" Middleware and European Standardisation"

Köln, 17.8.2011

Event supported by NEM initative

European
Games Developer
Federation

Dr. Malte Behrmann
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THROUGH EGDF YOU CAN REACH

more than

600

game studios

in

12

European countries

that employ over

17000

game industry professionals

UK, AT, DE, FR, DK, FI, NO, BE, NL, LU, ES, IT

EGDF IS A TRADE-ASSOCIATION (SME) THAT FOCUSES ON

Policy development

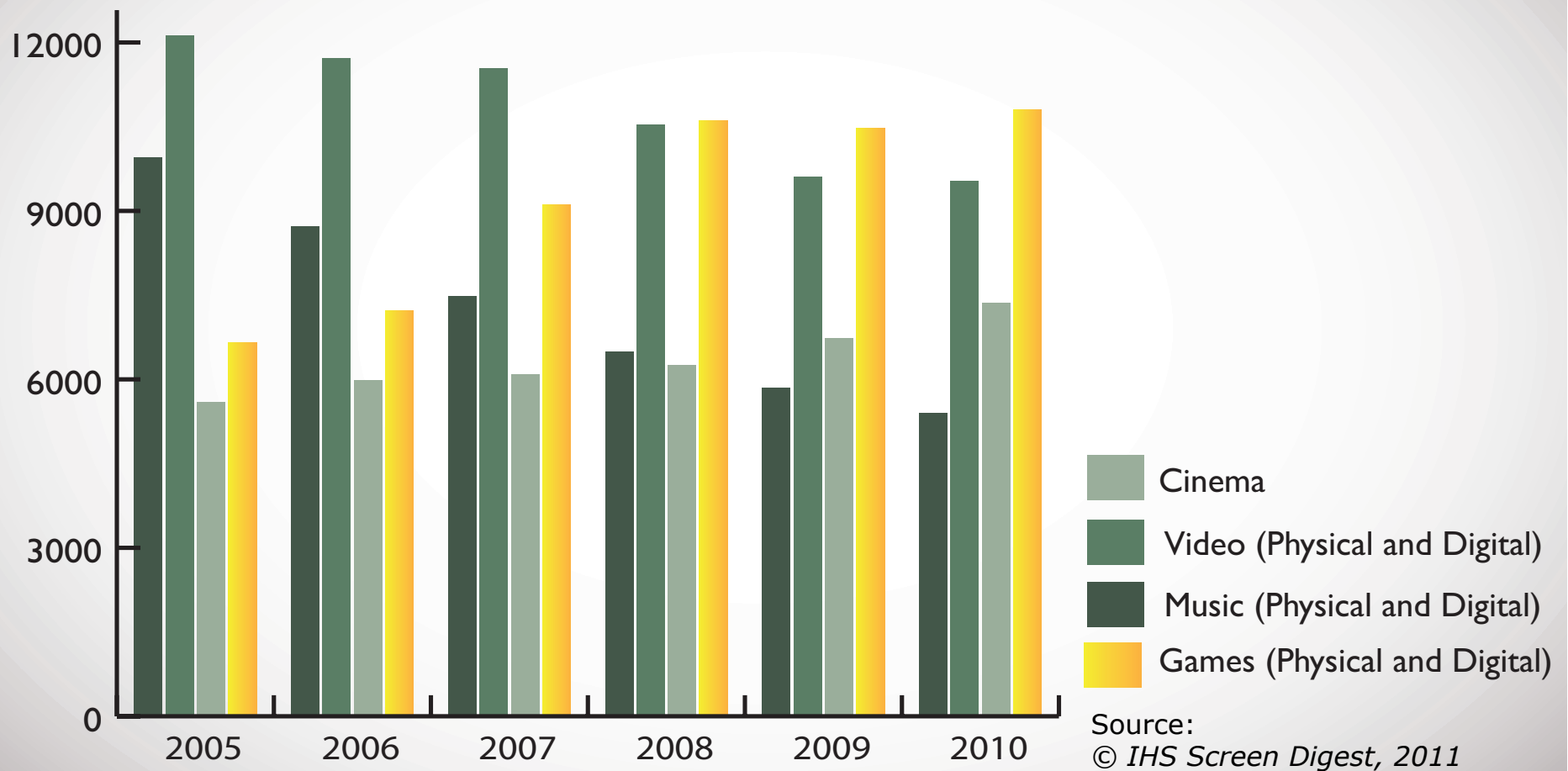participates processes developing policy recommendations that support game developers

Dissemination

disseminates the best practices, new standards, new tools etc.

