



European
Games Developer
Federation

2019 EUROPEAN VIDEO GAMES INDUSTRY INSIGHTS REPORT

By European Game Developers Federation (EGDF)
Supported by Interactive Software Federation of Europe (ISFE)



EUROPE'S
VIDEO GAMES
INDUSTRY

FOREWORD

From Olaf Coenen, Chair of ISFE and
Hendrik Lesser, President of EGDF

We are pleased to announce the release of the 2019 European Video Games Industry Insights report, which contains useful insights for the video games industry as well as European industry data. The report supplements the first joint ISFE-EGDF Key Facts report, published on 25 August, 2021. It also represents an important step in the collaboration between Europe's two main industry federations. The pooling of European industry data, from the smallest European studios to the biggest companies, creates an unprecedentedly clear and complete picture of Europe's video games sector.

Through the years, the video game industry has always been a daring frontrunner, pushing the artistic, technological, and business boundaries of games as a creative medium — an industry where a single visionary company in Europe has the power to become a global success story. We hope you find these insights useful in your work and that they enable you to drive your work and in turn our industry forward.



Hendrik Lesser

EGDF President
CEO, Remote Control Productions



Dr. Olaf Coenen

ISFE Chair
VP, Global Commercial
Management, Electronic Arts

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INTRODUCTION

Introduction

In many ways, the 2019 games industry data report is historic. For the first time, EGDF and ISFE has collaborated to create this industry insights report. According to the combined EGDF-ISFE data, the European digital single market for games is far larger than the combined turnover of European game developers and publishers. In the EU Member States, the combined revenue of game developers and publishers is around €12 billion. The European Union imports more games than it produces.

France, Sweden, and Finland are the only three countries with national game industry ecosystems worth more than €1 billion in terms of revenue. However, when combined with the fact that the majority of European game publishers are headquartered in France, this highlights France's prominent role in the European games ecosystem. Germany, on the other hand, should fare better in terms of game development studios and publishers. This emphasises the significance of new assistance measures implemented in Germany at the end of 2019.

Germany and France are also the only EU countries with more than ten thousand people working in the industry. However, the rapid rise of Poland and Romania among countries with the number of employees greater than 5000 people demonstrates that the industry has great potential in Eastern Europe as well. The proportion of women employed in the industry is highest in Eastern European countries. However, there is still much work to be done in the industry to promote gender diversity and inclusion in general, as no country has a female workforce that exceeds 30%.



EUROPEAN VIDEO GAMES INDUSTRY DATA

For this report, EGDF compiled national data from 2019 on the state of the local games industry from 19 European countries: Belgium, Czechia, Denmark, Finland, France, Germany, Latvia, Lithuania, Ireland, Netherlands, Norway, Poland, Portugal, Romania, Serbia, Slovakia, Slovenia, Spain, and Sweden.

In addition, the associations were able to collect 2018 industry data for the following countries Bulgaria, Greece, Italy, Turkey and the U.K. In the charts, 2018 data is highlighted in grey, while 2019 data is marked in yellow.

Some estimates in the EGDF 2018 report have now been replaced with precise data. This report employs a methodology that makes data more comparable across countries. As a result, data from national reports may not always be completely consistent with data from this report.

Different national trade associations collect data using various methodologies. In some countries, data is based on national surveys, while in others, data is gathered from public registers. When data is based on estimates, the number is highlighted in orange. Where data is marked #N/A, it means that EGDF did not have any available from the respective countries. Links to national reports are available at Annex 1 and at www.egdf.eu/data-and-studies

