



KADIR HAS UNIVERSITY
GRADUATE SCHOOL OF SOCIAL SCIENCES
DEPARTMENT OF COMMUNICATION SCIENCES

**RISE OF THE CREATIVE CLASS:
GAMING AS A CREATIVE INDUSTRY IN TURKEY**

NESLİGÜL DENİZ KOLAŞINLI

ADVISOR: ASSOC.PROF. LEVENT SOYSAL

MA THESIS

ISTANBUL, SEPTEMBER, 2018

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MA THESIS

Submitted to the Graduate School of Social Sciences
in partial fulfillment of the requirements for the degree of Master of Arts
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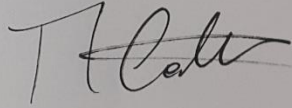
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NESLİGÜL DENİZ KOLAŞINLI

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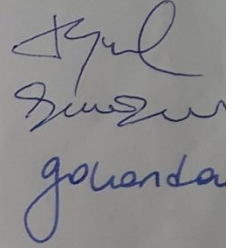
ACCEPTANCE AND APPROVAL

This work entitled **Rise of the Creative Class; Gaming as a New Creative Industry in Turkey** prepared by **NESLİGÜL DENİZ KOLAŞINLI** has been judged to be successful at the defense exam held on **17.09.2018** and accepted by our jury as **MASTER OF ARTS THESIS**.

Assoc. Prof. Dr. Levent SOYSAL (Advisor) Kadir Has University

Assoc. Prof. Dr. Suncem KOÇER Kadir Has University

Assoc. Prof. Dr. Gökçe Dervişoğlu Okandan İstanbul Bilgi University



I certify that the above signatures belong to the faculty members named above.

Graduate School of Social Sciences
DATE OF APPROVAL:

17..09.2018

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Abstract

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In our technologically developing society, a once calm group is currently ascending to wind up as a standout amongst the most broadcasted spectacles on the planet. Measuring the time individuals play computer games and the amount of money spent on them, it is safe to say that gaming is a huge business and a noteworthy component of contemporary culture.

This thesis shall examine the growing influence of computer games, economical value added by this new industry in cultural economy of Turkey and Istanbul's future as a possible creative city. The interpretations of the process shall be examined in light of the findings of Richard Florida. It is suggested that cities must meet certain expectations in order to attract members of the creative class. In a time when the economical growth in every sense is very much needed, gaming industry and especially E-sports is filling the void and creates new opportunities.

I have analyzed the economical data showing the state of E-sports, conducted interviews with gaming industry professionals in order to get a more in-depth analysis of the state of gaming industry in Turkey and analyzed my findings through Richard Florida's "Creative Class" concept. The purpose of this thesis is to introduce the professional gaming world, to understand the current standing of gaming in Turkey and analyze this new emerging creative industry through a social science perspective.

Keywords: E-Sports, Gaming Industry, Creative Class, Cultural Economy

Özet

Kolaşinli, Nesligül Deniz. Yaratıcı Sınıfın Yükselişi: Türkiye’de Yeni Bir Kültür Endüstrisi Olarak Oyun, İstanbul,2018.

Teknolojik olarak gelişmekte olan bir toplumumuzda, bir zamanlar göze batmayan bir grup gezegende en çok yayınlana gösteriler arasında dikkatleri üstüne çekiyor. Bireylerin bilgisayar oyunları oynadıkları zamanı ve onlara harcanan para miktarını ölçtüğümüzde, oyunların büyük bir sektör ve çağdaş kültürün kayda değer bir bileşeni olduğunu söyleyebiliriz.

Bu araştırma bilgisayar oyunlarının artan etkisini, bu yeni endüstrinin Türkiye'nin kültür ekonomisine eklediği ekonomik katma değeri ve İstanbulun gelecekte “yaratıcı şehir” olma ihtimalini inceleyecektir. Bu süreç öncelikle Richard Florida’nın yaratıcı sınıf ve yaratıcı şehirler üzerine yaptığı açıklamalar ışığında incelenecektir. Şehirlerin yaratıcı sınıfa mensub profesyonelleri çekmek için belli standartları yakalamaları gerektiği ileri sürülmektedir. Ekonomik gelişimin her anlamda ihtiyaç duyulduğu bir zamanda, oyun endüstrisi ve e-Spor bu boşluğu doldurmakta ve yeni gelişme fırsatları yaratmaktadır.

Türkiye’de e-spor’un durumunun daha derinlemesine analizini yapmak ekonomik verileri inceledim, oyun endüstrisi alanında profesyoneller ile derinlemesine röportajlar gerçekleştirdim ve bulgularımı Richard Florida’nın “Yaratıcı Sınıf” kavramı ışığında inceledim. Bu tezin amacı, profesyonel oyun dünyasını tanıtmak, oyunların Türkiye’deki güncel durumunu anlamak ve bu yeni gelişmekte olan yaratıcı endüstriyi sosyal bilimler perspektifinden analiz etmektir.

Anahtar Sözcükler: E-Spor, Oyun Endüstrisi, Yaratıcı Sınıf, Kültür Ekonomisi

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1. INTRODUCTION

We are living in the age of technology where life at this point is nearly unimaginable without the technological advancements we enjoy today. Without video games our lives would have taken a very different course. While, one may think that video games don't seem as important in comparison to telecommunications or social media, it is still obvious that video games have made a deep impact both culturally and socially.

Video games have made a significant addition to the global economy, the total consumer spenditure on video games and related merchandise was \$32.2 billion in 2018.(The Entertainment Software Association (ESA) 2017) Digital game industry is one of the largest commercial sectors in today's world. It appeals to every age group and its economical value is increasing. Also, from a cultural stand point, video games have completely redefined our engagements with play, social experience, daily life, art, education, media, and our cultural understanding. This increase of everyday use of technology also enables the existence of videogames in our lives. We play games on our computers, phones, even on our smart watches.

According to the Global Games Market Report there are approximately 2.3 billion gamers all around the world and the generated game revenue is expected to be around \$137.9 billion in 2018. This represents an increase of \$16.2 billion, or 13.3%, from the year before. Digital game revenues will constitute 91% of the global market with a shocking number of \$125.3 billion in 2018 as well. (Newzoo 2018)

This thesis intends to further improve the current understanding of the concept of video games in general and new fields formed as their extensions such as e-sports. While referring to the existing and ongoing research on game studies, this study also aims to clarify the economical value added of games, in particularly the future of Istanbul as a creative city. A brief introduction to game history and online gaming systems are made in order to provide the readers with a necessary background. A complete analysis of the computer games and e-sports are conducted by using the methodologies like in-depth Interviews, content analysis, secondary data collection and participant observation. Aside from the generic creative class analysis from a macro point, a specific analysis of

Istanbul from the gaming industry perspective will be conducted based primarily on Florida's 2002 book, *Rise of The Creative Class*. Florida's analysis will be the departure point of my research. Furthermore, the concept of creative industries and how gaming has become an important field will be discussed particularly in Turkish market.

The thesis will begin with the introduction of Richard Florida's Creative Class theory and the overall definition of the concept of creative class. Then, the following chapter, "Understanding Games" will concentrate on the world of video games, starting with a brief introduction to the history of video games and elaborating the subject with the introduction of MMORPG and MOBA game systems. Moving forward to the chapter titled "Gaming as a Creative Industry", I will introduce the upcoming term e-sports and additional services like streaming and analyze the field through my findings. This chapter will provide a chance to analyze the gaming industry from the perspective of Frankfurt School scholars. Last chapter focuses on Turkey, and Istanbul in particular. The Turkish gaming industry will be analyzed historically, and the application of Florida's thesis in case of Istanbul will be discussed.

E-sports is a lucrative new emerging market and the gaming industry has finally become fullfledged. This immense growth brings out questions about its effect on society, economy and cultural environment. In this thesis I will try to analyze the current state of gaming and E-sports in Turkey and investigate the application of Richard Florida's "Creative Class" thesis to Istanbul.

2. FLORIDA’S CREATIVE CLASS

2.1 What is the “Creative Class?”

Being creative is generally linked with artistic features. Creativity was not considered to be an important tool for the financial advance. Right brain/left brain debate has been ongoing for a long time, but what happens when two attributes merge and create a, per se, “super class”?

For a long time when defining work we have thought only physical labor. Then comes the Industrial Revolution, focusing our attention to machines and their mode of production, leaving the potential of a human mind unnoticed. Until 60’s “human factor” was not considered pivotal for economic growth, and it took a long time until we figure out that that creativity in particular can improve the economic standing of cities. Creativity grabbed the attention of the bussiness world in the last 30 years or so.

Nowadays the term “creative economy” is becoming an accepted and commonly used concept. Creativity and the creative economy that it generates provide us with a powerful tool to manage complicated interactions of a global world that is changing on a daily basis. This new economy and the industries that come with it could create new ways of earning, job opportunities, and endorse development of the human potential. To look at only from an economic point of view would be misleading since it positively changes other cultural and institutional factors that defines societies.

Florida says “in today’s economy creativity is pervasive and ongoing: we constantly revise and enhance every product, process and activity imaginable, and fit them together in new ways. Moreover, technological and economic creativity are nurtured by and interact with artistic and cultural creativity.” According to him creativity is crucial and valuable asset for economy and it is present in many different aspects of the economic and social life. In his words; “creativity has come to be the most highly prized commodity in our economy-and yet it is not a commodity. Creativity comes from people”. (Florida, 2012:4)

There are several values Florida states that creative class possesses; diversity, meritocracy, openness and individuality. These values affect the decision making process of the creative class while choosing a company to work at. The shift of decision-making power compelled the companies to change strategies, offering more amenities to their employees, trying to make themselves more appealing to the Creative Class. Traditional rules of a workplace is becoming more condoning, allowing the employees to utilize their creativity and produce better outcomes, which will eventually lead to the prosperity of the company. Flexibility is becoming more important as the creative class performs better without restrictions of the rules and regulations, which will limit their imagination.

When defining the creative class many professions come to mind. One of the most obvious examples would be the professions related to the gaming industry. The complex nature of games makes it difficult to classify them. In the early years members of this emerging industry were considered to be only engineers and professionals with mathematical backgrounds. Besides the systems and codes forming the games, there are artistic aspects such as visual design and game narrative. With the accelerated growth of internet and technology after 1980's, the industry adopted a more creative stand instead of a tech dominated view. Videogames today distinguish themselves from other creative products since they have numerous creative components, combining software and audiovisual elements which enhance the gaming experience for users and enables player interaction.

