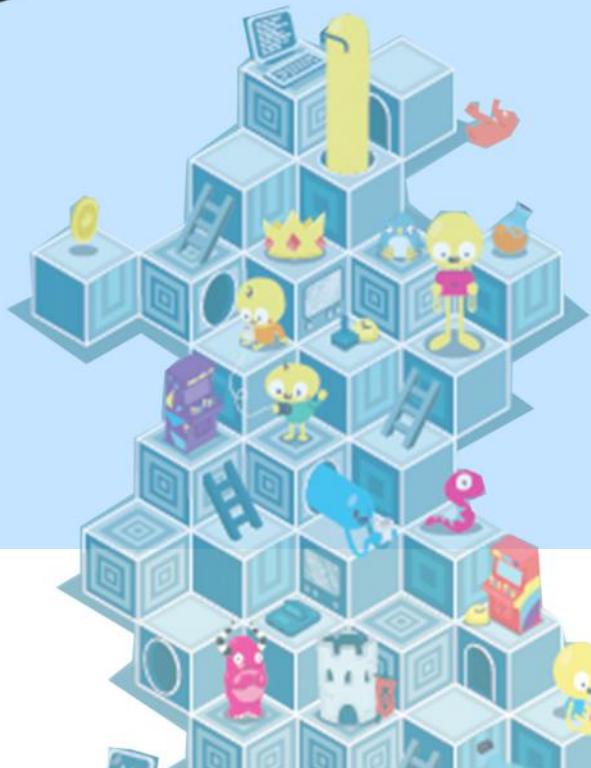
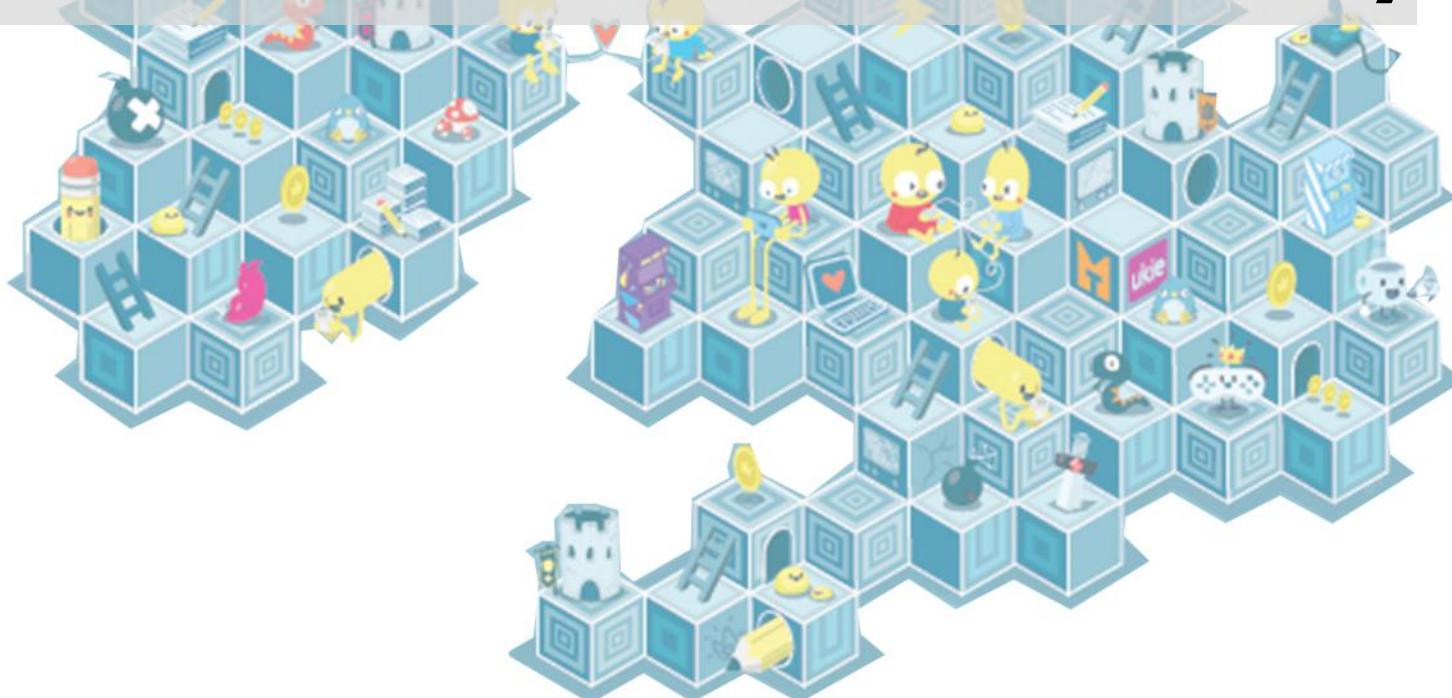


