

REPORT 2018



## **FRONT COVER**

**Fingersoft • Hill Climb Racing 2**

**Futureplay • Battlelands Royale**

**Next Games • The Walking Dead: Our World**

**Rovio Entertainment • Angry Birds 2**

**Small Giant Games • Empires & Puzzles**

**Supercell • Brawl Stars, Clash Royale, Clash of Clans and Hay Day**

## **BACK COVER**

**Remedy Entertainment • Control**

**Housemarque • Stormdivers**

**SecretExit • Zen Bound 2**

**Rival Games • Thief of Thieves: Season One**

**Superplus Games • Hills of Steel**

**Critical Force • Critical Ops**

**Frogmind • Badland Brawl**

**Nitro Games • Heroes of Warland**

**Kukouri Mobile Entertainment • Pixel Worlds**

**Tree Men Games • PAKO Forever**

**Publisher Neogames Finland ry (2019)**



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## ABOUT THIS REPORT

**Neogames Finland** has been monitoring the progress of the Finnish Game Industry since 2003. During these fifteen years almost everything in the industry has changed; platforms, technologies, the business environment and games themselves. However, the biggest change has taken place in the industry's level of professionalism. These days the level of professionalism in even a small start-up is on a level presented only by few in 2003.

This publication aims to provide a holistic overview of the Finnish game industry in 2018. The data and information presented in the following pages is based on a total of 140 company interviews carried out from October 2018 to February 2019,

augmented by data from other sources. This study is a continuation of similar studies conducted in 2004, 2008, 2010, 2014 and 2016.

Over 70 Game companies, members of Suomen Pelinkehittäjät ry (Finnish Game Developers Association) are introduced on the company profile pages as well as Business Finland and the most relevant game industry organizations and regional clusters.

We wish to thank everyone who has participated in this process. Special thanks to Suomen Pelinkehittäjät ry (Finnish Game Developers Association) and Business Finland for their support.

### **Team Neogames:**

KooPee Hiltunen, Suvi Latva, J-P Kaleva



Picture: SmallGiant | Empires&Puzzles

# History



Picture: Supercell | Clash of Clans

## 1979 to 1986 - The beginning

### **FROM FINLAND TO THE INTERNATIONAL MARKET**

**The first** known Finnish digital game was released as early as 1979: Chesmac, a chess game designed by Raimo Suonio. However, serious game development efforts did not start until home computers gained popularity in the beginning of following decade.

At first, game development was mostly a hobby, but in the mid-1980s, developers released the first commercial games. These early game releases targeted the domestic market. The first game to be distributed internationally was Sanxion, which debuted in 1986.

## 1987 to 1995 - Professionalism

### **FROM INDIVIDUAL DEVELOPERS TO GAME DEVELOPMENT TEAMS**

**Up until** the early 1980s, games were typically innovations led by a single developer. However, towards the end of the decade, game developers begun to cooperate, giving rise to the first game development teams.

A major boost came from game developer events, including the notable Assembly, which was first organised in 1992 and continues to date. These gaming teams, i.e., demo groups, also gave rise to the first Finnish game studios. The oldest Finnish gaming companies still in operation, Housemarque and Remedy Entertainment, are strongly rooted in these demo groups.

## 1996 to 2000 - First wave

### THE FIRST SUCCESS STORIES AND MOBILE GAME STUDIOS

In the mid-'90s, games were mostly developed for home computers. However, 1999 witnessed a major shift when Nokia introduced the WAP standard, which seemed like a promising platform in terms of game development. Several game studios were set up in its wake, and the Finnish gaming industry saw its first boom.

WAP did not, however, meet expectations, and with the downfall of WAP went the mobile game studios of the first wave. Successes, though, were had on other fronts. In PC and console games, Housemarque's Supreme Snowboarding and Remedy's Max Payne proved to be big hits, and Sulake's Hotel

Goldfish (Habbo Hotel) became an internet sensation.

## 2001 to 2004 - The difficult years

### FLYING HIGH AFTER HITTING ROCK BOTTOM

**Despite** a few successes, the early 2000s were a difficult period for the Finnish game industry. Risky investments in gaming were halted, and despite a promising start, mobile game development also ground to a halt. Publisher-driven PC and console game development was too challenging for most small game studios.

Luckily Nokia saw a business opportunity in mobile games. Nokia was confident that its N-Gage PDA, launched in 2003, would revolutionize mobile gaming and therefore invested



in the development of game content for the handset, including investments in Finnish companies and their games.

The N-Gage failed. The device was expensive to manufacture, clumsy to play on and games were distributed only in traditional brick-and-mortar stores. Still, the foundation for the mobile game ecosystem had been laid, and a number of new game studios were established between 2003–2005, including Sumea, Mr.Goodliving and Universomo.

## 2005 to 2009 - Moderate growth

### **THE ERA OF A MATURE MARKET**

**Towards** the end of the 2000s, the Finnish gaming industry ecosystem continued to grow steadily. What was once a hobby had finally transformed

into a serious sector of its own, the gaming industry.

Growth was relatively slow, however. The turnover of the game industry grew from around 40 million euros in 2004 to approximately 87 million euros in 2009. The relatively slow growth is explained by the value chain of the distribution of the games, which was functional but not particularly profitable for the game developer. But change was coming.

## 2010 to 2011 - A system in turmoil

### **BALANCE OF POWER REVOLUTIONISED BY MOBILE DIGITAL DISTRIBUTION**

**The digital** distribution of games was the true driver of change in the gaming industry. Digital distribution began on a PC platform but later expanded to consoles and smartphones through

Apple's App Store and Google Play.

The new distribution methods represented a change in the balance of power within the industry. With digital distribution, game developers were able to reap 70 % profits instead of the former 15–25 %. This made a huge difference, and Rovio's Angry Birds and its sequels were among the first to benefit from these new opportunities.

As markets opened and international investors started to take interest and make investments in Finnish companies, the number of game studios exploded. The turnover of the industry almost doubled in just three years, from approximately 87 million euros in 2009 to 165 million euros in 2011.

## 2012 to 2016 - The perfect storm

### F2P MODEL

**Supercell** was the first mobile gaming company to successfully apply the micropayment model, skyrocketing Hay Day and Clash of Clans to the top of the most profitable games list, where they have stayed for several years.

Supercell's success further increased international interest in Finnish gaming, and both investments and the industry turnover surged from 2012–2015. In 2015, the Finnish gaming industry crossed the landmark of two billion euros in turnover.

Despite the strong focus on mobile games, Finnish companies continued to design games for other platforms, too. Remedy's success stories Alan Wake and Quantum Break and Colossal

Order's success story Cities: Skylines are examples of Finnish competence in design for non-mobile platforms.

## 2017 to 2019 - The era of establishment

### **GAMES INDUSTRY FROM 2017 ONWARDS**

**The year** 2017 was a year of stabilisation for the Finnish gaming industry. A key milestone was the listing of four Finnish gaming companies.

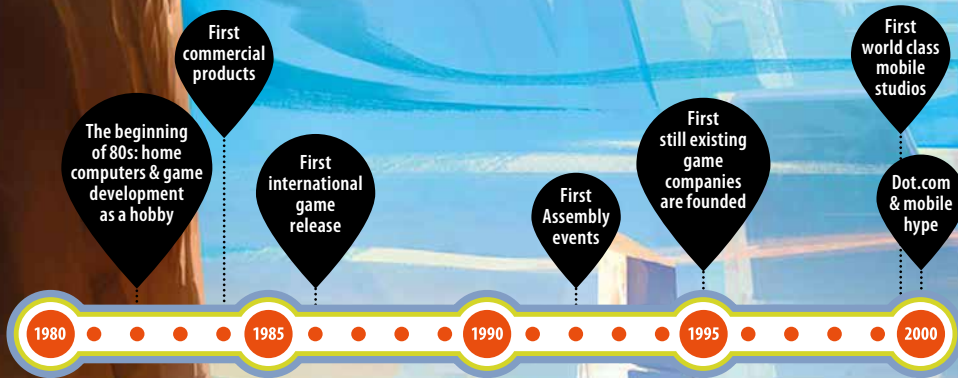
In 2017 and 2018 the industry also went through structural development, and the “prosperous middle class” of gaming companies grew significantly. The number of companies that employ more than 50 people and have a

turnover of more than 10 million continued to increase.

The number of employees in the industry grew to 3,200 in the end of 2018. In international comparison, Finland was placed within the top-three game developer countries in Europe by turnover.



# History





# State of the Industry

## Industry in a Nutshell

**Compared** to years 2004–2016 covered in Neogames' previous studies, years 2017 and 2018 have been years of stabilization. The rapid growth of turnover in 2011–2016 has changed into a modest decline and the number of studios has decreased from 250 in 2016 to 220 in 2018. However, there seems to be an increase in the number of studios established in 2017 and 2018. According to statistics, 48 new studios were established 2017–2018 (45 new studios 2015–2016).

In 2017 the listing of four Finnish game companies into the stock exchange was a major milestone for the industry. In 2018, the Zynga - Small Giant deal at the end of the year was the year's biggest highlight.



Picture: Small Giant | Empires & Puzzles

Although the number of studios is now smaller, the Finnish game industry employs more people (3200) than it did at the end of 2016 (2750), and during 2019–2020 Finnish game studios expect to open over 500 new positions. One of the biggest findings of this study is that the share of non-Finnish employees has increased from 18 % in 2016 to over 27 % in 2018. The increase is significant and proves that Finland is globally a highly attractive games industry hub and, to a certain extent, the availability of experienced professionals locally has been and still is one of the biggest challenges to the Finnish game industry.

Another notable finding is that in 2018 the number of new games published was around 100 compared to 150–200 games per year previously. This is mainly an outcome of the increased

popularity of the game as service -model. Launching a new game is a risk due to the huge marketing and UA costs. For that reason studios concentrate on developing their existing games rather than launching new ones. Only 5 out of the 30 biggest game studios by turnover launched a new game in 2018. However, it seems that there is going to be an increase in new titles in 2019.

In many ways the Finnish game industry has reached a "Business as usual" – status and has stabilized and matured to be over €2 Billion industry in its own right in 2017–2018. However, when interviewing companies, this acquired level of stability is most often seen as a stepping stone to new growth, and not as a satisfactory achievement. The industry remains dynamic.

