



November 20, 2013

Elizabeth Ward
Goods and Investment Branch
Department of Foreign Affairs and Trade
R.G. Casey Building
John McEwen Crescent
Barton ACT 0221

Via email: elizabeth.ward@dfat.gov.au

Dear Elizabeth,

RE: Trans-Pacific Partnership Agreement

We refer to the Department of Foreign Affairs and Trade's (**DFAT's**) call for submissions on the Trans-Pacific Partnership Agreement (**TPPA**).

The Interactive Games & Entertainment Association (**IGEA**) is an industry association representing the business and public policy interests of Australian and New Zealand companies in the computer and video game industry. IGEA's members publish, market, develop and/or distribute interactive games and entertainment content and related hardware.

Formed in 1999, the Game Developers' Association of Australia (**GDAA**) is a NGO, not-for-profit organisation that represents the interests of the national game development industry. The GDAA is tasked with promoting the game development industry (locally and internationally), retaining and attracting development talent, attracting investment and global game publisher interest, engaging with educational institutions, advising government of industry trend and opportunity, and fostering the Australian game development community.

The GDAA currently has in excess of 180 game development studios in its national database.

Australian game developers make world-class products that appeal to the global market. In 2012, Australia's interactive games market was worth AUD\$1,315,000, an amount which represented

2.1% of the global interactive games market¹. Australia's domestic market is relatively small compared to the global market, therefore game development in Australia is heavily focused on exports.

While the Australian industry is preparing to undertake research on the local games industry, in the interim it is instructive to examine the most recent research from a similar territory - New Zealand. In New Zealand it is estimated that 99% of the games developed are exported² and a recent survey from the New Zealand Game Developers' Association found that over 86.5% of New Zealand game developer earnings came from the export of smartphone and online games³. This figure reflects the estimated percentage of export revenues of game development in Australia.

The production of interactive games requires a significant amount of investment and capital that simply cannot be recouped from Australia's domestic market alone. Export markets are therefore essential to the industry's survival.

With export markets being a fundamental aspect of Australian games businesses, the TPPA's ability to guarantee open access to international markets is essential for the survival and ongoing growth of games businesses in Australia.

With regards,



Ron Curry
CEO
Interactive Games & Entertainment Association



Antony Reed
CEO
Game Developers' Association of Australia

¹ PricewaterhouseCoopers, Outlook: Australian Entertainment and Media 2013-2017

² PricewaterhouseCoopers, August 2012, 'Mobility is reshaping the future: Five year forecast on the entertainment and media industry in New Zealand.'

³ <http://www.nzgda.com/news/nz-made-video-games-industry-grew-86in-2012/>