Elaboration

elaborates game developers' mutual positions (technology, content)

Consumer spending on entertainment media (€m)

Source:
© IHS Screen Digest, 2011

Legend:
- Cinema
- Video (Physical and Digital)
- Music (Physical and Digital)
- Games (Physical and Digital)

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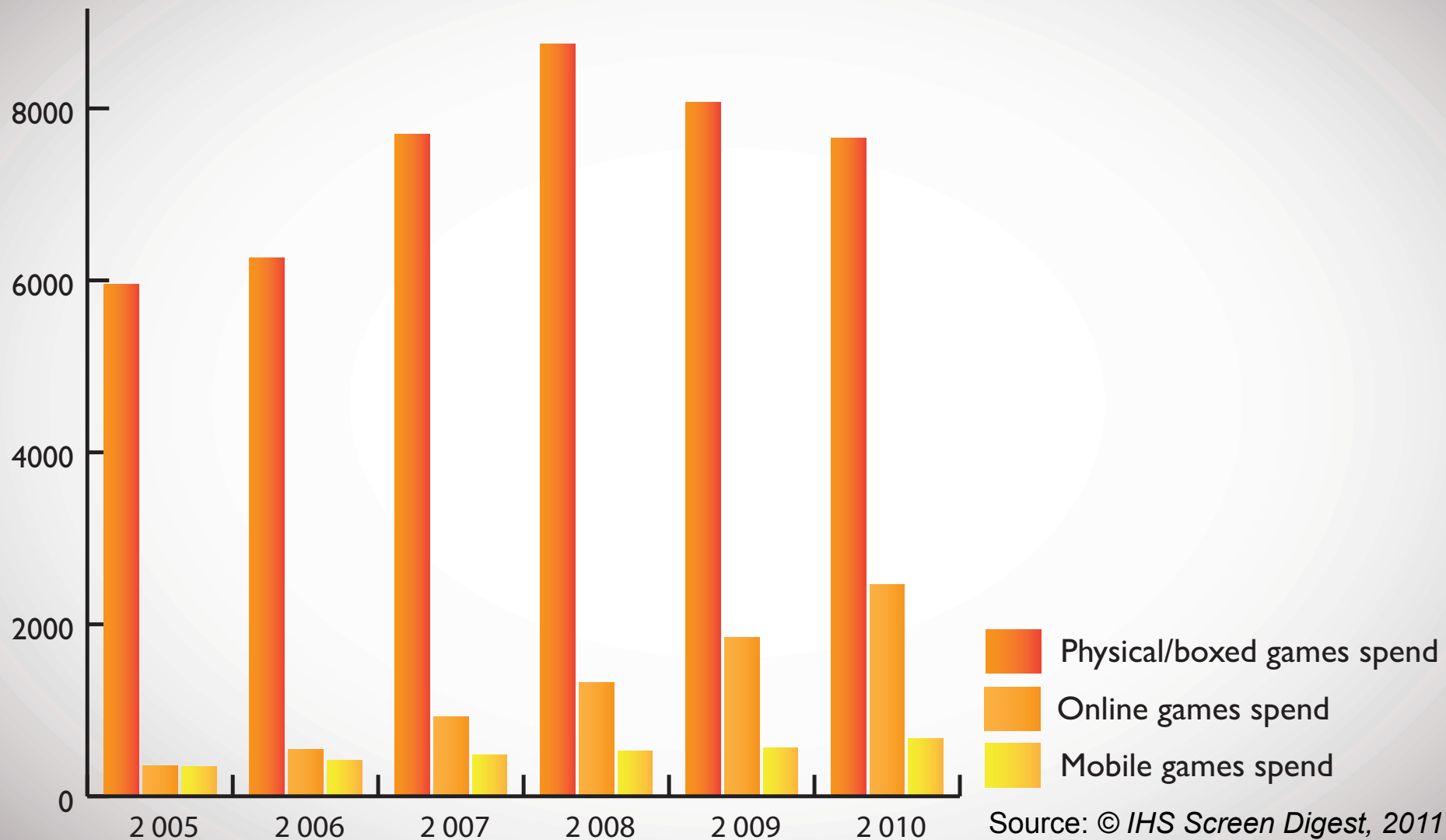
European consumer spending on games (€m)

