The Game Industry Of FINLAND

Report 2016

Index

Index

Picture: Supercell ● Clash Royale

ABOUT THIS REPORT

FOR almost a decade, our game industry has been the biggest cultural export branch in Finland. Finnish games from Angry Birds to Clash of Clans, from Quantum Break to Cities: Skylines have conquered the world, and well over a billion people all over the globe have been playing games made in Finland. When Finland celebrates its 100 years of independence in 2017, the game industry has become a vital part of Finnish cultural landscape and its significance, both culturally and economically, is well recognized.

This publication provides a holistic overview of the Finnish game industry in 2016. The data presented in the following pages is based on a total of 140 company interviews carried out from October 2016 to January 2017, augmented by data from other sources. This study is a continuation of similar studies conducted in 2004, 2008, 2010 and 2014.

Altogether 60 game companies, members of the Finnish Game

Picture: KoplaGames ● Nonstop Knight

Developers Association or Serious Gaming Cluster, are listed and introduced on the company profile pages.

We wish to thank everyone who has participated in this process. Special thanks to Suomen Pelinkehittäjät ry (Finnish Game Developers Association), Invest in Finland and Tekes (the Finnish Funding Agency for Innovation) for their support.

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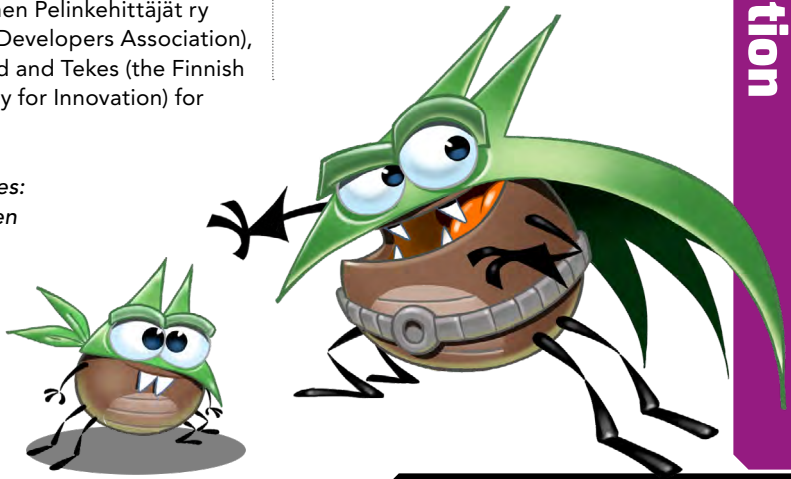


Picture: Seriously ● Best Fiends

Picture: Rovio
● *Angry Birds Movie*

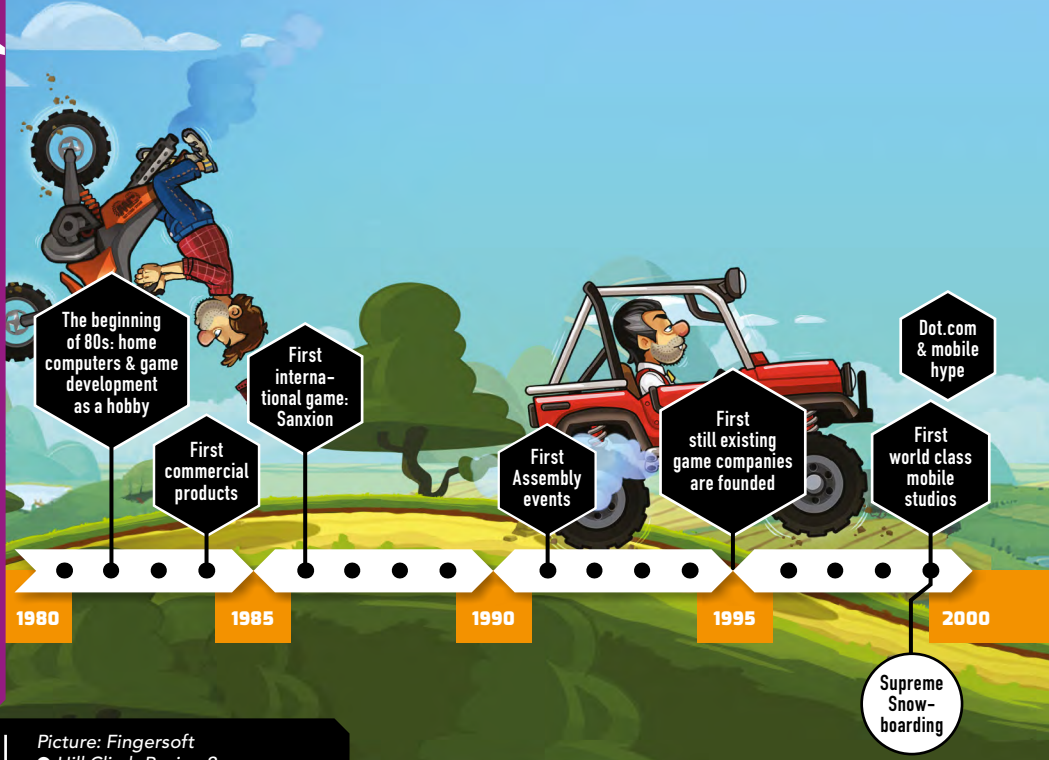
1980's: The beginning

THE ROOTS of the Finnish game industry were planted in the beginning of the 1980's during the era of the first personal computers. Despite the scope and financial significance of game development being quite small at the time, it managed to create a base for the Finnish demo scene and game development culture. Early experimentation in technical, commercial and cultural possibilities offered vital experience in the area of game development and the realities of the game market.