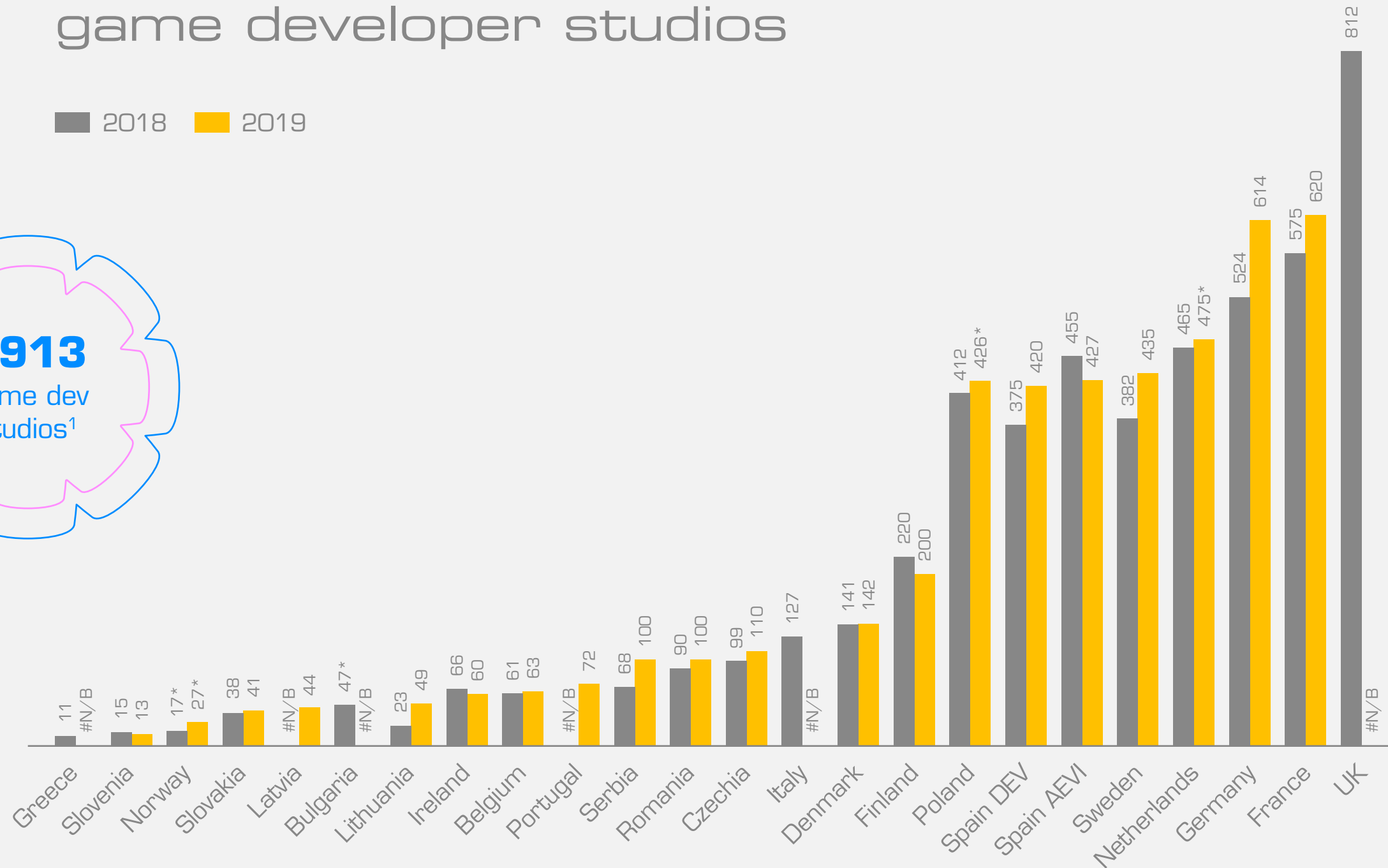
A woman with curly hair is sitting at a desk in a dimly lit office, typing on a keyboard. She is wearing a light blue button-down shirt. In the background, another person is visible, also working at a desk. The office has warm, ambient lighting from hanging bulbs. A white text box is overlaid on the right side of the image.

In 2019, Europe was home to 4,913 game developer studios and 203 game publishers.

