

The Game Industry Of

FINLAND

Report
2016



- 4 | Introduction**
- 6 | History**
- 16 | The State of The Finnish Game Industry**
 - 17 | Industry in a Nutshell**
 - 20 | Studio Founding Years**
 - 22 | Location of Companies and Clusters**
 - 24 | Developers' Challenges**
- 28 | Platforms**
- 30 | Developers & Diversity**
- 34 | Financial Outlook**
- 36 | Trends and Future / Platforms and Genres**
- 43 | Trends and Future / Industry Framework**

48 | The Industry Support and Networks

49 | Suomen Pelinkehittäjät ry

50 | Tekes

51 | Invest in Finland

52 | Neogames Finland

54 | Serious Gaming Cluster

55 | IGDA Finland ry

56 | Finnish Game Jam

57 | FIVR

58 | Education

62 | Regional Support

72 | Studio Profiles (separate file)



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.

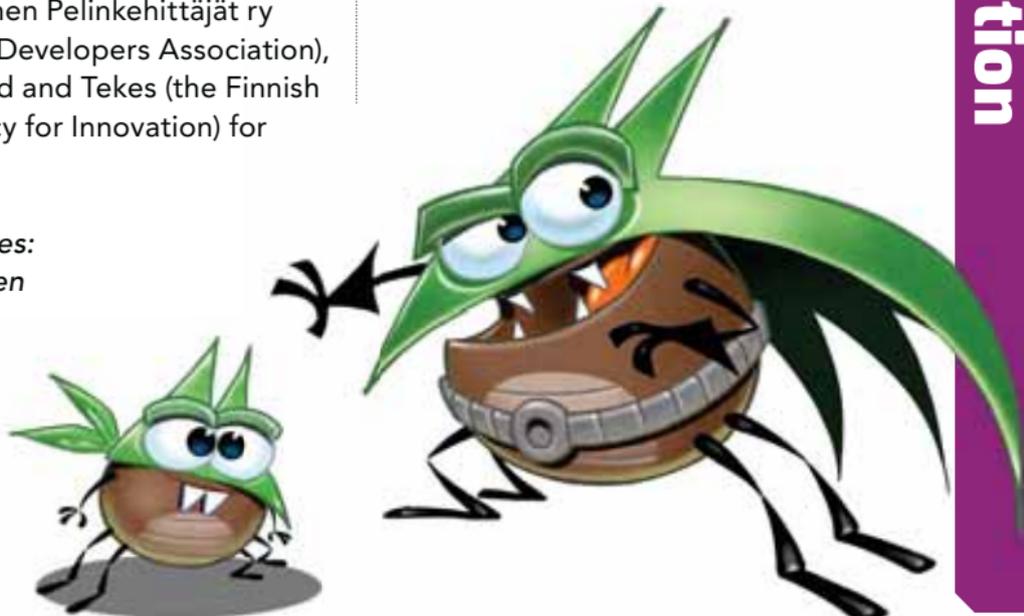
This publication provides a holistic overview of the Finnish game industry in 2016. The data presented in the following pages is based on a total of 140 company interviews carried out from October 2016 to January 2017, augmented by data from other sources. This study is a continuation of similar studies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

Altogether 60 game companies, members of the Finnish Game

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.

*Team Neogames:
KooPee Hiltunen
Suvi Latva
J-P Kaleva*





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

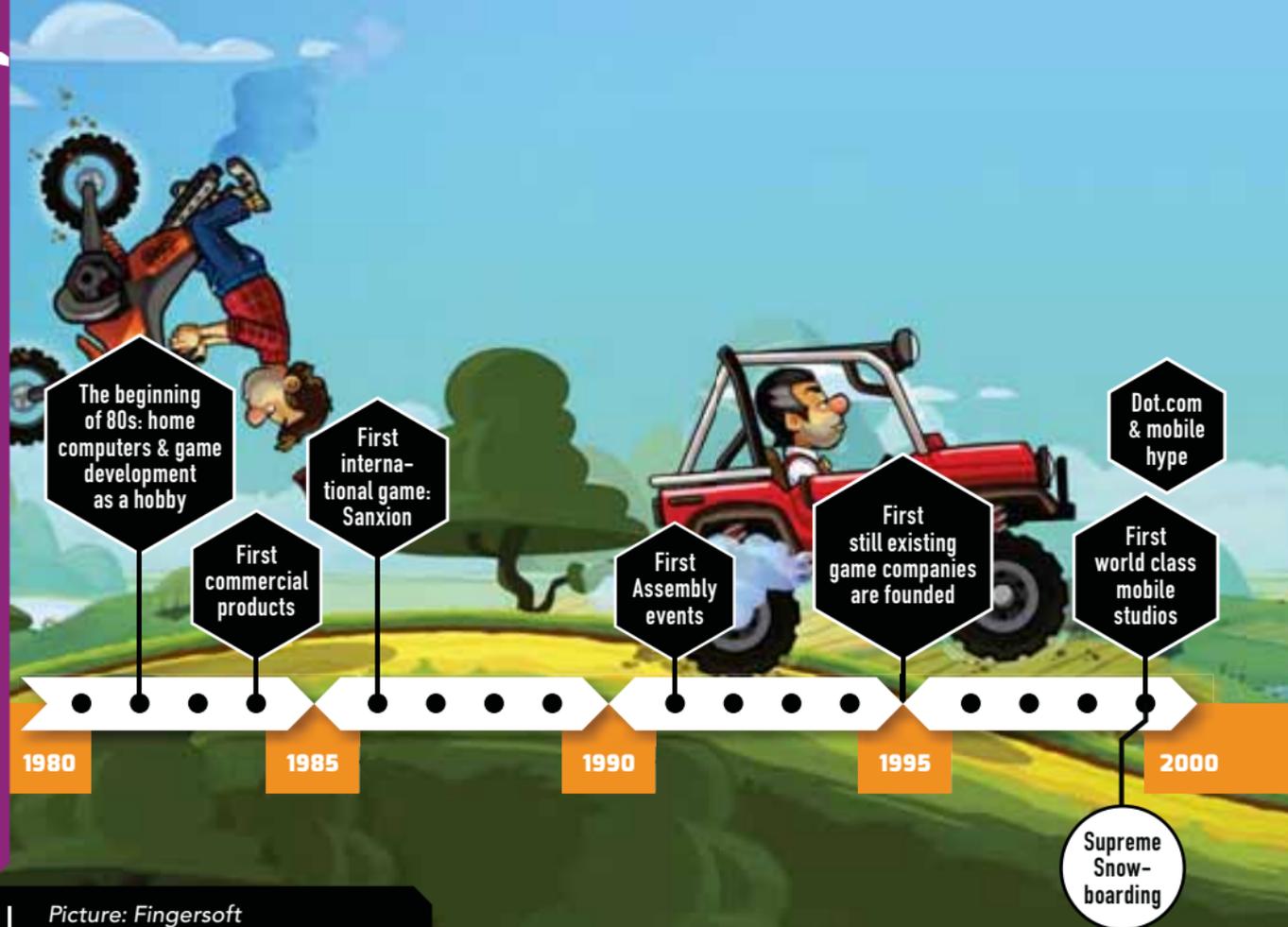
THE ENTHUSIASTIC hobbyist culture that began in the 1980's started to take

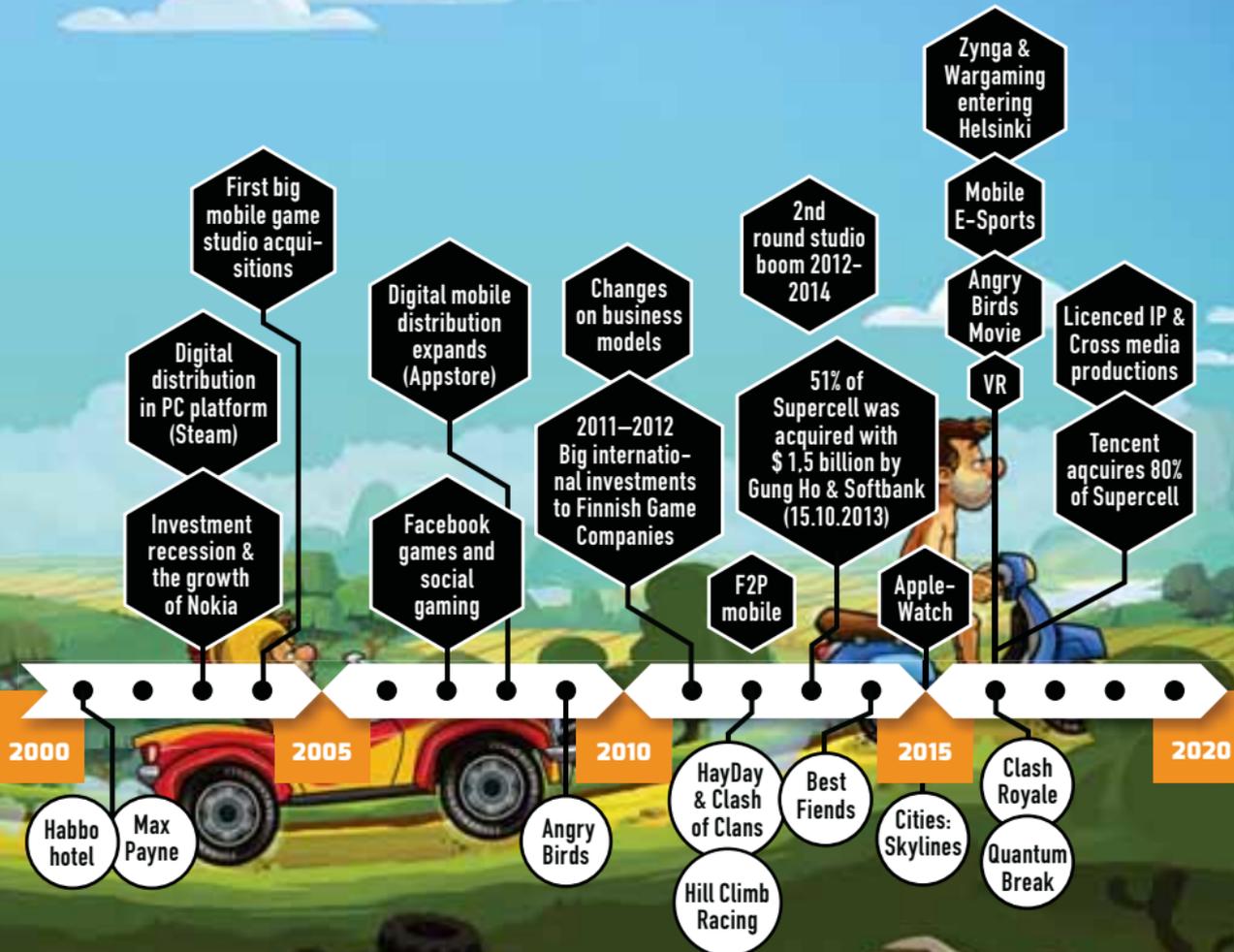
on new forms at the turn of the decade, when the quick progress of technology enabled technologically and culturally more ambitious games. This in turn forced hobbyists to specialize in certain areas of game development



