ul style="list-style-type: none"> • MDA testbed facilities.

What Partner is looking for ?	Motorola	MDA
Innovative Solutions	<ul style="list-style-type: none"> • seeking enabling technologies and R&D partnerships that will enhance the television experience with Internet Protocol TV (IPTV) delivered over next-generation networks, including highly interactive applications developed on set-top boxes” 	<ul style="list-style-type: none"> • Augmented file classification system <ul style="list-style-type: none"> - Search a video clip against a dictionary of text, audio and video images (eg : scenes containing nudity, sex, coarse language or violence found within the video and identify and tag in multiple languages including English, Chinese, Malay, Tamil exceptions for action. - Compare and identify the differences if any, between 2 video clips with the same title including the exact location or timing of any differences from the original. • Automatic language conversion cum subtitling. • Portable Multi-output HD streamer system where HDTV clips are loaded onto storage. Users should be able to schedule any of the outputs. Support for multiple output interfaces at HD resolution.