Number of European game developer studios

2018 2019

4913
game dev studios¹

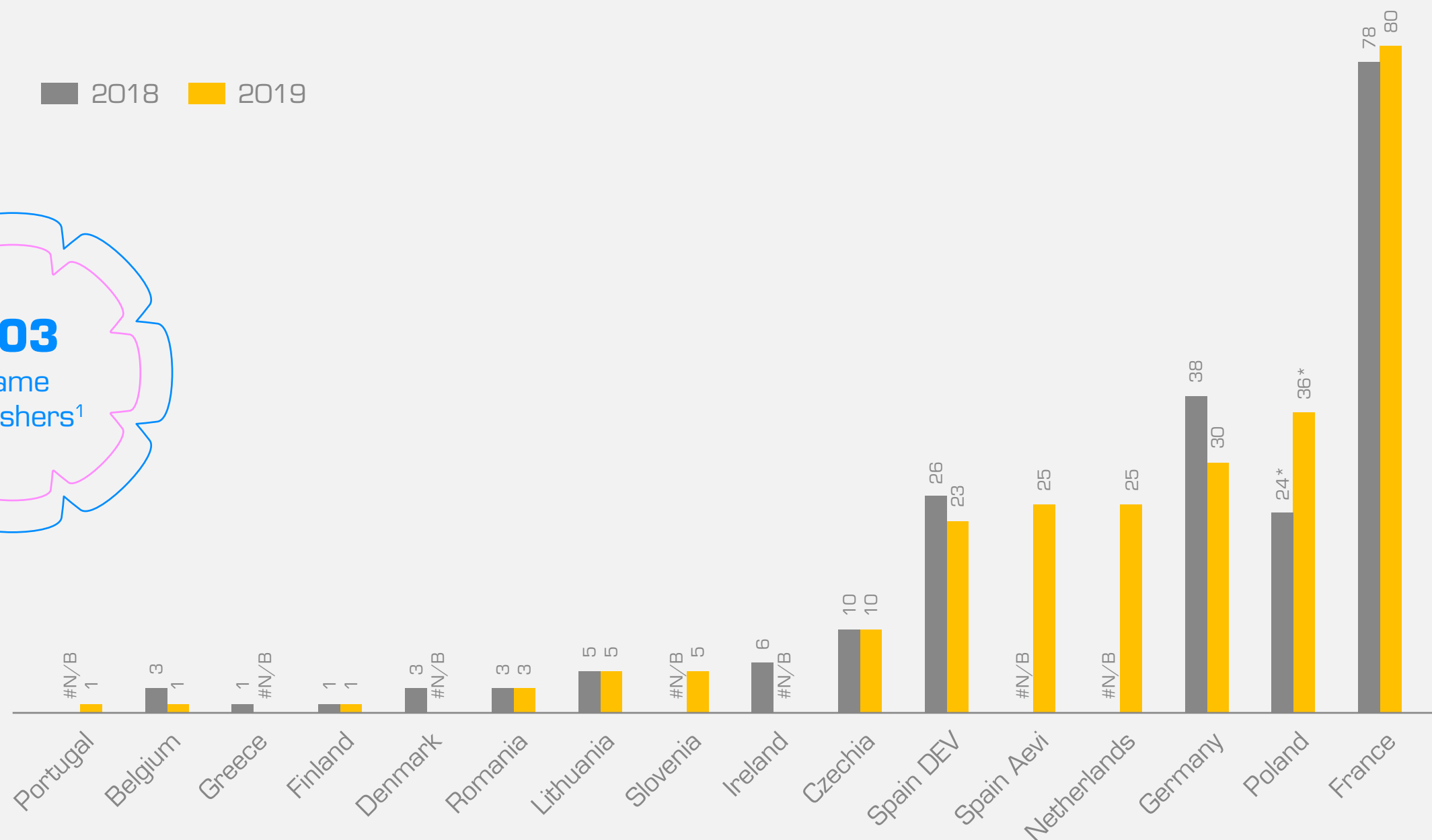


* Data based on estimations, approximations, not based on surveys or not entirely complying with the provided definitions

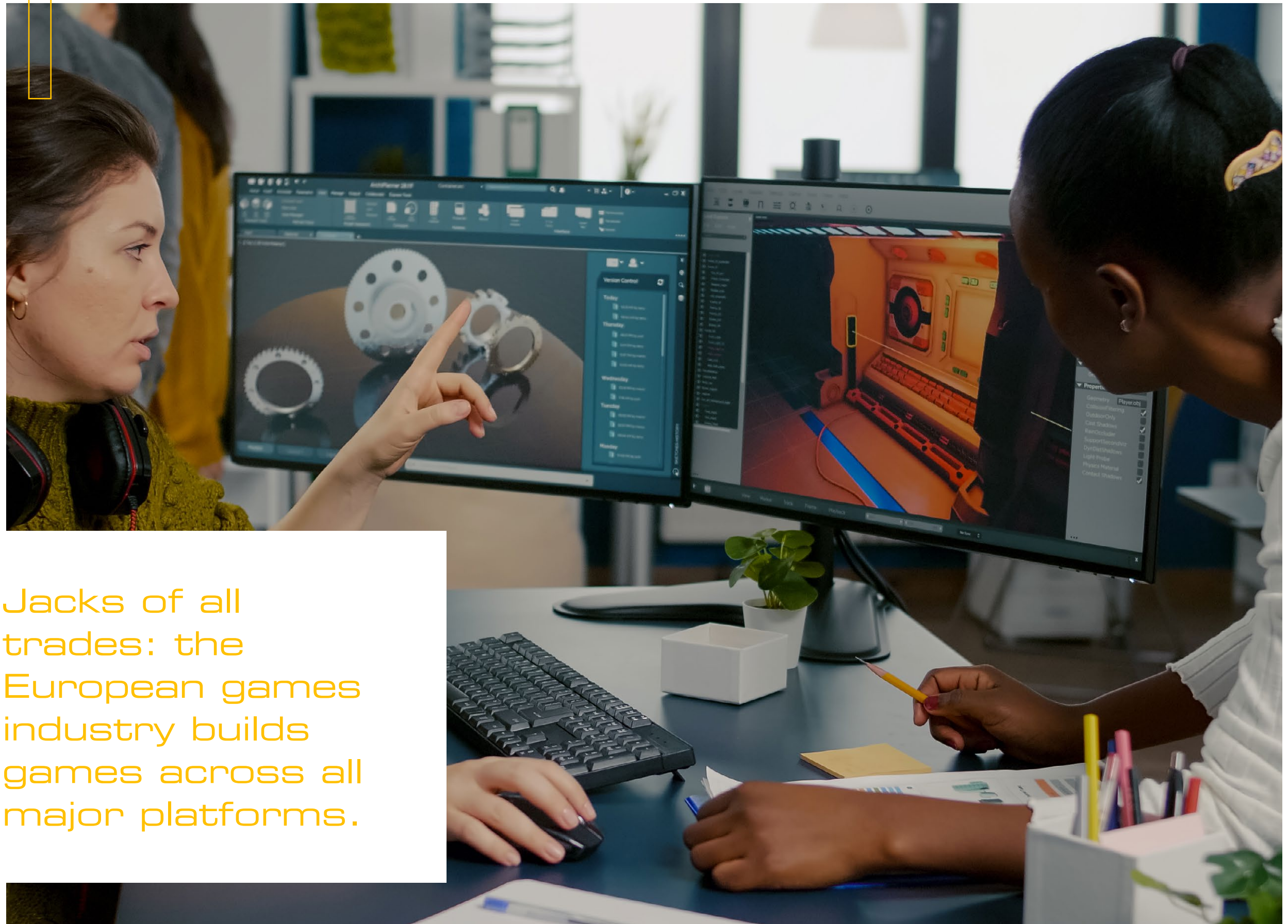
Number of game publishers

2018 2019

203
game
publishers¹



* Data based on estimations, approximations, not based on surveys or not entirely complying with the provided definitions



Jacks of all
trades: the
European games
industry builds
games across all
major platforms.