With their special status within cultural products and their growing affect on society, games will provide us with the opportunity to further investigate the creative class thesis in a micro point of view.

2.2 Richard Florida's Creative Class Thesis

Creativity is the main difference between humans and other species and nowadays it has become crucial for success in the competitive scene of the modern society. Society just recently understood the economical value of creativity and the means to utilize creative minds. On his book "The Rise of the Creative Class", Richard Florida analyzes the shift of variables affecting the economic growth and how creativity plays an essential role in this process. He argues that creativity is the key to economic prosperity. He realized that Marx and other classical economists studied the physical aspect of labor, whereas in reality our underlying creativity is what makes us different than other species.

(Mellander and Florida, 2012)

Florida realized that creativity is recognized and utilized both in professional and civil life more than ever before. According to him what he defines as "Creative Class" will become the leading actor in our modern economical scene. These selected people have the ability to generate economical growth with their ideas and strategies, but it is not all about the work for them. They change the everyday life, the social structure and even the cultural scene. The creative professional challenges the standards of the classical employee model; finding unusual ways of solving problems and performing routine tasks which are reflections of the industrial society. The Creative Class introduces the concept of creativity as a new component of economy which will lead to innovations, technological advancements and new art forms. This theory claims that human beings; especially their thought, ideas and characteristics; are the new capital for production and growth.

In his study Florida further investigates the human capital theory, narrowing down his focus on a specific group of people since it focuses solely on creative capital. The cities that attract the creative class, and the overall activities that comes with them, are more likely to reach prosperity and wealth.

Cities with well established technological infrastructure and a productive environment of residents are more appealing to the super creative core like computer engineers and interface designers. These cities tend to have culturally tolerant and diverse social climate

that can easily accept the creative people who tends to be out of norm. It is important for these cities to have cultural meeting points like cafes&bars, independent galleries, artistic shops which encourage creative expression, opens up creative conversations and create social networking opportunities.

Florida argued neighborhoods must stimulate creativity also with their physical attributes. They must be eco-friendly, walkable and characteristically different from the uniform idea of a what cities must look like. Florida supported his thesis with correlational research and case studies like San Francisco and Seattle, cities that achieved high economic growth rates due to their creative qualities which attracts the thinkers, innovators and makers. His research demonstrates the link between urban economic growth and the creative class.

Instead of analyzing creative industries from a macro point of view Florida puts creative worker at the center of attention for his research since he claims employees influence the decisions of companies, especially location, and not the other way around. The competitive advantage of a business is based on the creativity that its employees generate. Uniform mode of production is not suited for everyone and just as Florida bringing out the creative potential within people and involving them in a creative economy will be beneficial for the individuals as much as society. Innovation is the product you create with the help of knowledge and creativity. He says that knowledge and information are tools of creativity, and that innovation is its product.

His ideas on urban economic progress has been accepted and used by urban politicians but got mixed reactions by academics. Many scholars pointed out the problematic structure of the creative class thesis and it's proposed development strategies. Nevertheless Richard Florida's creative class thesis has affected the urban policies around the world, especially in United States and Europe.

3. UNDERSTANDING GAMES

3.1 A Brief History of Video Games

If every generation is remembered by their pop-culture products we will definitely be remembered for our video games. 1970's were boogie nights, 1990's were MTV music videos and rom-com's, 2000's is console games and here we are discussing the possibility of referring competitive gaming as a professional career choice.

We can see early examples of video games in the late 1940's and the first known example was "Cathode Ray Tube Amusement Device" in 1948. Unfortunately, due to high equipment costs the game was never released. Only handmade prototypes were ever created.

A group of MIT programmers invented the first game designed explicitly for the computer circa 1962. It was called *Spacewar!* and had rocket-powered spaceships, missiles, gravitational effects and also hyperspace function.

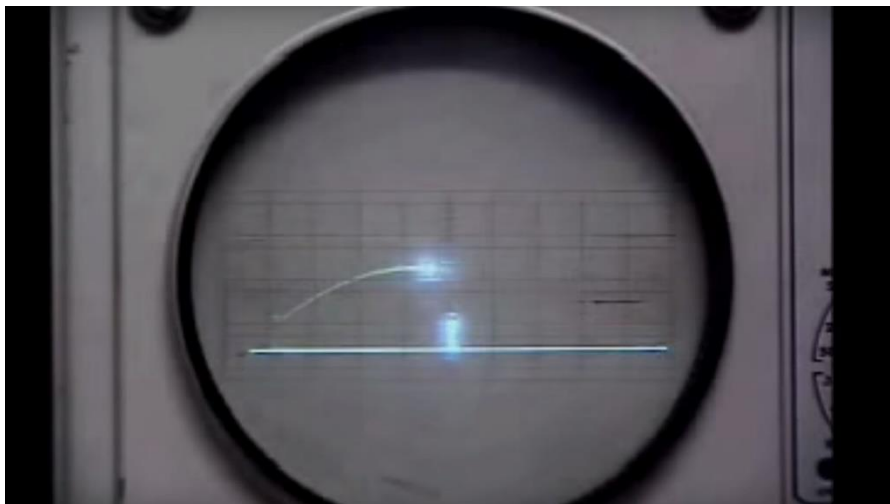


Figure. 3.1 "Cathode Ray Tube Amusement Device"

This game is considered to be influential since it was uploaded on computers at the time and shared between the early users of internet. Eventhough the game was never commercialized, “Spacewar!” inspired those who would bring video games to the masses in coming decades. In later years, researchers at MIT advanced the idea of computer games. These newly formed computer games had very basic PC graphics and very little design features like *Mouse in the Maze* and *Tic-Tac-Toe*. Although during 1960’s there had been attempts to create a computer game in the modern sense the first commercially successful game was *Computer Space* released at 1971. Creators were Ted Dabney and Nolan Bushnell who would later co-found Atari Inc. By the 1980’s both console and computer based games had become very common in America. Following the 1983 crash in the video game industry, the markets began to shift to both Europe and Japan. In this era the games were mostly dominated by arcade games most of which were action oriented. Games like Taito’s “Space Invaders” or Atari’s “Asteroids” were typical of this era. We can see the emergence of other types of games at this time-period. There were interactive adevnture fiction games that were text based and early examples of vehicle and war simulation games. While war games were in essence adapted from already existing board games, vehicle simulations were totally unique in the sense that there were no non-computer analogues of these games at the time. The 80’s are also significant as the personal home computers were manufactured in great numbers and were the foremost means to play video games apart from arcade machines that could be seen in malls or arcade saloons. By mid 80’s it was not a very rare thing to see computers in middle-class homes even in Turkey. Early 90’s witnessed the rise of some legendary computers such as Amiga 500 or Atari ST and also the new generation of consoles. In a sense this period was an early golden age for video games as there was a constant production of games and gaming machines became even more popular reaching many homes. In this era new industrial standards for games also emerged.

Different types of games were formed under clearly defined genres. Even common gamers started to recognize these genres and became standardized consumers. One of the most famous genres which is still favored today was the first person shooters. By mid 90’s garage programmers mostly disappeared from the scene and new and bigger companies replaced them. As a result more money could be spent on game development

and video games were drastically changed as a result. New consoles like Play Station and the use of CD's as media caused video games to feature better and more advanced graphics and sounds. This was an age of glamour as many players started to judge the games depending on their looks or sounds. Also some of the popular genres of the past began to disappear such as interactive fiction or war games. Another change that was significant at the time was the rise of personal computers (PC) as gaming devices. New hardware that were produced solely for gaming found their place in PC's, such as dedicated 3D video cards that were only used for displaying game graphics. Another significant development in the 90's was the emergence of MMORPG's which shall be described separately in the next section. By 2000, the video game industry had become larger and larger. While whether the total number of games developed changed is inconclusive, it is apparent that the number of big budget games rose dramatically. This also meant that the development times of the games were also greatly extended. As a result of this a new industrialization wave occurred in video game development, reducing the number of small companies and creating some industry giants such as EA Games. Gaming sector has seen another critical development in 2000's, the idea of "casual games". Games like "Farmville" can be easily uploaded to smart phones and tablets, does not require any expensive hardware and is very easy to play. This form of games enlarged the consumer base even further including women, the elderly and even kids.

Digital games are an essential information product and service developed by cultural laborers and aimed at final consumers. Starting with the immense success of Sony Playstation at mid 1990's, digital games have become an essential part of our daily lives. From that point forward the industry has emphasized massively multiplayer online games and casual games. Its potential of economic success has been an attraction to private investors, sports companies and even governments looking for foreign investments.

Games are deeply ambivalent. It would be a inaccurate and difficult to give a single definition to the term 'computer game' since it is a multi-layered complex phenomenon. Computer games have several genres and subgenres with different play modes and interactivity levels and therefore they challenge the pre-defined understanding through a single theoretical framework.

3.2 What is MMORPG and MOBA?

Massively Multiplayer Online Role Playing Games, often referred to as MMORPG, is a form of digital game where massive amounts of gamers can play simultaneously. You start with an entry level and the ultimate goal is to reach the highest rank possible. As you progress in the game you gain new skills, items and with the rise of your level you get access to advanced dungeons and raids which require a group of people to complete.

These games allowed players to interact and socialize within a virtual space. People could go to quests with other people, in some cases could initiate player vs. player combat, buy or sell items to each other, etc. As a result, these games were largely constituted by intersubjective relations among their players. Players created the first examples of virtual communities and virtual economies. Virtual economies provided players with the ability to sell and buy in-game stuff with dynamic pricing, which is not that different from small community markets. The most important fact about these virtual communities and virtual socialization was that it was not the game mechanics that created these relations, it was the gamers. One can claim that people who play these games are forming smaller and somewhat more limited versions of real life communities.

Multiplayer Online Battle Arena(MOBA) emerged as a subgenre of the real-time strategy video games, where a player commands a character in one of two opposing teams. It is basically a strategic medieval war where you and your team formed by other characters also referred as “heroes”, try to weaken the opponent team’s defenses and occupy or destroy their base, while they try to do the same thing. Within virtual realms, users create and control an in-game characters called “heroes” or "avatars". The player's avatar crafts in-game goods and gains additional goods and currency, thus increasing his in-game wealth.