## Studios

**The aim of this study** is to give a picture, as accurate as possible, of the Finnish game industry. For that reason, the Neogames' database used as background material when making this study, contains only the studios that are active in game development. However, keeping up an entirely accurate database of all active game companies is virtually impossible for multiple reasons: Statistics Finland has no definitive classification for game developer studios, setting up a new game studio is relatively easy, game developers can sometimes be in stealth mode for years before going public, and quite often studios just discontinue their active business but remain still on active status in the business register



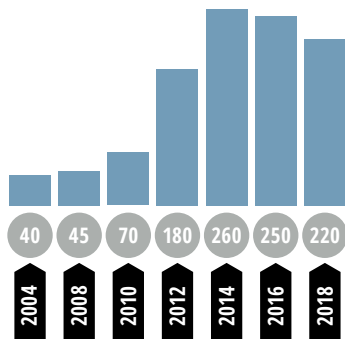
Picture: Remedy Entertainment | Control



Neogames estimates, that from 1995 to 2018 there have been almost 600 game companies out of which 220 were active in game development in the end 2018. For comparison, Neogames' first study about the Finnish game industry covers the year 2004 and includes 40

active game studios. Out of those 40 studios, 11 (28 %) are still active in game development. The other 29 have either moved to other branches or went out of business for other reasons. When comparing to the study conducted in 2008 (45 studios), 18 of those studios are still active. The "mortality rate" over 10 years has been 60 %.

The listing of number of active studios clearly indicates that the growth spurt of the Finnish game industry started in after 2010 following the rise of mobile gaming. In the top year of 2014, there were 260 active studios. Since then the number of active studios has decreased, mainly because competing on global markets has become more difficult, and a small studio's chances to survive are smaller than before, and therefore the threshold to set up a new studio is higher.



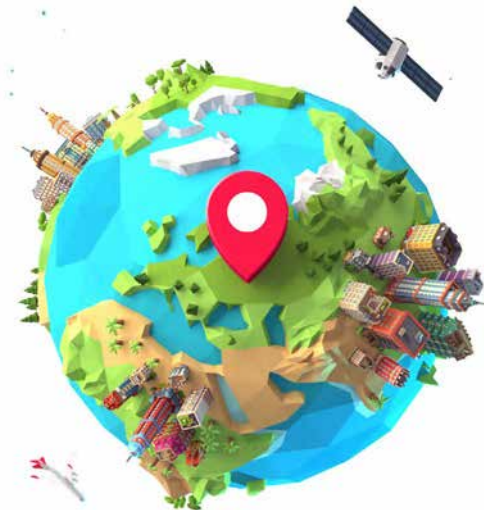
Number of active studios 2004–2018

# Location

## Location of Companies and Clusters

**The changes** in company locations compared to the previous full study (data from year 2016) are not dramatic. The Capital Region has increased its share from 42 % to 46 % and the central area has grown from 18 % at the end of 2016 to 21 % at the end of 2018.

Outside the Capital Region, regional capitals seem to be hotspots of the game industry in their respective regions. This reflects the general development of the Finnish society. Cities with educational possibilities like universities and universities of applied sciences are attractive, especially for a younger, more game-oriented generation. The major game industry hubs outside the Capital Region (by



Picture: Shipyard Games | Concept art

headcount) are Tampere, Oulu, Kajaani and Turku.

In terms of economic significance and financial value, the Capital Region is still well ahead of other areas. 97 % of the industry's turnover is generated by companies located in the Capital Region, and around 75 % of all employees work in there. The figures are almost exactly the same as in the previous study.

	Capital	Central	East	North	West
2018	46%	21%	7%	16%	11%
2016	42%	18%	9%	18%	13%
2014	38%	26%	10%	16%	8%

Location of the companies N:220



# Platforms

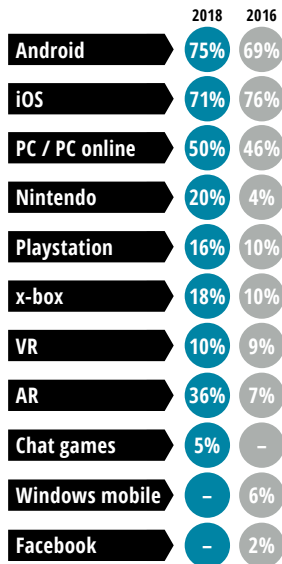
## Platforms

**The mobile** platforms iOS and Android are still the most popular target platforms for the Finnish game industry. After the last study in 2016, Android has surpassed iOS as the most popular platform, though the difference is small.

The popularity of PC as a platform continues to grow. Some developers have moved on from mobile to PC, mainly due to the not-yet-so-crowded distribution channels. After years of Steam dominance, new PC distribution channels have gained some popularity among new developers. There are also a number of highly experienced and solid PC -development companies, often developing games for console platforms as well.



Picture: 10tons | Tesla vs. Love Craft



Popularity of the platforms among Finnish Game Studios N:124

The most distinctive feature in the new industry data is the rapid growth of the popularity of Nintendo (Switch) among Finnish developers. Also chat games, which were not even on the list in 2016, are in the focus of some companies.

A number of companies have chosen VR/AR as their main focus, although especially the VR game market is considered to be quite immature. Not surprisingly, Windows mobile and Facebook are no longer on the list of targeted platforms.

As already for years, multiplatform development is very common, and most companies develop the same game for several platforms.

## Developers & Diversity

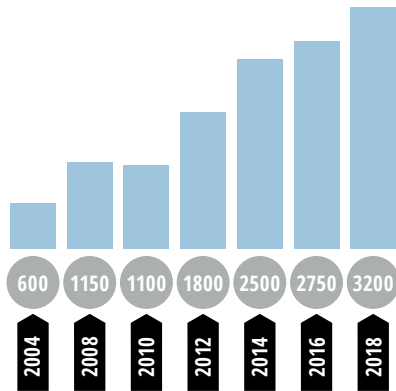
**The number** of people working in the Finnish game industry is, generally speaking, quite low compared to the industry turnover. This is mainly due to the fact that a majority of Finnish game studios still develop mobile games, which are traditionally less resource intensive than console games, for example. However, during the last couple of years the development and especially the marketing and maintenance of mobile games (games as services-model) has increased the human resources required.

In the end of 2016, Neogames estimated that there were 2 750 people in total working in the industry (2 500 at the end of 2014). The 140 companies interviewed for this study (of 220 total)

employed 2 801 people full time at the end of 2018. The number of part time employees was 42 and number of interns 121. The number of part time employees was relatively small and, according to interviews, part time employment was often the employees own choice. Though these 140 companies represent only 63 % of the number of known companies in the whole industry, all of the largest companies are included in the survey, and the companies that did not respond are mainly relatively new or small.

Information from other available sources confirms that at the end of 2018, the Finnish game industry employed in rough figures 3 200 (FTE) people. This is 450 more than at the end of 2016 and 700 more than at the end of 2014.

## Developers & Diversity



**Number of people employed Finnish Game Industry 2004–2018**

These figures include entrepreneurs and persons employed abroad by Finnish studios.

Out of the 140 companies surveyed, 86 (61 %) estimated that they are going to hire at least one new employee within the next 12-18 months.

Altogether, these companies are expecting to hire Over 500 new game industry professionals during 2019–2020. Due to the volatile nature of the industry, the actual demand for new employees is hard to estimate with any precision. However, these figures confirm that the Finnish game developers are still looking for growth, and the lack of employees is still a challenge to the industry.

According to the survey, the number of female employees in the 140 companies surveyed has increased from

# Developers & Diversity

406 to 569 from 2016 to 2018. The share of female employees in these companies is a little over 20 %, two percentage points more than in the previous study in 2016 (18 %).

The biggest change in diversity has happened in the number of non-Finnish employees. According to the present survey answers (140), the total number of non-Finnish employees was 762 at the end of 2018 (397 in the end of 2016). This equals 27 % of the total number of people employed in those studios (18 % in 2016). The increase is significant and seems to be localised to the biggest studios. 26 out of the 30 biggest studios measured by headcount had non-Finnish employees in their payroll while the 30 smallest studios did not employ any non-Finns. 278 employees, roughly 10 % of all employees, came from

outside the EU/ETA area (5 % in 2016) and a majority of them are working for Finnish studios in Finland.

The median number of persons employed in the 140 companies surveyed is 7, and the average 20. The median in the 2016 study was 6 and the average was 16, so there is a slight increase in both indicators.



Picture: DazzleRocks | 7 Legends





## Financial Outlook

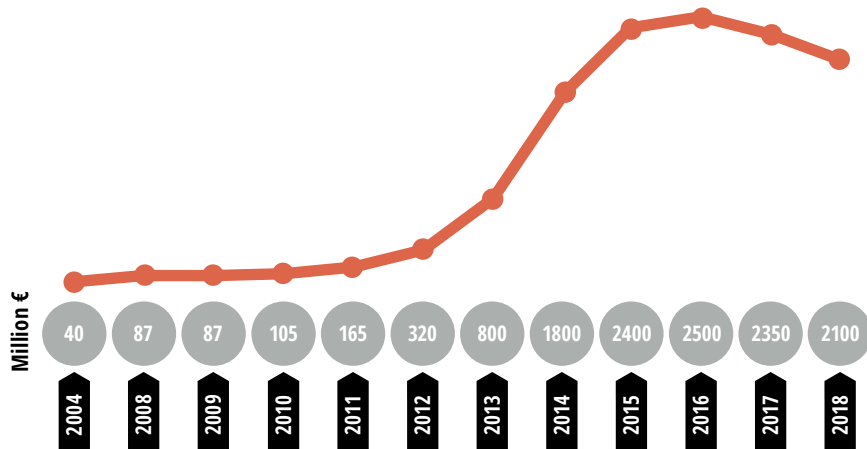
**The Finnish** game industry has been financially successful the whole past decade. The growth spurt started in 2012, and the increase of turnover continued until 2016. After that there has been a decline in 2017 and 2018. Despite that the game industry is still an over €2 Billion industry in Finland. When it comes to financial performance, perhaps the most significant change during the last years has been the decrease of Supercell's weight in the Finnish game industry portfolio. In 2015, Supercell's share of the total turnover was almost 88 %. In 2018, the share was only 65 %. Moneywise this means that while in 2015 the game cluster outside Supercell created a turnover of €300 Million, in

2018 that turnover was over €700 Million. This growth proves that the Finnish game industry is not a one hit wonder.

