

Committee Secretary  
House of Representatives  
Standing Committee on Communications, Information Technology and the Arts  
Parliament House  
Canberra ACT 2600  
AUSTRALIA

**HOUSE OF REPRESENTATIVES**  
**Standing Committee on**  
**Communications, Technology and the Arts**

**INQUIRY INTO**

**THE FUTURE OPPORTUNITIES FOR AUSTRALIA'S FILM, ANIMATION,  
SPECIAL EFFECTS AND ELECTRONIC GAMES INDUSTRIES**

Submission by Creative Industries Research and Applications Centre (CIRAC),  
Queensland University of Technology

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**ABOUT CIRAC**

The Creative Industries Research and Applications Centre (CIRAC) contributes to the research and applications needs of the creative industries - locally, at a state level, nationally and internationally. The Centre aims to:

- *Map the growth and dynamics of the sector to show the extent and value of the creative industries in Australia and overseas;*
- *Assist the growth and diversification of creative applications in the new information economy, providing know-how and facilities to partners from government to micro-business;*
- *Produce both creative IP for commercialisation, and cutting-edge industry-oriented research;*
- *Contribute to the development of the Creative Industries Precinct, working with co-locating partners;*
- *Work towards Co-operative Research Centre (CRC) status for a consortium dedicated to*

*Research and Development leadership in this emergent industry sector.*

CIRAC's submission includes the following attached documents as appendices:

1. *Creative digital industries in Australia: innovation in quantitative and qualitative mapping*

Creative Industries Research and Applications Centre-National Office of the Information Economy –Department Communication Information Technology and the Arts-Australian Film Commission ARC Linkage application 2003 round.

2. *Creative Industries –from Blue Poles to fat pipes*

Prof John Hartley and Prof Stuart Cunningham

3. *Culture, Services, Knowledge or Is content King, or are we just drama Queens?*

Prof Stuart Cunningham, address at Communications Research Forum 2002

4. *QUT CRC for Interaction Design*

Prof. Jeff Jones

5. *Tales from the Frontier, Marion Jacka*

Australian Film Commission, Sydney, Creative Industries Research and Applications Centre, Brisbane, and Australian Key Centre for Cultural and Media Policy, Brisbane.

#### TERMS OF REFERENCE

- a) the current size and scale of Australia's film, animation, special effects and electronic games industries;
- b) the economic, social and cultural benefits of these industries;
- c) future opportunities for further growth of these industries, including through the application of advanced digital technologies, online interactivity and broadband;
- d) the current and likely future infrastructure needs of these industries, including access to bandwidth;
- e) the skills required to facilitate future growth in these industries and the capacity of the education and training system to meet these demands;
- f) the effectiveness of the existing linkages between these industries and the wider cultural and information technology sectors;
- g) how Australia's capabilities in these industries, including in education and training, can be best leveraged to maximise export and investment opportunities; and
- h) whether any changes should be made to existing government support programs to ensure they are aligned with the future opportunities and trends in these industries.

**The key elements of our submission respond to your terms of reference:**

- a) *The current size and scale of Australia's film, animation, special effects and electronic games industries;*

Knowledge of the size and scale of these industries suffers from a lack of appropriate data and methods of data collection. Appendix 1 *Creative digital industries in Australia: innovation in quantitative and qualitative mapping* is an extract from a current CIRAC application for funding to address these issues. We have also conducted the following projects that address these issues:

- Brisbane's Creative Industries 2003 BCC/CIRAC  
<http://www.creativeindustries.qut.com/research/cirac/documents/bccreportonly.pdf>
- Creative Industries in Qld Cluster Mapping and Value Chain Analysis ARC Linkage 2002-2004 (partners Department of State Development, Arts Queensland, Brisbane City Council)
- Regional development of audio-visual industries in the Northern Rivers ARC Linkage (partners Northern Development Task Force: Northern Rivers Screenworks)

b) *The economic, social and cultural benefits of these industries*

The benefits of these industries need to be understood in contemporary new economy terms. Traditional modes of understanding the arts and broadcast media are not necessarily the most appropriate terms. Appendix 2 *Creative Industries –from Blue Poles to fat pipes* addresses this issue in detail.

c) *Future opportunities for further growth of these industries, including through the application of advanced digital technologies, online interactivity and broadband*

The future opportunities for Australia's film, animation, special effects and electronic games industries are linked to understanding in more empirical detail the attributes and outputs of creative industries. Appendix 1 *Creative digital industries in Australia: innovation in quantitative and qualitative mapping* details the complex issue relating to data collection (cf DCITA's Creative Industries Cluster Study Stage 3 Data and Statistical Industries consultancy, on which we are providing expert commentary on for DCITA)

d) *The current and likely future infrastructure needs of these industries, including access to bandwidth*

Opportunities for content providers within Australia's film, animation, special effects and electronic games industries include material for various media platforms and the creation of original material specifically for broadband internet services. Marion Jacka details this in Appendix 6 *Tales from the Frontier*.

- e) and f) *The skills required to facilitate future growth in these industries and the capacity of the education and training system to meet these demands; and the effectiveness of the existing linkages between these industries and the wider cultural and information technology sectors*

The nature of sub-sectors of creative industries in particular geographical locations (internationally, nationally and regional) enable us to understand interdependencies, both tangible and intangible, that promote innovative practices. Until recently the opportunities provided by clusters of creative industries (including film, animation, special effects and games) has been neglected, with more attention being focused on remedial support mechanisms for existing industries. The links between actors in these sectors are multifarious but generally speaking uncoordinated and do not achieve strategic scale and profile befitting the importance of the sectors to Australia's economic and cultural future. Appendix 5 details a major intervention in this situation. The Australasian Centre for Interaction Design, the new CRC and the first in the CRC program that addresses directly the issue of content creation in an R&D/innovation system, will broker links and provide strategic assistance to SME sector and link large and small etc

- g) and h) *How Australia's capabilities in these industries, including in education and training, can be best leveraged to maximise export and investment opportunities; and whether any changes should be made to existing government support programs to ensure they are aligned with the future opportunities and trends in these industries*

Appendix 1 *Creative digital industries in Australia: innovation in quantitative and qualitative mapping* argues that creative digital industries constitute an arena in which to test Australia's capacity for national innovation, not only in identified creative sectors but also in the context of creative industries **inputs into**, or **enablers of** the wider service industries. There is a role for government as a market organiser here as well as a provider of infrastructure. The tensions between cultural, industry development and R&D need to be fully understood and worked through. Appendix 3 *Culture, Services, Knowledge or Is content King, or are we just drama Queens?* details the challenges for current Australian policies to deal with these sectors. The paper argues that culture is where most policy development has occurred over decades; industry development being applied in some but not all sectors, while R&D policies are virtually terra nullius but need to be changed to embrace these sectors.