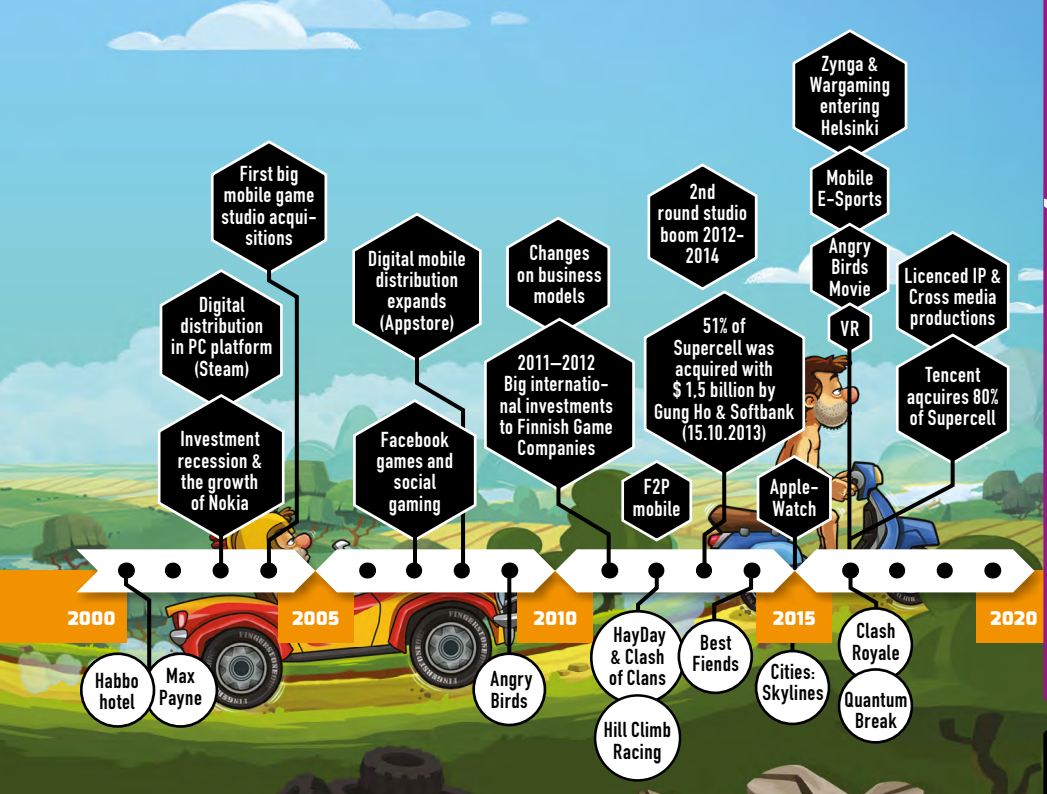
1990's: Demo scene and the first steps of the Finnish game industry

THE ENTHUSIASTIC hobbyist culture that began in the 1980's started to take on new forms at the turn of the decade, when the quick progress of technology enabled technologically and culturally more ambitious games. This in turn forced hobbyists to specialize in certain areas of game development

Picture: FuturePlay ● Farm Away



Picture: Fingersoft
● *Hill Climb Racing 2*


2000
2005
2010
2015
2020
Habbo hotel
Max Payne
Investment recession & the growth of Nokia
Digital distribution in PC platform (Steam)
First big mobile game studio acquisitions
Angry Birds
Facebook games and social gaming
Digital mobile distribution expands (Appstore)
Hill Climb Racing
2011–2012 Big international investments to Finnish Game Companies
Changes on business models
HayDay & Clash of Clans
F2P mobile
51% of Supercell was acquired with $ 1,5 billion by Gung Ho & Softbank (15.10.2013)
2nd round studio boom 2012–2014
Best Fiends
Apple-Watch
Cities: Skylines
Zynga & Wargaming entering Helsinki
Mobile E-Sports
Angry Birds Movie
VR
Clash Royale
Quantum Break
Licenced IP & Cross media productions
Tencent aqcuires 80% of Supercell

and share their expertise with other hobbyists. The 1990's with their strong demo scene brought typical corporate elements to the hobbyist culture: teams, objectives, competition and professionalism. It is no coincidence that the oldest Finnish game studios have a strong background in the demo scene. Even today, many new Finnish game studios are founded by teams who either qualified in the demo scene or elsewhere in the vibrant Finnish hobbyist culture.

Late 1990's: Hype and downfall

BY THE END of the 1990's a professional game industry had emerged in Finland. There were a dozen studios and the industry employed almost 200 people. The second half of the 1990's is generally considered to have been a time of rapid technological evolution. Especially, the internet, network technology in general, and the digital economy took big steps forward. In the ICT sector, the years 1995–2000

Picture: Snowhound ● Apestorm: Full Bananas

are remembered as the "Internet bubble" or the "dot.com hype" due to the financial speculation which took place at the time. In Finland this hype had a strong mobile emphasis. The investments by Nokia in the development of WAP-protocol set the direction for the Finnish game industry far into the next decade. WAP was advertised as enabling the easy use of mobile internet. However, due to technical (poor usability) and financial (e.g. the high price of data transfer) reasons, WAP never really became an economically profitable phenomenon.

Early 2000's: Back to the basics

AT THE START of the millennium, unsuccessful investments, the high risks of new investments, and the general deliberation of investors practically stopped investments completely. This clearly affected the structures of the game industry, and companies changed their focus from conquering the world to securing organic growth and focusing on project based work. On the mobile side this meant more cooperation with mobile operators and the aggregators who collected game portfolios for them. Even though investments stopped in 2002–2003, Nokia's N-Gage (2003) and N-Gage QD (2004) were significant enablers of game development in Finland at the time, despite that in the end both platforms were to be unsuccessful. At the same time, the global markets for Java-based games kept growing, and this helped secure the Finnish game industry's strong mobile focus and prepared the overall industry for

the forthcoming industry-wide digital distribution market. Although many of the companies of that era have since closed their doors, their talents can still be seen throughout the industry.

Late 2000's: The rise of digital distribution

THE RECENT growth and progress of the Finnish game industry has been based on digital distribution and the possibilities it created. Shortened value chains enabled by digital distribution opened new possibilities for game developers. At the same time, working without publishers brought new significant risks for games companies. A company working without a publisher has to bear the costs of production and marketing, and also undertake all of the marketing and PR activities themselves. Thus, an increase in possibilities led to higher risks, but also to wider areas of expertise.

Early 2010's: Angry Birds, start-up boom and second round studios

IT CAN BE said with certainty that digital distribution was a substantial reason for both the Angry Birds phenomenon launched in 2009 and the start-up boom which began in 2011 and reached its height (55 new studios) in 2012. For the first time, developing and distributing games was easy for smaller and less well financed game studios. All in all, around 200 new game studios were founded during 2011–2015 and around 20 % of these new studios could be described as "second round studios". These studios have founders

with strong prior experience in the industry, which puts them in a far better position than first timers.

Early 2010´s: Investments

DURING 2011–2013, the financial success of the Finnish game industry drew the attention of international investors. Mobile games, especially F2P games and studios developing them were seen as a good investment target. These investments had a significant impact on the growth of the industry. The largest of these investments, in 2011–2013, was the Supercell GungHo/ Softbank deal worth € 1.1 billion.

Early 2010's: F2P (Free to Play)

AFTER digital distribution, the biggest and most financially significant transition in the industry has been the introduction of the F2P model. The best examples of its significance have been Supercell's Clash of Clans, Hay Day, and Clash Royale whose success has lead the turnover of the Finnish game industry into a whole new

Picture: TicBits ● Crazy Kings

category. It's fair to say that without mobile F2P Finnish game industry wouldn't have been able to grow to its current size.