The change in industry structure can also be seen in the statistics. The number of studios making more than a €50 million turnover has increased from 2 in 2016 to 4 in 2018. The number of studios making +10 million has grown from 7 in 2016 to 11 in 2018. At the end of 2018, there were 34 studios with an annual turnover of more than €1 million. This is 4 more than in previous study 2016.

The median turnover of a game studio participating in this survey was €135 000 in 2018 (€95 000 in 2016), which equals a 40 % growth in median.

# Financial Outlook



Turnover of the Industry 2004–2018

# Challenges and Strengths

## Challenges and Strengths of the Finnish Game Industry

### CHALLENGES

#### PUBLISHING

**Based** on the companies interviewed for this study, a minority (45 %) of developers use a publisher to publish their games. A majority (71 %) of the developers rely at least partly on self-publishing. Especially for smaller studios, approaching publishers and getting a favourable publishing deal is a challenge. Currently, many publishers (as well as investors) would like to see soft launch metrics of games offered to them before making a deal. Only a few

publishers were willing to fund the development of games up to the moment when collecting metrics is possible.

#### FUNDING

**For many** Finnish studios, getting early stage funding is a challenge, especially for the first round start-ups. Convincing investors requires providing track record of the team/people behind the game company, already published successful games, new game in soft launch with promising metrics and/or a very impressive demo.

#### BUSINESS

**Game** developers increasingly use analytic and metric tools to evaluate player behaviour. Especially for the F2P model the volume of users, user

# Challenges and Strengths

acquisition, server technologies and understanding KPI's (Key Performance Indicators) are fundamental. Data provides a great support for game development. However, developers also emphasise the value of their own vision and creativity. Data cannot be the tail wagging the dog. Many developers preferred quick development cycles and (soft) launch in very early stage. Early user data reveals critical issues in the game and final publishing decisions are often made based on metrics.

## **CONTINUOUS CHANGE**

**Change** has always been present in the game industry. Usually change has presented itself in technology and business environment, but last year regulatory changes had a bigger effect than before on developers' everyday

business. Topics like consumer protection, GDPR, lootboxes and e-privacy are widely discussed in the industry.

## **DISTRIBUTION CHANNELS / STORES – ALGORITHMS & VISIBILITY AND USER ACQUISITION:**

**Challenges** in discovery and rising UA cost have been a challenge in the games industry for years. There is no silver bullet in sight, as even the impact of game featuring by platform holders is decreasing. Changes in advertisement and search algorithms seem to have a growing impact on the effectiveness of the discoverability of games. In PC distribution the dominance of Steam is crumbling and new distribution channels are emerging.

# Challenges and Strengths

## LACK OF EMPLOYEES

**The lack** of employees, especially of senior level experience, came out clearly in the interviews. In addition to recruiting professionals from abroad, one way to fill the gap between supply and demand is to find ways to support and coach newly graduated and junior level employees to reach the required skill level.

## STRENGTHS

### INCREASED BUSINESS FOCUS IN YOUNG START-UPS

**Compared** to the previous Finnish Game Industry report from 2016, the interviews in 2018 amplified increased business focus even among first round start-ups. As a result, many young

companies offer work for hire -services and are therefore able to establish a sustainable business through subcontracting. Work for hire is also seen as a way to educate junior employees.

## INDIES

**A unique** indie style and creativity have been one of the corner stones of the Finnish game industry. The so called “indie apocalypse”, the existence of which has been debated in the industry, was not emphasised in the interviews. New platforms, like Nintendo Switch, have offered new opportunities for indies as well.

# Challenges and Strengths

## **COMMUNITY**

**Regional** game clusters and incubators are highly appreciated among the interviewed companies. There is a solid game developers' community that provides support to its members in a number of Finnish cities. Finnish game industry organizations continue to co-operate to take care of and nurture the developer community in Finland.

## **CONTENT & CREATIVITY**

**Finnish** game developers have a strong ambition to investigate new game mechanics, new kinds of creative content and strong narratives. Metrics driven design has led to a situation where the majority of the successful games are quite similar to each other and thus there is room for new kinds of games.

## **ABILITY TO UTILIZE DISRUPTION OF THE MARKET**

**Finnish** game developers have been successful in taking advantage of new opening markets, business practises and platforms. Many Finnish studios are mapping out new opportunities in blockchain, cross platform games, cloud gaming, the subscription model, HTML5 (including chat games), new consoles etc. XR technologies are also seen as an interesting opportunity. Most of the developers are confident in their ability to take full advantage of the new emerging opportunities.

# Trends and the Future

## Trends and the Future

### PLATFORMS

#### **Cross platform games are here, cross platform stores are coming**

Over the past few years, the processing power of smartphones has reach the level of some laptops and consoles. As a result, game genres that were once exclusive to PC or console are now accessible on mobile. Fortnite will not be the only big cross platform title trying to conquer top-grossing lists on mobile. In the near future, we will likely witness several other PC and console giants announcing similar plans and mobile behemoths trying to enter PC and console stores.

#### **From console to cloud games**

Both Microsoft and Sony are planning to announce the next, likely partly cloud based, console generation in 2020 at the earliest. Meanwhile the console market (including Nintendo) continues to open up for third-party developers.

#### **PC Store Wars gear up, but PC cloud is coming**

On PC, Steam has had a de facto monopoly on the digital game store market for over a decade. In the end of 2018, Epic Games and Discord launched their own stores. Both stores are competing with better revenue splits for developers. Furthermore, Epic is offering exclusivity deals and developer grants. Meanwhile Google has launched its Project Stream trying to become the



first successful cloud gaming platform for PC games.

## **The mobile cloud services emerge**

On the mobile side, some game developers are experimenting with bypassing the dominating application stores. However, a bigger transition is coming with new cloud based consoles that allow players to play their console games through their mobile devices. Mobile cloud gaming is not likely to challenge other cloud gaming platforms before 5G and 5G based mobile cloud gaming platforms like Finnish Hatch go mainstream.

## **E-SPORTS**

### **Growth might continue, or not**

During the previous years the

e-sports industry has been in the focus of investment also in mobile devices. However, it seems that so far the market has not developed as quickly as predicted.

## **WILD, WILD WEB HAS DIED, WELCOME TO THE HEAVILY REGULATED DIGITAL MARKETS**

### **Global regulator fragmentation speeds up**

Especially the companies relying on free-to-play monetization models (like in-game micro-transactions and data based advertisement) continue to experience regulatory challenges, as new countries are continuously introducing new regulations and guidelines on data and consumer

# Trends and the Future

protection and protection of minors in digital environment. Furthermore, number of countries focus on clarifying the line between games for entertainment and gambling (lootboxes, social casino games and e-sports related gambling).

## **Protectionism and looming digital trade wars**

Following regulatory reform in China it will be increasingly difficult for Western developers and publishers to release their games in there. To overcome this obstacle, foreign companies must invest time and resources to adjust their titles to fit the local requirements.

## **Corporate responsibility is the new black**

The Finnish game industry has significant positive social and economic impacts arising from its entertainment value, innovation, technological know-how and creative work. The most significant environmental impacts of the gaming industry are related to energy consumption, both in the game development stage and while gaming, and the manufacturing of gaming hardware.

Through their games, Finnish game development studios play a role in the lives of hundreds of millions of people globally every day. Finnish studios have increasingly focused on safe and responsible gaming for players of every age. Other main focus areas include, but are not limited to, the responsibility of

licensed products, employee well-being and diversity, responsible operating methods and the environment.

## **GAME DEVELOPMENT**

### **Games are a service**

Sustainable success in premium games markets is increasingly based on games that stand out with their high quality and strong brands and create long term value for the players. The F2P gaming business is growing through continuously updating and improving key live games as well as by developing and releasing new games. Companies strive to release games that become long-lasting digital hobbies through continuously introducing new features and in-game events that increase player engagement and monetization.

### **Multiplayer trend continues**

One of the most significant drivers of success in the biggest games in recent years has been the efforts taken by game developers to make it easy for old and new friends to play games together.

### **Analytics driven game design is here to stay**

Quantitative data based on player behaviour as well as qualitative insights from player feedback and research are essential ingredients in creating engaging games. In addition to that Finnish studios invest in the efficient utilization of player data in their decision-making, and continuously develop their processes to deliver insights into the game development process in order to make player-centric decisions.

# Trends and the Future

## **AI drive game development**

Shared tools and best practices across games are essential to carry out efficient live operations. Finnish game developer studios are investigating opportunities for the utilization of machine learning and artificial intelligence. In the future, AI will be increasingly embedded to games and game development tools and at least part of the game content will be algorithmically generated.

## **FUTURE WAITS FOR ITSELF**

### **Foundations of new economy are built in game industry**

In addition to constantly creating new professions in developing games, the games industry is increasingly mapping out the possibilities of creating

jobs through playing games as well (player community content creators, game trainers etc.). Professional e-sports players and streamers are just the beginning.

### **No breakthrough in gaming for crypto, blockchain, VR and AR**

In the next 12 months XR technologies will develop further, but the main application area will be in B-to-B markets, not in games. Controllers are still a problem in XR over the next two or three years.

Cryptocurrencies have been extremely volatile and are to an increasing extent regulated.

Consequently, it is likely that cryptocurrencies, blockchain, VR and AR will not come close to mass consumer market adoption in the near future.



# The Industry Support and Networks



## Suomen Pelinkehittäjät ry

**Finnish** game developer studios association, Suomen Pelinkehittäjät ry, is an amalgamation of game developer studios. The main mission of the association is to act as a guardian of interests for game studios, and to advance the political and economic interests of the Finnish game industry on both national and global level. Suomen Pelinkehittäjät is committed to improving diversity and equality within the game industry and it works in close

co-operation with other industry networks. It has over 80 members including all of the major studios in Finland. Suomen Pelinkehittäjät ry is a founding member in EGDF, (European Games Developer Federation) which represents games studios based in 15 European countries.

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Picture: Kukouri | Pixel Worlds

# The Industry Support and Networks

## BUSINESS FINLAND

### Business Finland

#### **Ideas to success – supporting the Finnish game business growth**

Have a good idea, a promising team, and will to grow your game business globally? Business Finland can fund your company to get off to a fast start. Companies registered and operating in Finland can apply for our funding. We can be part of the growth when scaling your business, and our global expert network is at your service.