On several websites, which operates just like foreign exchange and trading markets, gamers get to sell their in-game earnings, items and even their characters for real life money. Purchases are made in order to move forward in games and collecting in-game gold, thus reaching further levels that require advanced skill sets which also increases the adrenaline and enjoyment for the gamer. Real life sales of virtual items and currencies can be very profitable for the gamers who shows a professional interest in these exchanges just as if it's the stock market.

Almost every game has an in-game currency. Second Life, which is described as an online virtual world has its own currency called "Lindens". In 2018 the value of 1 Linden Dollar in Euros is € 0.0033 and you can easily monetize this money through paypal, and this exchange won't be taxed. As we see the rise of crypto currencies like bitcoin and etherum, it is safe to assume in-game virtual currencies will become an accepted form of capital and a new investment area. It may lead up to new bussiness models, like online shopping malls where users can buy virtual goods where the supply and demand of consumers can easily be observed by companies. This is a model already applied to MMORPG's and it can easily reach a broader audience through more popular social games.

Creation of a multiplayer game is a business risk many game publishers won't take. In addition to the fact that they are costly to create, maintaining the gamers is a challenging problem when you talk about over 27 Million players per day. However those who take the risk and succeed are rewarded immensely. *World of Warcraft* is the ultimate success story of multiplayer games. The most popular MOBA with the broadest fan base is *League of Legends* by RIOT Games. Competition is coming from Blizzard, the creators of Warcraft and Starcraft since they launched their new game, *Heroes of the Storm* which seems to be a crowd pleaser.

World of Warcraft continues to charge a \$14.99 monthly subscription fee in a sector where free to play model is more common. In spite of Warcraft's 12 years of existence, Blizzard has figured out how to keep up the solid subscriber base. As of now, it's assessed to have around 9 million active players. It is currently estimated since its

release in November 2004 *World of Warcraft* has earned more than \$10 billion in revenue. No other MMORPG has surpassed *World of Warcraft's* revenue totals but there has been only three video games in general which have succeeded, *Space Invaders* (\$13.93 billion), *Pac-Man* (\$12.81 billion), and *Street Fighter 2* (\$10.61 billion), which are all titles that depended on an immensely lucrative arcade market in the 1980's and 1990's.

In the upcoming years we will see a transformation in video games from what they call a packaged product model to a service model, where users pay a small amount monthly. Publishers want the users to be connected to their servers at all times.

This gives them the surveillance where they make sure you are not using a pirated copy of their expensive game so they offer expansion packs and monthly subscriptions to play multiplayer. After a while I believe the whole system will change where the user doesn't get a copy of the game, instead you will pay a monthly fee for streaming the content online. This will minimize the cost of printing the games and also create user dependency through monthly online payment systems.

Since their first debut, video games have changed considerably. With the current advances in artificial intelligence (AI), quality of graphics and in design innovation they keep evolving every minute. With every advance comes the question of what would be the economical and sociological outcome of this new medium?

4. GAMING AS A CREATIVE BUSSINESS

4.1 Not Just a Game: E-sports

E-Sport is the term that generally defines a competitive video game tournament where two teams of professional gamers compete in matches of either single elimination or best of 3 and best of 5. Local and global tournaments and gaming events are organized live or online where gamers compete in selected categories for prize pool of money or other related awards.

E-Sports has become a cultural phenomenon, becoming a dominant aspect in digital game culture. E-sports is an new industry created around competitive gaming at all levels and thus it transforms into something more than just professional gaming, “Electronic sports are no longer a pastime of purported basement-dwellers and arcade-loitering youths, gaming is now a valid career choice for a skilled few. Teenagers are earning millions, signing lucrative sponsorship deals, and dating supermodels, all because they can play games really, really well”. (Keach 2015)

The word E-sports seems conflicting since the words “electronic” and “sports” seems paradoxical. Generally when someone talks about sports, we would immediately consider a conventional sports like football or tennis. In the last twenty years another version of sport has picked up the attention of the fans and it keeps on developing right up until the present time. E-sports is a new category of sports that focuses around playing video games professionally and competetively. The arguments on whether or not E-Sports is a sportive activity is still ongoing. The status of E-sports as a sport has been attacked by many. According to Hutchins, competitive gaming has some similar values with sports, including regular training, team work or perfect execution of tactics planned in advance. (Hutchins 2006)

Manager of a Turkish E-Sports Club stated that “In my opinion E-sports can’t be put into the same category with traditional sports.It should be considered a separate sub-genre of sports” (Interview 1, 2018)

Like the title might suggest, some e-sports titles are sports video games, but there are numerous different genres of competitive multiplayer games. In order to take an E-sport to the professional level a dedicated fan base is essential. The first video game tournament held was the Space Invaders tournament in 1980 but E-sports as we know today came to life at the Red Annihilation Tournament and the Cyberathlete Professional League's (CPL) FRAG tournament held in 1997 which created a chain-reaction that led different companies to organize annual tournaments.

E-sports incorporates both gaming and sports. There are myriad different categories in traditional sports like football, basketball or hockey and in concept E-sports is the same. There are tournaments and leagues for different video games such as League of Legends, Counter-Strike, DOTA or Starcraft2. Starcraft2 is a one-on-one game, whereas two teams of five players competing against each other in League of Legends(LoL). There are different categories and sub-genres in E-sports just like it is in many traditional sports. This new industry is at its kickoff and is expected to become even more popular with time. The League of Legends world finals at 2014 had over 27 million spectators, whereas same years NBA finals could attract just 18 million. online gaming is a highly competitive field, not much different than traditional sports. Competitions in E-sports may vary based on genre categories such as first person shooter games like *Counter Strike*, real time strategy games *StarCraft*, sports games like *FIFA*, or massive online battle arena games like *League of Legends*. This list can be further expanded but each genre has the potential to create its own subgenre, adding new titles to the list.

The electronic gaming industry, whose development is faster than other types of media, is growing twice as fast as cinema and four times faster than the music and publishing industry. Although it is thought that this development is due to the fact that the industry is more recent than the others, it would not be accurate to reach such a judgment yet. Because, as the sector is in constant development, it is directly under the influence of new technological formations. Therefore, the ever-changing dynamic of electronic games brings many innovations.

In recent years E-sports has experienced massive growth through the world. With the progress of online streaming services like Twitch.tv and Youtube, the online viewership

numbers has gone through the roof. Multiplayer team games became popular and this has been followed up by large leagues and tournaments with lucrative cash prizes. Pioneering examples of gaming leagues would be MLG (Major League Gaming) and EVO (Evolution Championship Series).

Video games such as DOTA, Warcraft, League of Legends or Counter Strike have a massive following base. Around 250,000 people watch the tournaments online during the League of Legends season matches. Professional players like Søren Bjergsen have 640,000 Twitter followers. According to Newzoo Global E-sports Economy Will Reach \$905.6 Million in 2018, which is higher than many traditional sports. Time spent watching online E-sports videos is expected to reach 6.6 billion hours in 2018, which will show a 275% increase in five years since the numbers were 2.4 billion hours in 2013. (Newzoo 2017)

The growth seen in twitch.tv and other streaming platforms paved the way for E-sports commentators and shoutcasters. We can see the formation of professional teams globally. The formation of TeSPA, a network of college clubs founded to promote gaming culture in US, is increasing the visibility of E-sports and helps create gaming communities within colleges.

The success of E-sports today is for the most part caused by four variables: Better structure and organization, streaming and the experienced casters and conscious audiences that formed as a result, gaming communities, and the acceptance of society like getting TV slots and being considered as a sport.

Getting the E-sports competitions on television has been a major milestone for the industry. In-between 1982 and 1984, a programme called Starcade was broadcast for two years, featuring variety of competitive gaming tournaments and interviews. ESPN, the heavily acknowledged sports network, has also lately recognized the size of E-sports, and that it is still growing. In The issue of ESPN June 2015 magazine was focusing on E-sports. The discussion of whether E-sports could be considered a sport has been one of the main reasons that holds E-sports back.

The number of E-sports fans have grown immensely with the streaming services, spectacular tournaments and huge cash prizes. Nowadays the audience which preferred

to follow the games online attend the actual tournaments as well. This growing number of live spectators gives the gamers on stage an element of “celebrity” .











IMAGE	RANK	GAME TITLE	PUBLISHER	CHANGE
	1	League of Legends	Riot Games	-
	2	PLAYERUNKNOWN'S BATTLEGROUNDS	Bluehole Studio	-
	3	Fortnite	Epic Games	1 ▲
	4	Hearthstone: Heroes of Warcraft	Blizzard Entertainment	1 ▼
	5	Counter-Strike: Global Offensive	Valve Corporation	-
	6	Minecraft	Mojang	-
	7	Overwatch	Blizzard Entertainment	-
	8	Tom Clancy's Rainbow Six: Siege	Ubisoft Entertainment	1 ▲
	9	World of Warcraft	Blizzard Entertainment	1 ▼
	10	Grand Theft Auto V	Rockstar Games	-

Figure 4.1 Newzoo Report- Most Played PC Games March 2018

A Twitch.tv employee stated “During the first years of E-sports families had a cold approach due to financial inconsistencies and poor conditions but this profession’s prestige and acceptability has grown in time. Today E-sports is at the same level with traditional sports. Pro players are going through really intense mental and physical camp periods. Their workout routine and lifestyle is a proof of that” (Interview 2, 2018)

In the LCS(League of Legends Championship Series), player contracts are usually on a split basis and transfers happen frequently. All players earns a minimum \$12,500 salary per split, which generally is a period of 4 months. They can potentially earn a lot more if they win tournaments.



