

GAME INITIATIVE

White paper

On May 13, 2014 GameFounders initiated Game Initiative Meetup, a gathering of initiatives aimed to help young game studios in the making. Over 50 people from 15 countries attended the event, including 15 organisations working with game startups. The event included presentations by 9 organisations about their structures and results as well as government and educational institutions about co-operation with game initiatives.

Before the event GameFounders conducted a survey about game initiatives around the world. A total of 9 organisations from 6 countries participated in the survey answering questions about their operations, co-operation and track record.

The following organisations were present at the event and/or participated in the survey:

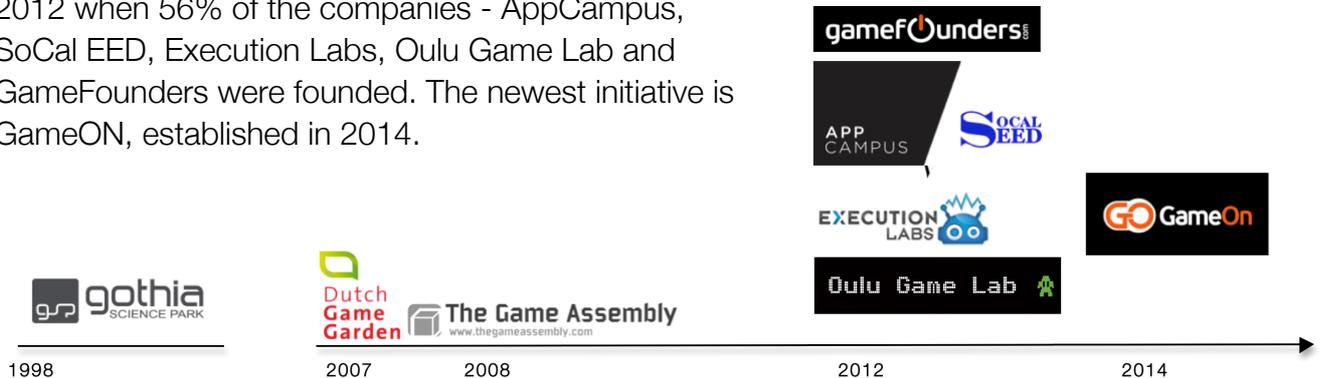
name	country	Game Initiative Meetup	
		Event	Survey
Appcampus	Finland	x	x
Dataspelsbranschen	Sweden	x	
Digital Entertainment Cluster	Poland	x	
Digital Media Fixer	UK	x	
Dutch Game Garden	Netherlands	x	x
Execution Labs	Canada		x
GameFounders	Estonia	x	x
GameON	Netherlands	x	x
Gothia Science Park Incubator	Sweden	x	x
Innovation Agency	Georgia	x	
iVenture Capital	Germany	x	
Kaunas University	Lithuania	x	
Kuovola Game Cluster	Finland	x	
Oulu Game Lab	Finland	x	x
SoCal EED, Inc	USA		x
Tallinn University	Estonia	x	
Tekes	Finland	x	
The Game Assembly	Sweden	x	x

The following topics were covered in the survey and the event:

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ORGANISATIONS

The organization with the longest experience of all the participants is Gothia Science Park Incubator, running smoothly since 1998. In 2007 Dutch Game Garden was established, followed by The Game Assembly in 2008. The most productive year for starting new initiatives was 2012 when 56% of the companies - AppCampus, SoCal EED, Execution Labs, Oulu Game Lab and GameFounders were founded. The newest initiative is GameON, established in 2014.



Two out of 9 consider themselves educational programs. The Game Assembly is Advanced Vocational Education organization for game developers. The program lasts for 2,5 years, the last 1/3 is spent at a workplace. Oulu Game is a pre-incubator game education program that follows a studio+ model. The main goal of the Game Assembly is to prepare the most talented game students for the industry, a big part of the Oulu Game Lab program is to combine bachelor students to veterans from different fields and mix them into teams. Both organizations are educating people for national and international games industry. However, the studies at The Game Assembly are conducted in Swedish for now (though one of their entrance requirements is qualification in English), education in Oulu Game Lab is given in English.

Three out of 9 initiatives label themselves acceleration programs – AppCampus, GameFounders and Dutch Game Garden. AppCampus is a 3-year mobile application seed accelerator, GameFounders is a 3-month business accelerator program and Dutch Game Garden is a community accelerator impacting the growth of the Netherlands Game Sector. Dutch Game Garden's housed companies are 85% game related, 15% digital media, 21% of the accelerated companies in the have been game startups. AppCampus is considering every great app idea (from educational apps to games) while GameFounders is focusing solely on gaming startups. The program of AppCampus is conducted remotely, online as well as on spot with face-to-face camps, GameFounders program requires the core team to work on spot (Tallinn) during 3 months.

We would qualify two more initiatives as accelerators- SoCal EED Inc. in the US and Execution Labs in Canada. SoCal EED Inc. is a non-profit organization focused on helping early-stage entrepreneurs, focusing on developing their business plans, investor presentations and funding that lead to sustainable job creation in Southern California. Their vision for startup communities ensures that startups have a place to create and refine their idea (Seed Accelerator) and then a place to turn their idea into a product/service and associated business (Business Accelerator). Execution Labs is a talent platform that helps independent game developers make games and bring them to market. The goal is to enable experienced developers to become entrepreneurs and pursue their dreams of creative independence.

One of the organizations is a game industry focused incubation program – Gothia Science Park Incubator. The average incubation time is 24 months and they have room for 10-12 studios per

year. Throughout the incubator system they provide access to funding from scholarship to equity based investments.

GameON is the only fund participatin in the survey, based in the Netherlands investing in early-stage companies within the games ecosystem.