Funding can be used e.g. for testing the viability of the business concept, enabling the development and piloting

of new products, services and business models or rapid scaling to international markets.

#### **About Business Finland**

Business Finland is a public innovation funding and expert organization with an annual budget of 500 million euros. Since 1995 we have been working in close collaboration with the best Finnish game companies, research organizations and private investors. Our customers include companies like Small Giant Games, Colossal Order, Remedy, Seriously, Supercell and Rovio. Our funding for the Finnish game industry has been over 130 million euros. This has contributed to the growth of the game industry and availability of private investments.



# The Industry Support and Networks

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# The Industry Support and Networks



neogames  
HUB OF THE FINNISH GAME INDUSTRY

## Neogames Finland

Neogames Finland is a member-based non-profit game industry organization established in 2003. Neogames' mission is to accelerate, coordinate and support the development of the Finnish game ecosystem. Neogames' members represent all sectors of the game industry from business to education and research. Neogames is an impartial umbrella association and serves the shared interests of all industry players. As the hub of the industry, Neogames is the fastest channel to information and contacts within the Finnish game industry.

Our services include organizing trade missions to international events, coordination of cross-industry development projects, cooperation with ministries and the political sector, organizing domestic networking events, promoting media relations both domestically and internationally. Neogames Finland also produces various surveys and reports related to the Finnish games industry.

Neogames Finland is the representative of Suomen pelinkehittäjät ry in EGDF taking care of lobbying activities on the EU-level.

# The Industry Support and Networks

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# The Industry Support and Networks



**SGC** FINLAND  
SERIOUS GAMING CLUSTER

## Serious Gaming Cluster

**Serious Gaming Cluster** Finland is a non-profit organisation and a network of companies developing games and products with a primary purpose other than pure entertainment. Our members develop games and products for learning and education, health and wellbeing, gamification, simulation and the environment.

→ [www.seriousgamingcluster.fi](http://www.seriousgamingcluster.fi)



Picture: Big Ear Games | Play With Music

# The Industry Support and Networks



## IGDA FINLAND

**IGDA Finland ry** (association) is the local Finnish chapter of IGDA, the International Game Developers Association. IGDA is a non-profit professional society that is committed to advancing the careers and enhancing the lives of game developers by connecting members with their peers, promoting professional development, and advocating on issues that affect the developer community.

The mission of IGDA Finland is to promote the development of careers and professional skills of individual

game developers (and individuals of related industries) based in Finland, and to further develop the international recognition of the Finnish game developer community.

Everyone is welcome to join our events!

### → **CONTACT:**

**NATASHA TRYGG**

Chairwoman of the Board

[natasha.trygg@igda.fi](mailto:natasha.trygg@igda.fi)

→ [www.igda.fi](http://www.igda.fi)

# The Industry Support and Networks



FINNISH  
GAME JAM

## Finnish Game Jam

**Finnish Game Jam** is a non-profit organization founded to support game development as a hobby in Finland. The main objectives of FGJ are to run game jams, unify jam organizers and provide information on game development events. FGJ organizes multiple game jams and events, including the international Jam Jam Festival. The annual main event, participation in the Global Game Jam, gathers around 1000 organizers and jammers throughout the country. The annual Finnish Game Jam



Awards honors jam games, jammers and the supporters of the Finnish game jam scene.

➔ [www.finnishgamejam.com](http://www.finnishgamejam.com)

# The Industry Support and Networks



## FIVR

**FIVR** (Finnish Virtual Reality Association) promotes and advances the development of the XR (VR/AR/MR) sector in Finland.

The association arranges meetups, connects developers, artists and companies, conducts research and acts as an open information nexus of Finnish XR for all stakeholders. FIVR also provides free work spaces for early stage VR/AR teams in four cities and loans devices to tech and content producers.

In January 2019 FIVR and Metropolia University of Applied Sciences co-founded Helsinki XR Center, a Digital Innovation Hub of XR technologies, which also acts as the future HQ of FIVR's activities. It is one the largest innovation, development and startup centers in Europe dedicated to VR and AR technologies.

### → **CONTACT:**

#### **OLLI SINERMA**

FIVR / Director  
olli@fivr.fi

#### **SANTERI SUOMINEN**

HXRC / XR Curator and  
ecosystem relations  
santeri.suominen@helsinkixrcenter.com

→ [www.fivr.fi](http://www.fivr.fi)

→ [www.helsinkixrcenter.fi](http://www.helsinkixrcenter.fi)

# The Industry Support and Networks

## Women in Games Finland

**Women in Games Finland** is a non-profit organization aiming to improve diversity and inclusiveness within the Finnish gaming industry. WiGfi was spun from a network of more than a thousand women initially formed in 2011, and in 2019 the organization was founded to support the mission fully with a fresh board of 12 game industry experts.

WiGfi organizes workshops, seminars and networking events, including a monthly pre-IGDA assembly. WiGfi manages a list of diverse speakers, a mentorship program, and supports minorities in game research. WiGfi also promotes diversity and inclusiveness in games related public sphere.



Everyone is welcomed as a member!

→ **CONTACT:**

**TAINA MYÖHÄNEN**

President

[info@womeningames.fi](mailto:info@womeningames.fi)





Picture: Wargaming Helsinki | Concept art

# Education

**FINLAND** has an excellent base for raising new talent to enter the game industry. There is a wide range of game industry education in Finland on different levels from folk high schools to Universities. During the past few years, Finnish

games education has moved from strict curriculums to a more flexible and student-oriented approach, where first games are developed as early as possible, and where all the gaps between a formal and a non-formal educational

path will be bridged. In game research Finland is one of the forerunners of multidisciplinary game research and Finnish game researchers are highly valued globally. Also private game education has taken off in Finland. Coding school Hive will start in August 2019

The educational institutions listed below are members of Neogames Finland. All the educational institutions offering game education in Finland can be found on:

→ <https://www.neogames.fi/en/education-research/>



Picture: Tree Men games | Pako Forever

## EDUCATIONAL INSTITUTIONS

### Universities (EQF levels 7 & 8)

Aalto University:

<https://www.aalto.fi/aalto-media-lab>

University of Jyväskylä:

<https://www.jamk.fi/en/Education/>

University of Tampere:

<https://gameresearchlab.uta.fi/>

### Universities of Applied Sciences (EQF levels 6 & 7)

Centria University of Applied Sciences:

<https://web.centria.fi/applicants/bachelors-degrees/how-to-apply-to-bachelors>

Helsinki Metropolia University of Applied Sciences:

[https://www.metropolia.fi/en/Jyväskylä University of Applied Sciences:](https://www.metropolia.fi/en/Jyväskylä%20University%20of%20Applied%20Sciences/)

<https://www.jamk.fi/en/Education/>

Kajaani University of Applied Sciences:

<https://matkapelialalle.fi/>

Karelia University of Applied Sciences:

<http://www.karelia.fi/en>

North Karelia College, Outokumpu Pelitalo

<http://pelitalo.org/outokumpu>

Oulu University of Applied Sciences:

<http://www.oamk.fi/oulugamelab/>

Tampere University of Applied Sciences:

<https://www.tamk.fi>

Turku University of Applied Sciences:

<http://www.turkugamelab.fi/>

XAMK:

• Bachelor of Culture and Arts, Game Design:

<https://www.xamk.fi/koulutukset/bachelor-of-culture-and-arts-dp-in-game-design/>

• XAMK GameLab:

<https://360.xamk.fi/eng/kotkan-kampus/gamelab>

### Vocational Schools (EQF levels 4 & 5)

Kouvola Region Vocational College:

<http://www.ksao.fi/koulutustarjonta/?ala=2&l=1>

Suupohja Vocational College:

<http://www.saiedu.fi/fi>

Sataedu Vocational College:

<https://sataedu.fi/>

Stadin ammattiopisto

<http://mediastadi.fi/>

# Regional Support

## Regional Support

**THE ROLE** of regional clusters and hubs is essential in the Finnish game industry ecosystem since they provide services, funding and an operational environment to start-ups and smaller companies in their respective regions. As a result of this support, the game industry is able to thrive everywhere in Finland.



Picture: Rovio | Angry Birds Dream Blast

## Helsinki

**Helsinki is a world leader** in mobile game development and the home of the Finnish game industry with over 80 companies, 1 600 employees (28 % non-Finnish), and 1,7 billion EUR turnover (2018) of which 98,4 % comes from export. For decades, Helsinki has hosted a flourishing game culture that forms the basis for this success. The Helsinki game ecosystem is supported by Maria01, a campus for ambitious start-ups, and Games Factory, an embassy and showroom for the games industry. Newco Helsinki provides start-up services from ideation to the validation phase. The main contact person is Henrik Keinonen/Newco.

## Helsinki

### → CONTACT:

[www.newcohelsinki.fi/en](http://www.newcohelsinki.fi/en)

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[www.gamesfactory.fi](http://www.gamesfactory.fi)

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**VOITTO KANGAS**

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# Regional Support

## Joensuu

**Business Joensuu** helps to expertly guide game companies through the challenging early years onto a path of growth. Game Business ideas are developed in the Joensuu Science Park Virtual Reality Lab Environment with the help of Business Joensuu incubator and University of Eastern Finland. The Virtual Reality Lab is a 200 sqm open studio located on the best premises Joensuu Science Park has to offer.

➔ **CONTACT:**

**VEIKKO MIETTINEN**

Development Manager,  
New Business and  
Internationalisation Services

+358 50 5020383

veikko.miettinen@businessjoensuu.fi

➔ *[www.businessjoensuu.fi](http://www.businessjoensuu.fi)*



UNIVERSITY OF  
EASTERN FINLAND

**BUSINESS  
JOENSUU**

## Jyväskylä

**Peliosuuskunta Expa** (Expa Game Business Co-operative) / IGDA Finland Jyväskylä Hub is one of the most active game industry hubs in Finland. Business Jyväskylä by City of Jyväskylä brings together Jyväskylä success stories, the city's top sectors and development projects. Business Jyväskylä provides information about services and helps game studios expand their business operations.

University of Jyväskylä co-operates with University of Tampere and the University of Turku in the Centre of Excellence program in Game Culture. The e-sport scene is also active in the Jyväskylä region.