Figure 4.2 DOTA 2 Team Standings, 2017-18 Season

Being an E-sport athlete is an alluring career choice for many. Once entering a professional team, players drop out of high school at a very young age. The career of pro players is short since mid-20s is generally considered too old to be a professional since their reaction time slows. Although it became an actual job with a considerable salary and benefits there is no globally accepted certification or education to prepare these young athletes for professional life and retirement. In 2017 Bahçeşehir University (BAU) partnered with Riot Games Turkey to create an esports teaching module. (Ashton 2017)

In April 2018 The University of California Berkeley and Riot Games announced a League of Legends Intramural E-sports league where they will give scholarships for student-athletes playing on the Cal E-sports League of Legends competitive team. In the United Kingdom, Staffordshire University will be the first university to start a bachelor degree for E-sports in September 2018. (Nguyen 2017)

The popularity of E-sports grows crosswise over seas, speaking to different nations all around the world. After live streaming and broadcasting on the web became promptly accessible to small scale associations and organizations, the popularity of this new found genre spiked even further. The presence of an E-sports industry is particularly critical considering its huge monetary development and demand among the gamers.

E-Sports transforms online gaming into a spectator sport. It imitates the experience of watching a professional sporting event where spectators watch team of gamers compete against each other instead of watching a physical event. E-sports has become so popular that the organized events are held in huge sports venues and expo centers like Ülker Arena and Uniq Hall. The games are separated into competitive leagues and tournaments just like traditional sports.

As E-sports keep on growing not just as a aspect of the gaming business, but also as a spectator affair, the 'sports' side of E-sports is being challenged by many. In 2014 when ESPN 2, a widely respected sports channel aired a DOTA 2 tournament, people took over the social media platforms to share their astonishment and anger. Some praised the network for their foresight and some were simply shocked. Many E-sports fans thought considering the prize money of \$10 million many E-sports fans thought the event deserved coverage from an all-sports TV network. This is followed by the live streaming of college students playing *Heroes of the Storm* on ESPN 2 at 2015.



Jeff Murray @J_Murray14 · 3m

Really hope whatever is on **ESPN2** isnt some start of a trend. Ill really be dissapointed if my kids get hype for this instead of sports on TV

← ↻ 4 ★ 4 ...



Natalie @NATthinks · 36m

Are we now calling **video games** a sport? Is that why this is on **ESPN 2??** That'll help America's obesity problem..

← ↻ ★ 5 ...

Figure 4.3 Twitter Entries, 21.07.2014

The popularity of E-sport leagues enabled them to be considered as a professional sport league where pro-players get paid for participation, broadcasting rights of the games are being sold and the audience is buying tickets to see the events. Likewise, as in sports events, E-sports is a productive new medium for the promoters and companies to increase their exposure by sponsorship deals. In professional League of Legends(LoL) tournaments teams compete in huge stadiums with a crowded audience, which resembles the audience around a football stadium.



Figure 4.4 LoL Tournament

The hierarchical system in E-sports, in some extent, is similar to the system in football and basketball. The audience mostly consist of amateur players, and just like other sports it is possible for amateur E-Sports players to become professional. Although there is no direct physical contact, E-Sports has a physical aspect as well as a mental one. This is an a fact that is overlooked by many who have never personally watched an E-Sports competition. I believe that E-sports should not be ruled out as a sport just because it does not involve pyhsical activity like traditional sports. There is one crucial difference in comparison to traditional sports the companies that produce the games own them. This turns E-sports to an even more complivated ecosystem, both financially and regulatorily. At present just League of Legends(LoL) has been able to create a viable system of

hierarchy, with their regional league structures in North-America, Latin America, South-East Asia, Europe and Turkey and country league structures in China or South-Korea. Even though several attempts of unionizing and creating a common legal ground for E-sports has been tried, it is not yet unanimous globally. France became the first country to regulate E-sports when the French Parliament accepted the Numeric Law (Loi pour une République Numérique) at 2016. There is an immense need for electronic sports law instead of sports law specially thought for an industry where the production companies claim the ultimate authority. I foresee within a several years, a regulative and legal order applied globally.

The competitive environment led E-sports to become a major industry. E-sports players give pre or post-game interviews just like in traditional sporting events. The matches are also simultaneously reviewed; analysts review possible strategies and hero selections pre game and analyze the results post-game and commentators make real time commentary during the game at shoutcasters desk. There are custom-made jerseys with teams and sponsor's logos, which are mass-produced and sold in online platforms. Turning pro comes with lots of responsibilities. Players need to increase their ranks to catch the attention of professional teams. This occasionally requires a considerable amount of consecutive group wins, which takes long hours invested in playing the game as an amateur. Players must be physically fit, determined and concentrated. Wagner defined the term E-sports as following; "eSports is an area of sport activities in which people develop and train mental or physical abilities in the use of information and communication technologies" (Wagner 2006)

There are three noteworthy E-sports operators: Major League Gaming, Turtle Entertainment, Dreamhack. Largest of them is the Major League Gaming which hosts over 10 million users. All three platforms have been bought out by larger companies due to their growing popularity. Leading game company Activision Blizzard purchased Major League Gaming, in the mean time they are also developing their own E-sports platform. Vast supporters have additionally put resources into the E-sports business and numerous European nations have likewise begun broadcasting eSports on real channels. Likewise, expansive web based gaming stages devote assets to E-sports.

According to Newzoo, global audience of the E-sports grew 43%, from 204 million to 292 million between 2014 and 2016 and it is estimated to exceed 427 million around the world by 2019. Global revenue in the E-sports industry rose from \$194 million to \$463 million with a 239% increase in same years and it is expected to smash \$1 billion by 2019. (Newzoo 2016)

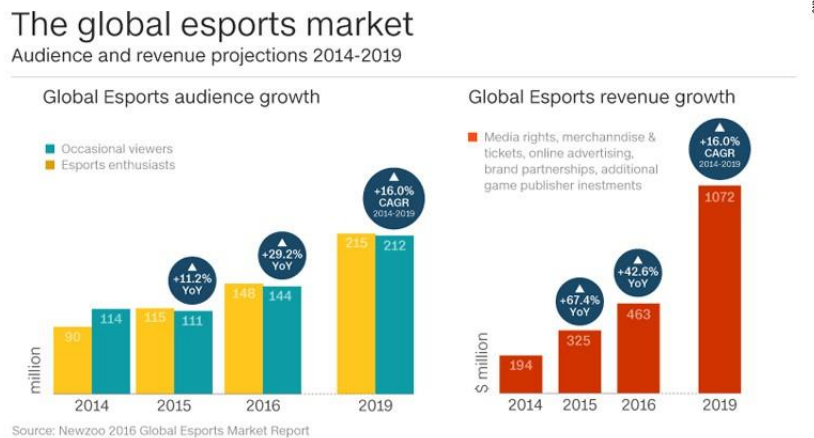


Figure 4.5 Global E-Sports Market Audience and Revenue Projections 2014-2019

The increase of E-sports grew drastically the following years, and tournaments were held everywhere, focusing globally on various game genres. The release of the game League of Legends by Riot Games in the end of 2009 was a game changer according to participant statistics. It is one of the leading games played in the field of E-sports, attracting players and viewers from all around the world. Proof of this could be the League of Legends 2013 finals which became the biggest E-sport event held with 32,000,000 online viewers. The growth of E-sports can also be seen in the sense of prize pool, where The International DOTA 2 tournament in 2017 reached a total prize pool of over \$24,787,916. Eventhough successful titles like DOTA, PUBG, League of Legends(LoL) and Counter-Strike made their way, E-sports is still at its infancy. Existing and emerging genres are trying to find the optimum solution to create a sustainable ecosystem for the teams.

4.2 Streaming

When Justin.tv was introduced as a live streaming platform focused on games, it was an indication of the potential of this industry. Justin.tv, now turned into Twitch.tv has changed the trajectory of E-sports. Watching live streams of amateurs playing games or professional E-sports tournaments has become more and more popular, and Twitch has become the base for gaming related content, along with other platforms like Youtube Gaming and Mixer.

While on Twitch.tv users broadcast themselves and text through the chatbox alongside the video, discussing strategies, asking questions, or just talking trash. Streamers can also archive their videos so it reaches a wider audience even when they have gone offline. What started off as an open platform for gaming related content gave the E-sports industry a leverage over traditional media outlets like television. The popularity of online streaming platforms gave professional gamers and tournaments a chance to air their events online rather than a staged version of a competition on large TV networks, which gave a sense of sincerity and made it easier to connect with the consumers.

As the number of professionals and audiences continues to grow, E-sports broadcasters look towards older models of broadcasting to inform their own style. E-sports broadcasting to a great extent replicates the structure of traditional sports with a great difference of being more sincere and personal.

E-sports audiences have never been larger, Riot games reached an impressive 57.6 million viewers for the *League of Legends* World Championship in 2017.(RIOT Games 2017) The Intel Extreme Masters 2017, the longest-running global pro gaming circuit in the world, reached 340,000 unique viewers tuning into the VR broadcast partnered up with silver.tv, a platform which delivers an 360° virtual reality space which includes live stats, replays, and scores in real-time.(Intel Extreme Masters 2017)

In order to keep up with this trend ESPN started creating digital content and providing live broadcast hours to global finals of important games. Other channels like BBC followed this trend. Turkish Pay TV operator Digiturk broadcast 2016 League of Legend Winter Season Finals on TV and also simultaneously on their web portal “Digiturk Play”. Streaming is an exceptional way for players to be in touch with their fan base and profit from this interaction. The celebrity concept and the real life aspect of streaming is similar to TV reality shows. Nowadays Twitch is broadening its content beyond gaming since they have purchased the rights to broadcast an 11 game package with the NFL(National football League). Evenhough broadcaster advertising and its budgets would surely be beneficial to competitive gaming, E-Sports and traditional media have not yet aligned. Is there a possibility of such alliance between all-digital E-Sports the traditional media systems? I foresee a hybrid approach since the old broadcasting methods need to adapt to the recent expectations of the audience.

Live streaming became a critical part of the game industry following the emergence of web based streaming platforms in 2007. In 2017, 666 million people all over the world tuned in to watch “gaming video content,” and that number is expected to reach 740 million by 2019. (Christensen 2017) Retail giant Amazon.com acquired Twitch.tv in 2014 for \$970 million and now they are leveraging their widespread Amazon Prime user base to present premium features on Twitch. While Twitch dominates live-streaming, YouTube is still the first choice when it comes to edited gaming videos. Youtube Gaming was launched in 2015 in order to compete with the sector giant Twitch.tv. Popular streamers and famous gamers use both of the popular streaming platforms, at the same time maintaining a strong presence in social media and up and coming indie platforms. YouTube’s decision to get involved in live-streaming will drive up the cost of talent acquisition, the competition may be beneficial for their opponents and for the gaming industry in general. The quality of content creators will increase exponentially if game streaming becomes a more accepted and valued career choice.