Percentage of games developed for various platforms

COUNTRY	YEAR	PLATFORMS					
		PC/MAC	CONSOLE	MOBILE/ TABLET	BROWSER	VR/AR	OTHER
Belgium	2019	32%	15%	16%	17%	17%	
	2018	29%	16%	18%	10%	27%	
Czechia	2019		67%	41%	16%	8%	
	2018						
Finland	2019	38%	7%	63%	1%	3%	50%
	2018	52%	14%	59%			
France	2019	80%	45%	70%			
	2018	80%	41%	60%			
Germany	2019		50%	58%	25%	20%	
	2018						
Greece	2019						
	2018	13%		39%			
Italy	2019						
	2018	51.50%	15%	29%	2.50%		2%
Lithuania	2019	15%	5%	70%		10%	
	2018						

COUNTRY	YEAR	PLATFORMS					
		PC/MAC	CONSOLE	MOBILE/ TABLET	BROWSER	VR/AR	OTHER
Netherlands	2019						
	2018	75%/50%	35%	46%/ 40%	13%	6%	17%
Poland	2019	84%/41%	40%	55%	12%	18%	
	2018						
Portugal	2019	82%	51.70%	69%	27%		10%
	2018						
Romania	2019						
	2018	23%	26%	39%	10%		
Serbia	2019	33.33%	5.56%	38.89%	6.94%	8.33%	6.94%
	2018	26%	11%	38%	10%	13%	4%
Slovakia	2019	73%	27%	60%		18%	9%
	2018	53%	3%	36%	6%	3%	
Slovenia	2019	15%		80%			5%
	2018						
Spain AEVI	2019	57.52%	28.76%	40.31%	2.88%	7.74%	1.99%
	2018						
Spain DEV	2019	76%/36%	43%	68%	20%	7%	
	2018	75%/45%	38%	67%	23%	11%	
Sweden	2019						
	2018	56%	50%	48%/ 27%			17%

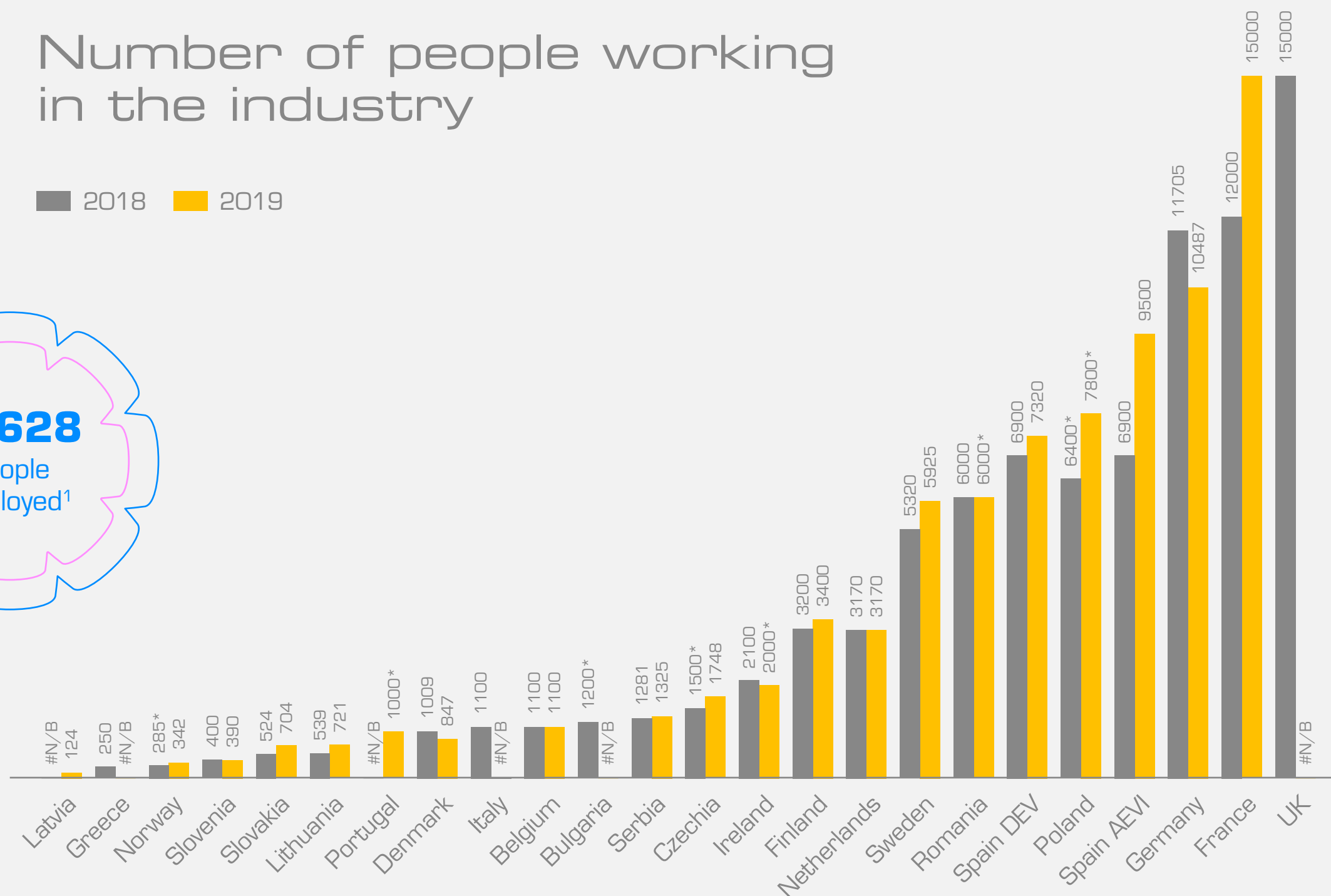


In 2019, the video games industry employed 87,628 across Europe.