The next chapter in the story will be the Digi & Game Center bringing the whole industry under the same roof.

→ <https://expa.fi/game-center>

## BUSINESS JYVÄSKYLÄ

JYVÄSKYLÄ GAME INDUSTRY HUB

EXPA



### → CONTACT:

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→ [www.expafi](http://www.expafi)

# Regional Support

## Kajaani

**Located** 600 km northeast from Helsinki, Kajaani has Finland's second largest local pool of students and professionals of the game industry. Around the undeniably best game education centre in Finland has risen a lively and constantly growing start-up concentration - KAVIO Cluster. As proof of the talent pool, prizes like BAFTA, Nordic Indie Sensation and Finnish Game Award have already found their way to Kajaani.



***KAINUUN ETU***



**KAVIO**  
C L U S T E R

→ **CONTACT:**

timo.ylikangas@kainuunetu.fi  
+358 445 514 614



## Oulu

**Oulu is the** center of the northern game industry with 20+ companies, and almost €30 million turnover with 90 % export. The unique gaming ecosystem in Oulu is creating the conditions for predictable and repeatable success from first demo to global market. The key players are neatly settled at the brand new Game Campus Oulu in the city center. The campus is led by Fingersoft, the biggest company in the area. Oulu Game Lab, an innovative education and incubation program is another important occupant.

**OULU** | *BusinessOulu*

→ **CONTACT:**

Heikki.tunkkari@businessoulu.com  
+358 44 703 1399

→ [www.businessoulu.com](http://www.businessoulu.com)

# Regional Support

## South-East Finland

**The Playa Game Industry Hub** is a community of game industry companies in the region of South-East Finland. The hub is centered in Kotka, nestled between the metropolitan areas of Helsinki and St. Petersburg. The community consists of game developers, suppliers, educational institutes and other stakeholders, all together +15 companies and over 100 employees in Kotka, Kouvola and Lappeenranta. Playa supports the local game companies - especially start-ups - with their business development, financing activities and trade missions.



### → **CONTACT:**

Teemu.Saarelainen@cursor.fi  
+358 40 190 2523

→ [www.playahub.com](http://www.playahub.com)

## Tampere

**Tampere region** hosts the second largest game cluster in Finland with almost 30 companies employing over 200 game industry professionals.

Within recent years the ever tightening collaboration between game companies, educational institutes, regional start-up hubs, associations, Business Tampere and City of Tampere has ensured active and endorsing place to grow for game companies at all stages of development.

Game research has always been one of the strengths of the Tampere region. Game Research Lab at Tampere University is one of the most well know game research units in Europe.

**BUSINESS  
TAMPERE**

**TAMPERE.**  
**FINLAND**

→ **CONTACT:**

**JANNE KAAKINEN**

janne.kaakinen@tampere.fi  
+358 40 707 1658

# Regional Support

## Turku

**Turku** is the hometown of 20 game companies, such as Rival Games, TicBits, Tribeflame, Snowfall and MiTale. In Turku there are two higher education institutes delivering a programming-focused degree in game development. The education produces 50–60 graduates per year.

Game research in Turku Game Lab is active and the passionate game developers community, supported by Hive - Turku Game Hub and IGDA Turku chapter, is a good breeding ground for game industry. Turku Science Park offers support to the whole game industry ecosystem in the area.



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→ [www.turkubusinessregion.com](http://www.turkubusinessregion.com)



Picture: EA Finland/Tracktwenty | SimCity BuildIt

# Studio Profiles

**Studios listed here are members of Finnish Game Developers Association (Suomen Pelinkehittäjät ry)**

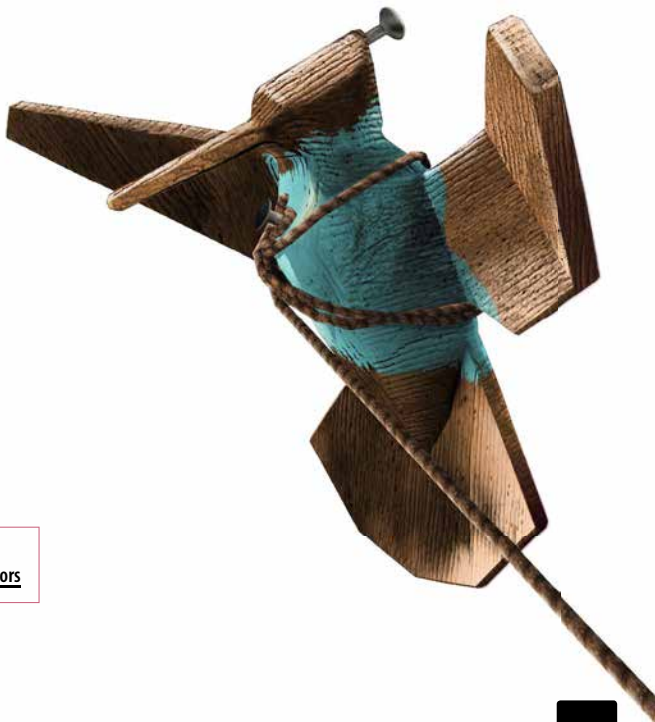
- |                           |                                |                                   |                              |
|---------------------------|--------------------------------|-----------------------------------|------------------------------|
| ▶ 10tons                  | ▶ Hologram Monster             | ▶ Next Games                      | ▶ Small Giant Games          |
| ▶ 3rdEye Studios          | ▶ Housemarque                  | ▶ Nitro Games                     | ▶ Supercell                  |
| ▶ Action Squad Studios    | ▶ Hyperkani                    | ▶ Pikkukala                       | ▶ Superplus Games            |
| ▶ Aniway                  | ▶ Iceflake Studios             | ▶ Platonic Partnership            | ▶ Team Jolly Roger           |
| ▶ Armada Interactive      | ▶ Kajak Games                  | ▶ PlayStack                       | ▶ Tic Bits                   |
| ▶ Big Ear Games           | ▶ Kopla Games                  | ▶ Psyon Games                     | ▶ Traplight                  |
| ▶ Bugbear Entertainment   | ▶ Koukoi Games                 | ▶ Quicksave                       | ▶ Tree Men Games             |
| ▶ Colossal Order          | ▶ Kukouri Mobile Entertainment | ▶ Random Potion                   | ▶ Tribeflame                 |
| ▶ Cornfox & Brothers      | ▶ Kuuasema                     | ▶ Red Stage Entertainment         | ▶ Two Men and a Dog          |
| ▶ Critical Force          | ▶ Kyy Games                    | ▶ Remedy Entertainment            | ▶ Ubisoft RedLynx            |
| ▶ Dazzle Rocks            | ▶ Lightneer                    | ▶ Rival Games                     | ▶ Virtual Air Guitar Company |
| ▶ Dodreams                | ▶ LudoCraft                    | ▶ Rovio Entertainment             | ▶ Wargaming Helsinki         |
| ▶ Electronic Arts Finland | ▶ Mantisbite                   | ▶ Rusto Games                     | ▶ Yousician                  |
| ▶ tracktwenty             | ▶ Ministry of Games            | ▶ Second Order                    | ▶ Zaibatsu Interactive       |
| ▶ Fingersoft              | ▶ MiTale                       | ▶ Seepia Games                    | ▶ Redhill Games              |
| ▶ Flatfish                | ▶ Moido Games                  | ▶ Seriously Digital Entertainment | ▶ LunarByte                  |
| ▶ Frogmind                | ▶ MotionVolt Games             | ▶ Shipyard Games                  | ▶ Reworks                    |
| ▶ Frozenbyte              | ▶ Motorious Entertainment      |                                   |                              |
| ▶ Futureplay              |                                |                                   |                              |
| ▶ Greener Grass           |                                |                                   |                              |

***Members without studio profile  
in the study:***

- ▶ Everywear Games
- ▶ Grand Cru
- ▶ Iron Sight
- ▶ Logicnap
- ▶ Mountain Sheep
- ▶ Musopia
- ▶ Reforged Studios
- ▶ Secret Exit
- ▶ Sieidi
- ▶ Star Arcade
- ▶ Theory Interactive
- ▶ Virtual Frontiers

→ More studios can be found on  
[www.neogames.fi/en/industry-info/operators](http://www.neogames.fi/en/industry-info/operators)

Picture: Secret Exit | Zen Bound 2



# 10tons

## 10tons

- 11 employees
- Founded in 2003
- Based in Tampere
- Committed to delivering top-quality gaming entertainment for PC, mobile and console
- Focus on self-publishing and original IP development
- Efficient in-house multiplatform tech tuned for productivity and portability
- Creators of Crimsonland, Tesla vs Lovecraft, JYDGE and Neon Chrome
- Working on new original multiplatform IPs
- [www.10tons.com](http://www.10tons.com)







## 3rd Eye studios

- Founded in 2016
- Develops atmospheric games and cutting edge technology
- Downward Spiral: Prologue was released in 2017 for SteamVR
- Downward Spiral: Horus Station was released in 2018 for PC, SteamVR, PS4 and PSVR
- [www.3rdeyestudios.fi](http://www.3rdeyestudios.fi)



## Action Squad Studios

- Action Squad Studios is based on Espoo and currently employs 10 persons in multiple locations around Finland
- We are currently working on our first game, Iron Danger, that is due to be released in 2019
- The company is built on top of shared passion to build unique and memorable worlds and stories
- [www.actionsquadstudios.com](http://www.actionsquadstudios.com)



# A Full Service Game Development Studio

Game design / UI Design / Management / Programming / Art / Animation / 3D Modeling / AR & VR

**DO YOU HAVE  
A GAME THAT NEEDS  
TO GET DONE?**

**Become one of our satisfied clients!**



**ANIWAY**

## Aniway

- Founded in 1999
- Work for hire & own IP
- Entertainment, Serious/Applied, Advertising and Money games and Playable Ads
- Single, Multi and Massively Multiplaying
- Browser, Chat, Mobile, AR, PC/Mac
- HTML5/JavaScript, Unity & Tiny mode
- Clients incl. Unity Technologies Finland, Veikkaus/RAY, GrandCru
- 160+ completed game projects
- [www.aniway.com](http://www.aniway.com)