Although YouTube's gaming audience is twice the size, Twitch users are much more likely to support their favorite streamers financially with tips and subscriptions. Tips and subscriptions made up over 50% of the revenue earnings on Twitch, whereas YouTube earned about 20%. Twitch is now pulling in as many monthly viewers as cable news networks like MSNBC, ESPN or Fox. Twitch.tv had almost a million spectators at any given point in January 2018.

Game	Total Hour Game Broadcast	Total View
League of Legends	142.8 Million	308.5 Million
Dota 2	125.4 Million	116.2 Million
Counter-Strike: Global Offensive	125.1 Million,	184.3 Million
Hearthstone	29.7 Million	203.6 Million
StarCraft II	17.5 Million,	19.4 Million)

Figure 4.6 Broadcasting Hours of Games

There is an insane amount of people playing Dota 2, LoL, FIFA, WoW, Minecraft, Grand Theft Auto, Halo and even games like Farmville or Poker on Twitch. When you enter the website you see a list of games that people are watching, sorted by the current popularity of the game. When you pick a certain game you see a list of related channels that are online streaming at that moment. Once you pick a streamer you get redirected to their channel. Live-streaming creates an exclusive social medium, combining high-quality video graphics with old school forum style text-based communication channels.

You watch the game from the streamer's perspective and there is a chat box on the right where streamer interacts with viewers while playing the game. There is a split-screen where the game is at the center and there is a smaller screen with streamer's visual on the corner.

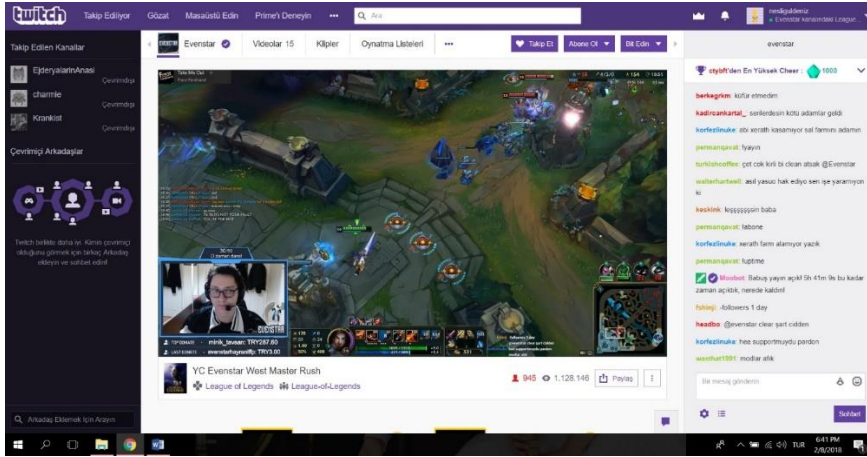


Figure 4.7 Screenshot of a Twitch Stream

There is usually an overlay on top of the game video for advertised sponsorships, alongside additional information like the name of the songs playing in the background. Streaming is giving fans a chance to watch professional and amateur gamers but it also creates a social platform where viewers can interact with the streamers or other viewers through chat function. It is actually free to follow and watch the streams, but if you are a subscriber who makes donations you get bonus benefits like special chat icons, shoutouts of your name, access to streamers slate of recorded videos and every once in a while a gift from the streamer. Subscribers do not have to watch stream ads and they get to use the streamers special emoticons and are denoted by a icon in chat.

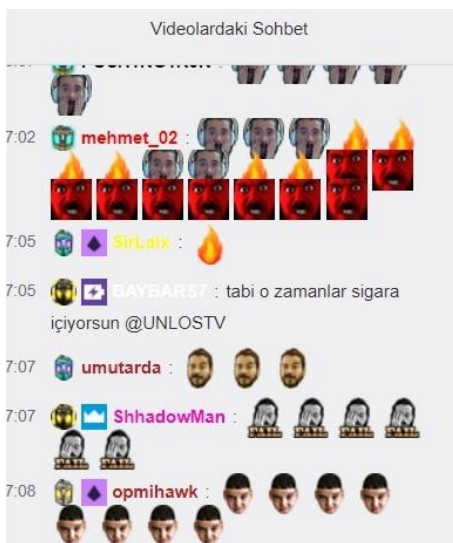


Figure 4.8 Screenshot of a Stream Chat Box

When you subscribe to a channel, it provides the streamer with a monthly payment, where the money is split %50-%50 between Twitch and the streamer. Twitch.tv has foregrounded the human element in a mass medium generally considered to be inhuman and solely technical, videogaming, thus distinguishing itself from other streaming platforms.

Streamers with a certain threshold of views to participate in the “partnership” program of Twitch. Streamers who enter into this agreement becomes ‘partners’. Once becoming a partner, streamers start to get a share of the advertisement income generated from their streams and get to choose when and how ads appear on their stream. If they stream regularly pro gamers make around \$3 per month per subscriber on Twitch, they also earn around \$0.005 per 1,000 views from ad revenue. The most successful professional players can earn around \$10,600 monthly even if they only stream part time. There are also corporate ads inserted in the chatbox of popular streamers. The messages appear at chat screens, coming from twitch bots, as if it is a user. The revenue of these advertisements solely belong to the streamer. Twitch does not collect a percentage of the sponsorship and advertisement deals that streamers make on their own.

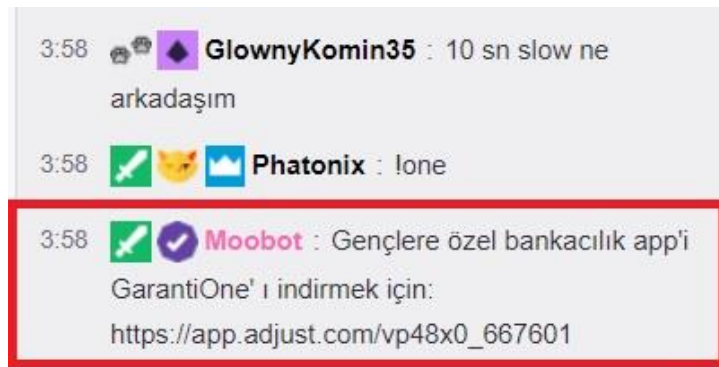


Figure 4.9 Garanti Bank sponsored add at stream chat

A famous cosplayer, streamer and founder of a famous gaming platform states; “In order to gain money from a stream your viewer numbers must be high. Otherwise the companies who will make you money won’t even look at you. So what do we do in this situation? We perform the “show” that audience is asking for. There are lot’s of streamers in Turkey but the number of the audience who appreciates genuine content is very low. It’s not just about the content creator, it is also about the consumer of the content”. (Interview 3, 2018)

Twitch is serving very diverse divisions of the gaming community. At the beginning viewers watched others play to learn their techniques to win or out of sheer interest. However, as E-sports developed, Twitch partnered up with big tournaments with high cash prizes to be their official broadcasters. Fans are paying large amounts of money to watch the tournaments at arenas like LA Staples Center. Fans who can't attend the tournaments physically are watching them online since in between tournament sessions pro gamers and famous shoutcasters often broadcast the event. Not all viewers are interested in popular game genres that turn out to be an E-sport. Niche fan bases like speedrun players who try to finish a game in record times or the retro gamers who play old school games have found a place within this wide community. Sharing a live video of something you enjoy while discussing it with other fellow enthusiast seems to be a very appealing career choice.

4.3 Frankfurt School in The Electronical Age

Famous scholars Theodor Adorno and Max Horkheimer describes the production of mass culture and power relations between capitalist producers and mass consumers with the term “The Culture Industry”. Their focus was to investigate the interaction between culture and economy. Their statements about the culture industry show their dislike of ‘industrialized’ items and their standardized packaging.

Adorno and Horkheimer saw popular culture as a tool of economic and political control. The “culture industry”, offered the masses a false sense of freedom to choose between what is essentially the same. The media products of the culture industry were intended to keep the audience misled in their oppression by offering a standart stereotypical form of culture.

As Theodor W. Adorno explains with reference to popular music; “Structural Standardization Aims at Standardized Reactions: Listening to popular music is manipulated not only by its promoters but, as it were, by the inherent nature of this music itself, into a system of response mechaanisms wholly antagonistic to the idea of individuality in a free, liberal society ... This is how popular music divests the listener of his spontaneity and promotes conditional reflexes.” (Adorno and Simpson; 2002)

Is Adorno’s claim that mass culture requires minimal effort by the consumer still accurate in this information age where audience become more participatory? Adorno and Horkheimer did not consider the consumers to be oblivious of the processes involved in the culture industry, it is an unconscious consciousness. They stated that the triumph of advertising in the culture industry is that consumers feel compelled to buy and use its products even though they see through them’

If consumers are associated within the culture industry, we might say that they are willing supporters of this system rather than being dominated by it. To start with, we should if consumers are mindful of the presence of a culture industry and to what degree they are participating in the processes.

Internet rendered possible the collectivization of consumers, in this case game consumers, and thus bringing up the consumers power over production and consumption. Collectively, consumers does not obey rules of the industry rather they influence the process. Since the economical power dictates the decisions of companies, they pay attention to consumer activity and feedback. Online and offline game fan communities can influence whether games have sequels, design of the in game characters and even the creation of a tournament for a game turning it to an E-sport event, thus capable of turning a game into a possible career.

Still we must be very cautious on estimating the extent of consumer's free choice on what, where and how they consume it. In many cases the isdea od a consumer choice is a deceptive one. Even when consumers poseess power over industry, they are still a part of to capitalist modes of production, securing their role in this consumer society. According to Adorno and Horkheimer, modes of production cannot be controlled or challenged from within.

The video game industry matches the outlines that the Frankfurt School revision of Marxist theory saw applied to popular culture as a whole. The economics of digital games are such that games are created for a mass market. Small games destined for niches are almost never distributed openly and avant-garde games are restricted to a dedicated website underground. A commercially successful game type, most prominently first-person shooters, become formulaic and standardized as the industry continues to churn out carbon copies of what has gone before. (Rutter and Bryce, 2006:150) This is not to say that creativity is sidelined, for the alternative developers' industry is alive and popular and every so often game distributors take a risk and release a less standart game.

