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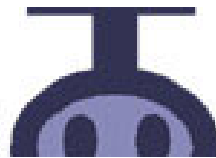
Le (3ieme)Forum a le Corum Jeux Video

3ieme Generation et le Mass Market

Fred Hasson

CEO

Tiga – Independent Developers

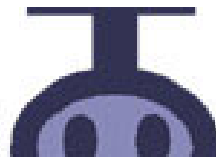


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Que es TIGA?

- Association sociétés development independants
- 90/120 studios au RU+ plusieurs europeen
- Objectifs:
 - Politiques
 - Editeurs
 - Financements

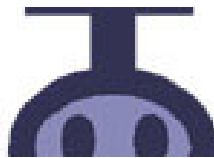


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TIGA - Politiques

- Lance en 2001 par Ministère d'Industrie
- Governments everywhere are discovering games – the 'new' sector!
- TIGA has met with Finance, Industry and Foreign Education, and Cultural Ministries
- Many Regions are also getting additional support

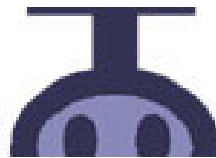


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Editeurs/Publishers

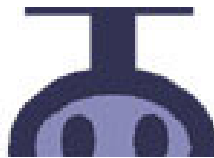
- Immature relationships with independents
- Actions:
 - Sommets
 - Standard/Model Contracts
 - Best Practice –Production Management
 - Liaison with Publishers trade body



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Finance-ment

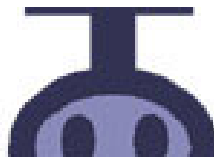
- Dialogue -banks, brokers, VCs, Analysts
- Annual Finance Conference
- Developed game financing model around R&D tax credits and allowances – lobbied the Treasury
- Film Style financing....?



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Responsability-é

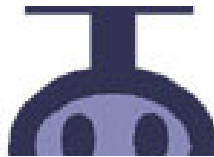
- Governments, Opinion –formers, public to understand the industry
- Combat piracy
- Promote the industry to more consumers
- Explore convergence/synergies with other industries



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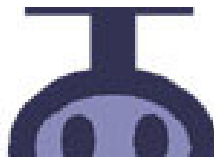
Lessons of 2nd Generation

- What 2nd gen taught us and what we can learn from it for 3rd gen?
- Last cycle was traumatic for developers and publishers... but a few did well
- Last cycle was Sad for Sega, Neutral for Nintendo, and Smilie for Sony and there was the new 'X' factor – Xbox
- PC remained static to lower – 25%



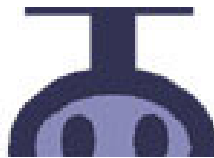
Developers

- Unwilling/unable to double the scale
- Many focused on handheld and mobile markets
- All aspects of production became more critical: HR, method and planning, on time delivery
- More difficult to create and own IP



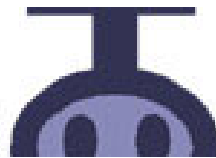
Publishers/Editeurs

- Potential of the new boxes was explored - development and marketing budgets escalated
- Developer issues – staffing, production etc
- Concentration of retail outlets > need for marketing
- Global Games – difficult to survive on local content
- Bigger budgets = Moins Jeux



Consumers

- Mainstream entertainment – UK 25m consoles and growing in Europe
- Buying more consoles and software
- Power of the retailers – Top 10 games
- Older people
- But price sensitive – 2nd hand market
- Don't forget Japan!



3ieme Generation - Questions

- Development: double the teams – will there be bloodletting on similar scale?
- Film Model for production and financing?
- Photo realistic game
- Mainstream entertainment –Sony IE not games, M/soft home entertainment centre
- On-line/Broadband – community, online downloads
- Remember Japan!



Development (Independent)

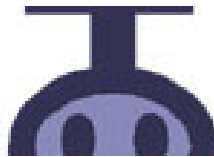
- UK-8 2001, -14 2002, -23 2003, -20+ 2004
- Teams of 60+
- Middleware?
- Fewer opportunities but new cycle-new IP
- More pilots
- Fewer/no royalties but direct to customer?
- More competition from low cost economies



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Publishers/Editeurs

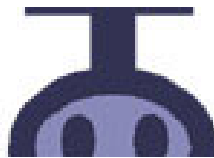
- Same development issues –scale and management
- On-line gaming
- B/band downloads
- Less is more –
 - SonyCEA limitations
 - Activision cancels 12/36 titles
 - In house or outsourcing?
 - Shorter games



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Consumers – remember Japan!

- Many devices
- Fadism
- Other leisure activities
- Price of games



Discussion

- Will there be fewer games titles?
- Do we need to change methods of production?
- Will there be a place for independent developers?
- Will there be more or less opportunity to create new IP?
- Cross platform IP?
- How to reach new audiences?
- Online Games: for all or the hard core? On-line downloads? Episodic