## Armada Interactive

- Armada Interactive is soft-launching its second game, a real-time PvP match 3 battler. After retiring its first game, Quantum Siege, the company has shifted its focus from AAA to accessible mid-core titles based on proven mechanics, but re-adapted for real time PvP experiences.
- Company founded: 2015
- Number of employees: 12
- Number of nationalities: 6
- [www.armadainteractive.com](http://www.armadainteractive.com)





## Big Ear Games

- Founded 2017 in Helsinki
- Big Ear Games focus on creative and social mobile music games
- To music lovers - making music was never as fun and easy
- To the music industry - a unique way to connect artists and their fan base
- Big Ear is about learning How Music Works by building up popular songs in musical puzzles and then creating tunes and sharing them
- Prizes in China Joy and G-STARs (2018)
- Powered by Native Instruments
- [www.bigeargames.com](http://www.bigeargames.com)





## Bugbear Entertainment

- Founded in 2000, a THQ Nordic studio based in Helsinki
- THQN has 15 studios and engages 2000 people worldwide
- Specialized in creating leading action driving experiences on PC and consoles
- Successful track record of award-winning games - Wreckfest and Flatout
- Success is built on cutting-edge, proprietary technology
- Highly passionate team who loves creating all kind of driving games
- [www.bugbeargames.com](http://www.bugbeargames.com)





## Colossal Order

- Company founded in 2009
- 24 employees
- Focus on simulation games to PC/Mac/Linux platforms
- Developer of city builder Cities: Skylines and mass transit simulators Cities in Motion and its sequel Cities in Motion 2
- Cities: Skylines was released to a commercial and critical success in 2015 and the team is working on expansions to the game
- [www.colossalorder.fi](http://www.colossalorder.fi)



## Cornfox & Brothers

- Founded in 2010 to focus on premium games
- Completely self-funded six man team
- Death Rally (iOS, Android, PC), over 20M downloads
- Oceanhorn: Monster of Uncharted Seas for mobile as well as PC, PS4, Xbox One and Nintendo Switch has sold more than 1.5 million copies worldwide
- Now working on Oceanhorn 2: Knights of the Lost Realm, a cutting-edge adventure game developed with Unreal Engine 4
- [www.cornfox.com](http://www.cornfox.com)







## Critical Force

- Company founded in 2012, HQ is based in Kajaani
- 54 employees, 10 different nationalities
- Winner of Kasvu Open 2015 and Finnish Game Developer of the Year 2016
- USD 4.5 million funding received
- Developing hardcore games for mobile platforms
- Current main title Critical Ops has already over 60M downloads
- Aiming to become the premier studio for mobile esports FPS titles
- [www.criticalforce.fi](http://www.criticalforce.fi)
- [www.criticalopsgame.com](http://www.criticalopsgame.com)



## Dazzle Rocks

- Founded in 2015
- Based in Helsinki
- 12 people and 6 nationalities
- Creating approachable MMO games for mobile
- East/West themes, social and real-time gameplay
- [www.dazzle.rocks](http://www.dazzle.rocks)





dodreams

## Dodreams

- Founded in 2008
- Creators of the Drive Ahead! family of games, with over 100 000 000 downloads
- Committed to crafting mobile games that are fun to play, share, and watch
- The Drive Ahead! brand has become a cornerstone for local and online multiplayer racing, with a promise of fun, challenge and quality
- Focused on competitive, skill-based gaming in action, racing, and sports genres
- Self-publishing games with a vibrant and engaged gamer community
- [www.dodreams.com](http://www.dodreams.com)



TRACK  
T W E N T Y

## Electronic Arts Finland tracktwenty

- ➔ An Electronic Arts studio, founded in 2012
- ➔ Based in the heart of Helsinki
- ➔ Focuses on F2P simulation/ builder games on mobile
- ➔ 50+ employees, 16+ nationalities
- ➔ First title SimCity BuildIt was released in December 2014
- ➔ New project in development
- ➔ [www.ea.com/studios/tracktwenty](http://www.ea.com/studios/tracktwenty)





# FINGER SOFT

## Fingersoft

- Founded in 2012
- 45+ employees
- 2017 revenue EUR 29.5M
- Known for Hill Climb Racing franchise which has over 1 Billion downloads to date
- Headquarter in Oulu
- New office opened in Helsinki (2018)
- [www.fingersoft.net](http://www.fingersoft.net)





## Flatfish

- Founded in 2014
- Based in Turku
- 8 self-driven employees
- Focus in work for hire
- Flat culture
- Developing Bruce Cannon, Let it bleed & tooling
- [www.flatfishgames.com](http://www.flatfishgames.com)





# FROGMIND

## Frogmind

- Founded in 2012
- 21 employees, 3 seasoned teams
- Over 90 million downloads for BADLAND, BADLAND 2 & Badland Brawl
- Apple iPad game of the year 2013
- Nordic Games - Mobile Game of the Year 2016
- Google Play Best of 2018
- 51% owned by Supercell
- Two new games in development
- [www.frogmind.com](http://www.frogmind.com)



# FROZENBYTE

## Frozenbyte

- Founded in 2001, 130+ employees
- Trine series has sold over 10M copies
- Others: Nine Parchments, Has-Been Heroes, Shadowgrounds series
- PC, Xbox One, PS4, Nintendo Switch
- Working on Trine 4 and three unannounced games
- Own technology, owns all IPs, most titles self-funded and self-published, studio ownership employees/founders
- [www.frozenbyte.com](http://www.frozenbyte.com)







## Futureplay

- 33 people collaborating to create groundbreaking mobile games
- Flat organisation.  
One simple rule: No bullshit
- Over \$12m revenue in 2018 and more than 1m DAU
- 5 games since founding in 2015 - the 'Idle Empire' portfolio and their latest hit Battlelands Royale, developed from concept to launch in just six months in 2018
- The Battle Royale title was named one of Google Play's Most Innovative Games 2018 and a winner of 2018's Tabby Mobile Game Awards
- [www.futureplaygames.com](http://www.futureplaygames.com)



## Greener Grass

- Company founded in 2015 and based in Tampere
- Team of 20 experienced game developers
- Self published title Dice Hunter: Quest of the Dicemancer has over 3 million downloads
- Healthy mix of work for hire and self publishing
- [www.greengrass.com](http://www.greengrass.com)



# BABA IS YOU





## Hologram Monster

- Founded in 2017
- Based in Tampere with 5 employees
- Focus on adventure games for PC and console
- Currently working on a 3D platformer game known as Project: Longtail
- Experience on several work-for-hire assignments
- [www.hologram-monster.com](http://www.hologram-monster.com)





## Housemarque

- Company Founded in 1995 and based in Helsinki, Finland
- Unannounced AAA project in development
- Currently working on Stormdivers (2019) Currently In Beta
- 70+ Employees
- Latest Releases: Nex Machina and Matterfall
- Company Motto "Gameplay is King"
- [www.housemarque.com](http://www.housemarque.com)



## Hyperkani

- Company founded in 2009
- Based in Tampere
- 11 employees
- Focus on mobile games
- Over 50 million downloads for Bomber Friends
- Over 10 million downloads for Stunt Car Challenge series
- New title coming in 2019
- [www.hyperkani.com](http://www.hyperkani.com)







## Iceflake Studios

- Company founded in 2007
- Team of 18 experienced developers
- Platforms: PC, Xbox One, PS4, iOS, Android, WP and VR
- Over 20 million players
- Latest release: Ice Lakes (PC, iOS, Android, VR) with 90% positive reviews on Steam
- Other notable games: Race Arcade (PC, Xbox One, PS4, Switch), Premium Pool (PC, Xbox One, PS4, Switch, Mobile)
- Working on an unannounced title for PC and consoles
- [www.iceflake.com](http://www.iceflake.com)



## Kajak Games

- Cooperative founded in 2010
- Ran by game development students
- Over 300 members
- Main mission of Kajak Games is to publish games created by the students of Kajaani University of Applied Sciences, while also helping them with quality assurance, testing and marketing. Additionally, they host multiple types of events, like game jams, while also offering subcontracting services related to game development
- [www.kajakgames.com](http://www.kajakgames.com)







## Kopla Games

- Kopla is an adventurous mobile games studio on a mission to introduce action RPGs to everyone
- Founded in 2015 and based in Tampere with 14 employees
- First title Nonstop Knight was a big success which led to acquisition of Kopla by Flaregames in 2016
- New game Nonstop Knight 2 is launching in 2019 and aims to set new benchmark for action RPG on mobile for fans of Diablo
- **[www.koplagames.com](http://www.koplagames.com)**



## Koukoi Games

- Company founded in 2015
- Koukoi Games is a mobile game company operating from Oulu, Finland
- The studio focuses on both original & licensed entertainment IP mobile games with exceptional production values and truly memorable gaming experiences
- [www.koukoi.com](http://www.koukoi.com)





## Kukouri Mobile Entertainment

- Multi-award winning indie developer
- Tiny Troopers series of games have over 35 million downloads and are available on all platforms from mobile to PC and consoles
- Pixel Worlds is awarded social MMO sandbox game with deep integration to social media
- [www.kukouri.com](http://www.kukouri.com)

## Kuuasema

- Company founded in 2004
- 30 employees
- 100+ game projects completed
- Platforms: Mobile, PC, Web
- Kuuasema is a creative and agile development studio working with publishers like Red Bull, Rovio, Disney, Ubisoft and Microsoft. We are set to outdo ourselves every day to create value for our players and publisher partners alike. We do co-production and work-for-hire projects
- [www.kuuasema.com](http://www.kuuasema.com)





## Kyy Games

- Founded in 2009
- Based in Tampere with 12 employees
- Focus on card, board and role-playing games
- Original titles include Cabals: Magic & Battle Cards, Trouserheart, Rimelands: Hammer of Thor and Legends of Elendria: The Frozen Maiden
- Work-for-hire titles include Knights of Pen & Paper 2 and Trulon: The Shadow Engine
- [www.kyygames.com](http://www.kyygames.com)





# LIGHTNEER

## Lightneer

- Creating hyper casual mobile games
- World-class team of 20+ with 7 nationalities
- Unique and scientific GameLab game development process
- Game concept to market test in a handful of weeks
- Tested 10 games in 2018, 50 games in 2019
- Funded by GSV Acceleration, IPR. VC, Brighteye VC, Reach Capital, Founders Factory and TEKES
- Founded in 2015
- [www.lightneer.com](http://www.lightneer.com)





