



# The future for UK indie games development.



# Introduction



We think that changes are needed to enhance the future for our community and society. Over the past fifteen years we've demonstrated how early-stage, grant-based project funding through the **UK Games Fund** provides an economic boost at both prototype and full-project scale. We've shown how our self-enterprise talent programmes like **Tranzfuser** and **DunDev** are impactful. Now we need to develop the ecosystem to also **deliver public value**. And we need to recognise the impact of indie games developers in both **growth** and **no-growth** scenarios.



# State of play/1

## THE UK GAMES FUND HAS BEEN IMPACTFUL

External evaluations have shown how the UK Games Fund has created impact. We've shown how it works at graduate talent level (Tranzfuser), early stage (Prototype Fund) and project finance (Content Fund) scales. Our DunDev programme has also piloted residential interventions. Ukie and TIGA both seek the continuation of the UK Games Fund in their manifestos.

# 01

# 02

## WHAT IS HARDER

We haven't been able to properly support games intended for non-economic impacts or solo developers and studios that aren't growth motivated. And some of our funded companies are no longer UK-owned.

# State of play/2

## **THERE'S AN OPPORTUNITY FOR PUBLIC VALUE IMPACT**

Games are missing from the remit of public service broadcasters (PSBs) and yet their 17-30 audiences are in steep decline. Public value content funding is entirely directed at other screen sectors.

03

04

## **GROWTH ISN'T THE ONLY STORY**

Lining up pipelines of early growth studios for overseas acquisition doesn't usually build secure foundations for our ecosystem in terms of growing UK IP assets, retaining UK talent and attracting non-UK talent.

# What comes next?

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## **SIGNIFICANT CHANGE REQUIRED TO SUPPORT PUBLIC FUNDING FOR GAMES**

The UK Games Fund should be broadened to allow the support of public value games and be complemented with National Lottery funding. Public service broadcast games commissions for for PSB audiences should also be stimulated within the BBC's new charter. This blended funding approach will help to build strengths for the future of games development in the UK.



## **A CONNECTED CONTEXT**

Change must happen within a new context with cross-cutting public-value principles that support accessibility and universality, driving high media literacy and closing the digital divide. These principles must also enshrine UK IP retention and not be eroded by erroneous claims of commercial displacement.

# SWOT Analysis

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**STRENGTH**

Our fabulously talented UK indie games community has huge potential to provide even greater economic, cultural and social impacts for the UK.

W

**WEAKNESSES**

The public value potential of UK games development is poorly recognised by government and policy makers. Funding for public value goes to other screen sectors instead.

O

**OPPORTUNITY**

Public value games investments will bring cultural and social impacts, increase media literacy, close the digital divide and maximise new technology benefits.

T

**THREAT**

Vested interests are protective of lottery funding and detractors may make erroneous commercial displacement claims.



**It's time to capitalise on the strengths and opportunities, address the weaknesses and overcome the threats. In the following pages those challenges are considered in a public service media context.**

# A research-led typology for public service



## Six facets of public service media

(Chivers and Allan 2022\*)



Economic



Organisational



Cultural



Social



Civic



Industrial

(Chivers, T and Allan, S. (2022) What is the Public Value of Public Service Broadcasting? Exploring challenges and opportunities in evolving media contexts. Creative Industries Policy and Evidence Centre and Cardiff University.)

## How public service games could deliver in each of the public media facets/1.

### ECONOMIC:

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- **What:** Analysts routinely evidence economic impacts through jobs and IP created and private capital leverage. That will still happen with public value games, although leverage of private capital will be less. Values also need to be attached to career capital growth for our sector and original IP creation.
- **Why:** Economic benefits are an essential part of the business case for public funds. They also help businesses become financially sustainable.
- **How:** Every new funded project increases the career capital of participants because of their experiential gains. The sum of the career capital gains lead to new IP creation also.