Legend:
- Physical/boxed games spend
- Online games spend
- Mobile games spend

Source: © *IHS Screen Digest, 2011*

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4€
DEVELOPER

16€
PUBLISHER

30€
DISTRIBUTORS

40€
RETAILERS

50€
CONSUMERS

10€
DEVELOPER

5€
DISTRIBUTORS

15€
CONSUMERS

5€
DEVELOPER

5€
CONSUMERS

Value chains of video game industry

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Conception

- requirement analysis
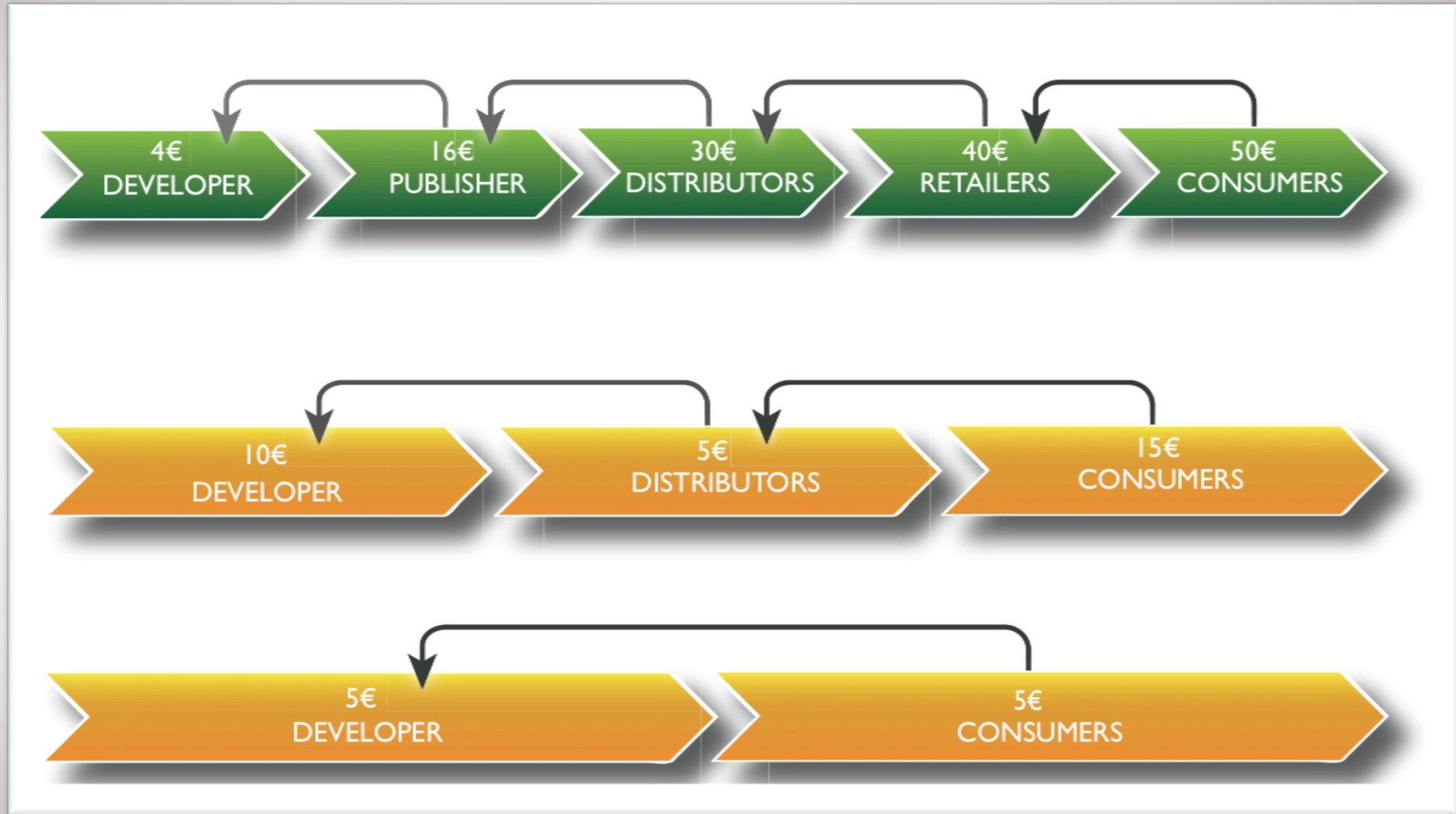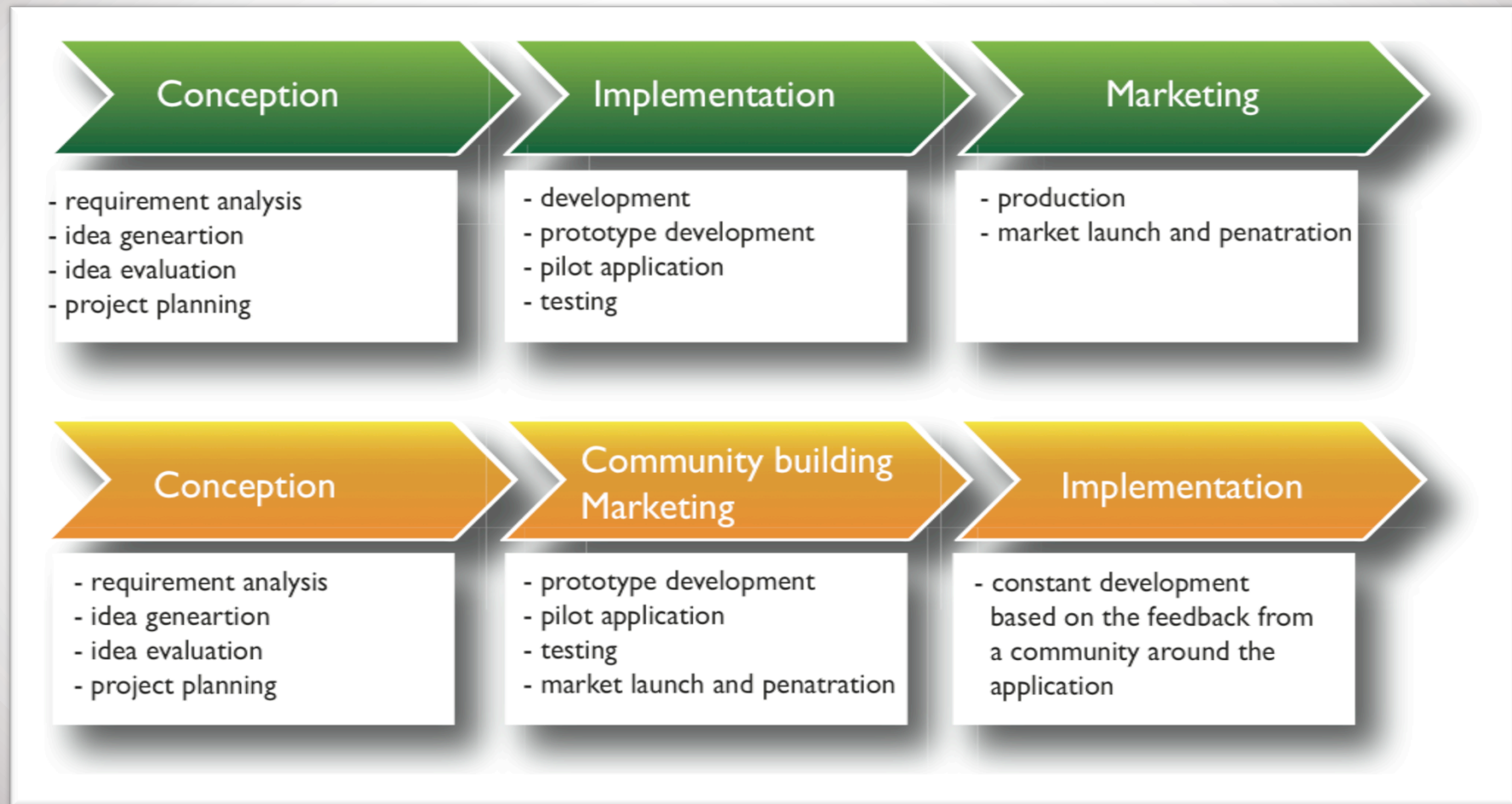- idea geneartion
- idea evaluation
- project planning