Picture: FuturePlay
● Farm Away

History





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

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 led the turnover of the Finnish game industry into a whole new



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



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



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.



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.

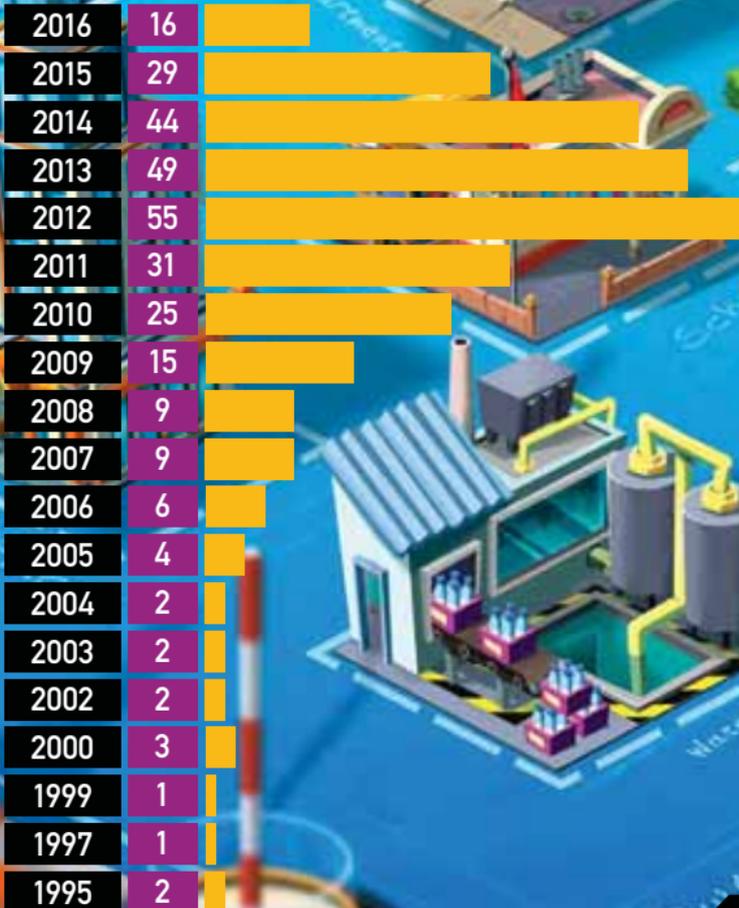
Statistics Finland has no definitive statistical class for game developer studios, setting up a new game studio is relatively easy, game developers can sometimes be in stealth mode for years before going public, and quite often studios just discontinue

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



250
active
companies
total

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.

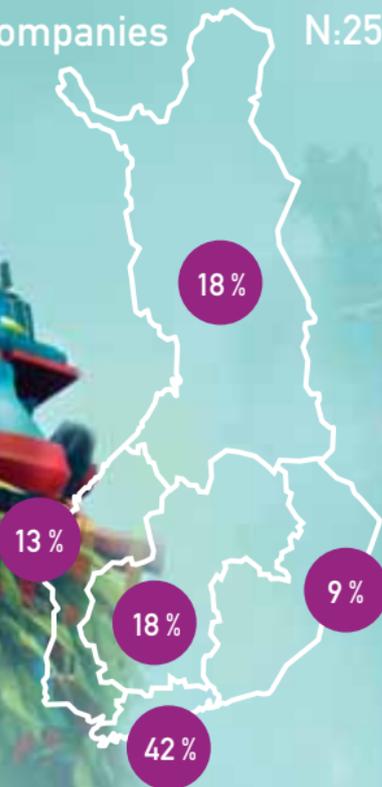
From a structural point of view, other areas in Finland are also becoming more mature. Game industry has developed well especially in regional growth hubs like Oulu, Tampere, Turku, Kotka, Kajaani Joensuu, Jyväskylä and Rovaniemi. All these regional hubs have game industry support schemes which have

had an impact on the game industry development in their respective regions.



Location of the companies

N:250





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.



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

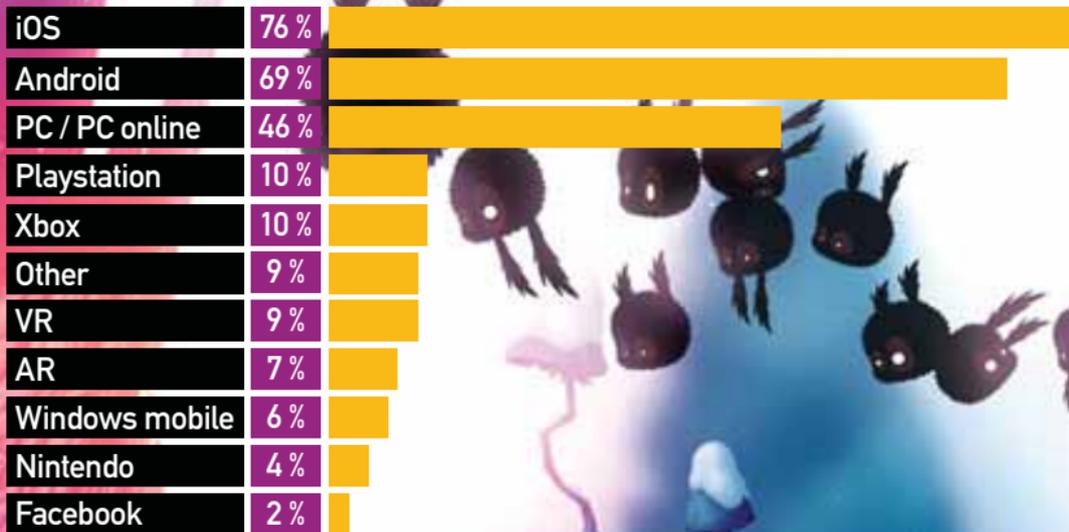


platform, mainly to the not-yet-so-crowded Steam. The other reason to move to PC is the premium business model which many developers find more convenient than mobile F2P model based monetization. There are also a number of already experienced and solid PC -development companies, often developing games 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.

Popularity of the platforms among Finnish Game Studios N:140





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).

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	

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.

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

Million €

2016	2500	
2015	2400	
2014	1800	
2013	900	
2012	350	
2011	165	
2010	105	
2009	87	
2008	87	



Picture: 3rdEye
● Downward spiral

FUTURE TRENDS

Mobile - Saturation, Consolidation and Institutionalisation

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



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



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

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.

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,



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.

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







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.

► Contact:

Mariina Hallikainen

Chair of the Board

mariina.hallikainen@colossalorder.fi



Picture: Dazzle Rocks
● 7 Legends

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



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

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► Contact:
Senior Advisor Gaming
+358 40 803 2526
oleg.paliy@finpro.fi

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.

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.

► Contact:

KOOPEE HILTUNEN

Director

+358 40 532 4176

koopee@neogames.fi

SUVI LATVA

Coordinator

+358 40 592 4018

suvi.latva@neogames.fi

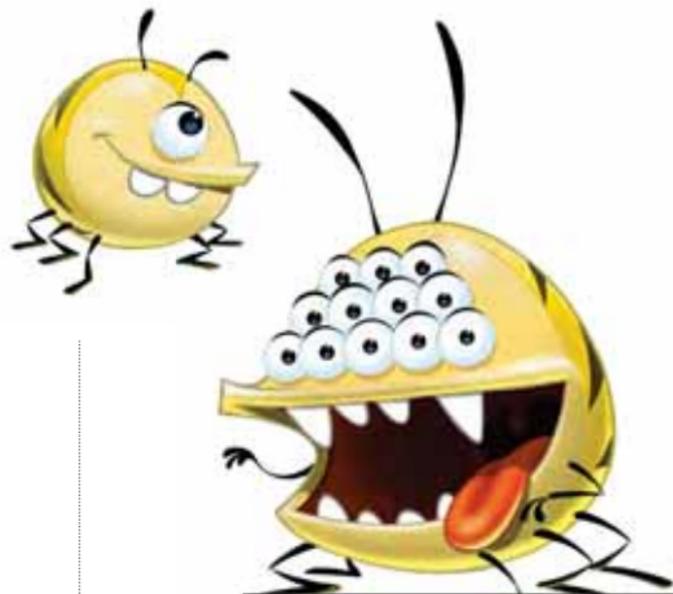
J-P KALEVA

Senior Policy Analyst

+358 40 716 3640

jari-pekka.kaleva@neogames.fi

► www.neogames.fi/en



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



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:

Vesa Raudasoja, Chairman of the Board
vesa.raudasoja@igda.fi
www.igda.fi





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 enthusiasts, 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





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.