The obvious comparison of game industry would be with Hollywood, where the production of a movie is very expensive so studios generally refrain from taking creative risks and thus we get sequels and comic book adaptations of the same characters every two years. Just like a summer block-buster, some video games can now reach millions of players. The video game has now become a cultural industry just like the cinema. It is a young sector, not as mature as cinema as of yet; but it is lacking in neither the societal effect nor the financial volume.

The situation within the video game industry is even more complex than that of cinema. The cost of a videogame is approximately six times more than a movie ticket and therefore gamers are six times as cautious when it comes to purchasing innovative games that might not meet their expectation. When you consider Turkish Lira's decline against foreign currency and the fact that the pricing is adjusted from an eurocentric point of view this is even more accurate. Therefore game publishers respond accordingly.

The games are controlled by the creating firms and their executives, the colors, the characters, advertisement campaigns and even the name of the game. Creators and developers can't risk being innovative. AAA game companies are producing games similar to Hollywood movies with little basic bits of interactivity for a wider audience which eventually increases their profitability.

If we analyze the current political economy of media we will witness a continuing process of "centralization of capital" as described by Marx, where the greater part of the media outlets is owned by very few companies. These larger processes of economic transformation have made a significant impact on all aspects of the gaming industry: game design, streaming, and live events. The gaming and therefore E-sport industry is presently dominated by several companies – Tencent, Blizzard, EA, Nintendo – that sell over 70 percent of the games worldwide.

A group of selected elites from big companies are deciding which games the consumer can select. Independent game companies are also forced to produce items in line with the already existing popular precedents if they want to stay in the business. Diversity and innovation in games are in danger due to expansion market concentration. In the long run there is a risk of standardization so widespread, we might not find any authentic games, we are left with versions of few selected game genres. Be that as it may, this isn't about absence of creativity between game developers or artists, it's about profit. The market has trapped games in a creative loop where everybody complains about sequels. Videogames are a creative sector with very little limits, deserving of creating games much more innovative and progressive. The only limit of the creator's imagination is the limits imposed by companies and sector leaders.

Adorno forecasted this trend as it can be seen in his arguments on the culture industry. Consumers have developed a homogenized popular taste in the gaming industry. They want the same familiar structures as it can be seen in the example of Call of Duty series, which keeps on growing without making any significant improvements. The games which are approved for big budgets of production are generally the franchises of already popular and money generating titles. Familiarity aspect of these games makes them easily digestible for the consumer and more attractive to the investor than an abstract idea of a new game. Sequeled games like Call of Duty or Grand Theft Auto can outsell indie titles at any given market. I personally experience, as a devoted game enthusiast, the creative potential of the industry and its growth beyond big budget popular games. Independent game developers could go above and beyond with their ideas and creations if given the opportunity.

However, this does not seem possible with the current standing of industry. Creating a game is an expensive endeavour and truly independent and unique games will not receive the same amount of investment as the generic AAA games with repetitive structures. There is of course a possibility of flourishing for these games, but in no way their success will be as glamorous and unlimited as big titles.

A Marxist critique of the recent turn of the AAA video game industry towards mediocrity would isolate the problem in the transformation of the video game into a blockbuster industry around 2004 with the release of Halo 2, which grossed more than that season's Hollywood movies, leading to a change in the model of production towards a Hollywood or TV model which centralized power in the hands of mega publishers like EA and Activision, seriously inflated the size of devteams and the costs of production, subsequently led to a serious deterioration in the labor rights of said nonunionized and now seriously alienated, factory-like workforce, and ultimately turned most AAA games into the gameplay-less mass spectacles so derided today. Furthermore, a specifically Frankfurt School-esque analysis would then do a reading into the ideology of these specific video games, outlining the way that their very structure and gameplay modalities serve to blunt the inherently emancipatory potential of video games as an art form and instead train their players to be passive, needy, obedient little consumers or even

soldiers, rather than independent-thinking, self-reliant human beings capable of questioning the system in which they find themselves.

The notion of the culture industry is more pertinent than ever in the present interactive media era. Mass entertainment now traverses through increasingly diffusive forms of media such as television, film and also games. These media forms get their power from their ability to submerge the viewer, listener or gamer within a fantasy world that is very different to their own reality. There we have a very powerful infrastructure that creates new types of fans. Gamers themselves become key players in that transformation through their participation in online gaming communities. Although it seems like the consumer has a significant control over game companies, they are actually being converted into structural parts within the production process. Thus they are at risk of becoming exploited on ever more elevated levels.

Official websites of games can be exploitative of fans, since promotion of certain products are integral part of these sites. At the same time as playing the game themselves, fans can also go online and watch broadcasts of the same game played by professionals and visit both official and unofficial websites in order to chat get cheat codes and strategy clues. The chat rooms and message boards used by gamers and fans is a good example of 'pseudo-realism' since they allow social interaction to take occur on a new virtual realm where there is no need for proximity, visual appearance or even a temporal link between people.

Modern cultural theorists often understand today's audiences as being potentially active and participatory in contrast with Adorno's view of audiences as rather passive. In today's world media have become interactive and there is a constant effort to understand the effects of new mediums like computer games on cognition, learning, and community. As Espen Aarseth put it in his editorial in the first issue of the journal *Game Studies*:

Games are both object and process; they can't be read as texts or listened to as music, they must be played. Playing is integral, not coincidental like the appreciative reader or listener. The creative involvement is a necessary ingredient in the uses of games (Aarseth 2001)

Gaming sector's winnings are now eclipsing Hollywood's, with Blizzard's World of Warcraft alone bringing more than 10 billion dollars in total revenue. Video games have begun replacing other media. We can now choose to be the lead actor in an offline video game of our choice, rather than passively watching others play a role instead of ourselves in a movie. Rather than looking for a way out of the suffocating chaos on TV screens consisting of terror attacks, family issues and cosmetic products; we can choose to become citizen of the world in a massively multiplayer online role-playing game's (MMORPG) that is fresh, primitive and well defined. Just as the Internet has partially taken over the news and entertainment duties from the TV, video games are becoming a media where we are spending more and more of our time.

In the last decades different opinions arose. Although all games are said to be alike, the producers are diverse. The gaming industry has several AAA companies with high selling games and broad fan bases and also independent companies of young entrepreneurs. Independent creators can still bring out their games on sharing platforms like steam and actually reach an immense number of potential clients. This means there is a possibility to create authentic content and avoid producing games that are formulated by AAA companies. Some gaming studios create fresh content to delve into new markets, while others manufacture derivative products as a result of the existent market competition. Just like any ecosystem, when a new game is immensely popular, copies are made, which in turn give birth to a new genre like the case of First Person Shooter(FPS) games. This genre then devolves into further subgenres, and the evolution continues. On the other hand, one must always keep in mind that this structure is being built under capitalistic conditions, and the video game is a commodity before all else.

The productions process of the video game is another aspect of the business. Again, to compare with the cinema, the resources needed to create a good video game are much more accessible than the resources needed to create a good movie. However, other issues come forward; such as the availability of a qualified and flexible work force, the working environment and the necessary financial funding throughout long production periods.

There is of course a considerable gap between the perspective and the technology of our time and that of these thinkers. This is not to imply that Adorno's critiques cannot be applied to the current state of affairs, merely that society has possibly changed in ways that cannot be accounted for solely by Adorno. There are several parallels for they witnessed the rise of the electronic mass media, comparable to the current rapid growth in computer gaming. While Adorno saw the beginning of the age of television, we have entered a new era of interactive entertainment.

With their hybrid approach, the Frankfurt School theorists can be seen as pioneers of a critical-institutional perspective on cultural production, media and communication. Nonetheless many scholars have criticised the work of the Frankfurt School and of Adorno's postmodernistic interpretations of cultural production.

The modernist approach to culture and politics will be considerably different to that produced by a 'post-industrial' society. In the consumer society we live in, where consumption and leisure now determine our experiences rather than work and production, these cultural changes are inevitable. This shows that 'consumer culture' dominates the cultural realm and the market determines our everyday life experiences. In our postmodern world there is no point of reference beyond the commodity.

These changes in post-industrial society have clearly altered the way that critical theory understands the role of the media in society. Cultural pessimism of Frankfurt School is no longer the dominant approach to the media. Due to the ubiquity of network technologies, the boundaries between high art and mass culture are becoming blurred, paving the way for the creation of a new process of cultural production full of contradictions. At one hand the culture industry seems to take into consideration resistant strategies using digital technologies, yet it still works within a capitalist structure, in service of monetary ambitions.

5. THE RISE OF A CREATIVE TURKEY?

5.1 E-Sports in Turkey

Japanese game console Atari was the gathering point for early gamers before the internet cafés became popular. This game console monopolized the gaming industry in arcade gaming, computer gaming and home gaming between 1970's to 80's. Their monopoly has ended with the rise of personal computers and internet cafés. According to Taylor, just surfing on forums and reading about games caused players to move into a virtual public sphere, although with internet cafés this public space also involved shared physical space. Widespread network capabilities of the games (Local Area Networks) are another feature that home play cannot offer. (Taylor, 2012: 86)

In Turkey, the idea of a shared place which eventually creates a community was very compelling to the young population. This community of people wanted two things, play video games and the sense of companionship through social activity. Turkey became a critically important country because of strong internet cafe expansion around cities. There are over 20.000 internet cafe's operating all over Turkey. According to TUIK(Türkiye İstatistik Kurumu) Household Information Technologies Usage Survey; in 2017 the use of computers in the 16-74 age group was 56.6%, respectively the ratio was 54.9% in 2016. (Türkiye İstatistik Kurumu 2017)

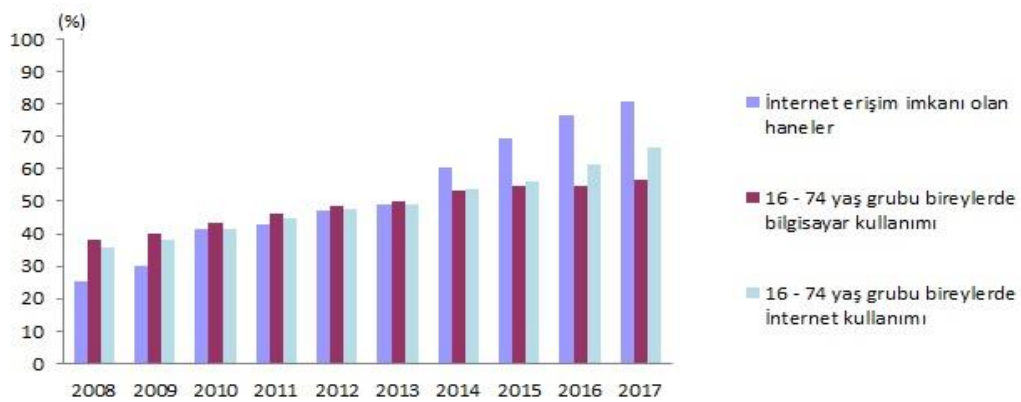


Figure 5.1 Household Information Technologies Usage Survey

Turkey's share of global gaming markets which have a total size of 110 billion dollars is \$ 750 million and the numbers are improving every day. Turkey is situated 16th among annual game incomes of other countries in the world. An average 30 million people actively play video games and 100-300 thousand gamers simultaneously go online to play a single game. With almost half of our country's population playing digital games, these figures give us an idea about this genre's progress.