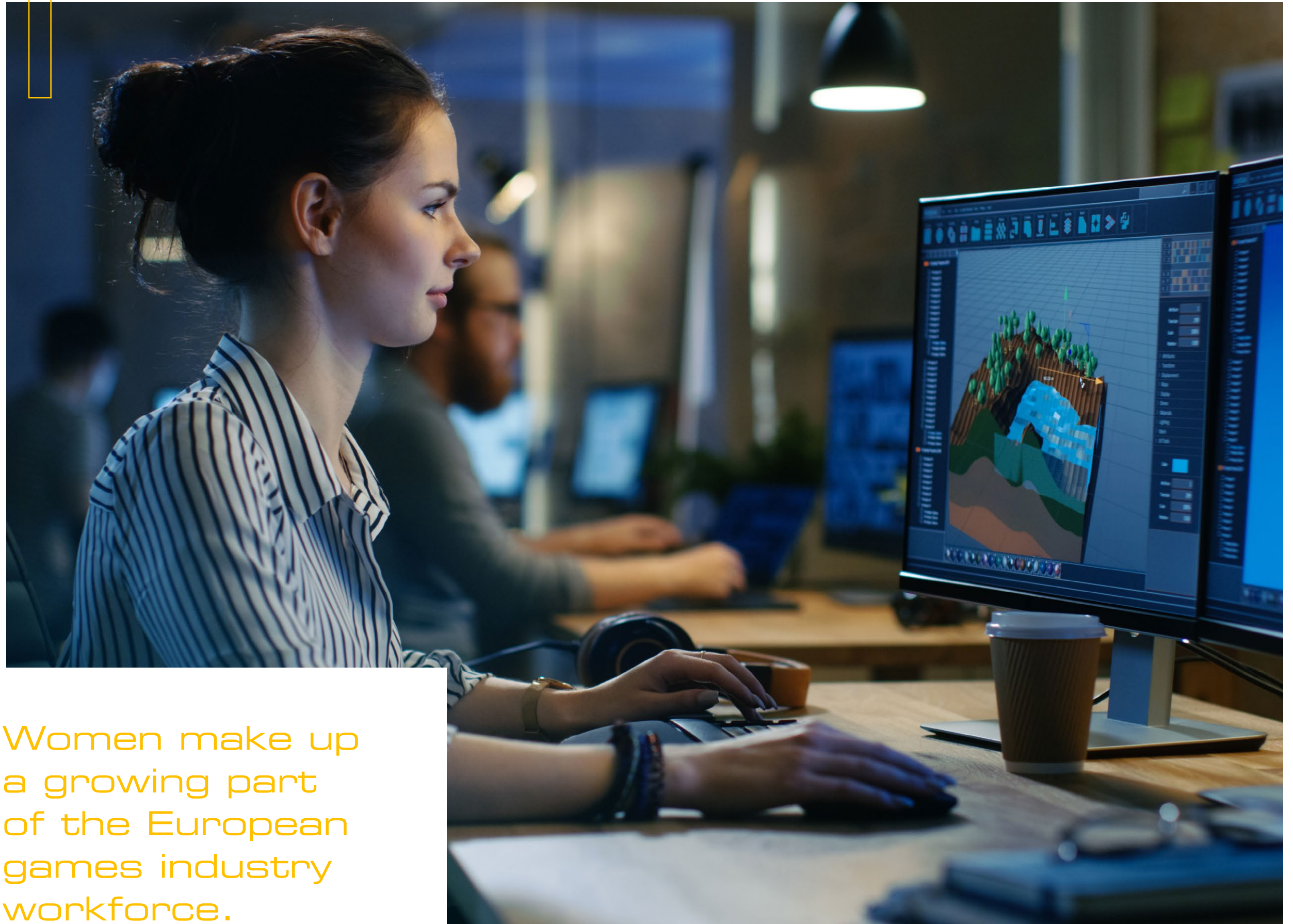
Number of people working in the industry