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/
- ▶ **Kyminlaakso 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
- ▶ **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

VOCATIONAL SCHOOLS

(EQF levels 4 and 5)

- ▶ **Helsinki Vocational College**
www.hel.fi/hki/amatillinen/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/
- ▶ **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 highschool 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.

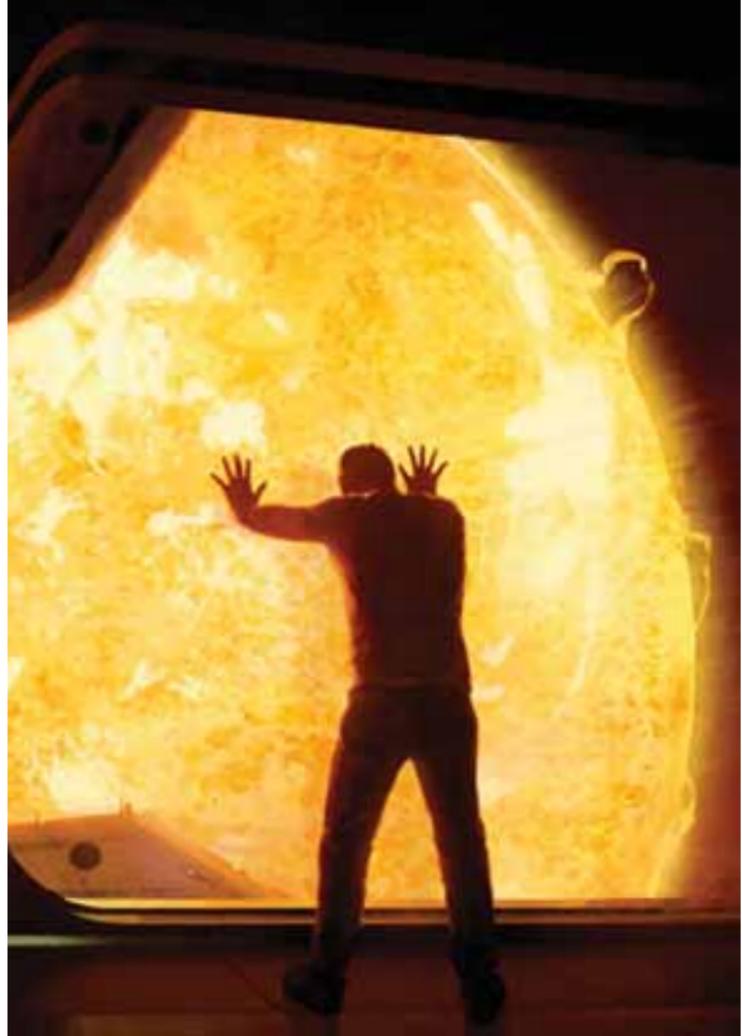




Picture: Two Men and a Dog
● Zombie Catchers

- ▶ 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

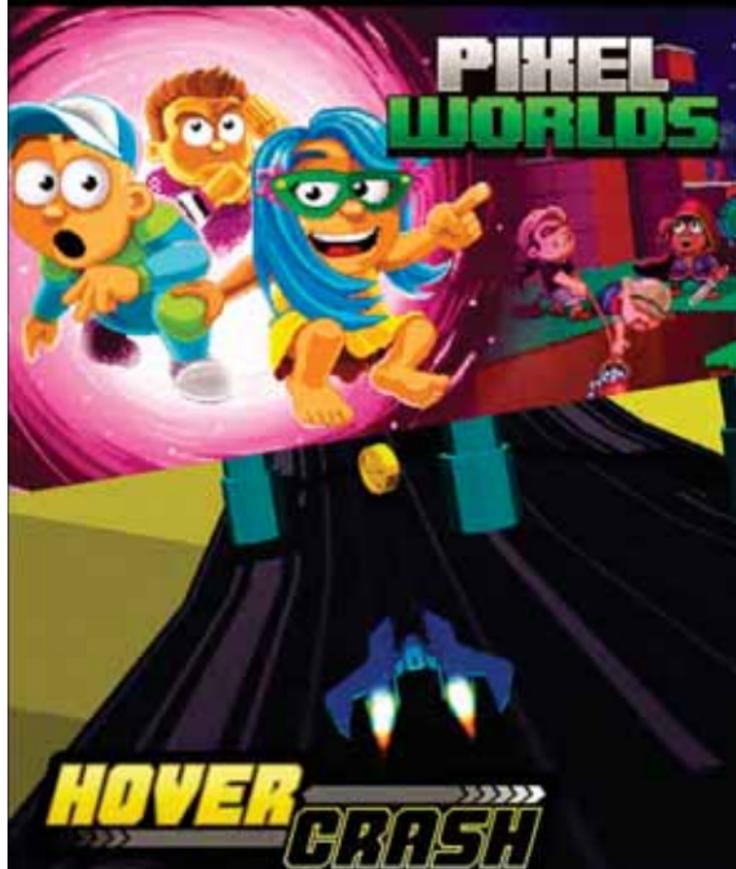




- ▶ Located 600 km northeast from Helsinki, Kajaani has the Finland's second largest local pool of students and professionals of the game industry.
- ▶ Around the undeniably best game education centre in Finland, has risen a lively and constantly growing start up concentration - KAVIO Cluster. As proof 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



- ▶ 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





- ▶ 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*

- ▶ 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

**SCIENCE
TURKU
PARK**







Studios listed here are members of the Finnish game industry registered associations*

**Finnish game developers association (Suomen Pelinkehittäjät), Serious Gaming Cluster and Neogames Finland*

- 5 More Minutes
- 10tons
- Aniway
- Armada Interactive
- Citynomadi
- Colossal Order
- Cornfox & Brothers
- Critical Force Entertainment
- DazzleRocks
- DoDreams
- Epic Owl
- Everywear Games
- Fingersoft
- Frogmindgames
- Frozenbyte
- Futurefly
- Futureplay
- Grand Cru
- Greener Grass
- Housemarque
- IceFlake Studios
- Iron Sight
- Kajak Games
- Kopla Games
- Koukoi Games
- Kukouri
- Kuuasema
- Kyygames
- Lightneer
- Ludocraft
- Mindfield Games
- Ministry of Games
- Moidogames
- MotionVolt Games
- Motorious Entertainment
- Next Games
- Nitro Games
- Pikkukala
- PlayRaven
- Redlynx
- Reforged studios
- Remedy
- Rival Games
- Rovio
- Rusto Games
- Seepia Games
- Seriously
- SIEIDI
- Small Giant Games
- Snowfall
- Star Arcade
- Supercell
- Tic Bits
- TJR Games
- Traplight
- Tree Men games
- Tribe Flame

- Tunnel Ground
- Two Men and a Dog
- Virtual Air Guitar Company
- Yousician
- Zaibatsu Interactive

Finnish game developers association members without studio profile in the study

Boomlagoon
Cubicle Studios
Mountainsheep
Musopia
Secret Exit
SharkFishStudio
SharkPunch
TheoryInteractive

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



- ✦ Founded in 2016 in Tampere
- ✦ Continues the legacy of TeacherGaming LLC, the creator of MinecraftEdu (acquired by Microsoft in 2016)
- ✦ 15+ employees
- ✦ First in-house game, Switch & Glitch, out in early 2017
- ✦ Also working on an ecosystem to boost the status of games as teaching tools, combining third-party blockbusters with robust learning analytics



- ✕ Founded in 2003
- ✕ 10 employees
- ✕ Efficient in-house multiplatform technology with support for PC, PS4, Xbox One, mobile, and more
- ✕ 40 games developed and published for PC, consoles, and mobile
- ✕ PC/console hits include Crimsonland and Neon Chrome
- ✕ Mobile hits include Sparkle and Azkend series
- ✕ Working on several new multiplatform titles



10tons

- ✦ Founded in 1999
- ✦ Work for hire expert
- ✦ Own IP development
- ✦ Entertainment, Serious/
Applied, Advertising and Money
games
- ✦ Single, Multi and Massively
Multiplaying
- ✦ AR, VR, Mobile, Web, PC/Mac
- ✦ HTML5, iOS, Android, Flash
- ✦ Unity, Angular, Cocos2D, Java,
JavaScript, C++, C#
- ✦ 200+ client projects
- ✦ 100+ clients incl. RAY, Battle-
front.com, Cloetta/Leaf, R-kioski,
Uplause, City of Helsinki



ANIWAY



Do you have a game that needs to get done?
Game Design / UI Design / Management / Programming / Art / Animation / 3D Modeling / VR & AR

Look no further!
An expert team of
professionals
at your service.

A Full Service Game Development Studio

Become one of our satisfied clients!



- ✘ Armada Interactive is actively developing its first game, a mobile-first RTS that will cater to players looking for a deeper and more immersive experience, for launch during 2017. The company has a strong focus on ultra-high fidelity graphics and player experience.
- ✘ Company founded: 2015
- ✘ Number of employees: 23
- ✘ Number of nationalities: 11



- ✖ Serious Gaming for Playful People!
- ✖ Gaming is more than entertainment, gaming can be utilised in working environments, education, exercise, motivation and logistics.