In Turkey there is a larger young population than Europe which large companies see as potential buyers and make their investment decisions in accordance with utilizing this vast potential. Companies like Netmarble, Riot Games, Nfinity Games, Bigpoint, NTTgame, Gameforge and Lokum Games are investing in E-sports in Turkey because of its vast potential and young population with a potential to become profitable fans. Riot games have a very strong effect on Turkish E-sports culture with their game League of Legends. *League of Legends* fandom and E-sports culture evolving around it have a secured place in Turkish culture. This industry giant has opened up a head quarters in Istanbul/Turkey. This has been very important since it gave many non-professional gamers a chance of a career in gaming industry in Turkey and also gave gamers a chance to play their favorite game localized. Character voice overs in Turkish, Turkish audience specific advertisements and localization of gaming elements.

There are over 4.000 licenced E-sport Players and 35 professional clubs, and over 14.000 amateur teams in Turkey. Manager of a Turkish E-sports Club shares his experience as a Professional team manager; "E-sports progress in Turkey was relatively slow in the beginning. We saw a moderate boost around 2015, expanding the player numbers up to 7 million. Now this expansion is 1.5 times the number of the previous year due to the effect of the global arena. E-sports is a dream career for the 12-26 age group in Turkey, they definitely envy these pro gamers when they see them on screen. A few years ago families were anxious but now that they see the money and reputation involved, their points of view have changed" (Interview 1, 2018)



Figure 5.2 Dark Passage E-sports Team, Turkey

Turkish gaming industry is attracting the attention of foreign investors in recent years. Multi-national firms are purchasing Turkish companies or becoming partners. This will accelerate the growth of the local gaming scene and also accelerate the development of qualified employees this industry needs.

Internationally ; Ajax, Paris Saint Germain, Sporting Lizbon, Manchester City, FC Schalke, Wolfsburg, Valencia, West Ham United, Philadelphia 76ers, PSV Eindhoven, F.C. Copenhagen, AS Roma has recruited talented gamers to create their own E-sports teams and enter the competitions.

French football club Paris Saint-Germain F.C. has partnered with Chinese LGD Gaming for their Dota 2 team. Doing so, PSG has become the first major European football club to invest and compete in the Dota 2 title. Fabien Allègre, Director of Merchandising and Diversification for PSG commented: “We are very happy to once again be a pioneer by being the first major European football club to invest on DotA 2. With an average of over 500,000 players simultaneously connected, Dota 2 is one of the most popular E-sports games, especially in Asia, a strategic region for PSG. Driven by the ambition of the club and our confidence in our partners LGD and Webedia, we are determined to make this commitment a success”. (Fitch 2018)

In Turkey many clubs have decided to step into the world of E-sports worldwide after Besiktas League of Legends team set up in Turkey. Some of them set up teams for FIFA, which is still related to football, while others did not stick with it and created teams for games like League of Legends and CS: GO. According to Riot Games Turkey's regional manager Bora Koçyiğit; Besiktas has achieved a first in the world: "There are many large institutions in many advanced E-sports leagues around the world, but there has never been a sports club competing in more than 10 different branches. Besiktas is unprecedented in that way. In eastern countries communication and media corporations have their own teams, while in Europe teams are usually independent. Also Ayça Zaman, a columnist at Level Gaming Magazine stated that "It will be much better for the industry if the clubs support it. Besiktas's team is a very big step for E-sport scene of Turkey. It's one of the best things that has happened to the gaming industry in recent years". (Sivaslı 2015)

In the last six months, 2,560 people have received licenses from the Ministry of Youth and Sports. Even though there are many fields of sport executed in Turkey, none of them has yet seen such high number of professional licenses. The Ministry shows a special interest in this new emerging sport. The ministry gave official athlete visas and gray passports to E-Sports players who were entitled to go to the World Championships. In the early days of E-sports, it was regulated under the name of "Federation of Digital Games" and then it was changed into the Federation of Emerging Sports Federation. I personally believe that it will return back to function under the "Federation of Digital Games" which is likely to become autonomous within a few months.

Even though there is a growing interest and thriving new economical possibilities in this new industry, many brands are still reluctant to associate themselves with E-sports since prejudices against competitive gaming still abound. The general E-sports audience demographic and the lack of quality content are the source of these prejudices. Comparing to the global sponsorship revenues the numbers are significantly lower.

Still brands like Turkcell, BKM Express, TP-Link, Zyxel, BenQ, Razer, Steelseries, Logitech, TTeSports, ASUS, MSI, GIGABYTE, ViewSonic, Paypal, Kaspersky, Ülker, AMD, Coca-Cola, Redbull, Nescafe, Turkcell, TeknoSA and NVIDIA have created budgets to sponsor E-sports. With the rise of consumers gaming, and games themselves becoming more omnipresent elements of popular culture, businesses need to understand these consumers way of thinking. Gamers are an incredibly passionate consumer segment who spends a considerable amount of money. Consumers in US spent more than \$30.4 billion on video game products in 2016, according to a statistics portal Statista. (Statista, 2016)



Figure 5.3 Burger King Pro Gamer Menu



Figure 5.4 League of Legends 3v3 Pack Gnctrkcell

I believe the economical reachability is a great factor in why E-sports has grown so much in Turkey. Games with professional E-sports tournaments are generally free to play, which means you can sign up and play free of charge. This is a big hook for attracting younger gamers who does not have the financial freedom of their elderluy counterparts. League of Legends (LOL) is an excellent example since it embraces a free to play model, which gives early teenagers an opportunity to play without being charged for it. However in MMOs and MMMORPGs, you need to create the character you want to play and invest on them accordingly. It is ofcourse possible to spend money on free to play games like League of Legends, but it will not provide tactical advantage, just an aesthetic one like the appearance of a champion.

There are roughly 21,8 million players in Turkey. It is estimated that 11.4 million of players are spending money on games and related product. Due to its young population Turkey has a very diffuse digital game culture and it is estimated that 39 million hours are played daily. Turkey is ranked first globally in the social game category with duration of sessions per game reaching 38.4 minutes. With this obvious potential it is projected that multinational companies will be entering Turkish game industry with buyins and corporate partnerships. Gaming technologies such as programming, modeling, animation, design, editing, music and sound are used extensively in defense, health and education. (Türkiye-Avrupa Eğitim ve Bilimsel Araştırmalar Vakfı, 2016)

Games have found a broad consumer audience in Turkey for the last twenty years. The generation who grew up with games has also expanded the interest in computer technologies. The universities that provide training on these technologies are supported by the future guarantee at the official level and by the gaming culture at the non-governmental level. This process has created an important mass who wants to contribute to digital game production; but the training provided was not enough to provide specialization in more specific topics such as design, modeling, animation, artificial intelligence, graphics, which are necessary to achieve this goal.

Many factors, such as the absence of an existing industry, the fact that basic social institutions such as the state and the family are also in a hindering attitude, the lack of a market for sales and promotion and games, and the investor's view of games as a high-risk investment increased the existing obstacles. Therefore after twenty years, we are still unable to return to a steady flow of game production.

E-sports tournaments and leagues must have a national, regional and global reach just like traditional sports if they want to get advertising budgets from companies. Since most of the marketing money is spent on a local capacity, very few advertisers have a budget for sponsorships. In order to succeed, local E-sports tournaments need support from local sponsors, global sponsors and E-Sports associations. While E-sports has received a lot of attention from mainstream media internationally, small scale local tournaments are struggling to find parties participants and sponsors live events. Game publishers and organizers must connect local E-sports activities with regional and global championships.

Has the growth and economical opportunities of this new genre reached its peak? I personally expect to see a sufficient growth in the field of E-sports. Especially in Turkey we are at the initial phases of the curve.

5.2 Creative Class Theory Applied to Istanbul

A “creative city” as Florida defines, is a socially collective environment that will support the increase of creativity. According to him, economic development is concentrated in places where creative workers cluster and be inspired by the stimulating mentality of people and places around them. The Creative Class tends to choose big cities with a wide range of opportunities and cultural dynamics. Tables have turned and the Creative Class are now looking for a place where its creativity can be expressed without any cultural, social or technological restriction instead of going wherever the jobs are. Community plays a big role in the decision process, people not only look for places with high paying jobs, but they also look for places that have communities formed by like-minded people where they can experience diversity and enjoy the amenities. Creative cities must be in constant competition to attract the Creative Class, which causes an economic growth wherever they locate. Can Istanbul become one of these creative cities, or is it already one? Istanbul is not yet a creative city as Florida defines but it definitely shows a vast potential to become one.

In his research Florida especially focuses on the United States, where the Creative Class counts %30 of the total workforce. His theories are mainly generated from studying American cities which definitely has different qualities compared to geographically and demographically complex cities in Europe and Asia. Turkey would be a good example to further investigate these differences, a country which is considered both European and Middle Eastern at the same time, that is altogether different from the American model.