2018 2019

87628
people
employed¹

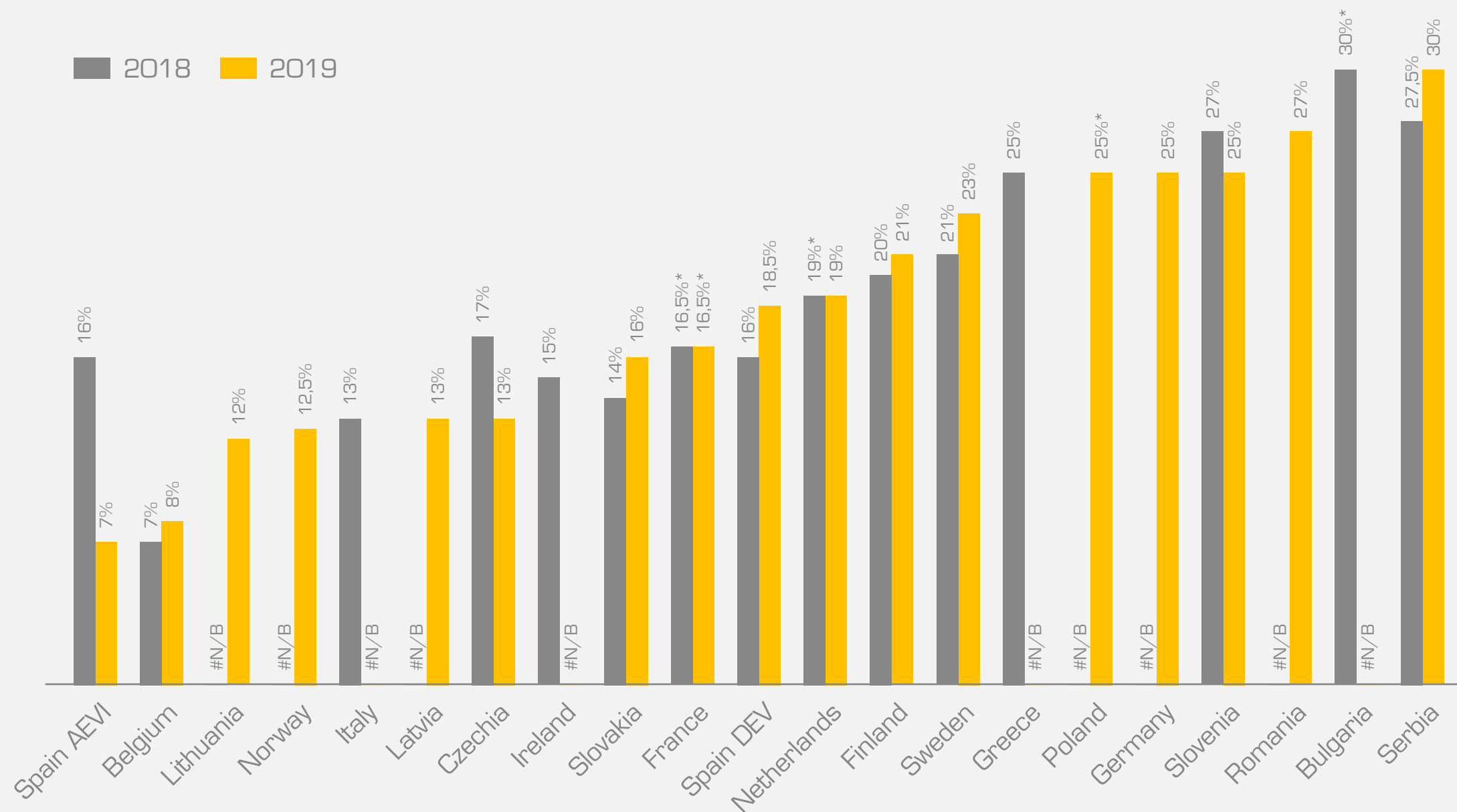


* Data based on estimations, approximations, not based on surveys or not entirely complying with the provided definitions




Women make up a growing part of the European games industry workforce.

Percentage of women working in the industry



* Data based on estimations, approximations, not based on surveys or not entirely complying with the provided definitions