Implementation

- development
- prototype development
- pilot application
- testing

Marketing

- production
- market launch and penatration

Conception

- requirement analysis
- idea geneartion
- idea evaluation
- project planning

Community building Marketing

- prototype development
- pilot application
- testing
- market launch and penatration

Implementation

- constant development based on the feedback from a community around the application

Viral innovation process

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www.GameMiddleware.org

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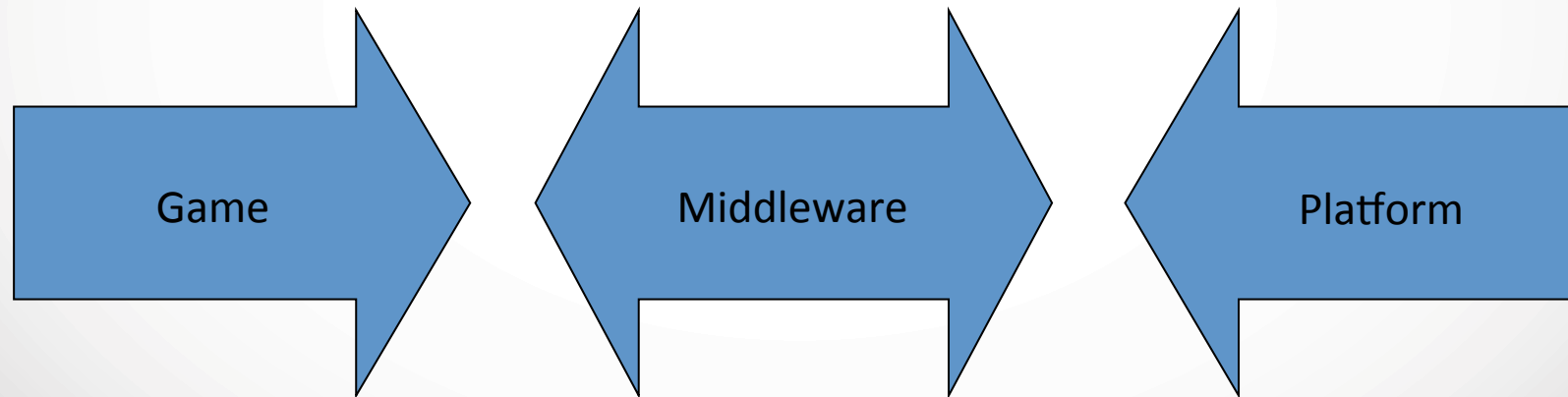Secretary General
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Standardization and Middelware

Examples of European Standardization: Metric system, GSM

Game Development uses increasingly specific middleware technologies. Developers tend less and less to reinvent the wheel.

Europe is more and more the home of middleware of global relevance. Different aspects of the value chain are represented and the healthy competition shows also the commercial relevance.

Europe is however also confronted by de facto standards from outside.

The innovative pace of the industry makes a slow standardisation process difficult and needs careful regulation, which is open for innovative and new developments.

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The Vision

Tools and middleware for content creation are developed to ease the access for content creation to the various platforms and render the European content more independent from overseas soft- and hardware.

- interoperable.
- technologically attractive

Multiavalibility of content from multiple sources implies both higher diversity and standardisation. As transaction costs are going down, the value of the content itself becomes more and more central and content will have an higher impact on the whole value chain.

Network effects and economies of scale can contribute to the fact, that inferior technologies supersede by establishing a standard. It is possible, that those companies, who have already a dominant position will be taking their dominant position to bring it to other markets.

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European Game Middleware

Europe has a very interesting position:

About 50% of entries at www.GameMiddleware.org are of European origin

A high number of SME's providing middleware technology in the games industry

These technologies

- are very important for our industry (just remember the Renderware case)

- have an important spill over effect to applied games

- reach out worldwide (e.g. Vision, CryEngine, Unity for game engines) – very strong   in Asia, -too.

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Standardization happens anyway

Main standardisation clusters in the context of games:

Web: W3C -> Web standards-> increasingly interested in games
Video & media coding: Khronos, MPEG ->compression and more
TV & Radio: ITU, DVB -> Screens, rendering
Telephone & Communication: ETSI, OMA -> currently researching translation, billing
Military, health etc: Serious Games

De facto standards: e.g. Flash

Does the games industry research ?

The essence of game development is research. The game industry, however, has not traditionally labelled its work "research" but simply done what is necessary to get the user experience right. Many areas of research in commercial game development touch on or overlap traditional industrial or academic research; however despite this fact, the industry has made few efforts to co-ordinate its own research with that of the academy, adjacent industries or even within the game industry.

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But what does the games industry ?

Moderator:

Dr. Malte Behrmann, General Secretary EGDF

Panel & Presentation:

Anne-Marie Sassen, European Commission, Brussels

Responsible for the implementation of standardisation policy of the Digital Agenda

Felix Röken, Havoc (Trinigy)

Trinigy is a European 3D middleware, which has been very successful worldwide and
especially in Asia recently and has been acquired last week by Havoc (INTEL)

Dr. Andreas Gerber, Xaitment

Xaitment is a European AI middleware, which has been successful in Asia and the US

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