## LudoCraft

- Company Founded: 2006
- CEO: Tony Manninen
- Background: game research unit (99-09) at University of Oulu
- Speciality: complex cases into game solutions
- Mobile, PC/Mac, Web, AR, VR
- 200+ delivered projects
- Customers include: Smithsonian Institute, Boeing, F-Secure, Fingersoft, Veikkaus, Sanoma Kids
- **[www.ludocraft.com](http://www.ludocraft.com)**



## Mantisbite

- Founded in 2015
- VR, PC, Console, Mobile
- Focus on mid-core gaming experiences with emphasis on humor and polished gameplay
- First game Island Delta released in 2016 and was Editors Choice on App Store and Google Play
- Currently developing a VR shooter game Bandit Point, coming out in 2019
- [www.mantisbite.com](http://www.mantisbite.com)







## Ministry of Games

- ➔ F2P mobile developer
- ➔ Founded in 2014
- ➔ 11 employees
- ➔ Currently working on Trade town, a medieval city building game for mobile
- ➔ Proprietary engine technology, focus on next generation super-social games
- ➔ Backed by tier-1 venture funds & industry veterans
- ➔ **[www.ministryofgames.io](http://www.ministryofgames.io)**



## MiTale

- MiTale is a game development company from Finland that sees future of gaming in tailored experiences for each individual player! We provide immersive narrative-driven experiences through latest available technologies. Our specialty is gamification, cross-platform development and interactive storytelling solutions
- [www.mitale.fi](http://www.mitale.fi)

We bring YOUR tales  
into REALITY





**MOIDO**

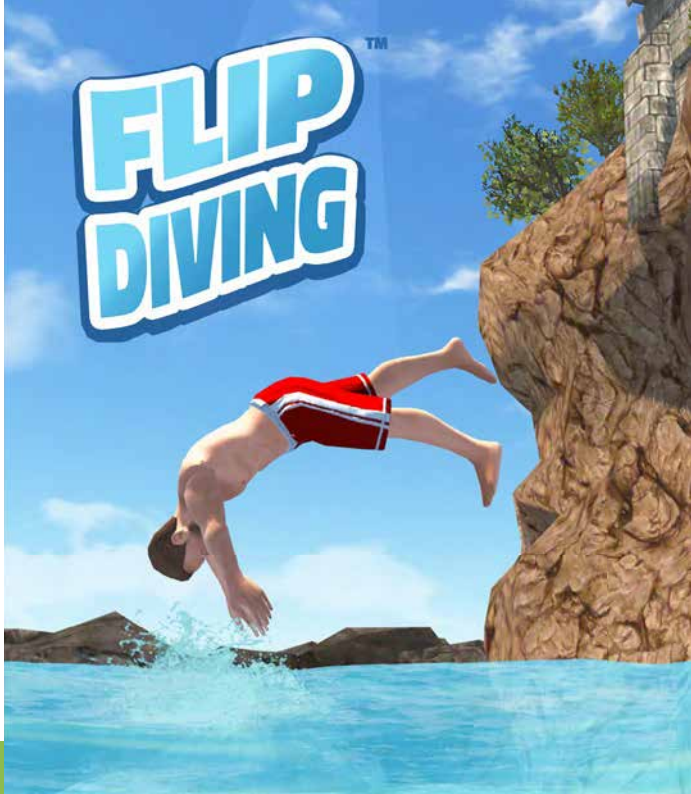
## Moido Games

- Founded in 2007
- Based in Tampere with 8 employees
- iOS, Android and browser based games
- Work-for-hire & own IP development
- Latest iOS/Android release Warsnake out in 2019
- Delivered over 50 online and mobile releases for our clients
- [www.moidogames.com](http://www.moidogames.com)



## MotionVolt Games

- MotionVolt Games was founded in 2015
- Focused on creating original physics based F2P - mobile games
- First mobile game, Flip Diving, was released in August 2016. Game reached the top #1 of the download lists in over 50 countries, including US & UK, and largest european countries
- Second mobile game, Flip Master, was released in September 2017. Game reached the top #1 of the download lists in over 40 countries, including US & UK
- Based in Helsinki and employs three persons
- [www.motionvolt.com](http://www.motionvolt.com)





**MOTORIOUS  
ENTERTAINMENT**

## Motorious Entertainment

➔ Founded in 2015

➔ Based in Helsinki

➔ 12 developers

➔ 2M€ in funding

Working on:

➔ Jane Austen's Puzzle Stories, f2p casualized midcore mobile title for adult women combining match3, storyline and dress up

➔ Clash of Race Teams, f2p midcore mobile game for adult males, combining base building and racing

➔ Top Gear Racing Challenge, f2p mobile game combining physics-based driving with BBC's Top Gear (official global license)

➔ [www.motorious.fi](http://www.motorious.fi)



## Next Games

- Founded in 2013. The first publicly listed mobile game developer and publisher in Finland (in March 2017)
- Team of over 140 industry professionals from 20 different nationalities
- We define the way franchise entertainment transforms into highly engaging mobile games played together with friends and fellow fans
- Two live games based on AMC's hit tv show: *The Walking Dead: No Man's Land* (2015) and *The Walking Dead: Our World* (2018)
- Latest game, *The Walking Dead: Our World*, is a unique location-based AR game
- [www.nextgames.com](http://www.nextgames.com)





## Nitro Games

- Founded in 2007
- 55 employees
- Based in Kotka & Helsinki
- Listed in Nasdaq First North Stockholm
- Latest releases: Heroes of Warland (iOS & Android 2018), Medals of War (iOS & Android 2017–2018)
- F2P mobile games
- Experts in competitive multiplayer games
- Focus in mid-core segment
- [www.nitrogames.com](http://www.nitrogames.com)

# Pikkukala

## Pikkukala

- Founded in 2012
- Family friendly games based on original animation properties
- Offices in Helsinki and Barcelona
- "Saari TV" (2013, iOS)
- "Saari Pairs" puzzle game (2014, iOS & Android)
- "Song of the stars" (2016, iOS & Android)
- "Saari Space Adventure (2017, iOS & Android)
- Currently developing "Royals Next Door, the game" and "Song of the Stars" (tvOS)
- [www.pikkukala.com](http://www.pikkukala.com)







## Platonic Partnership

- We at Platonic Partnership take pride in developing world-class story games and VR/AR -experiences
- Our goal is to be the number one narrative-driven game studio in the world
- Founded in 2017, we are a vigorous three person strong game studio from Vaasa
- Award-winning Lydia was published in 2017
- Next game King of Peasants coming in 2019
- People call us digital magicians
- [www.platonicpartnership.com](http://www.platonicpartnership.com)



PLAYSTACK  
HELSINKI

## PlayStack

- PlayStack Helsinki is the first publisher and funder to operate from Helsinki covering game discovery for the Nordics, Baltics and Russia, with headquarters in London
- PlayStack Helsinki is also a rapidly growing development studio situated right in the heart of Helsinki
- [www.playstack.com](http://www.playstack.com)





## Psyon Games

- Psyon Games is here to redefine the whole concept of applied games and to change the world through easily accessible and engaging science entertainment. To nurture understanding with mind-blowing experiences
- We are building a unique partnership model with the health industry and working to spread vaccine awareness with the world-leading vaccine producer GlaxoSmithKline
- Our games combine the joy of entertainment with the beauty of science
- **[www.psyongames.com](http://www.psyongames.com)**



## Quicksave Interactive

- Company's mission is to define chat gaming
- Deep and engaging titles for messaging applications
- Proprietary HTML5 technology for developing and running chat games
- Partnerships to co-create HTML5 chat games
- Experienced founders: made an exit from previous game startup to a chat app in 2015
- Founded 2017
- Team of 8 people
- [www.quicksave.fi](http://www.quicksave.fi)





**Random Potion**  
GUIDES TO TELL STORIES ABOUT

## Random Potion

- ➔ Random Potion is a game company founded in 2017 by a team of industry veterans. It is specialised in roleplaying games with a strong emphasis on interaction between players and player-driven storytelling
- ➔ The company is currently working on their first game (working title Project Scoundrel), which is a co-operative multiplayer roleplaying game with procedurally generated levels and a focus on narrative interaction between the players
- ➔ [www.randompotion.com](http://www.randompotion.com)



## Red Stage Entertainment

- Founded in 2017
- Focus in storytelling
- Team of 10, 6 different nationalities
- Working on an adventure game inspired by the indigenous S-mi mythology
- Surviving skills of a small arctic weasel
- No doubt the most likable team in Finland (source: mom)
- Our mission: To seek undiscovered stories, turn them into games, spread them all over the world and ultimately make people (and ourselves) happier
- [www.redstage.fi](http://www.redstage.fi)







## Remedy Entertainment

- Creator of ground-breaking action games with memorable stories
- Founded in 1995. Based in Espoo, Finland
- 220+ employees with over 25 nationalities
- Made history with Max Payne and Alan Wake
- Breaking new ground with multiple projects including Control, Crossfire HD and Vanguard
- [www.remedygames.com](http://www.remedygames.com)



**RIVAL GAMES**

## Rival Games

- Rival Games focuses on redefining interactive storytelling experiences for mature audiences
- Company founded in 2013
- Their debut title *The Detail* is a realistic neo-noir crime series of homicide and drug trafficking
- *Thief of Thieves: Season One* introduced Robert Kirkman's comic of heist to gamers
- *Alien: Blackout* brought the terrors of the classic sci-fi horror franchise to mobile devices
- [www.rival-games.com](http://www.rival-games.com)







## Rovio Entertainment

- ➔ Rovio Entertainment Corporation, the creator of the international phenomenon Angry Birds, is a global, industry-changing entertainment company headquartered in Espoo, Finland
- ➔ Rovio is on a mission to provide world-class entertainment with their game development and brand licensing businesses
- ➔ The sequel to the international blockbuster The Angry Birds Movie is on its way to theaters in August 2019
- ➔ [www.rovio.com](http://www.rovio.com)



## Rusto Games

- Founded in 2011, based in Kajaani
- Small team focusing on fun multiplayer experiences across platforms
- Currently supporting & developing Drunk-Fu: Wasted Masters
- Always available for interesting work for hire projects
- [www.rustogames.com](http://www.rustogames.com)