The first part of the survey showed how varied the different organisational setups of the game initiatives are. There are no common aspects based on country or region and also there is no standard structure or model that organisations of the same type are following. This shows how early stages the game initiatives are. Many of the organisations had not researched each other in depth and had thus not set their structure up on best practices or any practices. There is no common terminology making the distinction between incubators-accelerators and educational programmes very subjective. At the same time all initiatives are addressing specific issues of the games industry and are closely co-operating with the industry.

The number of people involved in each organisation varies from 10 to over 120. We separated team (full time), advisors

and mentors to get a better picture of the composition and structure of the organisation. Appcampus has the largest full time team, which can be explained by the fact that they do not only work with game startups, but

NUMBER OF PEOPLE WORKING AT/ FOR/ WITH THE INITIATIVE			
	Team size	Advisors	Mentors
AppCampus	12	0	100
Dutch Game Garden	7	3	10
Execution Labs	3	6	100
GameFounders	3	0	120
GameON	3	4	3
Gothia Science Park Incubator	8	5	18
Oulu Game Lab	10	10	10
SoCal EED	5	4	10
The Game Assembly	9	17	9

also any apps that are interested in publishing on Windows Phone. Incubators and educational programs have a larger full time team when compared to accelerators, which is explained through the length of the relevant programs. While accelerators have the smallest number of team members, they have the biggest mentor pools to draw from.

The initiatives tied to educational organisations or regions tend to have larger teams while the private initiatives have a 3- 5 person team heading up the whole operation.

APPLICATIONS

Most of the initiatives had run their programs and thus could provide with statistics on the applications they receive. The number of applications per cycle is smaller for initiatives that work with teams restricted to a region or an organisation/university and larger for initiatives directed to wider groups and international teams.

The number of teams in one class is smaller for initiatives with more tailored

APPLICATIONS AND TEAMS				
	Applications per space	Teams accepted	Team size	Teams in 1 class
AppCampus	3	300+	3	20
Dutch Game Garden	3-4	22	3	10
Execution Labs	20	9	4.5	4
GameFounders	10	29	3	7
GameON	NA	NA	NA	NA
Gothia Science Park Incubator	7	25	10	9
Oulu Game Lab	1,5	21	8	9
SoCal EED, Inc.	10	6	4	6
The Game Assembly	4.6	25		6

programs and larger for incubators. On average the number still stays at max 10 teams with the exception of Appcampus, that has a wider reach beyond games.

The size of teams in the program is fairly similar across all organisations with the exception of Gothia and Oulu working with larger teams of students. The average number of people in one cycle thus comes to 20-30 people with the exceptions of Gothia, Oulu and Appcampus working with 60-90 people at the same time.

Combining the numbers of teams and persons in these teams with the previous numbers about the team and mentors, we see that GameFounders and Execution Labs have both 6 mentors per person and Appcampus has 2 while for the other initiatives this number stays under 1. The difference can be explained by the mentors' roles and the extent of their stay with the teams.

The entrance requirements for applicants range from team size to skillsets to willingness to relocate. Some initiatives are looking for ready-made teams, some put the teams together themselves and the same goes for game ideas.

From the educational initiatives' side The Game Assembly requirements are the same as for universities and university colleges (upper secondary school diploma or equivalent degree required). Oulu Game Lab requires basic know-how on one of the following fields: programming, graphical design, game design, producing, project management, business and marketing, script writing, audio design, level design, animation, 3D modelling. English skills are required for both programs.

Three out of 9 initiatives have some sort of restrictions on team size. SoCal EED and Execution Labs prefer teams up to 5 people, GameFounders does not take in 1-person teams. Execution Labs would ideally see 2 programmers in the team. 2 of the initiatives have mentioned that during the program, the teams have to be able to work in one location (Execution Labs – in Montreal, Canada, GameFounders in Tallinn, Estonia).

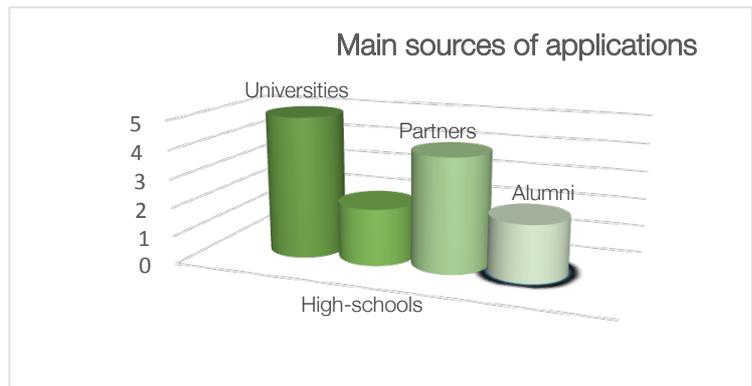
A third of the initiatives prefer that the team has some **previous experience** in business. SoCal EED takes in early-stage entrepreneurs with possibly a seed round funding. GameON is looking for passionate entrepreneurs who already have a clear understanding of their product and the market it addresses and prefers some earlier experience in running a business. Ideal companies for Execution Labs are those not yet incorporated. GameFounders does not require having a company, but the team should have the willingness to create one and turn it into a scalable business.

33% require a **scalable business model** and/or a vision for growth. For example, The Dutch Game Garden wants to see a rough plan for next 3 years and that the team has defined the market and projects. Game ON also takes into account the defined path to revenues ability to scale up rapidly without large fixed costs and the potential for widespread adoption.

Also a **prototype** is required or preferred for 3 out of 9 initiatives. GameFounders is accepting startups that have a beta, first release, vertical slice or prototype ready. The Dutch Game Garden requires one or more working prototypes, while for Execution Labs it is not compulsory, but is considered an ideal situation.

There are some requirements that are applied only in one of the participant organisations. For example AppCampus requires WP App exclusivity for 90 days and potential to reach ½ million downloads in the first year. Dutch Game Garden requires the teams a budget to pay rent for a year. Execution Labs also requires an existing Canadian work permit.