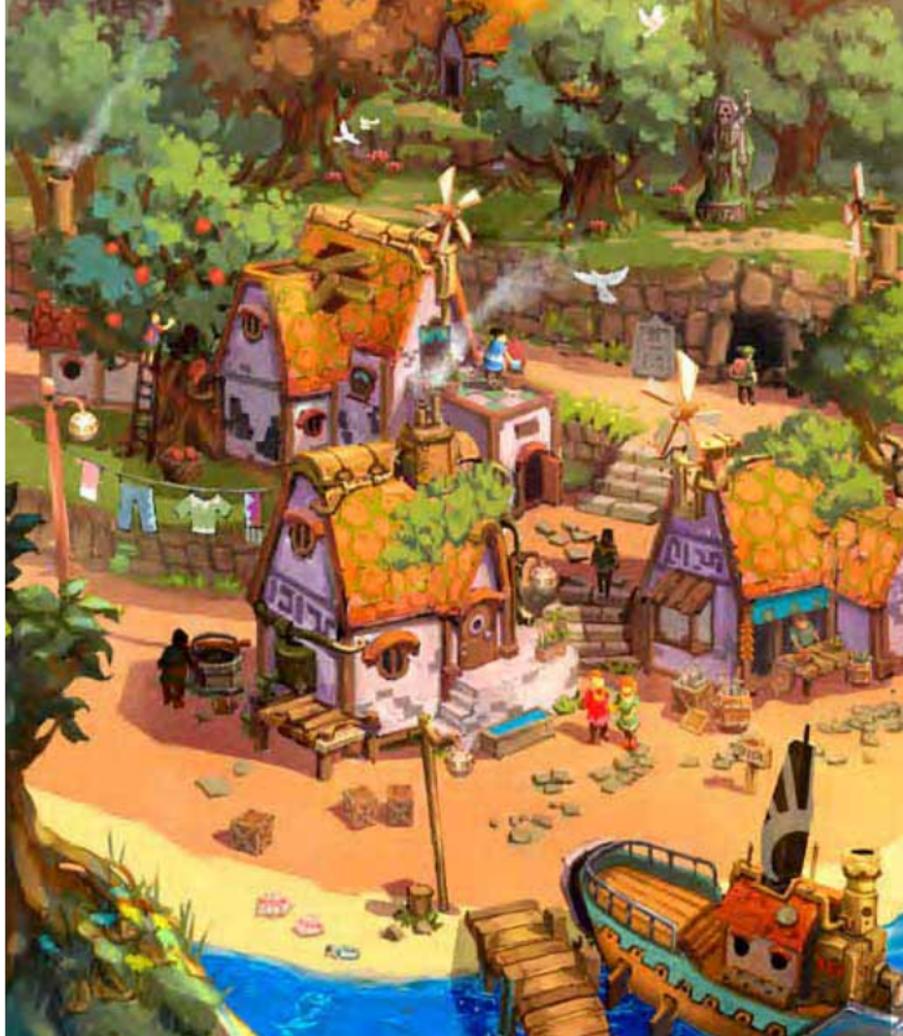


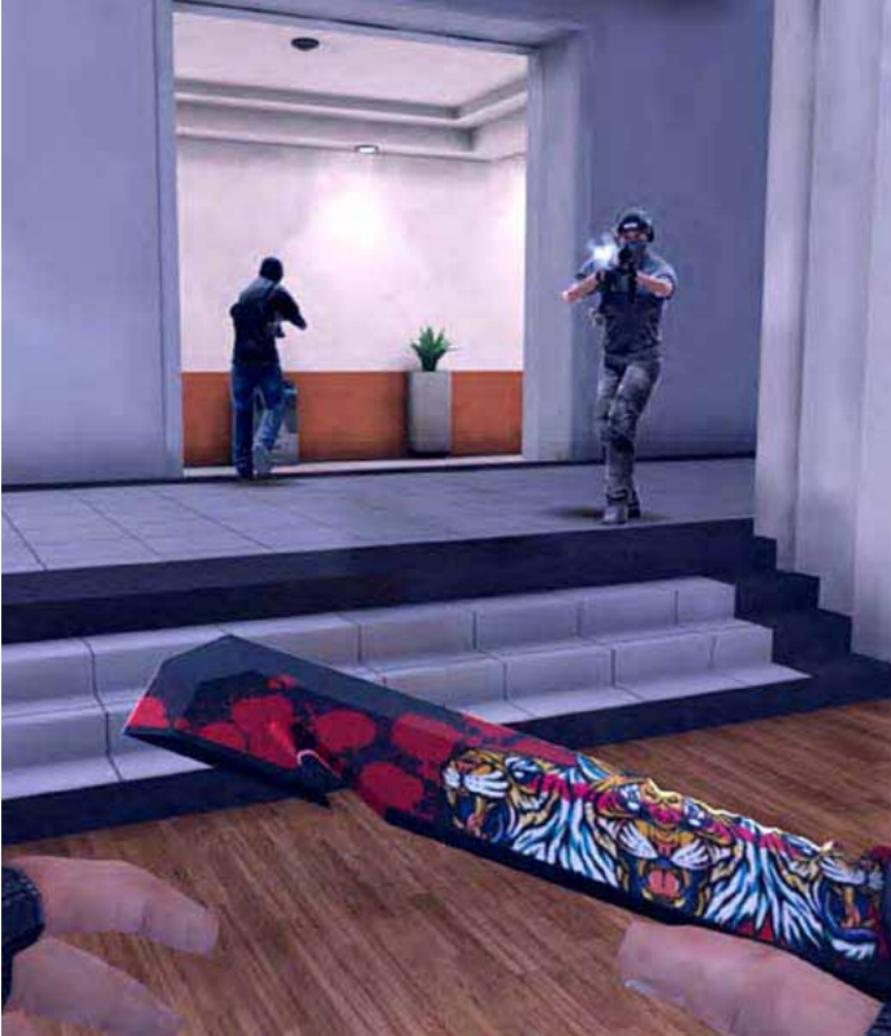


- ✖ Company founded in 2009
- ✖ 18 employees
- ✖ Focus on simulation games to PC/Mac/Linux platforms
- ✖ Developer of city builder Cities: Skylines and mass transit simulators Cities in Motion and its sequel Cities in Motion 2.
- ✖ Cities: Skylines was released to a commercial and critical success in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



- ✦ An independent developer of memorable and action-filled digital games.
- ✦ Founded in 2010 by a team that has worked together developing games for close to a decade.
- ✦ Oceanhorn: Monster of Uncharted Seas for mobile platforms as well as PC, PS4, Xbox One and Nintendo has sold more than 1 million copies worldwide.
- ✦ Now working on Oceanhorn 2: Knights of the Lost Realm, a cutting-edge adventure game developed with Unreal Engine 4.





- ✘ Company founded in 2012
- ✘ 20+ employees, growing fast
- ✘ Winner of Kasvu Open 2015
- ✘ USD 4.5 million funding received during 2016
- ✘ Current main title Critical Ops has already over 10M downloads, while still in alpha phase
- ✘ A total of three games in development
- ✘ Aiming to become the premier studio for mobile eSports FPS titles
- ✘ Finnish Game developer of the year 2016



- ✦ Based in Helsinki, Finland
- ✦ Founded in 2015
- ✦ 12 employees
- ✦ Social mobile games for messaging platforms
- ✦ Own character-based IP for East/West market regions
- ✦ First launch coming in 2017





- ✖ Founded in 2008
- ✖ Creators of the Drive Ahead! Family of Games
- ✖ Committed to crafting fun-first, memorable mobile experiences that bring family and friends together
- ✖ The Drive Ahead! brand has become the world's cornerstone for local and online multiplayer racing and 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

dodreams

- ✦ Company founded in 2014
- ✦ Co-founders from Rovio Entertainment and Brimstone Interactive
- ✦ Making mobile games for core gamers
- ✦ The first game Starside Arena launched in November 2015 on iOS and Android
- ✦ The second game Spaceship Battles launched with HeroCraft Ltd in December 2016 on iOS and Android



EPIC OWL





- ✖ World's leading wearable game studio
- ✖ Founded in 2014
- ✖ Apple Watch Game of the year 2015; Runeblade
- ✖ Apple Keynote September 2016; Field Day
- ✖ Apple Watch Game of the year 2016; Field Day

everywear
games

- ✖ Founded in 2012
- ✖ 26 employees
- ✖ 2015 revenue Eur 14,8M

Fingersoft's Hill Climb Racing (2012) has over 500 million downloads. Hill Climb Racing 2 was published in the end of 2016.