Picture: Two Men and a Dog ● Zombie Catchers

Mid 2010's: Co-operation with Asian game publishers

ROVIO'S Angry Birds was the first Finnish game to break through in Asian markets. In 2011, Rovio was one of the first Finnish game developer studios to open an office in China, and already in 2012 China became Rovios' biggest market measured by daily users. The growing interest from Asia towards Finnish game industry began to accelerate soon after Supercell's & Japanese GungHo / Softbank acquisition (October 2013). Especially Chinese game companies were interested in Finnish Game companies. Chinese TenCent acquired GungHo / Softbank shares of Supercell in 2016. As a result, the Supercell & Tencent combination became one of

the strongest players in both west and Asian market.

Mid 2010's: The end of the beginning?

IN 2016 VR alongside mobile e-sports were hot topics in the Finnish game industry. However, it looks as though the VR market is not quite mature enough yet. In mobile e-sports the progress has been faster.

One notable development was Wargaming and Zynga, both prominent actors in game industry, entering Helsinki to do mobile development.

Rovio´s feature film "The Angry Birds Movie" based on Angry Birds games premiered in spring 2016 and turned out to be the most successful game based on a mobile game.

Picture: Rovio ● Bad Piggies

Picture: Koukoi
● Crashing Season

Industry in a Nutshell

RAPID GROWTH has been one of the main characteristics of the Finnish game industry during the last decade. However, the latest data reveals that the time of hyper growth is, at least for the time being, over. This is especially clear when looking at the number of studios established in 2016. In the previous years of 2012–2015 the number of new studios per year has been 30–55. In 2016 it was only 16. According to Neogames' statistics, 2016 was also the first year when the number of active Finnish game studios decreased: from estimated 270 studios at the end of 2015 to 250 studios at the end of 2016. There are some clear reasons for that. Some of the studios established during the start-up boom 2011–2015 haven't been able to stay in business. There have also been studio mergers and some studios have actually switched trade to more traditional ICT industry. The main reasons for the slowdown in 2016 were the intense competition, especially in mobile platforms, and the global struggle to find experienced enough employees.

Picture: Greener Grass ● Dice Hunter

Even if the number of studios now is smaller than in the end 2015, the Finnish game industry employs around the same number of people (2750) as it did at the end of 2015 (2700), and game studios expect to have 280 new open positions during 2017. To some extent, the availability of experienced professionals is still one of the biggest obstacles to future growth. Despite the slowdown of growth, the Finnish game industry is still doing well.

The number of studios making an over € 1 Million annual turnover is bigger than ever before (30) as well as the number of studios employing more than 50 employees (10) and there are several studios very close to these threshold values. The turnover of the industry was slightly (around € 100 million) more than in the previous year 2015. The annual growth from 2015 to 2016 was around 4 % (33 % from 2014 to 2015). Hypergrowth of previous years has turned into a more mature development and quest for stability.

In the near future, competition and the saturation of mobile space will continue to grow and the role of UA (User Acquisition) and the significance of developer – consumer relationship will increase. VR and AR games are one of the future directions, but the market especially for VR is still immature. Mobile e-sports is likely to be the next notable phenomenon, and PC downloadable games are likely to gain popularity, especially among the smaller developers. Also, some more consolidation is likely take place.

Picture: Nitro Games
● *Raids of Glory*

Studio Founding Years

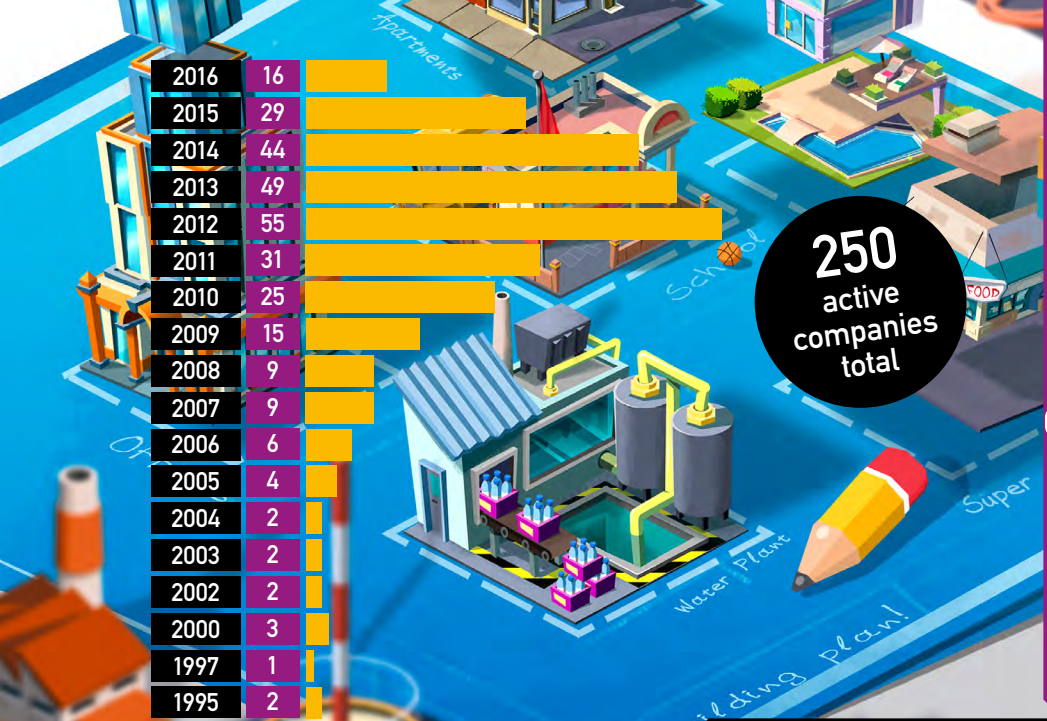
KEEPING UP an entirely accurate list of all active game companies is virtually impossible for multiple reasons: Statistics Finland has no definitive statistical class for game developer studios, setting up a new game studio is relatively easy, and game developers can sometimes be in stealth mode for years before going public, and quite often studios just discontinue their active business but remain still on operational status in the business information system.

Statistics Finland has no definitive statistical class 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 quite low, but compared to the study published in 2015, the share of the studios ten years of age or older has increased from 6.5 % to 8 %.

An interesting thing to note is the "mortality" rate of studios: e.g. according to a previous study from 2015, 55 new studios were established in 2012, the most active year of the game industry start-up boom. Out of those 55 studios, 31 (57 %) were still active at the end of 2016.