ukie



The Next Level: Priorities for the Games and Interactive Entertainment Industry



The Next Level

Introduction

As we continue into the Fourth Industrial Revolution, it is more important now than ever that the UK capitalises on its technological strengths and takes advantage of emerging opportunities.

The UK games and interactive entertainment industry is already an economic and cultural success, blending the best of British innovation, creativity, technology and art.

We want the UK to be a world leader for an industry which is finding increasing resonance with audiences worldwide and which will be here to stay for years to come.

The sector's contribution to the UK's cultural soft power around the world and its position as a centre of creative excellence is recognised internationally, having attracted at least £1.75bn of inward investment during the period of 2015-2017. The UK games industry supports 50,000 jobs across vibrant high-skilled clusters in all four nations of the UK and feeds £2.87bn GVA into the economy each year.

As we experience profound technological and social change, the games industry needs to be agile and adaptive, as do the policies which support growth and protect consumers.

If the right policies and leadership are in place, the UK can remain a global champion of an industry which continues to spearhead innovation and discover emerging technologies while keeping consumers safe.

It is crucial that the stable regulatory environment which has enabled the UK games industry to thrive remains in place – especially in the wake of a still uncertain Brexit outcome.



This manifesto makes the case for maintaining the UK's position at the forefront of a vibrant creative industry that sits at the heart of the wider international games sector and, increasingly, the wider global economy.

We are committed to ensuring that the UK remains the best place in the world to make, sell and play games. We look forward to working collaboratively with the next Government to achieve that.

Dr Jo Twist OBE, CEO of Ukie

Recommendations



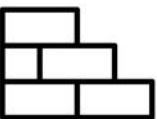
1 Public funding for cultural games

We call on the next Government to open up additional sources of public funding specifically to interactive entertainment to recognise, and further develop, its cultural footprint.



2 Games and digital literacy

We call on the next Government to recognise the role video games can play in increasing digital literacy across society.



3 Building the evidence base

We call on the next Government to work with industry and academics to establish a strategy to support research into consumer engagement with games.



4 Extend and grow the UK Games Fund

We call on Government to extend the UK Games Fund for prototyping and to establish further funding for game projects to help promising businesses to realise their true potential



5 Unlocking local growth

We call on the next Government to assist in scaling up existing interactive entertainment clusters by promoting games heritage, developing local games initiatives, reviewing local infrastructure and working with local education providers.



6 Local games festivals

We call on the next Government to provide funding to run local games festivals outside the capital, working closely with the games sector to deliver them.



7 Diversity

We call on the next Government to support our efforts to improve diversity in our sector following the results of our industry diversity census.



8 Expanding Digital Schoolhouse

We call on the next Government to further support the Digital Schoolhouse programme with an aspiration to reach every schoolchild in the UK.



9 Education & skills

We call on the next Government to support the talent of the future by revising Ofsted inspection criteria to reflect creativity in all subjects, communicate the opportunity of using games as a classroom tool, and re-visit the recommendations originally put forward by the Next Gen Skills report.



10 Esports

We call on the next Government to provide additional public funding for grassroots esports organisations in order to foster future talent, to allow esports talent to easily enter the UK and to create the infrastructure that esports businesses need to deliver interactive content to a growing global audience.

Public funding for cultural games

Video games are a major contributor to the UK's creative soft power around the globe.

The UK games industry's ongoing impact on international popular culture should be recognised, and artistic innovation should be encouraged, by allowing the games sector to access similar funds to those available for other screen sectors.

Indeed, cultural content in the UK has long been supported through The Arts Council, the National Lottery or through commissioning funds in places like the BBC and Channel 4.