Fingersoft Publishing Program:

- ✖ Make More (2016),
Bad Crane
- ✖ Javelin Masters 3 (2016),
Sadetta
- ✖ Fast Like a Fox (2015),
WayBefore



FINGERSOFT





- ✖ Founded in 2012
- ✖ 15 employees, 3 seasoned teams
- ✖ Over 50 million downloads for BADLAND & BADLAND 2
- ✖ Apple iPad game of the year 2013
- ✖ Nordic Games - Mobile Game of the Year 2016
- ✖ 51% owned by Supercell
- ✖ Three new games in development

FROGMIND

- ✖ Company founded in 2001
- ✖ 90+ employees
- ✖ Over 9 million total game copies sold (Trine series, Shadowgrounds series, Splot, Shadwen) on more than 9 different platforms
- ✖ Nine Parchments coming in 2017 for PC, Xbox One and PS4
- ✖ Multiple unannounced games in development for PC, consoles and VR



FROZENBYTE



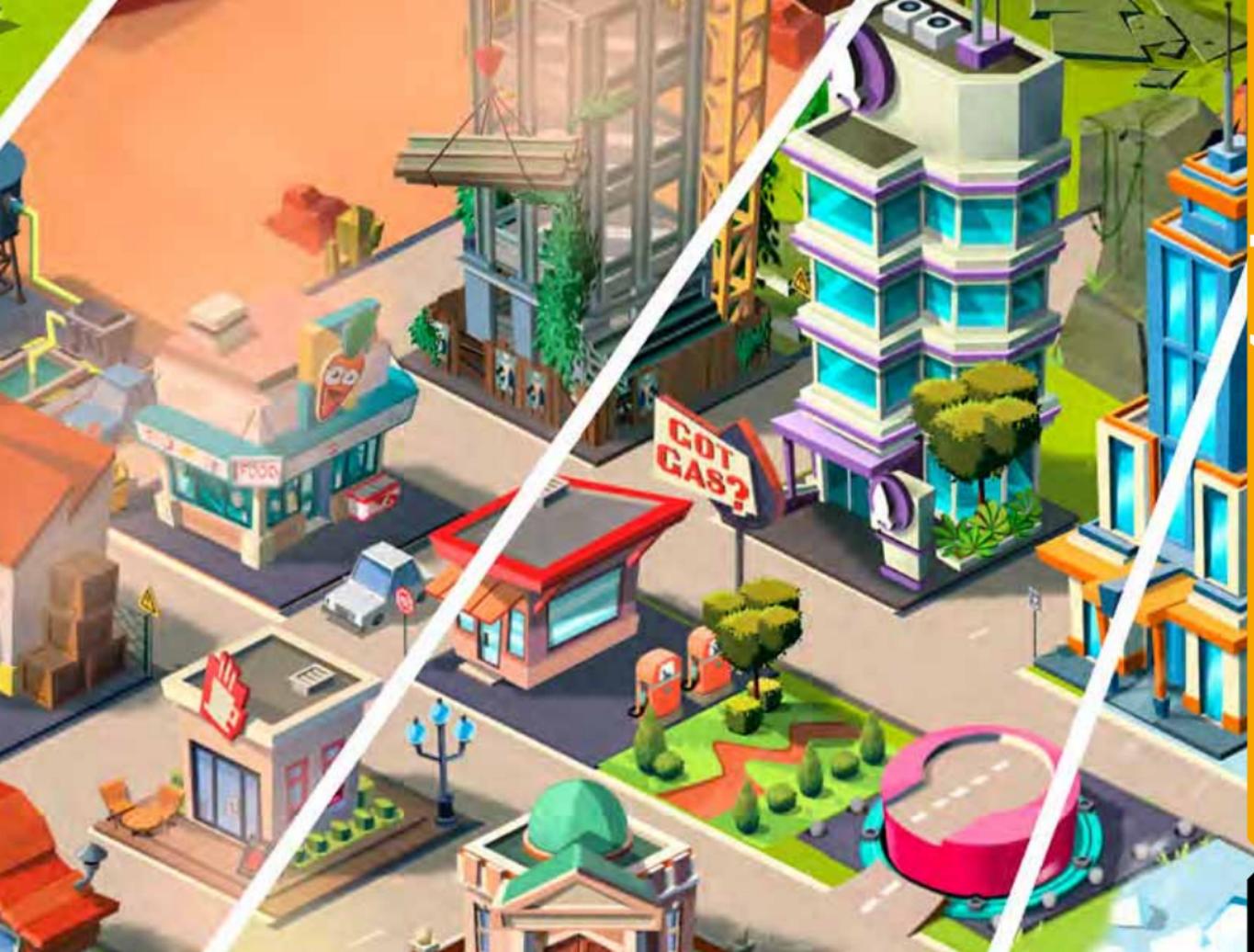


- ✖ Founded in Helsinki in 2014
- ✖ 13+ employees
- ✖ Disrupting messaging with gaming
- ✖ Core focus on Avatars, Animation, Augmented Reality and Location based technologies.
- ✖ Launched 3D Avatar chat, Rawr Messenger in 2016 (iOS and Android)
- ✖ \$3M funding: Vision+, Yuri Milner, John Lindfors, Risto Siilasmaa, Arielle Zuckerberg, Betaworks, Broadway Video Ventures
- ✖ New messaging-game projects in development (shipping early 2017)



- ✦ Founded in 2015
- ✦ Based in Helsinki
- ✦ 14 people, 5 nationalities
- ✦ 3.4 M in funding and profitable
- ✦ Creator of View-to-Play ad focus games
- ✦ Two games released in 1st year, Farm Away! and Build Away!
- ✦ Flat org, no bullshit, super-hero team with over 100 years of experience from Boomlagoon, Crytek, Digital Chocolate, EA, Exient, Frozenbyte, Gameloft, Kloonigames, Mr. Goodliving, Playfish, Reaktor, Recoil Games, Remedy, Rocketpack, Rovio, Sulake, Sumea, Valve, Wooga and Yousician





- ✦ Founded in 2011
- ✦ 20 employees
- ✦ USD 12.5 million in total funding
- ✦ Two new games coming out in 2017





- ✖ A game development partner
- ✖ 18 employees
- ✖ Established 2015
- ✖ Based in Tampere
- ✖ Check out our game - Dice Hunter: Quest of the Dicemancer

**GREENER
GRASS**

- ✖ Company founded in 1995
- ✖ 50+ employees strong
- ✖ Roots from the demo scene
- ✖ One of the most prolific arcade developers of this generation
- ✖ Resogun, Alienation, Dead Nation, Super Stardust HD, and Outland published in the last 10 years.
- ✖ Nex Machina and Matterfall coming up in the near future.
- ✖ Company motto: "Gameplay is King"



HOUSEMARQUE





- ✖ Company founded in 2007
- ✖ Team of 7 experienced developers
- ✖ Platforms: PC, Xbox One, PS4, iOS, Android, WP and VR
- ✖ Over 20 million players
- ✖ Latest release: Ice Lakes (PC, iOS) with 90% positive reviews on Steam
- ✖ Other notable games: Pirates Don't Run (Mobile), Premium Pool (Mobile, PC & coming to Xbox One)
- ✖ Working on retro themed racing game Race Online and another unannounced title for PC and consoles



ICEFLAKE
STUDIOS

- ✖ Iron Sight was founded in late 2015 and employs five people
- ✖ Located in Oulu
- ✖ CEO and founder Henry Vuontisjärvi
- ✖ Focus on PC tactical and strategy games
- ✖ Currently working on a tactical squad-based game End State, set to release in 2017



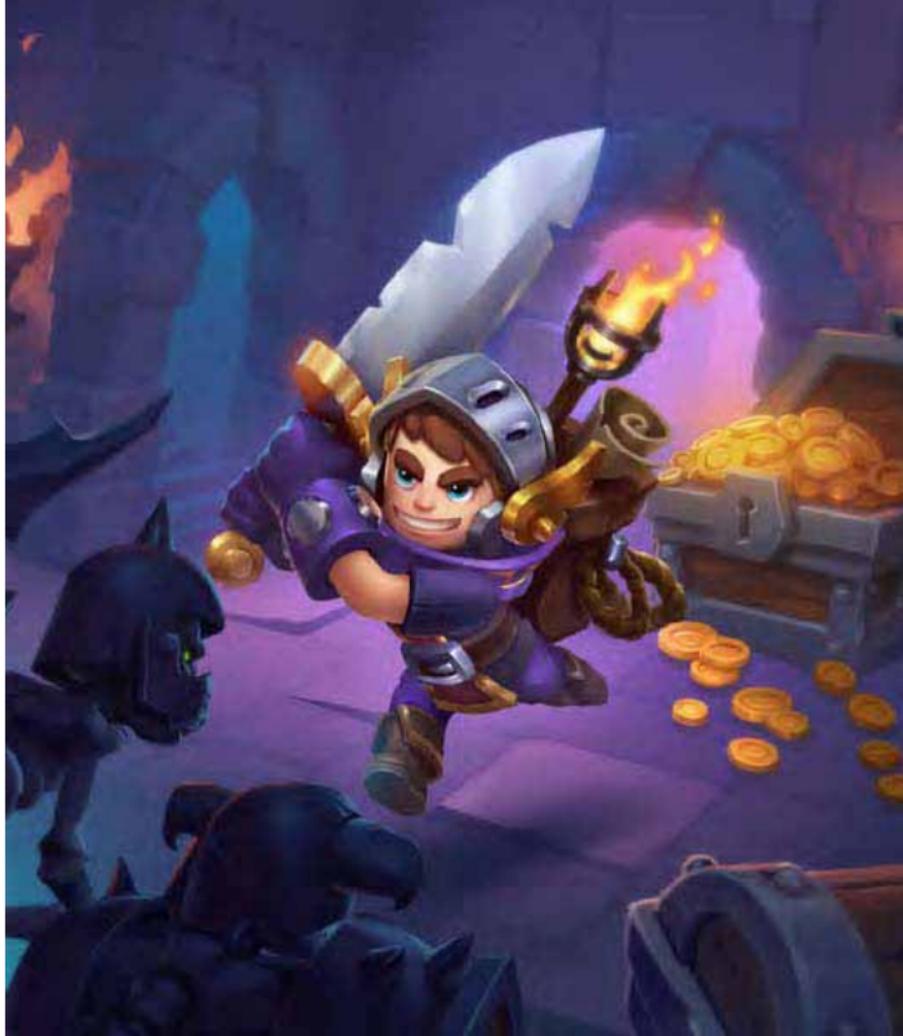


- ✖ Cooperative founded in 2010
- ✖ Ran by game development students
- ✖ Over 320 members
- ✖ Game publishing and subcontracting
- ✖ More than 2,4 million downloads over various mobile titles
- ✖ Recently expanded to Steam and VR



- ✦ Kopla is an adventurous mobile games studio that introduces action RPGs to everyone
- ✦ Founded in 2015 and based in Tampere with 10 employees
- ✦ First game Nonstop Knight has been a big success
- ✦ Acquired by flaregames in 2016

KOPLA
GAMES





✖ Koukoi Games is a mobile game startup from Oulu, Finland. Founded in 2015, Koukoi focuses on producing original and licensed IP mobile games featuring exceptional production value and truly memorable gaming experiences. Koukoi's award-winning "Crashing Season" title was launched on May 2016 worldwide. Koukoi acquired a Seed funding of \$1M in 2015 and additional \$1M in 2016 for stepping into making games based on Hollywood IPs and brands.