The next list of the founding years of still (2016) active game studios is based on Neogames' game developer studio list, which is constantly updated from many different sources.

Studio Founding Years



2016	16
2015	29
2014	44
2013	49
2012	55
2011	31
2010	25
2009	15
2008	9
2007	9
2006	6
2005	4
2004	2
2003	2
2002	2
2000	3
1997	1
1995	2

250 active companies total

Picture: Futureplay ● Build Away

Location of Companies and Clusters

THE CHANGES in company locations compared to the previous full study (data from year 2014) are not dramatic. The capital area has increased its share from 38 % to 42 % and the western area has also grown from 8 % at the end of 2014 to 13 % at the end of 2016.

However, in economic significance and financial value the capital area is still well ahead of other areas. 98 % of the industry's turnover is generated by companies located in the capital area, and around 75 % of all employees work in capital area companies.

From a structural point of view, other areas in Finland are also becoming more mature. Game industry has developed well especially in regional growth hubs like Oulu, Tampere, Turku, Kotka, Kajaani Joensuu, Jyväskylä and Rovaniemi. All these regional hubs have game industry support schemes which have had an impact on the game industry development in their respective regions.

Picture: Fingersoft ● Hill Climb Racing 2

Location of the companies

N:250

Picture: Dazzle Rocks ● 7 Legends

Picture: Rival Games
● *The Detail*

Developers' Challenges

During the interviews conducted for this survey, game studios pinpointed some common challenges they meet in their business. Those challenges can be categorised into five different areas:

1. FINDING (SENIOR) EMPLOYEES

In the interviews, many game companies, especially those larger and more established, indicated that the biggest challenge they meet is recruiting senior talent. The lack of senior employees is a global phenomenon and companies in Finland have to find ways to compete. At the moment, around 18 % of the employees in the Finnish game industry are outside Finland and in the future the share is likely to increase. However, hiring abroad is expensive and some developers have decided to start training juniors directly for their company's needs.

2. COMPETITION AND SATURATION OF THE MARKET

Saturation is a global challenge for mobile platforms. To somehow describe the scale of competition, over 21 000 new games were released in the Apple App store in May 2016 alone, and according to some estimates, the year 2016 saw a total of 760 000 new games when all platforms are considered.

3. ECONOMIC CHALLENGES

Even though Finnish game developers have been able to create several success stories in free to play mobile games, many of developers still find the actual business and design model

troublesome. The Free to play business model is based on small minority of the players generating the majority of game revenue. This creates challenges in discoverability and raises the cost of already expensive User Acquisition. Mismatch between paying customers and free riders makes User Acquisition even more challenging.

On the other hand, good user retention, the key to success in the F2P model, is profoundly connected with game-design and monetization. This has led to metrics and analytics driven design which is sometimes seen as a threat to truly unique and innovative game design.

4. UNPREDICTABILITY OF THE INDUSTRY

Unpredictability has always been one of the characteristics of the game industry, especially on the mobile side. Technology, trends, regulatory framework and unpredictability of customers create an environment very hard to operate in. The unpredictability of the industry also affects the availability of early stage funding.

5. MANAGING GROWTH

Success often brings with it the possibility to grow. However, in order to succeed in growth professional management is required. In Finland, like in many other countries, game companies are often managed by actual developers. In the interviews developers emphasized the importance of professional management, especially when the company is growing.

Picture: Mindfield Games
● *P.O.L.L.E.N*

Platforms

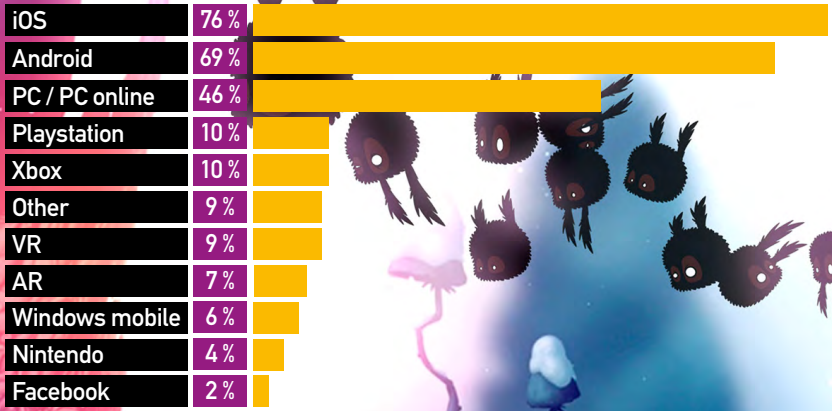
MOBILE PLATFORMS iOS and Android are still the most popular platforms in the Finnish game industry. However, the challenges of mobile platforms are imminent, and some developers have moved on from mobile to a PC platform, mainly to the not-yet-so-crowded Steam. The other reason to move to PC is the premium business model which many developers find more convenient than mobile F2P model based monetization. There are also a number of already experienced and solid PC -development companies, often developing games for console platforms as well.

There are some companies pioneering in the VR / AR as well as smartwatch and smart-TV market. Windows mobile, Nintendo platforms and Facebook all have a very small share.

Multiplatform development is very common, and most companies develop games for several platforms.

Picture: 5 More Minutes ● Tally

Popularity of the platforms among Finnish Game Studios N:140



Picture: Frogmind ● Badlands

Picture: Cornfox & Bros.
● Oceanhorn 2

THE NUMBER of people working in the Finnish game industry has grown quite steadily since the first Neogames study in 2004. The only exception to this was in 2009 when the number of people employed by the industry actually decreased because of the global economic slowdown.

In 2010–2016, growth has been quite steady. The 140 companies involved in our survey (of 250 total) employed 2 265 people in 2016. Though these companies represent 56 % of the number of companies in the whole industry, all of the largest companies are included in the survey, and the companies that didn't respond are mainly relatively new or small.

Information from other available sources confirms that at the end of 2016, the Finnish game industry employed 2 750 people. This is roughly the same (2 700) as Neogames´ estimate at the end of 2015 and 250 employees more than the end of 2014 (2 500). Unlike the official statistics from Statistics Finland, these figures include entrepreneurs and employees working abroad. Interns and freelancers were not included.

Out of the 140 companies surveyed, 54 (39 %) estimated that they are going to hire new employees within the next

Picture: Crand Cru ● Battle Jack

12 months. Altogether, these companies are expecting to hire 280 new game industry professionals during 2017. 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.

According to the survey, the number of female employees increased from 358 to 406 from 2014 to 2016. The share of female employees is 18 %, slightly less than in the previous study at the end of 2014 (20 %). When we estimate the share of female staff in the whole industry, including companies not in this survey, the actual share of females might be a bit smaller. The reason for this is that start-ups and smaller companies tend to be more male dominated than their more established counterparts.