As shown on the diagram, the main sources for applications are universities with a game development program (University of Skövde for Gothia Science Park Incubator, Oulu University of Applied Sciences for Oulu Game Lab, HKU School of the Arts, University of Utrecht and NHTV Breda for Dutch Game Garden). Besides that, the applications also come from events, online sources, social media, conferences, referrals, Erasmus partnerships (Oulu Game Lab) and Startup Networks (GameFounders).



EVALUATION

The most common stages of evaluation are:

1. Online application (online form, by e-mail, submitting CV, portfolio, qualifications etc.);
2. Interview (by Skype or 1-on-1 meetings with staff, advisors, mentors) + extra questionnaires, recommendations etc;
3. Evaluation committee, final decision.

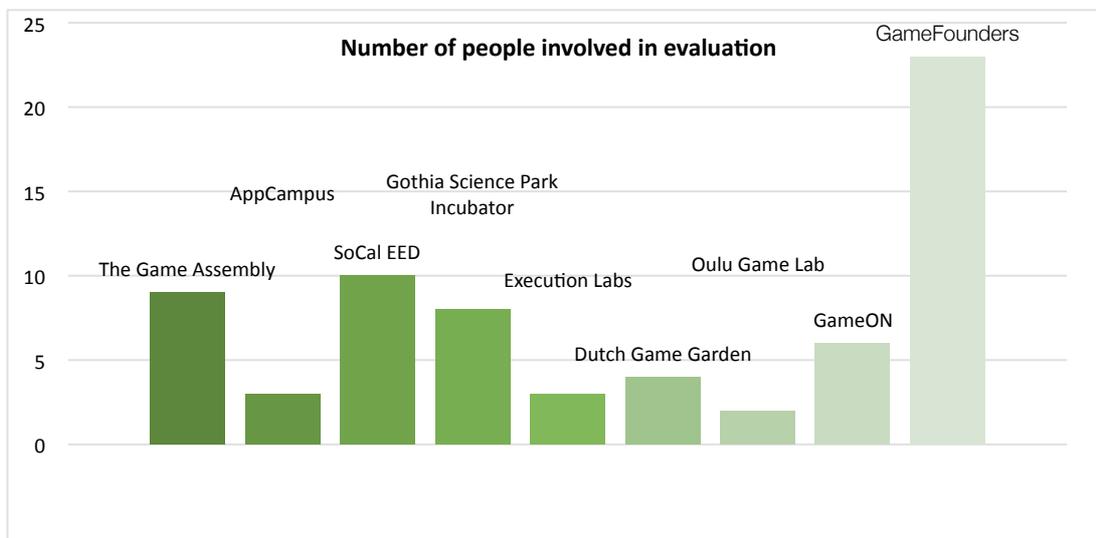
Application stage is the first basic evaluation, including questions about each team member, the team collectively, the project, portfolio and plans (Execution Labs), the applicants have to submit all the relevant information- including testflights, visuals of the project, team CV's etc. (GameFounders). The purpose is to assess whether the applicant's business plan makes sense (SoCal EED) and to make sure that they fall within the required parameters (for example investment parameters of the fund for GameON). AppCampus is doing continuous screening of cases -reviewing submissions and supporting info, references and additional info on previous success cases, looking at credibility of submission, fit to portfolio and match against selection criterias. Selection is based on the team skill DNA and personality DNA and the attitude as well as the plans for their first games and the market (DGG).

Interview is conducted to see whether the founders are „coachable“ (SoCal EED) and/or to get the information that was missing or unclear in the application forms (GameFounders). For the fund members of GameON will conduct initial diligence on the company, market, competitive landscape, etc on this level of evaluation.

Only the best applications pass to the final round where the decision about accession will be made. For that, SoCal EED has an advisory board that reviews the game and target market to see if it makes sense. GameFounders is organizing an evaluation committee event where all the finalists get to live pitch in front of the committee consisting of staff as well as mentors and investors.

In addition to these stages the Dutch Game Garden has also a questionnaire stage, then one interview with DGG staff and another with 2-3 senior incubators companies before the final decision. GameFounders has one more stage - online-evaluation -before the final decision where the staff gets advice from mentors all over the world.

The process varies a bit for the educational organizations. Oulu Game Lab, for example, has 3 different processes of evaluation depending on channel - 1) for University of Applied Sciences students 2) for Open University 3) for Exchange students. There are variations in portfolio evaluation, CV evaluation during interview and interview to find out about required talent and motivation to enter game industry and mental willingness to work on startups. Besides requirement for upper secondary school diploma or equivalent degree, the Game Assembly is testing the applicants about their level, whether they are able to keep up with the education and do validation if they used their own work in their portfolios.



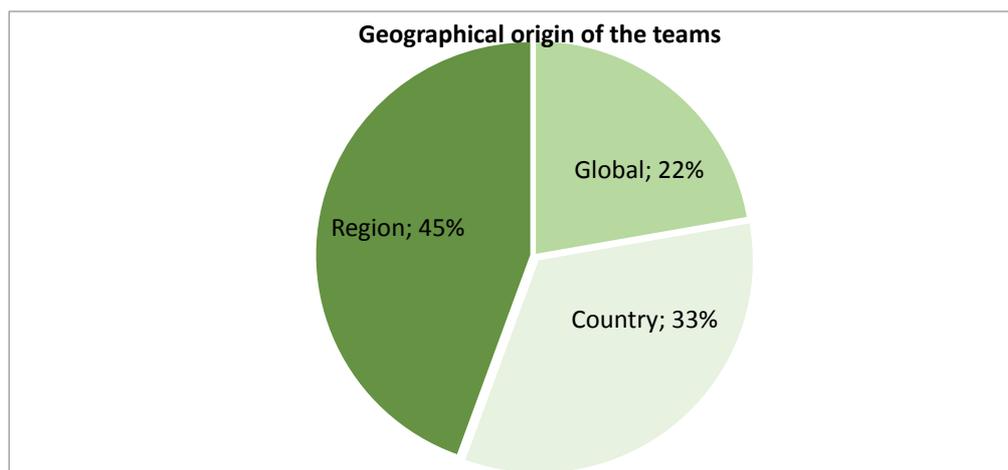
The number of people making decisions about the applications also varies a lot. The smallest number of people involved in the decisions is in Oulu Game Lab where 2 people conduct the evaluation. On the other side, GameFounders has the most people involved (20-25) in the process, also including the online evaluators.