- ✦ Company founded in 2004
- ✦ 30+ employees
- ✦ 100+ game projects completed
- ✦ Platforms: iOS, Android, WP, PC/Mac, Web
- ✦ Kuuasema is a creative and agile development studio working with publishers like Disney, Sanoma, Rovio, 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.

kuuasema



- ✖ Founded in 2009
- ✖ Based in Tampere with 12 employees
- ✖ Focus on card, board and role-playing games
- ✖ Original titles include Cabals: Magic & Battle Cards, Trousersheart, 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



- ✦ Learning game studio founded in 2015
- ✦ Based in Helsinki with 14 employees
- ✦ Mission to make the best casual games in the world and ignite the spark to learn
- ✦ \$4 million investment
- ✦ First title Big Bang Legends developed in collaboration with experts from CERN, Oxford and Harvard Universities
- ✦ Launching globally in 2017

Lightneer



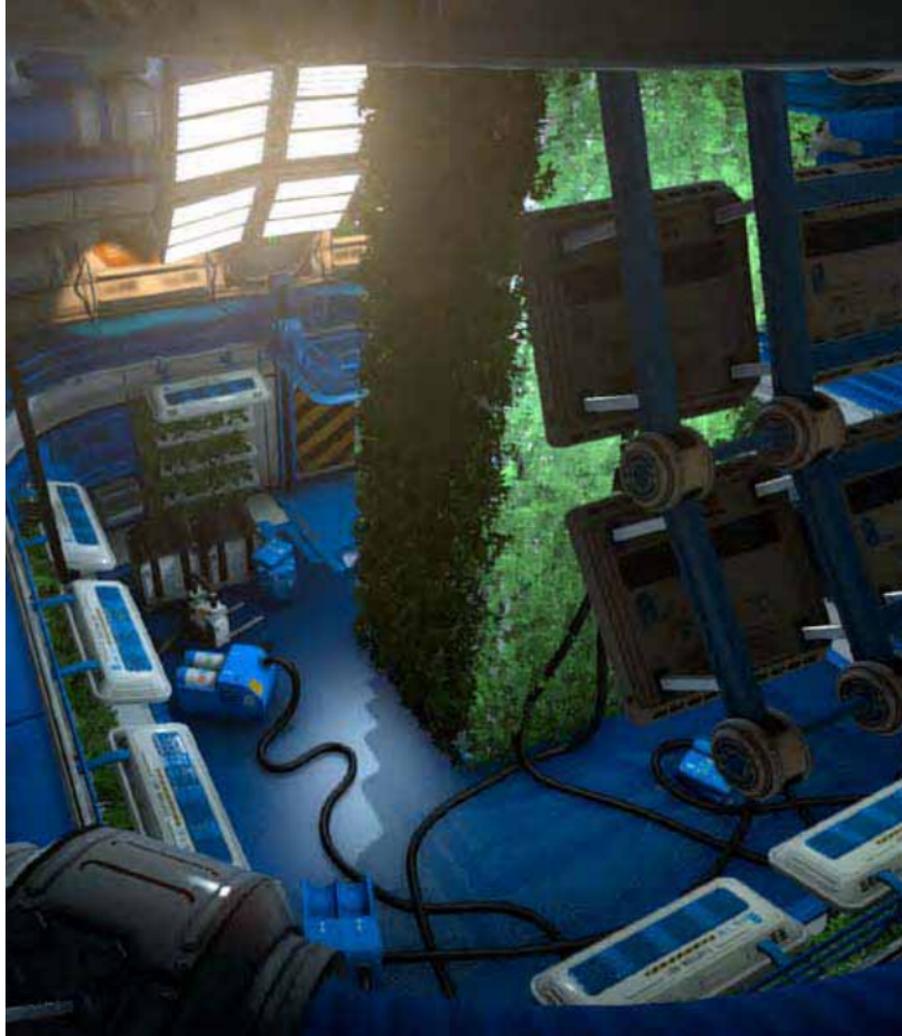


LUDOCRAFT

- ✖ Founded in 2006
- ✖ LudoCraft is one of the most experienced work-for-hire game studio in Finland
- ✖ 20 employees
- ✖ CEO Tony Manninen
- ✖ Contracted work (projectsales) & own IP development
- ✖ Privately owned
- ✖ Income funded, profitable, actively looking for investments



- ✖ Founded in 2013
- ✖ Based in Helsinki with 9 employees
- ✖ Finland's first VR only studio.
- ✖ Develops for all the major VR platforms (Vive, Rift, PSVR, Gear VR, Daydream).
- ✖ Pollen released for desktop VR in 2016
- ✖ Flocklore for mobile VR platforms in Q1/2017
- ✖ Next high-end VR title coming out in H2/2017





- ✖ F2P mobile developer
- ✖ Founded in 2014
- ✖ 9 employees
- ✖ Proprietary engine technology, focus on next generation super-social games
- ✖ Backed by tier-1 venture funds & industry veterans



- ✦ Founded in 2007
- ✦ Based in Tampere with 9 employees
- ✦ iOS, Android and browser based games
- ✦ iOS releases include word games "Words Unleashed" and "Wordspector"
- ✦ Delivered over 40 online and mobile releases for our clients



FLIP DIVING™

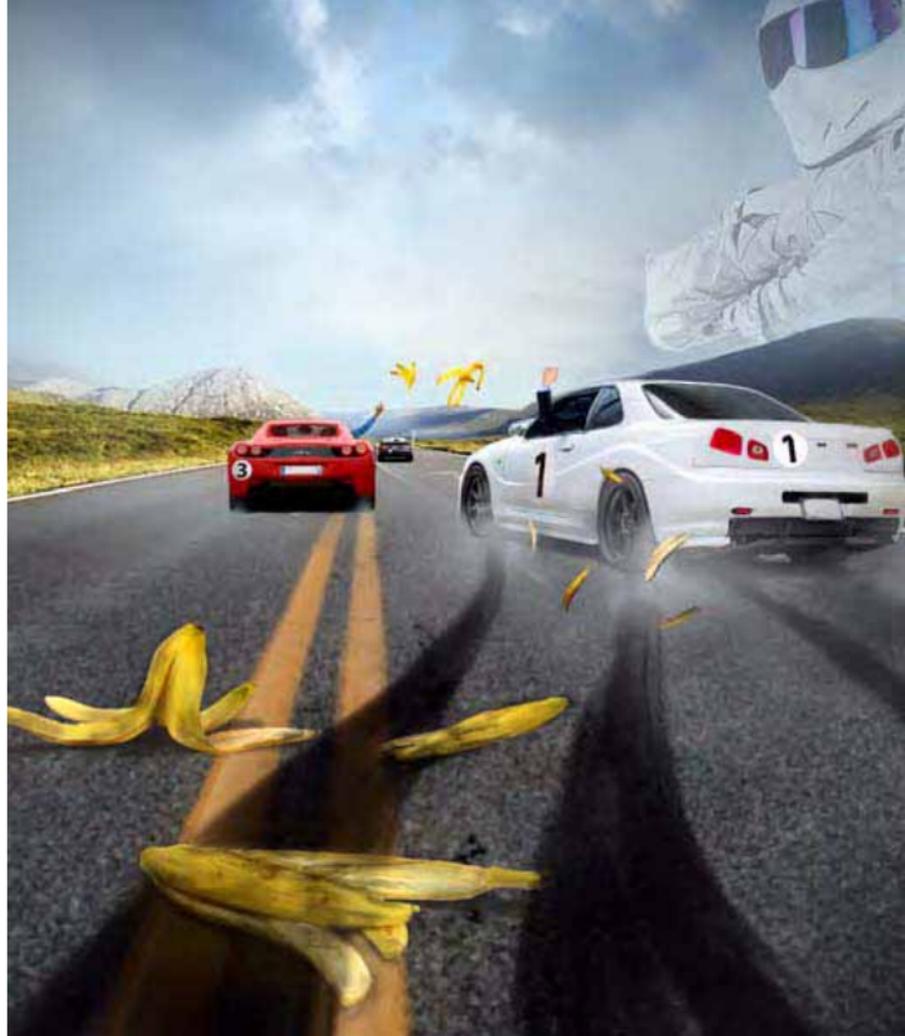


- ✖ MotionVolt Games was founded 2015 by Atte Ilvessuo
- ✖ Focused on creating original physics based F2P mobile games
- ✖ First mobile game, Flip Diving, was released in August 2016. Game reached the top #1 of the download lists in over 50 countries, including US & UK
- ✖ Flip Diving has been downloaded over 40 Million times and players have completed over 20 Billion dives
- ✖ Based in Helsinki and employs three persons



✦ Founded in 2015 by games, media and entertainment experts Jari Pauna and Timo Poijärvi, Motorious Entertainment focuses on bringing world famous entertainment brands to mobile. Their first title, Top Gear Road Trip launches early 2017, with support from BBC Worldwide.