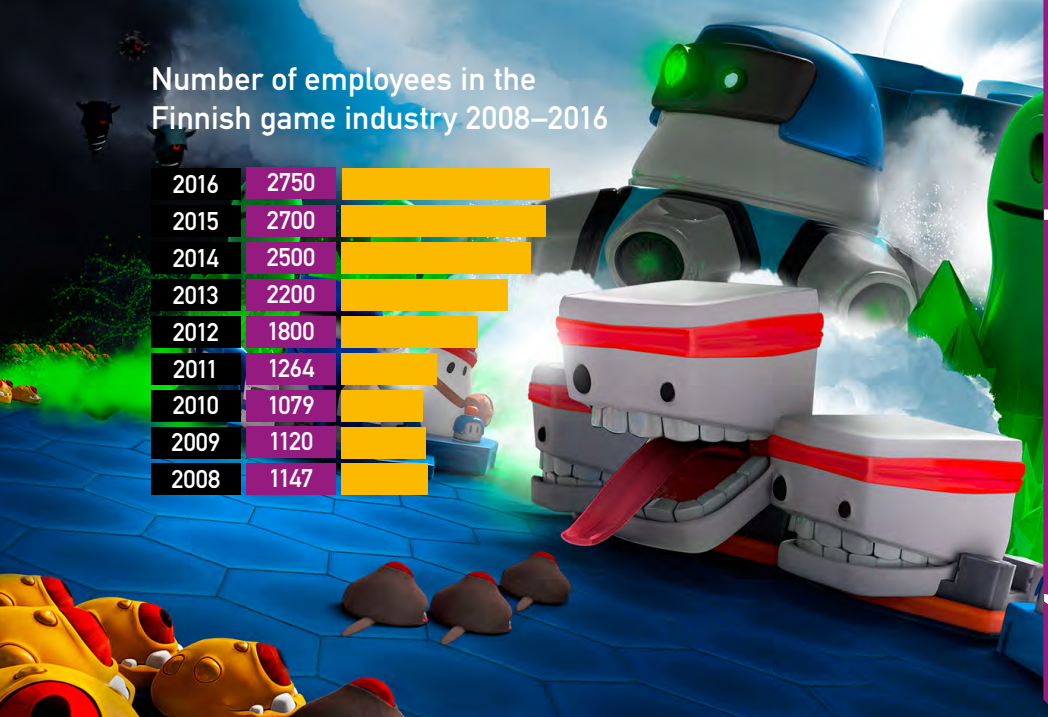
According to the survey answers (140), the total number of non-Finnish employees was 397 at the end of 2016. This means an around 18 % share of the total number of people employed. Roughly 5 % of all employees came from outside the EU / ETA area.

The median number of persons employed in companies answering the survey is 7 in 2016, which is 3 employees more than in 2014 (4).

Picture: Bad Crane ● RGB express

Number of employees in the Finnish game industry 2008–2016

2016	2750
2015	2700
2014	2500
2013	2200
2012	1800
2011	1264
2010	1079
2009	1120
2008	1147

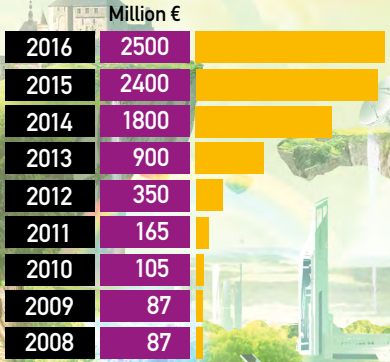


Picture: Psyon Games ● Antidote

2016 was once again a year of growth for the Finnish game industry, but the growth was significantly slower than during the previous couple of years, 4,2% from €2,4 Billion to €2,5 Billion. However, since the turnover of Supercell remained the same as in 2015, all of the growth came from other companies. This is one more piece of evidence of the maturity of the industry. At the moment, there are 30 studios with an annual turnover of more than € 1 million, which is 10 companies more than in 2014. This represents 12 % of the total amount of studios. Globally, this is a rather typical situation in the game industry, where a small number of studios tend to generate the majority of turnover. Due to the large number of start-ups the median turnover of a Finnish game studio was € 95 000 in 2016. From a global perspective, it's notable that according to data by Newzoo, mobile games generated an around € 35 Billion ($ 37 Billion) turnover in 2016 globally. The share of Finnish mobile game developers was roughly 7 % of the revenue generated. From the point of view of the national economy, the game industry has grown to be a significant part of the Finnish industrial landscape, and its incremental value to Finnish GDP was roughly 0.5 % in 2016.

Picture: Traplight ● Big Bang Racing

Turnover of the Finnish game industry core [game development] 2008–2016



Picture: Redlynx ● Trials Fusion

Picture: 3rdEye
● *Downward spiral*

FUTURE TRENDS
Mobile - Saturation, Consolidation and Instutionalisation

THE MOBILE game industry is becoming bigger, more saturated and segmented. At the same time the price of User Acquisition continues to grow, game productions are getting bigger and bigger and the competition in markets is getting extremely hard. This is leading to even more consolidated and institutionalised markets with a slim, but still existing chance of survival for small developers.

As an outcome of more and more difficult market conditions, the role of marketing and strategic business planning is becoming as important as good game design. Because of this, artistic risk taking has decreased and most developers are more and more focused on following the established genre conventions. Ironically this progress opens up possibilities for new innovative products to reach new audiences not satisfied with the mainstream games.

E-sports has been a big trend in Asia for a while now, and like many other Asian trends, it has become a major trend also

Picture: Tree Men Games ● Pako

in Western markets. Among Finnish Game Developers, Supercell has found their place in the global competition of e-sports. With Clash Royale, Supercell made real time PvP mainstream at mobile.

In the autumn of 2016, Northern-Finland based mobile e-sports company Critical Force raised significant funding from South-Korean entertainment company NHN.

PC and Console - New Indie Platforms

AS COMPETITION is getting harder on mobile, many developers are moving their main focus from mobile to Steam or, in some cases, to online console stores, introducing data driven games design and the Free2Play business

Picture: SmallGiant ● Empires & Puzzles

model to those platforms. As the example of the success of Colossal Order's Cities: Skylines demonstrates, small studios can build big success stories on PC using the traditional pay-per-download model. However, Steam is also starting to get more and more crowded, and some developers are therefore now starting to experiment with browser based games.