Besides the staff, a selection of mentors and investors are part of the decision making process.

TEAMS IN PORTFOLIO

AppCampus (59% comes from Europe, 13% from North America, 10% China, the rest from other regions) and GameFounders (teams from 16 different countries in the portfolio) accept participants from all around the world, while others are focused on local or regional applicants. Dutch Game Garden only hosts Dutch teams, Execution Labs requires Canadian work visas, so the teams are usually coming in only from across Canada. Some teams include international members, but they already have their work papers sorted.

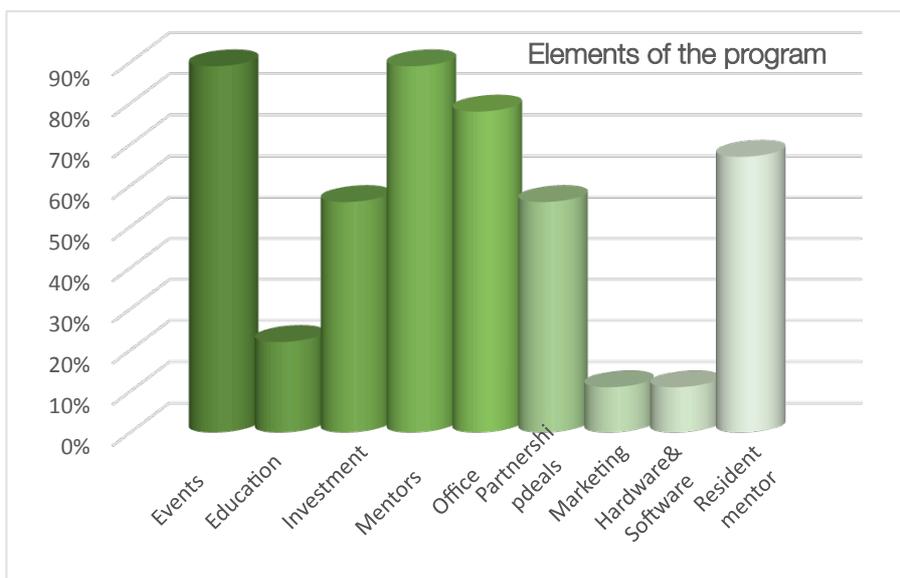
Almost all initiatives see constant improvement in the quality of the teams. In AppCampus' opinion, their teams are constantly improving in quality of submissions, track



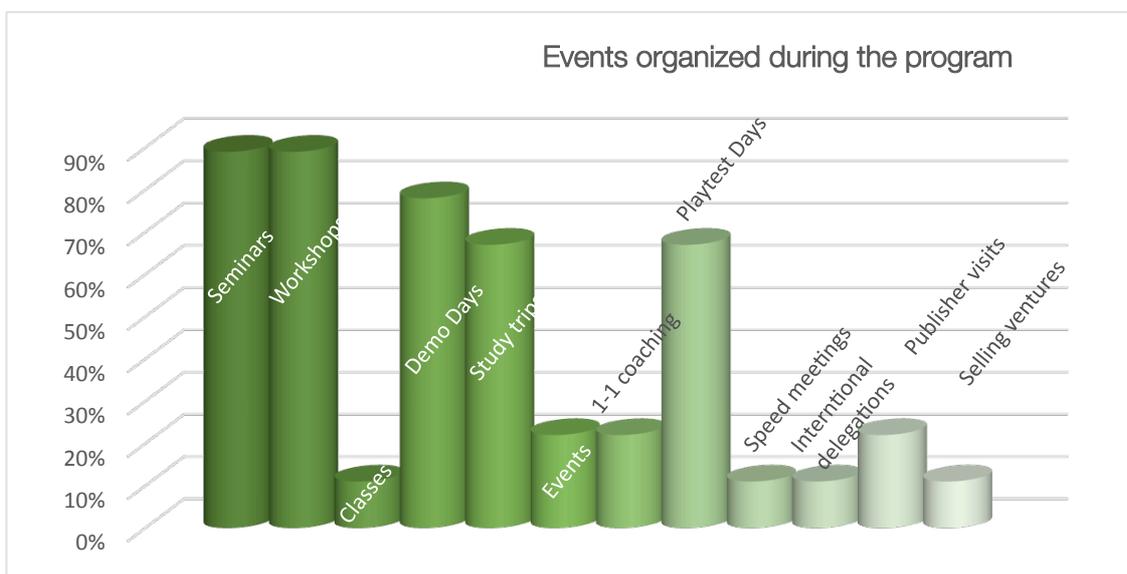
record, execution capabilities and results. SoCal EED is seeing more professionals coming into the program. Dutch Game Garden mentions the improvement in quality of gamedev skills, although very Unity focused which can mean lesser programming skills. They also see the teams more market focused than before. A big change is moving away from console market toward Steam-PC, and of course the high percentage of mobile focused companies.