The next Government should invest in the screen content of the future by unlocking public funds to the games industry.

We call on the next Government to open up additional sources of public funding specifically to interactive entertainment to further develop its cultural footprint.

Digital literacy and games

With the ongoing Fourth Industrial Revolution, it is imperative that people of all ages are empowered with the right information to feel in command, control, and comfortable online.

This is why Ukie runs initiatives such as askaboutgames.com to provide advice and guidance to parents and players, whilst allowing them to maintain their freedom to live in a digital age. The games industry also provides extensive safety controls to enable parents and players to restrict financial transactions, screen time, and contact with people online.

On top of this, the UK games industry successfully campaigned for the legally enforceable PEGI age rating system in 2011, after voluntarily placing age ratings on its products for decades.

There is clear potential here for games to be used as a digital literacy tool, teaching and empowering consumers how to stay safe online.

However, we also passionately believe government should seek to empower more individuals online, rather than attempting to regulate away the realities of our digital world. It is crucial that society is prepared for the technological changes – and the incredible opportunities that come with them – which lay ahead.

We call on the next Government to recognise the role video games can play increasing digital literacy across society.

Building the evidence base

Millions of players across the UK, and billions worldwide, play video games in a healthy and fun way every day. Games bring people together, provide a great way to relax, and offer engaging cultural experiences.

There is, however, concern about the impact games have on a small number of players. The games industry takes its responsibility for the safety and wellbeing of its players extremely seriously.

We therefore commit to working with Government, the academic community, public bodies, regulators and NGOs to determine what robust, independent research looks like and how best it can be achieved.

We call on the next Government to work with industry and academics to establish a strategy to support research into consumer engagement with games.

Extend and grow the UK Games Fund

The UK Games Fund and Tranzfuser (UKGFT) projects have been enormously successful in nurturing new talent and new businesses by supporting early-stage games and SMEs. From its launch four years ago, over 100 companies have been supported in five rounds of funding.

The next Government should continue this success by extending the UKGFT funding. This will continue to support the creation of original British IP, especially amongst ambitious start-up companies.

The UKGFT projects have, however, further exposed the urgent need for additional funding to cover the gap between prototype and product. Studios often reach a middle stage in which success is required to attract funding, but funding is required in order to be successful.

Supporting middle-stage studios is crucial if we want to maintain our vibrant games sector and support the scaling up of UK games studios who show great potential.

We call on Government to extend the UK Games Fund for prototyping and to establish further funding for game projects to help promising businesses to realise their true potential.

Unlocking local growth

The games industry plays a particularly important role in rebalancing the economy across the UK. Highly skilled clusters around all four nations, driving valuable investment, attracting international finance, and providing jobs for the future into local economies.

These clusters of high productivity jobs can, if supported further and nurtured appropriately by Local Enterprise Partnerships, Mayors, Local Authorities and Combined Authorities, become even more successful. The next Government can help ensure this happens by developing targeted growth strategies for games clusters, which build on existing local strengths.

This can be achieved through recognising the economic and cultural value of games locally, working with local education providers such as schools, colleges and universities to develop local skills programmes and reviewing local infrastructure with the aim of creating potential physical 'hubs' for the industry. But we recommend this is done in partnership with industry to ensure clusters are developed as effectively as possible.

We call on the next Government to assist in scaling up existing interactive entertainment clusters by promoting games heritage, developing local games initiatives, reviewing local infrastructure and working with local education providers.

Local games festivals

London Games Festival is a ground-breaking 12 days of activity celebrating games culture and generating business in multiple locations across the capital. The festival features the UK's biggest market for financing games projects, and in 2018 it delivered nearly £40m of potential investment to UK games companies.

The project is delivered by Ukie in partnership with Film London and funded by a £1.2m investment from the Mayor of London. The programme plays a big role in boosting UK's wider games sector by directly attracting inward investment and positions London as a world-leading cluster for games and interactive entertainment.

Public support for games has been key to the project's success. We believe this can be replicated in similar events outside of London, with additional financial support from the next Government equivalent to the Mayor of London's investment into Games London.

Pilot festivals have taken place in Guildford and Leamington Spa to great success, showing that a large local impact can be achieved with minimal investment.

By supporting these festivals further, public money could be effectively used to drive regional growth through our high value tech sector.