- ✦ Raised €500,000 seed round
- ✦ Team of 10 industry veterans from console, mobile, entertainment and publishing





- ✖ Founded 2013, based in Helsinki
- ✖ A veteran team with 70 employees, 14 nationalities
- ✖ Latest releases: The Walking Dead: No Man's Land based on AMC's hit TV show, Wild West-themed Compass Point: West
- ✖ Next Games is relentlessly focused on fans-first experience and aims to offer unique, authentic service-based games based on big IP.
- ✖ We define the way franchise entertainment transforms into highly engaging mobile games played together with friends and fellow fans.



- ✦ Founded in 2007
 - ✦ 25 employees
- Latest releases:
- ✦ Independence Day: Extinction (iOS & Android 2016)
 - ✦ Raids of Glory (iOS & Android 2015)
 - ✦ Multiplatform experience
 - ✦ Working on high production value synchronous multiplayer games for mobile
 - ✦ Focus in Mid-Core





✖ Pikkukala is a digital entertainment studio. We create original IPs and take them into games, animation and different media.

✖ "The song of the stars", interactive storybook based on a theatre play, "Saari Pairs" puzzle game, "Saari TV" VOD player.

✖ "Saari Space Adventure" is our next upcoming interactive storybook.

✖ Projects in development "Sisters", "Soul Seekers".

Pikkukala

- ✦ Founded in 2013
- ✦ 22 employees
- ✦ Focus on leading new categories in mobile F2P
- ✦ 3 game launches:
Spymaster (2014), Robocide,
Winterstate
- ✦ All games reached top 10 strategy chart positions across the globe
- ✦ \$7.5M in total funding (2013–2014)



- ✖ Founded in 2000, a Ubisoft studio since 2011
- ✖ 135 employees of 21 nationalities with 2 dogs and 1 manbear
- ✖ Over 100 games developed on all major gaming platforms
- ✖ Best known for the award winning physics-based racing series Trials, with over 6 million copies sold on PS4, Xbox One, Xbox 360 and PC, and over 50 million downloads on mobile
- ✖ Several unannounced games in production for consoles, PC and mobile

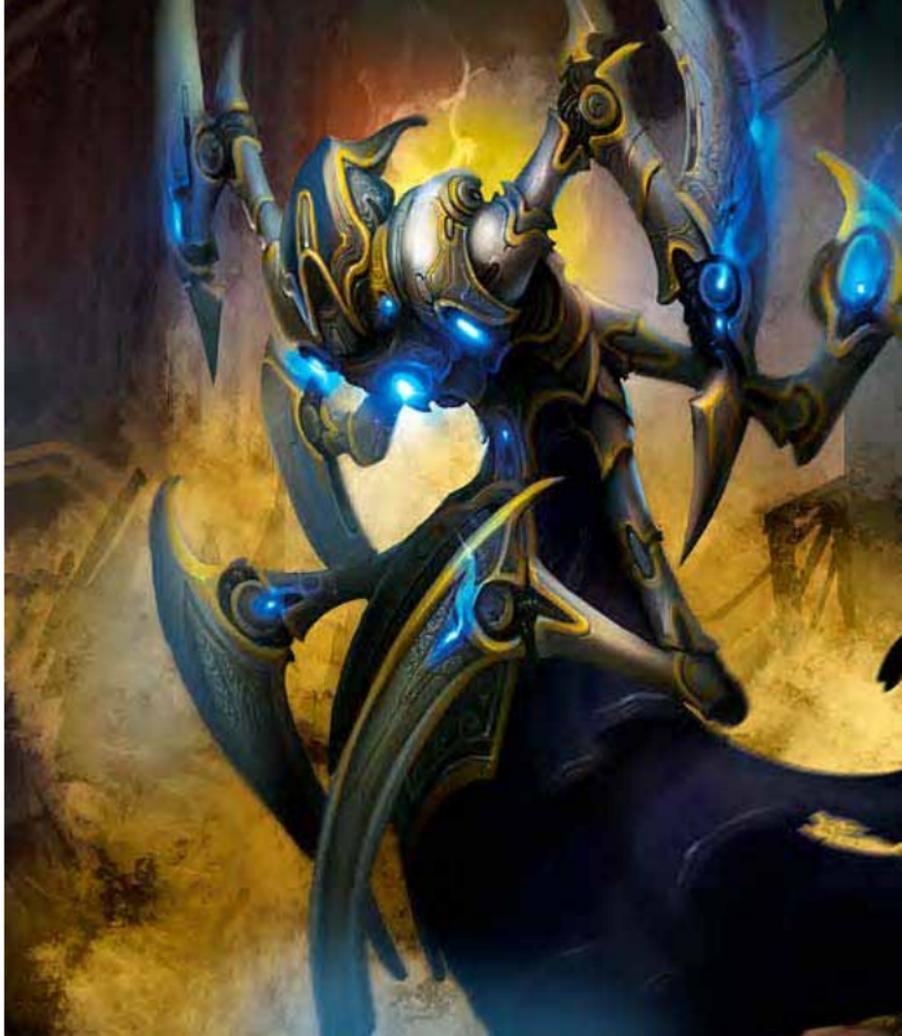


TRIALS
OF THE
BLOOD
DRAGON

- ✦ Company founded in 2015
- ✦ 20 employees
- ✦ \$2.5m funding from Netease Capital, Sisu Game Ventures
- ✦ Reforged focuses on connective core gaming; competitive and co-operative experiences mobile-first
- ✦ First title brings synchronous realtime strategy with massive armies to mobile in 2017
- ✦ Targeting the growing mobile eSports audience as a key segment



REFORGED



✖ Storytellers at heart, Remedy creates cinematic blockbuster action games packed with iconic characters, groundbreaking visuals and stylized gameplay.

✖ Founded in 1995 and based in Espoo, Finland.

✖ 130 employees with over 14 nationalities.

✖ Quantum Break, Alan Wake and Max Payne.

✖ Unannounced AAA project in development.

✖ Working on CROSSFIRE, the world's biggest FPS.



- ✦ Rival Games focuses on redefining interactive storytelling experiences for mature audiences.
- ✦ Their debut title, *The Detail*, introduces an unforgettable and realistic crime series, following the expanding investigation into drug trafficking and homicide in a modern American city.
- ✦ Rival Games' team consists of various skilled individuals, ranging from professional writers and artists to experienced audio designers.



RIVAL GAMES





✦ Rovio Entertainment Ltd, 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 create world-class entertainment experiences with their games, animation, licensing and other businesses that creatively combine digital with physical.

✦ The blockbuster movie – The Angry Birds Movie was launched in May 2016.

 ROVIO

- ✖ Based in Kajaani
- ✖ Founded in 2011
- ✖ Small team focused on making fun local & online multiplayer experiences tongue in cheek
- ✖ Started out with self-published mobile titles & working for hire from 2011 to 2015
- ✖ First console game Spareware released for Xbox One & PC in 2016
- ✖ Currently developing Drunk-Fu: Wasted Masters for Consoles & PC. Planned release in 2017



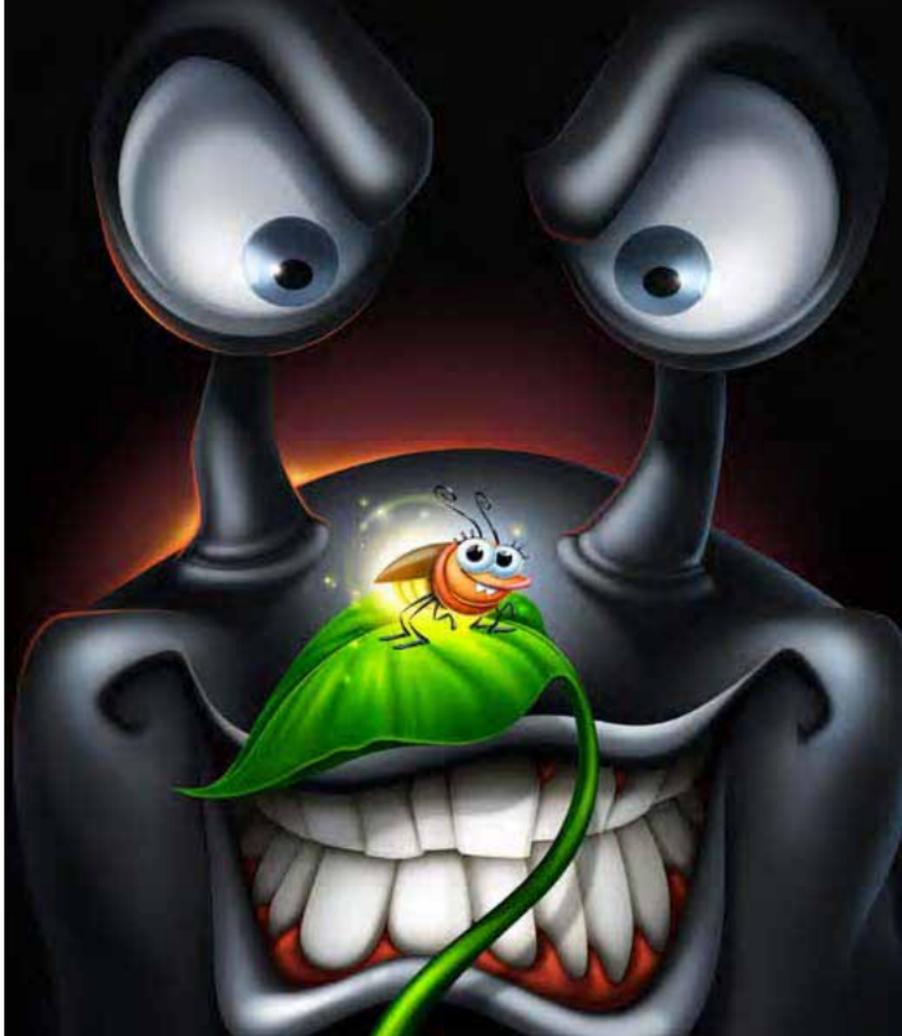


- ✖ Founded in 2012
- ✖ 10 employees
- ✖ Focuses on community-driven F2P strategy games on mobile.
- ✖ Permia Duels coming soon on Google Play & App Store



- ✦ Company founded in 2013
- ✦ 45 employees in Helsinki and 10 in Los Angeles
- ✦ First title Best Fiends was launched in October 2014
- ✦ Second title Best Fiends Forever launched in October 2016
- ✦ Over 50M downloads and 3,4M daily players across Best Fiends titles

Seriously





- ✖ Founded in 2014
- ✖ Creators of Gunnheim & Hypersensitive Bob
- ✖ We are small yet full blown VR game development studio, no ifs or buts.
- ✖ Our mission is to bring VR multiplayer experience in its finest to PC.
- ✖ ...And we are almost there! 2017 will be epic.