PROGRAM

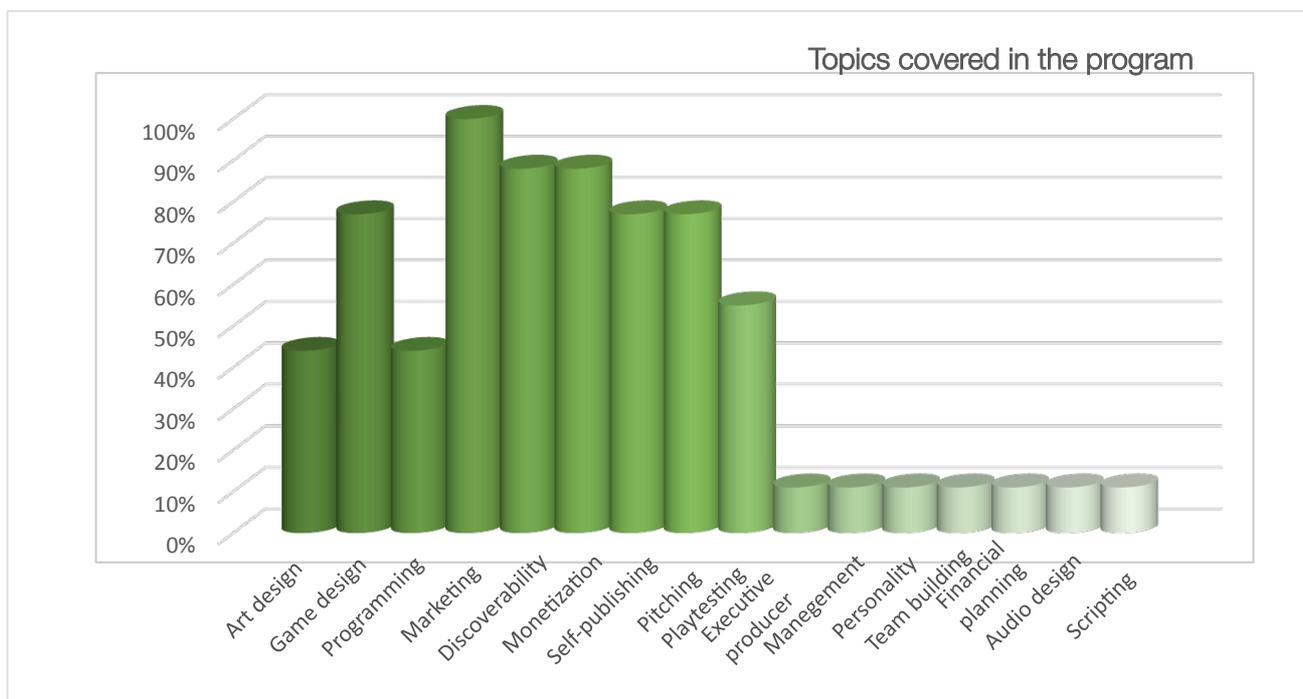
The most common perks provided by the initiatives are events (8 out of 9), mentors (8 out of 9) and office space (7 out of 9). Mentors and office space are not included to the perks of the Game Assembly, GameON is providing only mentors. Only Gothia Science Park Incubator provides the teams with hardware and software, only AppCampus is giving marketing support.



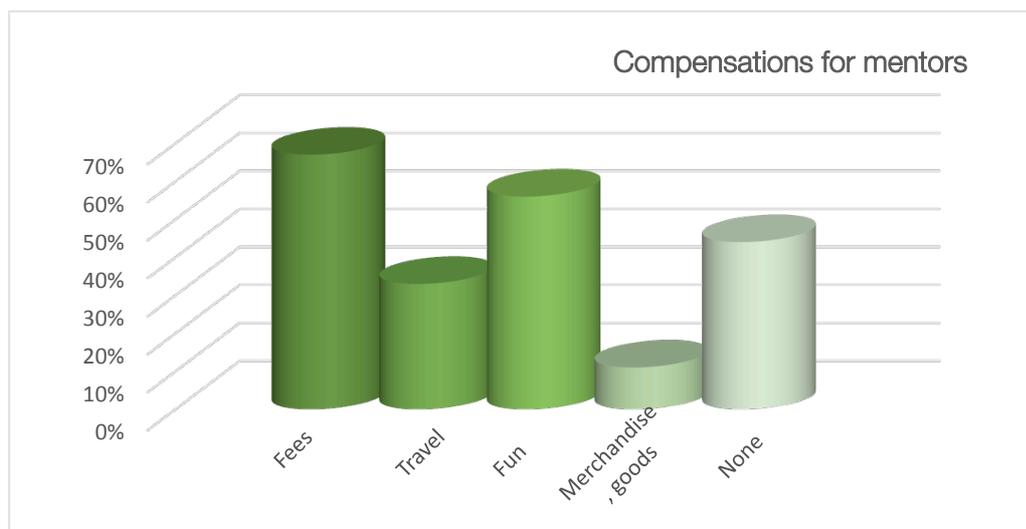
The most popular events are seminars and workshops, organized in 8 out of 9 organizations. There are no seminars at AppCampus and GameON doesn't do workshops. Initiatives have events in their own formats, like classes (The Game Assembly), speed meetings and selling ventures (Gothia Science Park Incubator) and international delegations (Execution Labs). GameON is only organizing seminars.



The most common topic in the program is marketing. 8 out of 9 organizations also cover monetization which is not included in The Game Assembly program. The least covered topics (1 out of 9) are the following: executive producer, management (Gothia Science Park Incubator); personality (DISC), team building, financial planning (Dutch Game Garden); audio design, scripting (Oulu Game Lab).



In most of the cases, the mentors are compensated for their time, help, expertise etc. Only 1 out of 9 said there is no compensation for mentors (SoCal EED). 6 out of 9 initiatives use fees as one of the ways of compensation. GameFounders, Execution Labs and SoCal EED are not paying fees at all. More ways to compensate a mentor is covering travel costs or organizing fun events, dinners etc.



Most of the initiatives mention that their programs are constantly evolving. GameON and SoCal EED are still too new organizations to talk about any evolution.