We call on the next Government to provide funding to run local games festivals outside the capital, working closely with the games sector to deliver them.

Diversity

Diverse international talent is vital to both ensure our games have global appeal, and to fulfil highly specialised roles which can be difficult to fill due to existing digital skills gaps in the domestic talent pool.

However, it is also the fusion of different experiences, skills and backgrounds from domestic talent which makes the industry able to consistently produce world class content.

The industry recognises that there is more it can do to encourage diversity and inclusion within the sector. This is why Ukie has recently undertaken the most comprehensive census ever of the domestic industry, which will allow us to rigorously measure the state of diversity in the sector and identify areas for improvement.

We call on the next Government to support our efforts to improve diversity in our sector following the results of our industry diversity census.

Expanding Digital Schoolhouse

Ukie's Digital Schoolhouse initiative, with support from Government, has helped tackle problems relating to both the teaching of computing and the diversity of the workforce.

The programme is inspiring children and teachers across the country to engage with the computing curriculum through play-based learning. It is also acting as an effective route into industry, by teaching students about the range

of careers available in the sector, through workshops at local schools and through its annual immersive esports tournament.

Digital Schoolhouse currently has 56 schools in its network and has reached nearly 60,000 students. But we want it to go further with the support of Government to ensure that every child benefits from this pioneering initiative in the future.

We call on the next Government to further support the Digital Schoolhouse programme with an aspiration to reach every schoolchild in the UK.

Education & skills

Ukie advocates boosting the domestic talent pipeline to close the skill gap and proposes this is done by inspiring future talent through an emphasis on creative thinking in education.

The games industry requires a unique combination of transferable skills, which sit at the apex of art, technology and culture.

At the heart of it all is creativity – in an artistic sense and intellectual sense – a skill which can benefit anyone no matter the industry they are in. We advocate a creative and play-based approach to learning and we recommend that Ofsted inspection criteria is amended to support this ambition.

There is also potential for games to be used as a classroom tool, a recommendation put forth in the ground-breaking Next Gen Skills report in 2011. Games touch on a multitude of disciplines which cover the majority of a students' curriculum – including art, maths, science, history, literature, and more – and their use within teaching should be encouraged across departments.

We call on the next Government to support the talent of the future by revising Ofsted inspection criteria to reflect creativity in all subjects, communicate the opportunity of using games as a classroom tool, and re-visit the recommendations originally put forward by the Next Gen Skills report.

Esports

Esports is one of the fastest growing entertainment sectors in the world. By 2021, it is expected that a quarter of the world's population will be aware of esports, with the global esports market set to grow from \$630m in 2017 to \$1.6bn by 2022.

Esports also has the potential to re-define how we interact with and experience traditional sports and wider digital entertainment – shaping new experiences and deeper connections between interactive entertainment, audiences, players, teams and brands.

With the right government backing, the UK can become a truly world class destination for esports – attracting investment and large tournaments, becoming the home of more professional teams and players and developing innovative technology platforms, venues and viewing experiences.

The UK esports industry needs the right environment to develop grassroots talent to thrive. On top of this, a future immigration system must recognise the potential in recruiting the best esports talent in the world to play for UK teams, and for players, coaches and support staff to be able to seamlessly travel to the UK for tournaments.

It also needs investment in the right infrastructure – such as multi-purpose arena space and high speed internet - to establish the UK as a potential leader in a globally competitive market.

We call on the next Government to provide additional public funding for grassroots esports organisations in order to foster future talent, to allow esports talent to easily enter the UK and to create the infrastructure that esports businesses need to deliver interactive content to a growing global audience.

About Ukie

Ukie is the trade body for the UK's games and interactive entertainment industry, representing over 450 businesses and organisations across the country.

A not-for-profit, it represents businesses of all sizes from small start-ups to large multinational developers, publishers and service companies, working across online, mobile, consoles, PC, esports, VR and AR.

Ukie also runs or contributes to a number of additional initiatives aimed at supporting the sector including Digital Schoolhouse, askaboutgames.com and Games London (created in partnership with Film London).

Find out more

For more information about Ukie's policy agenda, please contact Ukie's Head of Public Affairs, Tim Scott, via email: tim@ukie.org.uk

To view all of our policy papers, please visit www.ukie.org.uk.