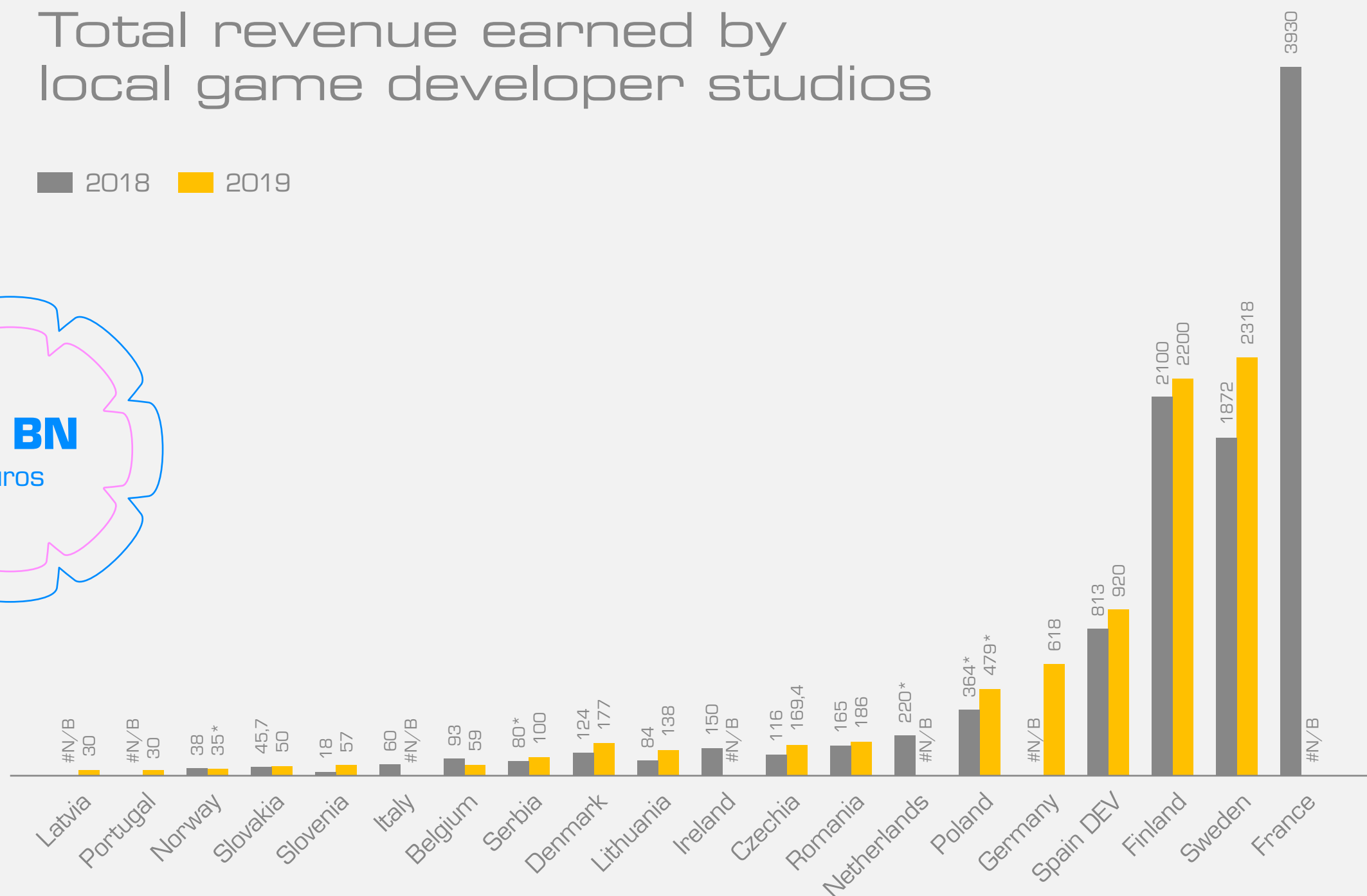
A photograph of a man and a young boy sitting on a light-colored sofa, playing video games. The man, on the right, is wearing a blue button-down shirt over a white t-shirt and blue jeans. He has a beard and is smiling broadly with his mouth open, holding a black game controller. The boy, on the left, is wearing a blue and white plaid shirt and dark blue jeans. He is also holding a black game controller and looking intently at the screen (not visible). The background is a white brick wall. In the top left corner, there is a small yellow rectangular graphic element. In the top right corner, there is a white text box with yellow text.

Local developers
earned a total
of 12 billion
euros in 2019.