6 out of 9 initiatives have made beneficial changes in the main program. GameFounders has improved the preparatory process, assisting the teams with different documents and also the

documents sent to mentors in advance. Oulu Game Lab offers support to the startups for longer period than when they first started (now 1 year instead of 4 months). Dutch Game Garden has changed the format from informal to formal - the advisory mentorship role of theirs was more hands-on and personal before, the role was later picked up by the senior game incubators. The Game Assembly is now helping the students more with knowledge how to set up their own company, while Oulu Game Lab has improved numerous details on how to help young teams get their first traction, first CV mark, track record or game out there. GameFounders now puts more emphasis on (self)publishing and monetization and is constantly growing their mentor network.

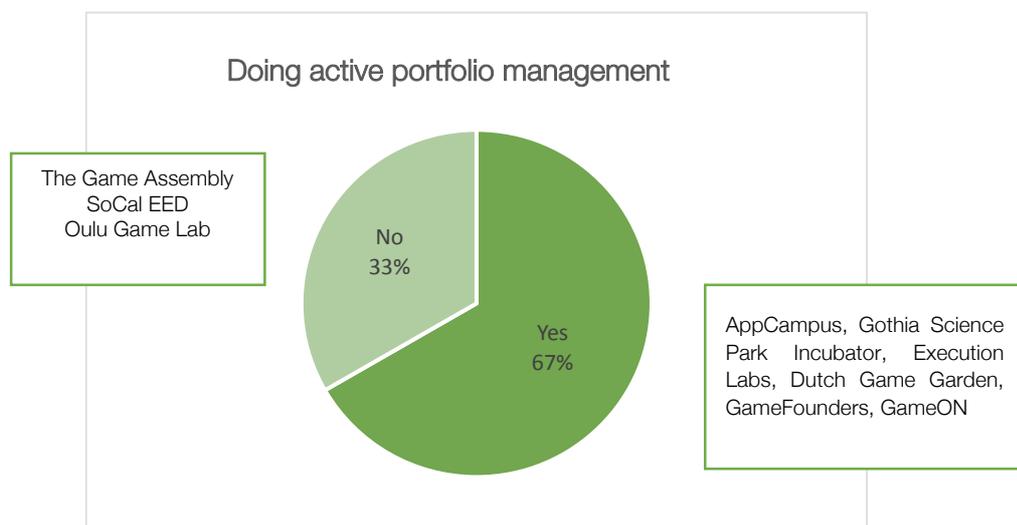
AppCampus has also made changes in their after-program activities by launching Alumni activities, alumni president etc. that was not done in the beginning.

FOLLOW-UP

All of the initiatives are monitoring the teams after the program in one or more of the following ways:

- Alumni events and gatherings
- Interaction via Alumni groups
- Surveys and research efforts
- Through the mentors
- Associate memberships
- Informal management (via e-mail, events, mutual events)
- Monthly update reports
- Regular Skype calls
- 6 mo evaluation if the graduated students are working in the game industry (The Game Assembly)

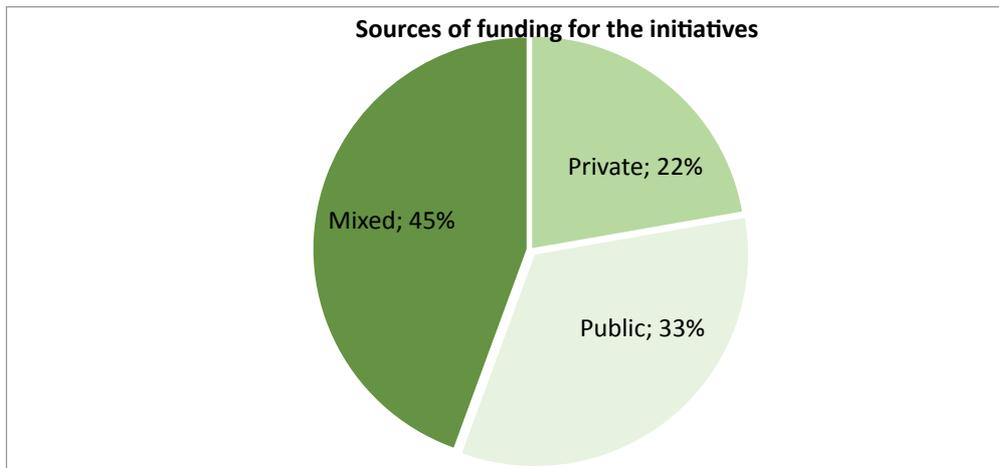
6 out of 9 initiatives also do active portfolio management. Gothia Science Park Incubator is monitoring the teams via board of directors. GameFounders practices include status update documents that is to be filled by the portfolio companies monthly, having regular Skype calls with the teams to discuss the status, intros to investors and publishers will be made based on this and asking the teams before conferences if there is someone they are interested to make contact with.



BUSINESS MODEL

Among participant initiatives both private and public, as well as mixed sources of funding are used.

The Game Assembly, Oulu Game Lab and Dutch Game Garden operate on public funding. The Game Assembly is financed by the Swedish National Agency for Higher Vocational Education which is state funded. Oulu Game Lab is almost 100% funded by Oulu University of Applied Sciences that gets funding from the state of Finland based on ECTS created. Dutch Game Garden gets European, national and local (province and city) government funding from an economical stimulance perspective (EFRO), however they also participate in several grant programs related to game research, game education and game innovation and work with sponsors like Microsoft for specific events and activities.