### REPRESENTATIONAL:

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- **What:** The universality and accessibility aspects will be paramount in the approach to interventions. Content for all and accessible and create-able by all. Improving media literacy is also a representational function.
- **Why:** These are fundamental public service precepts where impact can be measured by data collection.
- **How:** Programme design and commissioning has to ensure that constructive efforts are made to maximise representation and reach in both creators and audience. Underserved audiences need to be commissioned for.

## How public service games could deliver in each of the public media facets/2.

### CULTURAL:

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- **What:** Games impacts beyond economic will arise from supporting and commissioning games for good etc.
- **Why:** These are challenging to measure because efficacy testing often needs a/b cohort rigour and wider cultural benefits require qualitative analysis.
- **How:** Funding at the project level needs to cover meaningful levels of funding for content creation and efficacy / impact test deployment.

### SOCIAL:

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- **What:** Games for public benefit need to play a key part in closing the digital divide and providing safe communities for play and engagement.
- **Why:** This is part of the universal and accessible aspects, where trust and inclusiveness need to be embedded.
- **How:** There's a need for ubiquitous, trusted distribution approaches that allow communities to engage safely.

## How public service games could deliver in each of the public media facets/3.

### CIVIC:

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- **What:** Games that are factual need to be trusted sources of information. Public games creation, service and distribution needs to have regional and national dimensions within the UK context.
- **Why:** Effective public service media always retains a strong place-based element in creation and consumption.
- **How:** The UK games sector has a good spread of creative activity across major UK cities and a degree of rural penetration. In some cases this will need to be influenced by region-specific ring-fenced funds to maximise civic impact.

### INDUSTRIAL:

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- **What:** The industrial element is the fundamental heart of the UK indie games dev ecosystem where content, skills, technology and distribution meet investment to good effect.
- **Why:** There is a successful industrial heart to the UK games development ecosystem. This can be further enhanced and protected with public service games elements in play. This will be key in UK talent and investment attraction.
- **How:** Supporting a content portfolio blended between public and commercial remits, alongside companies that are both growth and no-growth focussed will maximise the industrial facet.

## Cross-cutting aspects



**Universal** and **accessible** principles are fundamental to public service content provision. That should be applied to both content consumption and creation.

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Properly designed public services **won't displace** commercial products, but some might claim they do. Broadcast television is a great example of the win/win existence of both. Any challenge on that basis needs to be vigorously defended.

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A vibrant public and commercial ecosystem will make the UK a **magnet for talent** and the breadth of content creation and universality and accessibility will attract wider representation across development teams.

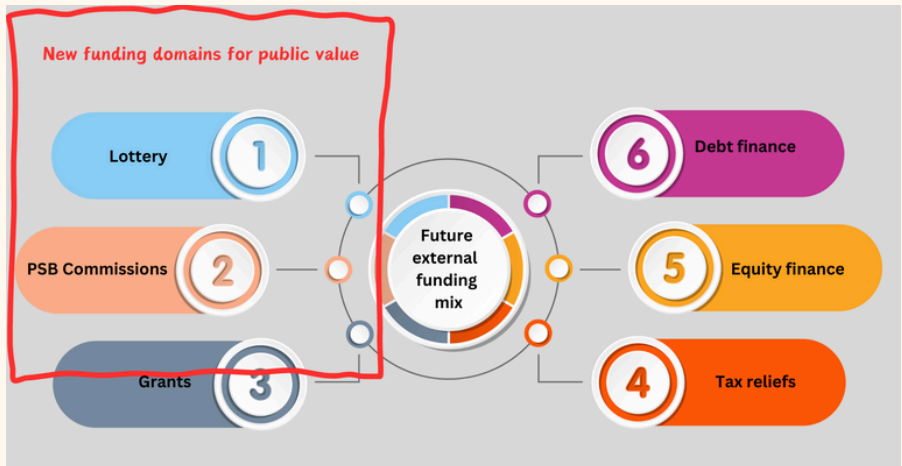
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We need inward investment that complements but **doesn't erode UK IP assets**. Any overseas ownership should be by good countries that value plurality and democracy.