# SECOND ORDER

## Second Order

- Founder in October 2015
- Independent game studio based in Helsinki
- Main focus on PC and console games but exploring new opportunities on other platforms as well
- First game Claybook developed and self-published on 31st of August 2018 on Steam, Xbox, and PlayStation 4. More platforms coming 2019
- [www.secondorder.com](http://www.secondorder.com)



## Seepia Games

- Regarded by clients as the 'go to partner' for rapid delivery of high quality projects
- Founded in 2012
- 10 Employees
- Seepia Games is a flexible studio with extensive experience in Web and Mobile development. Our compact and efficient team specialises in top quality playable ads, Google Play Instants and instant games with a focus on HTML5 and Unity platforms
- [www.seepiagames.com](http://www.seepiagames.com)





# Seriously

## Seriously Digital Entertainment

- ➔ Seriously was founded in 2013 and is on a mission to create phenomenal entertainment, storytelling and brands
- ➔ 80+ Employees (60+ in Helsinki and 20+ in Los Angeles)
- ➔ Launched the Best Fiends IP in 2014
- ➔ IP has generated 90M+ downloads and \$180M+ revenue
- ➔ 5 animation shorts released, total 50M+ views on Youtube
- ➔ [www.seriously.com](http://www.seriously.com)



## Shipyard Games

- Building the future of location-based gaming
- Founded in 2017 in Helsinki, Finland
- 10 employees with location-based gaming pioneers and many nationalities
- Funded by Supercell with \$2.9 million
- First location-based F2P title coming out soon on iOS
- [www.shipyard.games](http://www.shipyard.games)







## Small Giant Games

- One of the fastest growing mobile game studios in the world
- Empires & Puzzles has reached Top 10 Grossing positions in 110 countries and was chosen by Google Play as the Breakthrough Hit of 2018
- 80% of Small Giant was acquired by Zynga in December 2018 at \$700M valuation
- We are currently team of 48 and are looking for new talented team members
- [www.smallgiantgames.com](http://www.smallgiantgames.com)

# SUP ERC ELL

## Supercell

- HQ Helsinki, Finland
- Offices in San Francisco, Seoul, Tokyo and Shanghai
- Founded 2010
- 290 employees, 30+ nationalities
- Game released: Hay Day 2012, Clash of Clans 2012, Boom Beach 2014, Clash Royale 2016, Brawl Stars 2018
- Our goal is to make the best games – games that are played by as many people as possible, enjoyed for years and remembered forever
- [www.supercell.com](http://www.supercell.com)







## Superplus Games

- Founded in 2015
- Based in Helsinki with 10 people
- Profitable company
- Core competence: F2P mobile PvP
- Titles: Hills of Steel 1, 20M downloads and Google Play Editors Choice
- Hills of Steel 2, soft launching Q1/2019
- Unannounced title, soft launching Q3/2019
- [www.superplusgames.com](http://www.superplusgames.com)



## Team Jolly Roger

- Founded in 2013, based in Kajaani
- PC, Consoles & Mobile
- Also does work for hire
- Creators of Worbtal (PC & Consoles in 2019)
- Creators of Interplanetary (Steam / PC, Team17 label since 2016)
- Publishers of Mushroom Crusher Extreme (Steam / PC)
- Work for hire projects include the driving school simulator Drive! and partial development of Carmageddon Crashers
- [www.teamjollyroger.com](http://www.teamjollyroger.com)





## TicBits

- ➔ Founded in 2010, based in Turku
- ➔ Employees
- ➔ Acquired by Hong Kong based Animoca Brands in 2016
- ➔ Focused on creating tower defense games, the most recent launch being Crazy Defense Heroes
- ➔ [www.ticbits.com](http://www.ticbits.com)



## Traplight

- Founded in 2010 by Sami Kalliokoski, Jari Paananen and Riku Rakkola
- 28 strong team based in Tampere, Finland
- Backed up by renown investors such as Initial Capital, Korea Investment Partners, Sunstone Capital and Finnvera Venture Capital
- Traplight's Big Bang Racing was chosen as Best of 2016 in AppStore
- Currently preparing to soft launch their next game Battle Legion during 2019
- [www.traplightgames.com](http://www.traplightgames.com)





## Tree Men games

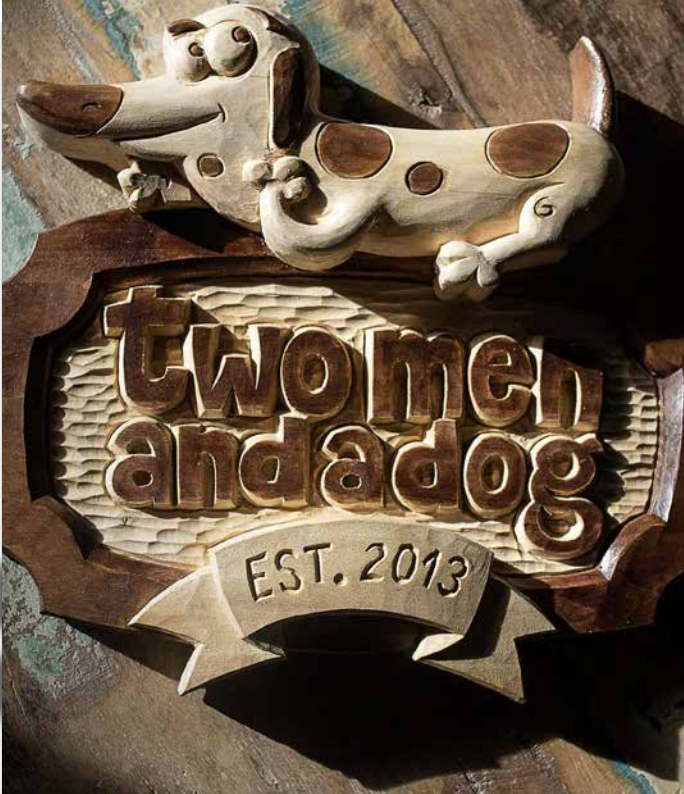
- Company Founded 2013, 3 employees, focuses on fast paced arcade games
- Known for Pako series, games this far released are Pako - Car Chase Simulator, Pako 2 and Pako Forever. They have all been released on numerous platforms, but currently TMG is focusing on mobile platforms
- Tree Men Games is working on additional content for the successful Pako Forever and completely new game concepts, with one planned to be revealed 2019
- [www.treemengames.com](http://www.treemengames.com)

## Tribeflame

- Founded in 2009
- Based in Turku
- 8 employees
- Biggest hit: Benji Bananas with >100M downloads
- Acquired by Hong Kong based Animoca Brands in January 2018
- Currently working on mobile strategy games
- [www.tribeflame.com](http://www.tribeflame.com)







# two men and a dog

## Two Men and a Dog

- Founded in 2013
- Free-to-play mobile game company based in Helsinki
- The original creators of Zombie Catchers
- Sold the Zombie Catchers IP to DECA Games in October 2018
- Working on brand new games
- [www.twomenandadog.fi](http://www.twomenandadog.fi)



UBISOFT  
**REDLYNX**

## Ubisoft RedLynx

- Founded in 2000, a Ubisoft studio since 2011
- 145 employees of 24 nationalities with 2 dogs and 1 ManBearPig
- Over 100 games developed on all major gaming platforms
- Best known for the award winning physics-based racing series Trials, with over 15 million players on PS4, Xbox One, Xbox 360 and PC, and over 70 million downloads on mobile
- South Park: Phone Destroyer, released on mobile in 2017
- Trials Rising, the most ambitious title in the series to date, released in 2019
- [www.redlynx.com](http://www.redlynx.com)







## Virtual Air Guitar Company

- Unique motion games and apps since 2006
- 14 games on Xbox One, Switch, Xbox 360, PS3, PC
- Motion, camera and VR content and consultation
- [www.virtualairguitar.com](http://www.virtualairguitar.com)



**WARGAMING  
MOBILE**

## Wargaming Helsinki

- Founded in 2012 as Boomlagoon
- Acquired by Wargaming in 2016
- Grown to 30+ talented game developers from 15 nationalities
- A full fleshed mobile game development studio working under the Wargaming umbrella
- Set out to develop defined mid-core experiences
- Working on unannounced title to be released in 2019! (There might be tanks)
- [www.wgmobile.net](http://www.wgmobile.net)





## Yousician

- Founded in 2010
- 15M monthly active users
- 5 instruments: guitar, ukulele, bass, piano, and voice!
- iOS, Android and desktop
- Profitable since 2014
- Two official offices in Helsinki & NYC with users all around the world!
- [company.yousician.com](https://company.yousician.com)



## Zaibatsu Interactive

- One of the biggest game studios in Central Finland
- Based in Jyväskylä
- Founded in 2014
- 13 employees
- Developing original titles:
  - co-op puzzle adventure Elder Goo
  - chaotic zombie runner Zombiefall
  - retro action clicker Idle Commando
- Offering game development and mobile app solutions
- [www.zaibatsu.fi](http://www.zaibatsu.fi)





- Redhill Games is a free to play PC game studio headquartered in Helsinki, Finland.
- Formed by a seasoned team of industry veterans.
- Track record of success but know our best games are yet ahead.
- Aiming high, approaching this opportunity with humility and determination.
- Calling to build not only games with global impact but also an organization that is sustainable and good.
- [www.redhillgames.com](http://www.redhillgames.com)

# LUNARBYTE

## LunarByte

- Founded in 2017
- Based in Helsinki
- One published mobile puzzle game
- We are game development consultancy and outsourcing company. Our mission is to help game companies to succeed by providing talented developers to work at their service
- We skyrocket your code
- [www.lunarbyte.com](http://www.lunarbyte.com)





# reworks

## Reworks

- We create next generation mobile customisation games. Our games are a mixture of creative gameplay, daily new content and community
- Our first game, Redecor, is a lifelike home design game currently in soft-launch
- Founded in 2018 and based in Helsinki, we are currently team of 14
- [www.reworksgames.com](http://www.reworksgames.com)





The Game Industry Of Finland

# REPORT 2018



**neogames**

HUB OF THE FINNISH GAME INDUSTRY

Suomen  
Pelinkehittäjät  
FINNISH GAME DEVELOPER STUDIOS ASSN.

**BUSINESS  
FINLAND**