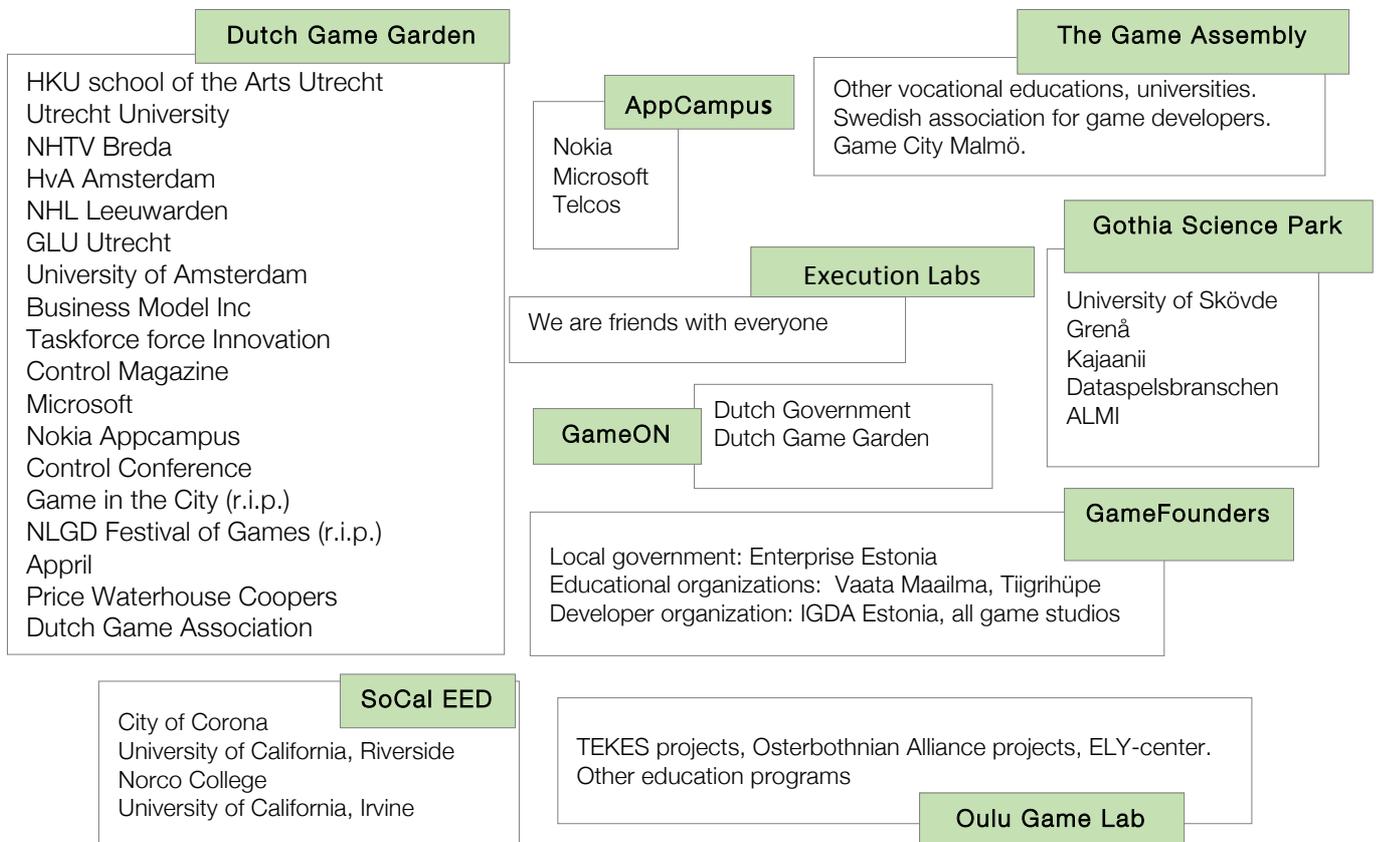
SoCal EED and Execution Labs have private funding (VC's, angels). The rest are using both private and public resources. For example GameFounders is investing 100% private money raised from Estonian angel investors and companies. At the same time it gets grants or contracts from the Startup Estonia program that is EU funded.

The initiatives offer startups different value propositions and also take different rewards in return. The educational organizations are offering their network and knowledge (The Game Assembly), free office space, education (300EUR open university payment is not covered though) and free trips (Oulu Game Lab). Some of the organizations give capital like Gothia Science Park Incubator (roughly \$100k), AppCampus (standardized 20, 50 or 70K grants) and GameFounders (up to €15k per company). Others pay for services like legal when necessary (Dutch Game Garden), ask for exclusivity like AppCampus who offers 90 days exclusivity in exchange of Grants (no Revenues, IP, rev share) or give free dev hardware/software like Gothia Science Park Incubator. GameON is reviewing each case separately and decide upon that.

Less than half of the initiatives – Gothia Science Park Incubator, Execution Labs, GameON and GameFounders - take equity in return for participating in the program.

CO-OPERATION

All the initiatives co-operate with educational organisations and local game developers' organizations, 8 out of 9 are also working with the government in some way.



The main co-operation form with the government is funding (7 out of 9). The Game Assembly is funded by The Swedish Agency for Higher Vocational Education, therefore they apply for the right to offer education every second year, Oulu Game Lab is applying for the development project funding as well as research project funding. GameFounders gets funding for operational costs from the Startup Estonia program. The core funding of Dutch Game Garden comes through the EFRO program, a mix of European, Dutch National and local (province and city, funding.), but they are also participating in several government grant programs. The Governments can also be a potential co-investor in the fund like for GameON. AppCampus is co-working with Tekes for financing of Finnish cases.

There are other co-operation forms like free space provided by the local government (SoCal EED) or getting help with international commercialization (mainly via events) and introductions (Execution Lab). Oulu Game Lab gives a good example of wider co-operation. For example they keep government organisations informed of the status of the local game industry. Finnish government also supports unemployed people's participation in the Oulu Game Lab program, which is working very well.

For the educational organisations, co-operation is mainly focused on finding synergies with other educational organizations, exchange of teachers and students and exchange of ideas, good practices on game education. Oulu Game Lab also mentions that communication with other

similar organizations helps to fill in the gaps they have with the expertise of other organisations staff and vice versa.

When the co-operation is very close, the universities are even planning their schedules according to the local game events. For example, since Dutch Game Garden is a hub for game students, their events are very student focused, therefore the Netherlands' gamedev universities plan their schedules so students can attend their events like Indigo, Global Gamejam, Summer Gamedev, Gamejams, Network lunches etc. GameFounders has opened their seminars to students of the university, where their office is located.