Istanbul, with a population higher than 15 million inhabitants, is the only contestant to be a creative city in Turkey. As Florida mentions in his book, the Creative Class prefer the opportunities offered in larger cities. Although it is not the capital of the country, economically and creatively Istanbul is the most diverse and vibrant city in Turkey. Florida suggests that companies at the creative industries often locate considering the social and cultural factors and urban comforts. These ‘soft’ factors are mainly related to the social and cultural atmosphere, “hipness” of the city and its overall perception of being an up and coming vibrant location where young professionals would want to live. Istanbul is a predominantly young city, both demographically and socially, that is

exciting to work and live in. Compared to the global market Turkey has a small industry but it is becoming an important location for international gaming companies, in particular the mobile games market is expected to grow at a massive rate where several Turkish firms are leading the industry. Almost every company that forms the Turkish gaming industry are located in Istanbul, putting this city in radar for every creative professional. Foreign firms are also actively searching for opportunities to expand into the Turkish gaming market. These economical interest from global investors is weakened by instability of the country and ideological conflicts with government.

The government intervention on communication and information in Turkey is a known fact even though internet and media companies are generally privatized. Internet in Turkey has been founded according to nation-state policies, and still being managed with a state-oriented mentality. State regulations on the online content are extreme and in alliance with the ideology of current government. Highly saturated political government in Turkey indirectly controls the private information and communication systems through regulations, financial policies and forced privatizations. Government's manipulation of traditional media left the oppositional educated masses to turn into alternative free information sources on internet. Especially during the last decade, the AKP government's oppression on oppositional media also affected internet content. Under AKP(Justice and Development Party) government global information and social media websites were censored like wikipedia and twitter. Private sector's profit oriented policies and governments suppressive and political attacks are slowing down the possible progress in these new emerging industry. Still government seems to support privatization and expansion of international companies in Turkish market, considering the monetary value added, with the condition of not being in opposition with state regulations.

The state policies which deny the freedom of information and speech stonewall the development of tech related creative business and turns internet into a common TV channel where the content is forcefully fed to viewers. Video games, which are still fairly untouched by the censorship, have become popular means of escape and entertainment.

We can now be a part of a our own narrative and be whoever we want to be in a multiplayer game, connecting to new people instead of consuming the pre-planned and highly fetishized traditional media narrative of terror, sex, and money.

Just as the Internet has partially taken over the news and entertainment duties from the TV, video games are becoming a media where we are spending more and more of our time. The emergence of personal computer in our lives paved the way for the creation of alternative cultural spaces that can infiltrate established culture. These new cultural spaces became platforms controlled by the participants, where individual ideas can be expressed that had no outlet in traditional media platforms. Gaming industry's strong appeal to the youth segment leads advertisers to explore online games to attract this client base. Big companies and advertisers are using this new media platform for advertising. In-game advertising is a big source of revenue for companies.

Gaming industry opened up a new market for Turkish economy and it's value added is increasing exponentially. Due to its rudimentary market structure and high potential of internet industry, Turkey attracts substantial information and communication technology companies and foreign capital. In the case of Istanbul, perspective investors in creative industries are attracted to a young labour force consisting of diverse and highly skilled professionals and prospects. Companies took into consideration the availability of a skilled labour force long before Florida's assessments; as it was established in human capital theory. Therefore Florida's claims that creative companies are following the location decisions of skilled labour is still correct but not exactly original.

Environment is another key factor for the decision making process of creative individuals. Cities mainly focus on large scale initiatives like museums and cultural events in order to create the "cultural vibe" necessary to attract the creative class. Although these are fruitful efforts, Florida states that cities must also pay attention to small scale local improvements. An atmosphere of diversity and tolerance will help a city reach the status of a creative city. Sadly Turkey's track record of minority rights and tolerance is not so bright.

Comparing to rural cities Istanbul has a more diverse and understanding mentality. The LGBTQ scene in Istanbul, which Florida states it's necessity, seems vibrant and colorful

on the outside but it hides a dark secret behind it. According to Transgender Europa's 2016 report Turkey ranked first in Europe and ninth globally for transsexual murders. Immigrant policies of the country seems welcoming too, considering Turkey allowed over 3.2 million refugees into their borders. Within social life the tolerance towards immigrants is almost non-existent. For Istanbul to be considered as a creative city, it must provide a viable surrounding according to diverse lifestyle choices of the residents. (Balzer, Lagata, and Berredo 2016)

Importance of creativity for economical progress is undeniable, thus the market value of creative individuals has risen. Big companies are adapting to the creativity oriented idea generation in order to survive in this new economical order. Policymakers tend to overlook the advantages of gaming industry while investigating its social affects. This industry encourage innovation and creativity by it's nature and as we already established new economical orders benefit highly from creative industries, as it is the case of Turkish economy. The continuous growth and progress of these industries rely on the positive approach of the Turkish policymakers. For Turkey to become a destination for the creative economy and restore economic wellbeing, countrys policies regarding foreign investors and creative content must be reconsidered. Istanbul's potential of being a destination for creative industries will be wasted if policymakers does not acknowledge that the city's creative and tolerant conditions are crucial for improving the country's economic standing and a positive change is not only economically beneficial but also quintessential.

Turkish game industry is thriving and Istanbul is becoming a serious contestant to become a creative city, especially for the gaming industry. With local companies producing new games and proving the economical possibilities, local and global investments will increase, thus will have more opportunities to produce original titles in the future. If the current game houses start to make more money, investments will also continue to grow, creating exciting employment opportunities for the skilled creative class who want to be involved in the gaming industry. Current research gives us a glimpse of possible future developments. Despite the set backs, Turkish game industry has an exciting future.

6 CONCLUSION

Play is a crucial element of being human. According to sociologist Johan Huizinga, play is an essential part of human life. He writes in *Homo Ludens* “Play cannot be denied. You can deny, if you like, nearly all abstractions: justice, beauty, truth, goodness, mind, God. You can deny seriousness, but not play” (Huizinga 1971)

Video games are an integrated part of our current reality and became a sub-culture element which paved the way for the creation of a new creative industry that is “Gaming Industry”. What was once a sub-culture rapidly turned into popular culture, and it started to have a great economical and sociological affect on societies. This thesis seeks to analyze the concept of creativity and its progress within time, how it became a core element of economy and finally being considered as a profitable production mode for a recently defined social class which is “creative class”. I have focused on a sub-group of the creative class; gaming industry and its creative workers.

Utilization of resources through physical labor was the basic description of production and economic progress in early days. With the industrial revolution machines took over and the “human” element became gradually less important with sole focus of productivity and profit. Industrial cities were considered strong cities and thus migration of capable workforce from rural to urban accelerated.

Technological revolution that we have been experiencing in the last 30 years brought back the “human” element, but this time it was not the physical capabilities of men. The mind and imagination, the one and only attribute that separates us from other living beings, became a key force of production. Globalization allowed the development of a new form of economy which we call “creative economy”. Known fields like business, science and technology applied creativity to their process, thus forming “creative industries”. These developments and the new employment opportunities resulted in a boom of interest to these fields and creative production.

In this innovative era creative class will be the reason behind further regional economical progress, using creativity as a tool of production and creation of new forms. Florida realised that economy depends on people and this new factor will result in change of dynamics of society.

Regions and cities in particular grow and prosper with creative industries, therefore cities must improve their living conditions, creating an atmosphere of tolerance and diversity, in order to attract the creative class. These changes are bound to affect our way of life and the structures of the cities and in the future economic and social systems of the world. Florida asserts that we are on the brink of a economic and social revolution that will rewrite human history. Creative class and the creative industries they have formed will affect society to a point where a change in social institutions and policies would be necessary.

His approach to the social and economical structure is in some measure opposite with the Marxist approach, where economic forces are fundamental reasons for historical transformations. In line with Marxist point of view, Florida asserts that means of production is the source of the changes in superstructure.

According to the urban studies theorist, due to the formation of creative class we get to witness a historical change in economical structure since they are transforming the conditions of production.

Ideas are means of production for creative class and they have total control over them. Florida explains this phenomena as follows, “this is now beginning to happen, although not as Marx thought it would, with the proletariat taking over the factories. Rather, more workers than ever control the means of production because it is inside their head; they are the means of production” (Florida, 2004: 67) Florida recognizes Marx’s prescience that a day will come when workers will revolt and become the leaders of production, just not exactly how he imagined it would occur.

Rise of the creative class will be the reason behind the drastic changes in economical development and societal orders. If cities are serious about increasing their economical and cultural resources, the authorities must pay attention to Creative Class Theory and make decisions accordingly.

The application of this theory to urban planning and regional economy has positive outcomes but it also raises a more concerning question, is it possible to preserve the individuality and creativity as something pure? In other words; can we uphold the uniqueness and mojo of the creative products against corporate greed for profits?

As Espen Aarseth put it in his editorial in the first issue of the journal *Game Studies*: Games are both object and process; they can't be read as texts or listened to as music, they must be played. Playing is integral, not coincidental like the appreciative reader or listener. The creative involvement is a necessary ingredient in the uses of games (Aarseth, 2001)

Considering companies around the world are capitalizing on creativity and innovation, is it possible that the human mind can be transformed into a mechanical means of production with the sole aim of profit making? Expanding the economical prosperity of local and global communities is a very positive attribute of the creative industries but I anticipate that creativity will prevail against the danger of becoming a uniform product, preserving its uniqueness and individuality.

Looking from a less economic point of view, especially in the case of gaming, emotions plays a big role on the consumption of the cultural products. Gamers choose the product based on the enjoyment, thrill and excitement they provide. As gaming industry keeps expanding and producing new titles, users will expect more and raise the standards for original content.

Gaming industry in Istanbul is and continue to be under the spotlight of national and international attention, create a positively competitive environment where game developers feel the necessity to outdone themselves. This competition will draw investments, reveal original ideas and generate possible employment opportunities for talented individuals. Beside AAA game companies, tech ventures and international

mergers, I foresee a boost in young start-ups and local entrepreneurs. This will result with the creation of local Turkish game narratives and possibly the export of successful Turkish games into the international market. Ofcourse the increasing rise of technological innovations and developments in gaming will positively affect the quality of products and draw further attention to this industry.

Digital games had a modest start more than 50 years ago but today they are a vital element of our entertainment life. I sincerely believe that the future of the Turkish game industry will be prosperous. Realization of the monetary potential of creativity will ensure an economic and cultural growth for Istanbul.

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