VR & AR - Still at an Early Stage

THERE have been high expectations for VR markets. However, currently, the VR markets themselves are still too small for most developers to build profitable business and entering the markets requires very specific new skills and knowledge. The actual breakthrough seems to be taking longer than expected, but once it comes, it is likely to be much bigger than expected.

Compared to VR, AR markets are more mature and more easily accessible for traditional mobile developers. Nintendo's Pokémon Go was a big hit in the summer of 2016. Although Pokémon Go was the biggest global hit of 2016, it has not started a new AR boom. The introduction of AR solutions built for contact lenses will be one of the key defining moments of game industry. Before that AR might be actually a bigger market on the serious games side, where AR headsets like Hololens will be first introduced.

Smart Watches, Wearables and Smart TVs -the New Frontiers

SMART WATCHES and wearables in

general, will remain niche markets until better new devices are introduced. Currently, smart watches are slowly moving to a direction where they form an additional layer to an existing mobile gameplay experience instead of becoming an independent platform. Porting games from iOS to AppleTV or Android to Android TV is rather easy, which makes them interesting secondary platforms for mobile developers. They provide much needed visibility for game developers, as getting featured there is much easier than on the main mobile platforms. However, the markets of those platforms are still at an early stage.

IP Monetisation and Marketing – Brand Oriented Games, Cross-Media Productions & Social Media Influencers

AS THE ever-growing amount of published games has led to sky high prices in User Acquisition, developers are looking for new alternative media

Picture: Greener Grass ● Dice Hunter

for monetizing their IPs and boost User Acquisition.

To reach maximum coverage and engagement between potential users, the meaning of social media and its influencers has grown. Twitch and Youtube presence has become a necessity for any game company today. Seriously has gone deeper into that via their charity campaigns, which have gone viral in social media.

Well known IP/Brand reduces marketing and User Acquisition costs. On the cross-media side, common IP productions, where the same IP is used in TV-series or movies and games, are becoming more popular. One of the biggest success stories of the Finnish game industry in 2016 was the Angry Birds Movie grossing more than $ 349 million globally. Rovio has been one of the first game developer studios successful in creating a game IP based transmedia and licensing empire.

Picture: Seriously ● Best Fiends

Serious Games – Waiting for the First Hit

SERIOUS games and gamification are separating themselves into two different independent fields. There is a lot of potential in serious games,

Picture: Housemarque
● Alienation

but the big serious game success story is still missing. The Finnish company Yousician, with their music oriented edugames, is close to becoming one, and it is likely that especially the edugame sector will be leading the growth of serious games during the upcoming years.

Industry Framework – The Core of the Finnish Game Industry is Getting Stronger

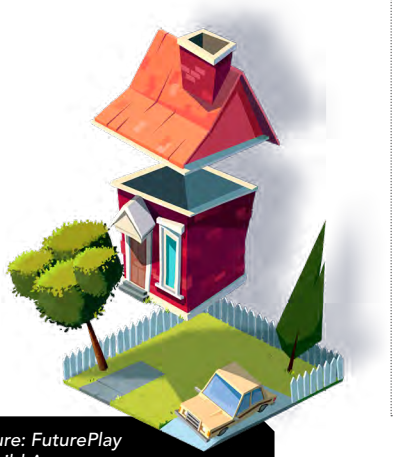
THE SECOND round start-up boom in the first half of this decade, has led to a growing number of small, well-established game developer studios with sufficient turnover. These studios are potential future superstars and along with their development the stability of the whole industry is increasing.

Funding – More Excellent Investment Opportunities Ahead

ACCESS to funding is one of the key challenges a game developer faces today. As the investment boom in game industry is slowing down globally, there is an opportunity for game industry focused investors. For developer studios, this means that they need to expand their business networks, increase marketing business and data analysis skills and learn the most effective ways to optimise their games. Also, the role of publisher will once again start to become more relevant in the industry.

Employees – Looking for a Job? Welcome to Finland

THE FINNISH game industry has been growing rapidly over the last five years. As an outcome of the success of Finnish industry, it is increasingly difficult to find talented senior level employees from Finland. At the same time, the level and scope of expertise required from people interested in working in the game industry is constantly increasing. In 2016 around 18 % of the employees working in the Finnish game industry were from abroad, and the number is likely to increase.



Picture: FuturePlay ● Build Away

Community Nurturing Game Industry Talents – Finland Leads the Way

THE FINNISH game industry has always been very community oriented. One example of strong community orientation is IGDA Finland, one of the most active IGDA chapters globally. In recent years Finland has also quickly become one of the most active countries in organising game jams under the

umbrella of the Finnish Game Jam Association and the number of participants in game jams is likely to increase in the near future. These events, where hobbyist developers and the industry experts meet, are a key element for the future success of the Finnish industry.

Regulation – From Tax Competition to Service Competition

THE GLOBAL regulatory framework for games markets is getting more complex every year. Meanwhile, protectionist policies are reaching digital markets, especially in China. At the same time the European Union is successfully introducing policies to stop competition on both VAT and corporate tax rates between its member states. In the future, EU Member States will be competing for the best game developer teams not only with tax instruments, but also with best public services for companies. Member States, whose tax, consumer and data protection authorities will have sufficient resources to help local companies implement both European and global regulation, will have a clear competitive advantage.

Picture: Psyon Games ● Antidote

Picture: Facepalm
● *The Swapper*

Picture: Supercell
● Clash Royale

Picture: Reforged Studios
● *Concept Art*

Suomen Pelinkehittäjät

(Finnish game developer studios association) 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. Suomen Pelinkehittäjät works in close co-operation with other industry networks. It has 70 members including all of the major studios in Finland. Members of the association are representative of about 95% of the turnover and 85% of the employees of the industry.

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Picture: Dazzle Rocks ● 7 Legends

Tekes' funding for gaming business pays off – the success story continues

Picture: Redlynx/Ubisoft ● Trials Fusion

TEKES, the Finnish Funding Agency for Innovation has supported the Finnish game industry growth with funding and networking since 1995 with approximately MEUR 100. The funding has accelerated the growth of game companies like Remedy, Housemarque, Supercell, Frozenbyte, Rovio, Next Games and Seriously. Tekes' game industry specific programme Skene – Games Refueled run between 2012 and 2015. During that time the Finnish game industry rose into global limelight. Tekes' game industry support continues with funding and networking in different industry events.

www.tekes.fi/en/skene
www.tekes.fi/en

Tekes

Invest in Finland – We help you grow your business

Take the fast track to Finland and explore business opportunities for you company with us. Working with Invest in Finland means you will receive the most relevant and updated industry insights and professional recommendations that meet your needs. Our industry experts provide not only hard and soft facts about Finland, but also insight into industry sectors, Finnish companies, research institutes, and universities.