Universities are often founding partners of game initiatives. Aalto University is the founding partner of AppCampus, running the program and active in research studies. The initiative organizations can also be in an advisory role for the universities. Dutch Game Garden is helping several universities like the HKU, University of Amsterdam, NHTV Breda, NHL Leeuwarden being formal advisors for their bachelor and master programs.

GameFounders brings school kids who are attending programming/IT courses at school to test the games and give feedback to the teams and also give an overview about what is an accelerator and who are these companies and different people jobs in the game industry.

Other ways of working with educational organizations include giving out internships, organizing student trips and being part of student research projects (Execution Labs).

3 out of 9 say that game developers' organizations are members of the steering committee of the organization. For example Dutch Game Association was initiated partially by the Dutch Game Garden and their managing director has been on the board for many years.

For The Game Assembly is very important to work closely together with game development organizations in order to keep up their curriculum up to date.

Many of the initiatives also organize events and gatherings with game developers' organizations and attend theirs. 2 of 9 initiatives mention they are part of local IGDA organisations. GameFounders is part of IGDA Estonia organization, having organized mutual events in Tallinn such as a hackathon in September 2013 etc. GameFounders has also organized seminars for a wider audience and spread the info in IGDA channels. IGDA Finland Oulu Hub is the most valuable game developer's organisation partner for Oulu Game Lab. They are also working together with Play Finland and IGDA Finland.

6 out of 9 are working closely with service providers, making strategic partnerships, work together in some innovation grant programs, bringing mentors on board from these companies, etc. Sometimes the partners make special offers for the teams in the program, give an overview how some services work or how to use new tools (GameFounders).

Oulu Game Lab gets project ideas from existing companies, but also through research projects they share their findings on market research analysis with companies who are actively involved with our operations. In AppCampus' case, the service provider is a funding partner of the organization (Nokia) and they have Telcos as a partner for seed activities and distribution. In some innovation grant programs we work together with the leading game companies and have them participate.

Dutch Game Garden is co-organizing playable gamejam together with Business Model Inc. In general, the majority of initiatives are open to any new co-operation forms.

LESSONS LEARNED

3 out of 9 would not change anything in the accession/application process. Dutch Game Garden would like to do more filtering based on personality, attitude and team synergy in the future. Their practices show that most of the startups fail due to negative personality dynamics within the founders' team. AppCampus would use F6S for channels, crowdsource screening process.

8 out of 9 organizations would not strip anything from the program, but to add more stuff, re-evaluate the old practices and change accordingly since the game industry is changing so fast. Dutch Game Garden has practiced paying to mentors in the past, but now believe that this should not be necessary. They would also add team building activities to the program. The Game Assembly as an educational organization mentions evolving and developing further by sharing their good practices and methods to others and also to keep the Network because together we are strong. 3 out of 9 organizations would like to have more secure/bigger funding or funding at all. For example Oulu Game Lab would prefer more secure funding which could be found if we get engineers to be game engineers, tradenomes to become game tradenomes etc. SoCal EED is bringing more equipment for the teams to work with during the program, AppCampus would also add trips.

According to the initiatives' suggestions, follow-up could be improved by making it more formalized, frequent and to have a more calendered structure. Since some teams do not have the skills to follow-up the intros made, there might also be a need to act as an agent in some cases. Periodical meetings should also be organized when investing in companies. Having enough staff to do regular follow-ups was also mentioned.

SUMMARY

Game Initiative is a group of organisations supporting the development of young game studios or developers. Over 50 people from 15 countries attended the first event in Tallinn, including 15 organisations working with game startups. A total of 9 organisations from 6 countries participated in this survey.

Game initiatives were founded in 1998 (Gothia Science Park Incubator), 2007 (Dutch Game Garden), 2008 (Game Assembly), 2012 (AppCampus, SoCal EED, Execution Labs, Oulu Game Lab and GameFounders), 2014 (GameON).

The first part of the survey showed how varied the different organisational setups of the game initiatives are. There are no common aspects based on country or region and also there is no standard structure or model that organisations of the same type are following. This shows how early stages the game initiatives are. Many of the organisations had not researched each other in depth and had thus not set their structure up on best practices or any practices. There is no common terminology making the distinction between incubators-accelerators and educational programmes very subjective. At the same time all initiatives are addressing specific issues of the games industry and are closely co-operating with the industry.

The number of people involved in each organisation varies from 10 to over 120. Incubators and educational programs have a larger full time team when compared to accelerators, which is explained through the length of the relevant programs. The initiatives tied to educational

organisations or regions tend to have larger teams while the private initiatives have a 3- 5 person team heading up the whole operation.

The number of applications per cycle is smaller for initiatives that work with teams restricted to a region or an organisation/university and larger for initiatives directed to wider groups and international teams. The number of teams in one class is smaller for initiatives with more tailored programs and larger for incubators.

The main sources for applications are universities with a game development program, events, online sources, social media, conferences, referrals, Erasmus partnerships and Startup Networks.

The types of teams accepted also varies from high school graduates for university-tied programs to experienced businesspeople. 1/3 of the initiatives require a **previous experience** in business, scalable business model and prototype.

The most common stages of evaluation are online applications, interviews and evaluation committee meetings. The number of people making decisions about the applications also varies from 2 to 20. The number of teams accepted during the whole duration of the initiatives so far range from 6 to 29 with Appcampus as the only one with over 300 teams. Less than half of the initiatives take equity for the right to participate in the program and about half give investments/grants to the teams.

The most common perks provided by the initiatives are events, mentors and office space. The most common topic in the program is marketing. Almost all programs also cover monetization and discoverability, game design, publishing, pitching.

For more information see <http://gameinitiative.gamefounders.com>

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