✦ We create stunning multiplayer mobile games, which become a daily hobby for our players

✦ Experienced team: former core Habbo and Remedy guys and younger top talent.

✦ Games published

- Oddwings Escape - multiplayer flying game (May 2015)

- Rope Racers- fun multiplayer racing game (March 2016)

- New game coming in Q1/2017: Empires & Puzzles

✦ Mid-core RPG combining match-3 battling, base building and hero collection.

✦ Funding raised: \$4.1M (2013, 2014 - Creandum, PROfounders, Spintop and private investors)



✖ Snowfall Ltd. is Finnish gaming company developing mobile games around a strong domestic brand of Moomins. The target market for Snowfall's games is in Asia, with the first game *iMoomin Under Sail* being primarily developed for Japanese market. The main mission is to provide immersive gameplay in rich world of Moomins, following faithfully all the brilliant stories by Tove Jansson and her vibrant characters.



SNOWFALL

- ✦ Established 2010
- ✦ Star Arcade is a growing studio from Jyväskylä, Finland. We build real-time (synchronous) multiplayer mobile games. We have developed a world-class technology to enable synchronous multiplayer games on all major platforms and OS's. Our latest game Jelly Wars is launching in early 2015
- ✦ Real-time multiplayer games
- ✦ Cross-platform
- ✦ More than 10million downloads





- ✖ HQ Helsinki, Finland
- ✖ Offices: San Francisco, Seoul, Tokyo and Shanghai
- ✖ Founded 2010
- ✖ 210 employees 30+ nationalities
- ✖ Game released:
Hay Day 2012, Clash of Clans 2012 and Boom Beach 2014
Latest release Clash Royale in March 2016 (No. 1 on top grossing list in 131 countries)

**SUP
ERC
ELL**

- ✦ Founded in 2010, based in Turku
- ✦ 9 Employees
- ✦ Was acquired by Hong Kong based Animoca Brands in July 2016
- ✦ Working on updates to Crazy Kings as well as brand new games





- ✖ Founded in 2013
- ✖ 9 employees, based in Kajaani
- ✖ Working on own game projects and work for hire
- ✖ Creators of Interplanetary (Win, Mac, Linux), launched on Steam in 2015
- ✖ Publishers of Mushroom Crusher Extreme (Win, Mac, Linux), currently on Steam Early Access
- ✖ Work for hire projects include the fishing game Legends of Kitka, the educational game Nivelrikko and the driving school simulator Drive!



- ✖ Founded in 2010
- ✖ Based in Tampere with 21 employees
- ✖ Aims to become the market leader in User-Generated Content games on mobile
- ✖ VC backed by the best in the industry
- ✖ New UGC games soft launching in 2017
- ✖ Big Bang Racing
 - Traplight's first UGC mobile game - launched in July 2016
 - ALL levels are created by the players 6 million levels created so far
 - Big Bang Racing chosen as Best of 2016 in App Store



PAKO

CAR CHASE SIMULATOR

- ✖ Company Founded 2013, 3 employees
- ✖ PAKO has been released for iOS, Android, Apple TV, Amazon FireTV and Windows Phone 8
- ✖ Combined amount of downloads on all platforms 5+ Million
- ✖ Working on Pako 1 Steam version and sequel Pako 2.

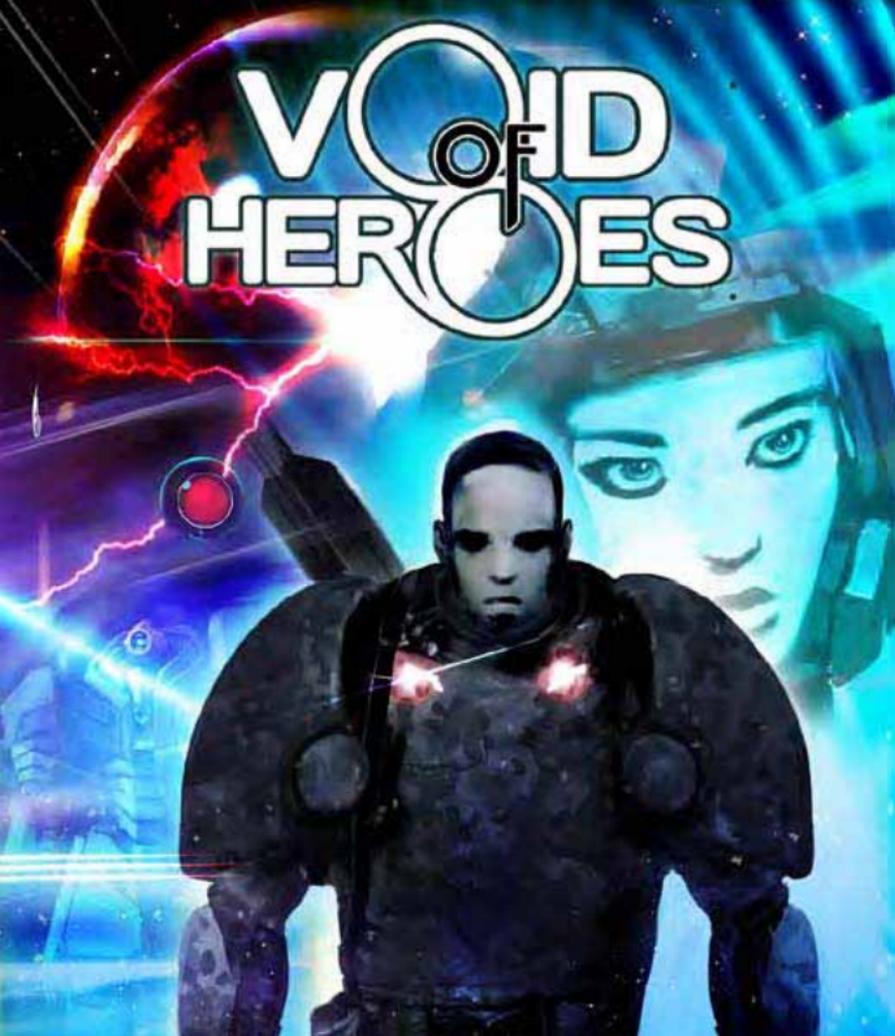


- ✦ Tribeflame can proudly claim to be one of the first tablet games companies in the world.
- ✦ The company was founded in 2009 - a year before the iPad came out - with the vision that tablet computers are coming, and that they will be great gaming devices. Since then, Tribeflame has launched more than a dozen games, and topped the charts multiple times on Android and iOS.
- ✦ The best known Tribeflame game is Benji Bananas, which has been downloaded over 90 million times.

Tribeflame



VOID OF HEROES

The background of the slide features a vibrant, sci-fi-themed illustration. At the top left, a large, glowing red planet with white lightning bolts is visible against a starry space background. In the center, a character in dark, heavy armor with glowing red lights on the chest stands prominently. Behind him, a large, ethereal face of a woman with blue eyes and a futuristic headpiece is superimposed. The overall color palette is dominated by blues, purples, and reds, creating a high-tech, futuristic atmosphere.

- ✖ Founded in 2012.
- ✖ Based in Helsinki.
- ✖ 7 employees.
- ✖ Raised Eur 500 000 funding.
- ✖ Creator of the Void of Heroes universe.
- ✖ Products include comic books and competitive online games.
- ✖ Products released on major mobile platforms.
- ✖ Established international comic- and game publishing network.

TG
TUNNEL
GROUND

- ✖ Founded in 2013
- ✖ Free-to-play mobile game company based in Helsinki
- ✖ Newest game Zombie Catchers has more than 15M downloads with an average rating of 4.7
- ✖ Focus on creating games that are fundamentally something different
- ✖ More games based on Zombie Catchers IP on the way

**two men
and a dog**





- ✖ Unique motion games since 2006
- ✖ Provides consultation and content for camera tech companies such as Intel
- ✖ 10 games on Xbox One, PC, Xbox 360, PS3
- ✖ Kung-Fu extracts the player from live camera feed into the game to fight with real kicks and punches



✖ Yousician reimagines music education by gamifying the process of learning an instrument. Millions of beginners and advanced players around the world use Yousician to improve their skills and play the music they love.

✖ Founded in 2010

✖ 8M active users

✖ 4 instruments: guitar, ukulele, bass and piano

✖ iOS, Android and desktop

✖ Profitable since 2014





- ✦ Zaiatsu is a fast growing game company in Central Finland
- ✦ We develop original game titles
- ✦ We offer software development and gamification solutions
- ✦ Elder Goo - a co-operative puzzle adventure for 1–4 players of all ages
- ✦ A local multiplayer experience on a single mobile device
- ✦ Published by Yle in Finland as Elder Goo – Möllit
- ✦ Available for iOS / Android





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*