We work nationally and in close cooperation with our regional partners. Therefore, we offer a consolidated approach as to the value that Finland can bring to your company.

We are a part of Finpro, Finland's Trade and Investment Promotion Agency.

All our services are free of charge. For more information, please visit *www.investinfinland.fi*

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INVEST IN **FINLAND**
FINPRO

Picture: DoDreams ● Drive Ahead

Neogames Finland

is a member-based non-profit game industry organization established in 2003. Our mission is to accelerate, coordinate and support the development of the Finnish game cluster.

Neogames' members represent all sectors of the game industry from business to education and research. Neogames is an impartial umbrella association, and we serve the shared interests of all industry players.

We do work that benefits everyone, but for which an individual organization may not have the resources. Our services include organizing group trips 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, and the production of various surveys and reports related to the Finnish games industry.

Picture: Reforged Studios ● Concept Art

As the hub of the industry, we are the fastest channel to information and contacts within the Finnish game industry. If you need to know anything about the Finnish game industry or to meet anyone – please, let us know. We can help.

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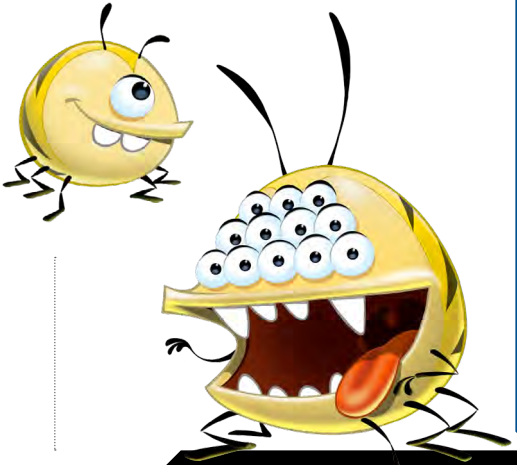
neogames
HUB OF THE FINNISH GAME INDUSTRY



Picture: Seriously ● Best Fiends

SGC

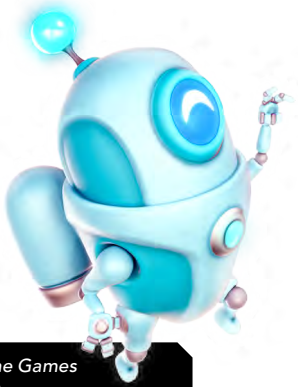
(Serious Gaming Cluster) Finland is a nonprofit organisation and a network of companies developing games and products with a primary purpose other than pure entertainment. Our members develop games & products for learning and education, health and wellbeing, gamification, simulation and environment.

Our strategic partners include Tekes, Kavio Cluster/Kainuun Etu Oy, Playful Learning Center and Helsinki University.

If you are looking for serious game developers, do contact us!

▶ Contact:

Miikka Lyytikäinen
Chairman of the board miikka lyytikainen@seriousgamingcluster.fi
www.seriousgamingcluster.fi



Picture: Vulpine Games ● Last Planets

SGC FINLAND
SERIOUS GAMING CLUSTER

IGDA FINLAND

(International Game Developers Association) is a worldwide nonprofit professional society for game developers.

IGDA Finland promotes the development of careers and professional skills of individual game developers based in Finland, and develops the international recognition of the Finnish game developer community.

A key activity of IGDA Finland is to bring Finnish game developers together to network and share knowledge in monthly gatherings organized by the local hubs all over Finland. Everyone is welcome to join our events!

▶ Contact:
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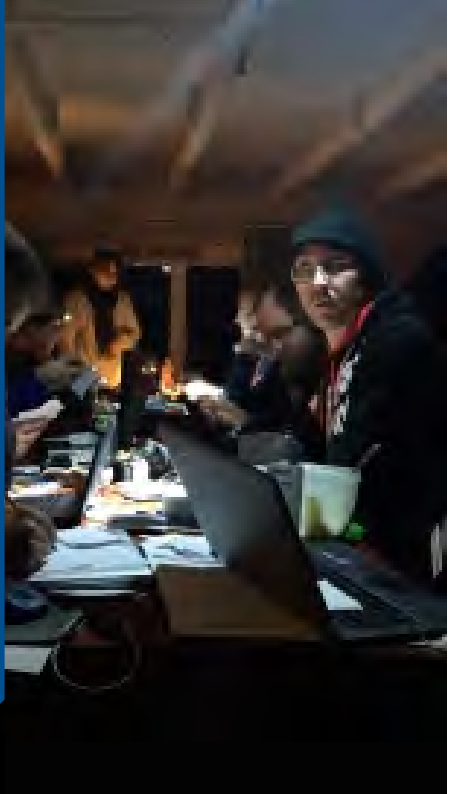
vesa.raudasoja@igda.fi
www.igda.fi

igda



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 of game development events.

- The annual main event, participation in the Global Game Jam, gathers around 1000 organizers and jammers throughout the country.
- FGJ scholarship program offers jammers possibilities to participate in prestige game jams around the globe.
- The annual Finnish Game Jam Awards honors jam games, jammers and the supporters of the Finnish game jam scene.
- Details: finnishgamejam.com

FINNISH GAME JAM

FIVR (Finnish Virtual Reality) is an association for virtual reality and augmented reality developers and enthuists, which seeks to promote the development and visibility of these sectors in Finland. The association organizes events, trade fairs and presentations, as well as takes local developers to foreign events. Similarly, FIVR also brings foreign investors in Finland. FIVR keep in touch with the platform stakeholders and introduces the domestic enterprises to them. The association has three VR / AR accelerators, of which the 30 person hub in Helsinki acts as a center for the new Tampere and Turku accelerators.

▶ Contact:
Olli Sinerma, Chairman of the Board
olli@fivr.fi
www.fivr.fi

FIVR
FINNISH VIRTUAL REALITY ASSOCIATION

Picture: Remedy
● Quantum Break

Game Education

FINLAND has an excellent base for raising new talent to game industry. Coding was recently introduced into the school curriculum and the Youth department of the City of Helsinki is leading the way globally on running youth clubs and summer camps focused on game development. 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 when all the gaps between a formal and a non-formal educational path will be bridged, Finland is likely to be able of offer both clear routes to success and caring community support for its young talents.