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# New funding domains



## WHAT IS NEEDED



Grant funding via the UK Games Fund should continue to support commercial projects but also allowing a wider remit supporting public value. In addition, lottery funding should be directed towards public-value games. A Public Service Broadcast commissioning focus on games can also provide further, relevant contracting income.

# The framework in summary

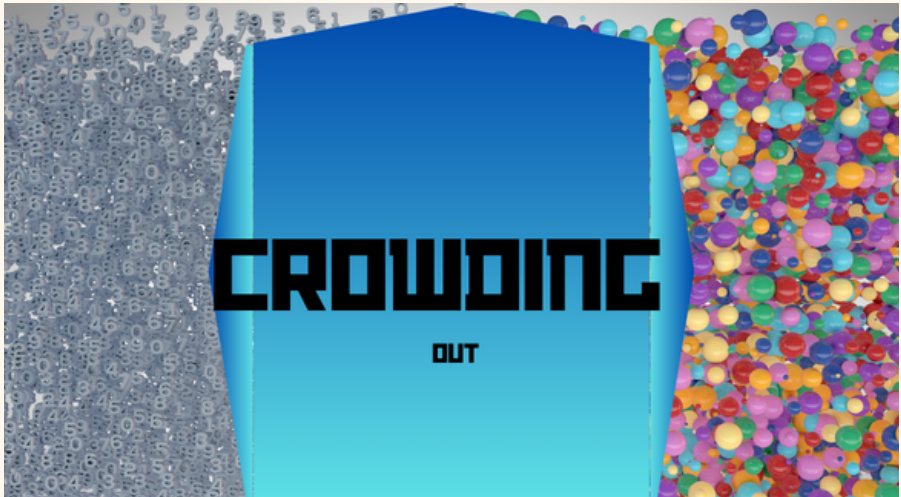
Theme	Headlines	Crosscutting all			
Economic	For both growth <b>and</b> no growth propositions. Jobs created and career capital enhanced. Reinforcing UK IP asset base.	UNIVERSAL & ACCESSIBLE	PUBLIC NOT SEEN AS DISPLACING COMMERCIAL	THE UK AS A MAGNET FOR TALENT	INVESTMENT THAT COMPLEMENTS NOT ERODES
Representational	Driving high media literacy. Universality and accessibility. Empowering content creation by all.				
Cultural	Win/win across all public service broadcast. Beyond economic impact. Games for good.				
Social	Closing the digital divide. Ubiquitous distribution for universality. Safe games communities.				
Civic	Addressing underserved consumers / creators. Games as trusted information sources. Local, national and regional facets.				
Industrial	Rooting skills/tech/content/distribution with prioritised UK emphasis to create a stable foundation for talent attraction.				

## OVERVIEW



This diagram summarises the Chivers and Allan typology thematically alongside the headline aspects of each facet. These headlines include public value and commercial aspects. The four cross-cutting aspects are also featured showing how each facet needs to be set in these wider contexts.

# Commercial co-existence

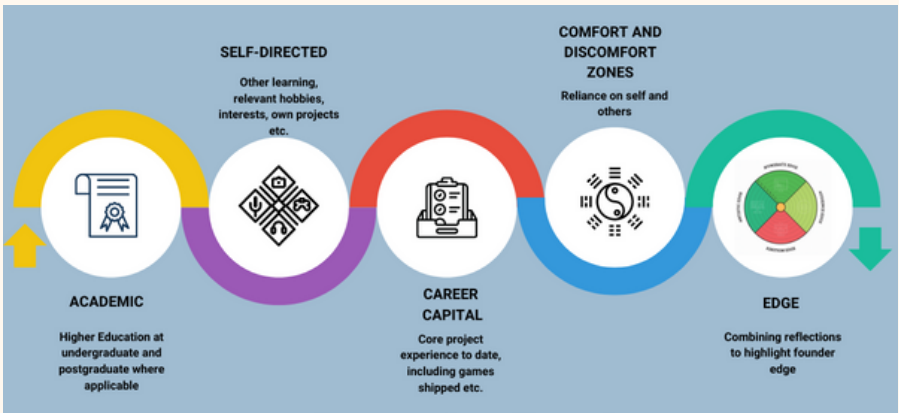


## ROOM FOR EVERYONE



Publicly subsidised and commercial media products can co-exist with mutual benefit as is demonstrated in the television sector. Some will criticise public investments in games content creation as displacing commercial interests. The reality will be a much stronger UK independent games development ecosystem with additional talent and IP assets. And that will benefit everyone.