Picture: Lightneer ● Big Bang Legends

UNIVERSITIES (EQF levels 7 and 8)

- **Aalto University**
  www.aalto.fi/en/
- **University of Helsinki**
  https://www.helsinki.fi/en University of Eastern Finland www.uef.fi/en/cs
- **University of Jyväskylä**
  www.jyu.fi/it/en
- **University of Tampere / Tampere Research Center for Information and Media**
  http://www.uta.fi/sis/trim/index.html www.uta.fi
- **University of Lapland**
  https://www.ulapland.fi/EN
- **University of Turku**
  http://www.utu.fi/en/Pages/home.aspx
- **University of Oulu**
  http://www.oulu.fi/university/

UNIVERSITIES OF APPLIED SCIENCES (EQF levels 6 and 7)

- **Lapland University of Applied Sciences**
  http://www.lapinamk.fi/en
- **Centria University of Applied Sciences**
  http://web.centria.fi/
- **Haaga-Helia University of Applied Sciences**
  www.haaga-helia.fi/en
- **Helsinki Metropolia University of Applied Sciences**
  www.metropolia.fi/en/
- **Jyväskylä University of Applied Sciences**
  www.jamk.fi/en
- **Kajaani University of Applied Sciences**
  www.kamk.fi/en
- **Karelia University of Applied Sciences**
  www.karelia.fi/en/
- **Kymenlaakso University of Applied Sciences**
  www.kyamk.fi/Frontpage
- **South-Eastern Finland University of Applied Sciences, XAMK**
  https://www.xamk.fi/koulutukset bachelor-of-culture-and-arts-dp-in game-design/

- **Lahti University of Applied Sciences**
  www.lamk.fi/english
- **Mikkeli University of Applied Sciences**
  http://www.mamk.fi/exchange
- **Oulu University of Applied Sciences**
  www.oamk.fi/english/
- **Savonia University of Applied Sciences**
  http://portal.savonia.fi/amk/en
- **Tampere University of Applied Sciences**
  www.tamk.fi/en
- **Turku University of Applied Sciences**
  www.tuas.fi/en/Amiedu www.amiedu.fi

VOCATIONAL SCHOOLS

(EQF levels 4 and 5)

- **Helsinki Vocational College**
  www.hel.fi/hki/ammatillinen/fi/in_english
- **Kouvola Region Vocational College**
  www.ksao.fi/en/
- **Laajasalon opisto**
  www.laajasalonopisto.fi
- **North Karelia municipal education and training consortium / Pelitalo**
  www.pkky.fi/en, http://pelitalo.org/
- **Keuda**
  https://www.keuda.fi/hakijalle/aikuisten-koulutus/tutkintoon-johtava koulutus/
- **Oulu Vocational College**
  www.osao.fi/en/
- **Vocational College Lappia**
  http://www.lappia.fi/sites/en-US
- **Sataedu**
  http://sataedu.fi
- **North Karelia college Outokumpu**
  http://www.pkky.fi/en/oppilaitokset ammattiopisto/outokumpu
- **Luksia, Western Uusimaa Municipal Training and Education Consortium**
  https://www.luksia.fi/in-english
- **Suupohja vocational institute**
  http://www.saiedu.fi/en/mainpage
- **Kainuu vocational institute and Kajaani highscool combined program Peliamis**
  http://www.oppihotelli.fi/2016/peliamis AEL https://www.ael.fi/koulutustarjonta/media-alan-ammattitutkinto?id=5121

Regional Clusters

THE ROLE of regional clusters and hubs is quickly increasing in the Finnish game industry. From the 49 most promising studios established in 2014 and 2015, about 63 % were established outside the capital region. This underlines the importance of the continuous development of regional support measures for game developer studios.

Picture: Traplight Games ● Big Bang Racing

Picture: Two Men and a Dog ● Zombie Catchers

- Joensuu Science Park Business Incubator helps to expertly guide companies through the challenging early years onto a path of growth. Game Business ideas in Joensuu Science Park are developed in an open Game studio called OASIS, which is a 150 sqm studio environment located in the best premises Joensuu Science Park can provide.
- Contact: Veikko Miettinen
  Development Manager, Games
  Joensuu Science Park
  +358 50 502 03 83
  veikko.miettinen@tiedepuisto.fi
- http://en.tiedepuisto./games

JOENSUU SCIENCE PARK

Picture: Joensuu Games Coop
● SOTKA 3D Space Adventuree for VR

Kajaani

- Located 600 km northeast from Helsinki, Kajaani has the 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.
- Contact:
  +358 445 514 614
  timo.ylikangas@kainuunetu.fi

KAINUUN ETU

KAVIO CLUSTER

Picture: Nemesis ● Perspective

- The Playa Game Industry Hub is a community of game industry companies in the region in 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, game equipment manufacturers, suppliers, educational institutes and other stakeholders. (+15 companies and over 100 employees in Kotka, Kouvola and Lappeenranta)
- Playa Game Industry Hub supports the local game companies, especially start-ups with business development, financing and publishing.
- Contact:
  Teemu.Saarelainen@cursor.fi
  tel. +358 40 190 2523
- www.playahub.com

PLAYA
GAME INDUSTRY HUB

Picture: Kukouri Mobile Entertainment and Kiemura

- Oulu is the center of northern game industry with 33+ companies, 300 employees and 20 M EUR Revenue 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. Campus is led by Fingersoft, the biggest company in the area. Oulu Game Lab, an innovative education and incubation program is another important occupant.
- Contact:
  Heikki.tunkkari@businessoulu.com
  tel. +358 44 703 1399
- www.businessoulu.com

OULU | *BusinessOulu*

Picture: Fingersoft
● Hill Climb Racing 2

Turku

- 24+ game companies: Rival Games, TicBits, Tribeflame, Quadro Delta and more
- Three higher education institutes delivering a programming-focused degree in game development
- 50–60 graduates per year
- 50+ researchers
- Turku Arts Academy animation degree program ranked twice as the best in the world
- Active and passionate game developers' community
- Active support activities: Turku Science Park, Turku Game Lab etc.
- Contact:
  Patrik.Uhinki@turkusciencepark.com
  tel. +358 40 557 7251
- www.gameturku.com and www.turkugamelab.fi

TURKU SCIENCE PARK

Picture: PlayRaven
● Robocide

Picture: Shiver Games
● *Lucius*

Front cover art:
Next Games • Walking Dead
Remedy • Quantum Break
Rovio • Angry Birds
Kopla Games • Nonstop Knight
Seriously • Best Fiends
Supercell • Clash Royale
Fingersoft • Hill Climb Racing 2
Colossal Order/Paradox Interactive • Cities: Skylines Natural Disaster

Back cover art:
Everywear Games • Rune Blade
DoDreams • Drive Ahead
Frogmind • Badlands
Housemarque • Alienation
Redlynx • Trials Fusion
Seriously • Best Fiends
Traplight Games • Big Bang Racing

Picture: Iceflakes ● Race Online