# We still support growing businesses...

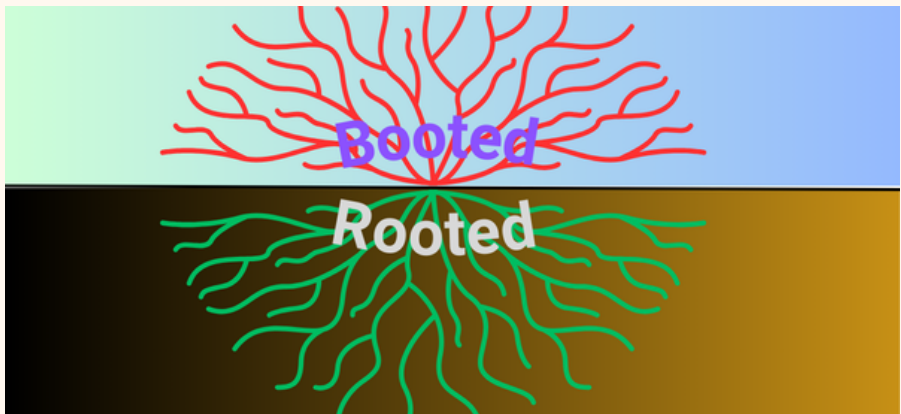


## FOUNDERSHIP PRINCIPLES



We remain passionate about helping early-stage companies with grants during the journey towards publishing deals and equity investment opportunities. Our work in supporting self-analysis by founders will help grow investable teams. We are continuing to build our peer support community and be impactful through the hundreds of days pledged by founders as community contributions.

# ...but growth isn't always the answer



## ROOTED AND BOOTED



Growth from 'booted up' companies that leads to non-UK investment can still bring positive aspects in terms of capital flows and inbound leadership talent. However, there can also be losses of UK IP ownership and value, eroding the core of the indie dev ecosystem. Some developers have shown how steady state business, with engaged audiences and stable team sizes can root these positive assets in place for longer. There is no single right approach.

# Change on the horizon



## CHARTER RENEWAL



If ever there was a time for existing PSBs such as the BBC to consider providing games for public value, the charter change in 2027 might be it. The BBC will also need to address falling audience sizes and cost pressures within the regulatory framework overseen by Ofcom. A new dynamic from the BBC could be a crucial boost as part of growing the games and public value domain.

**Actions to consider**



Read the background articles on Paul Durrant's LinkedIn pages

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Keep Ukie and TIGA updated with your views and ideas

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Write to us via [enquiry@ukgamesfund](mailto:enquiry@ukgamesfund) with any comments or ideas

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Follow what's happening with Ofcom and the BBC charter renewal and participate in any public consultation opportunities

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Let the new government know what you think about all this

**LinkedIn Reference Articles**



<b>Our Public Value Challenge</b>	Scene setting regarding competing areas.
<b>A Sinking Ship</b>	The challenge for the sector
<b>Framing our Future</b>	The Chivers and Allan typology
<b>Doing the (extra) ordinary</b>	The digital divide
<b>Power from the Portfolio</b>	Career capital rationale and value
<b>'Twixt the dream and the deed</b>	Harking back to Reith and the BBC
<b>Crowded house</b>	Displacement of commercial services
<b>Rooted and booted</b>	Growth and No Growth companies
<b>Foundership finesse</b>	Foundership work at UKGTF
<b>At the crossroads</b>	BBC Charter changes
<b>Out of balance</b>	Stakeholder funding conflicts
<b>Games and media literacy</b>	High media literacy from games playing



# Tell us what you think...

## Email

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