Total revenue earned by local game developer studios

2018 2019

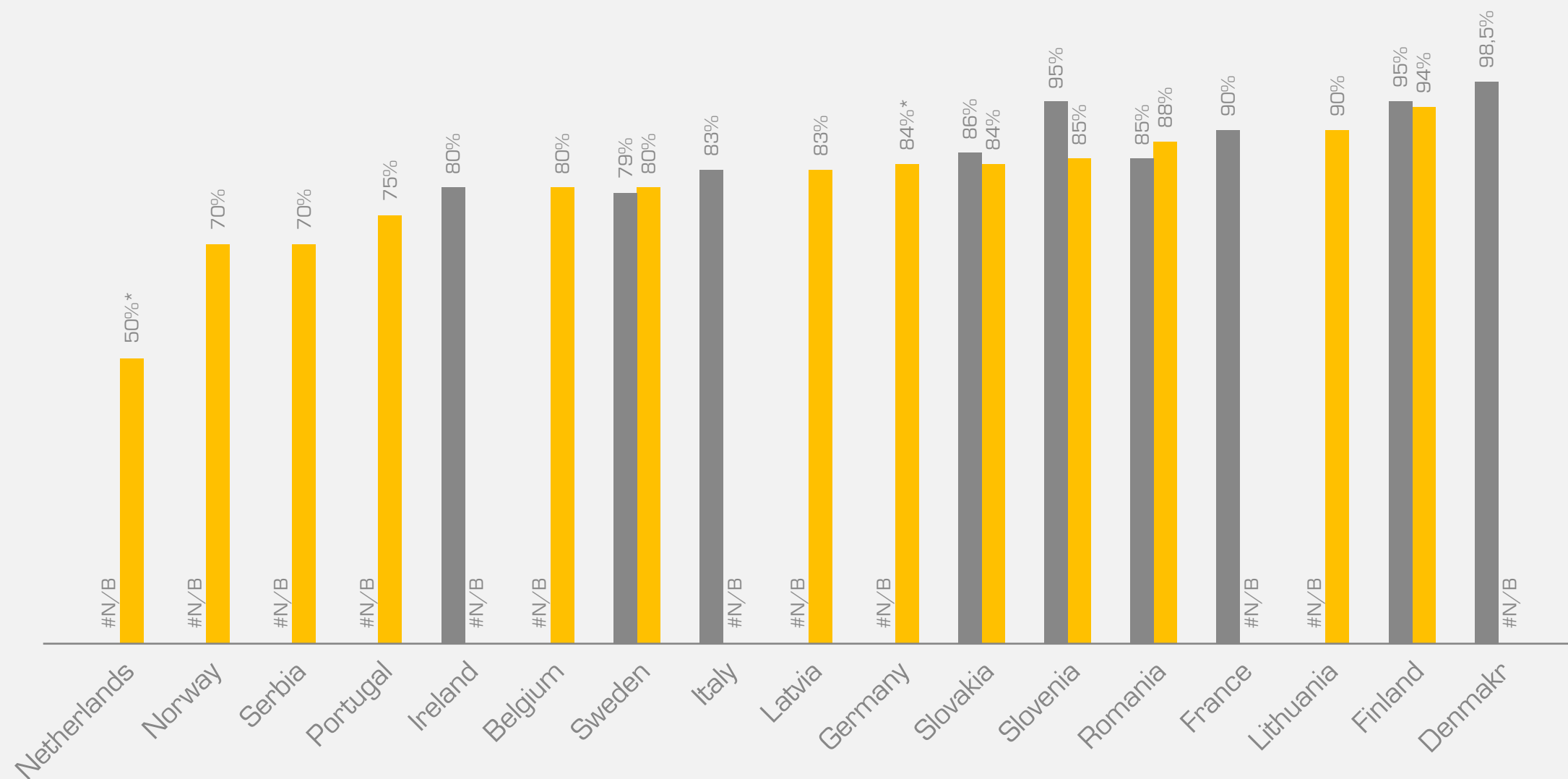
12 BN
euros



* Data based on estimations, approximations, not based on surveys or not entirely complying with the provided definitions

Total revenue earned by top 10% of studios

■ 2018 ■ 2019

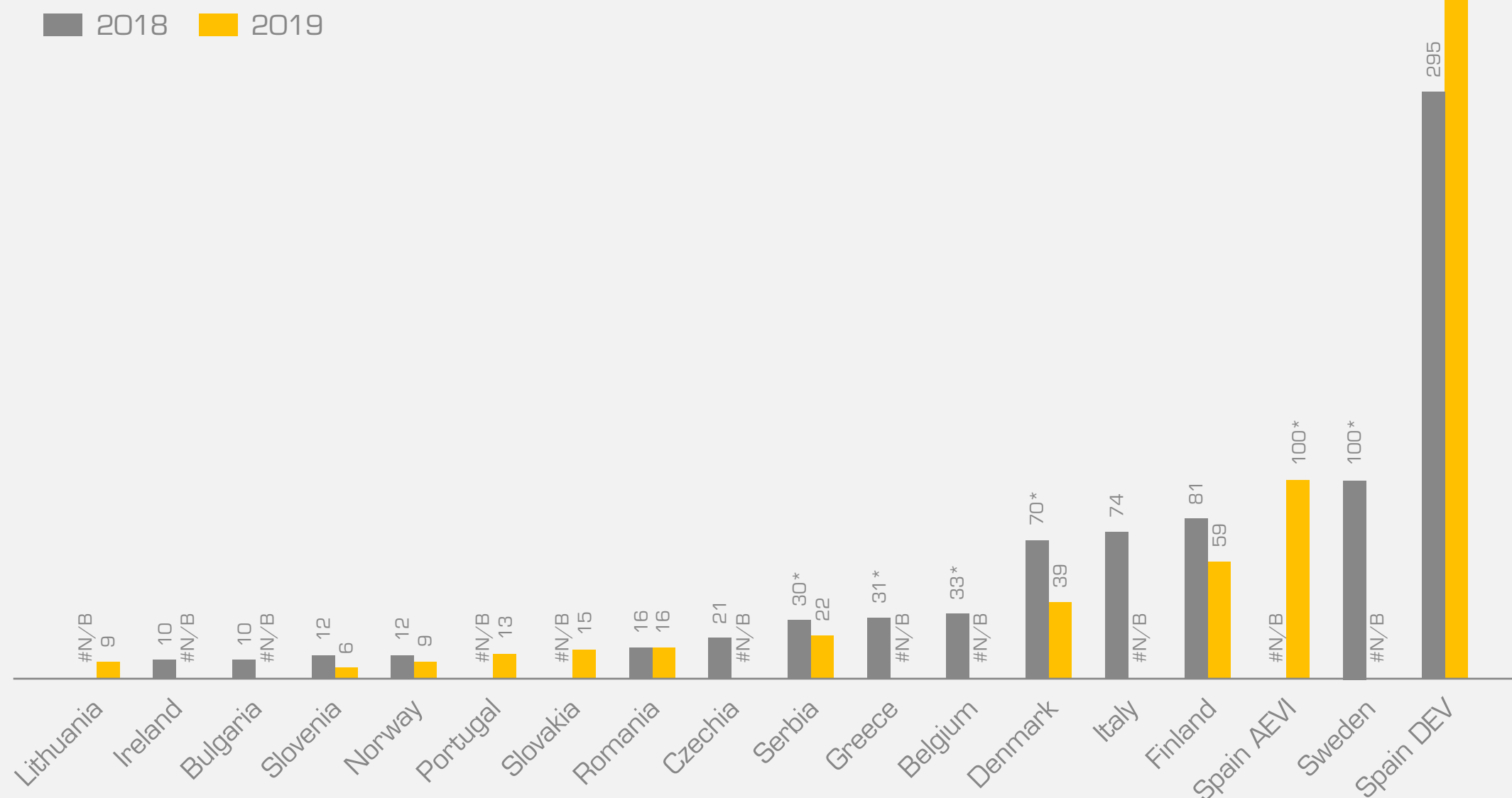


* Data based on estimations, approximations, not based on surveys or not entirely complying with the provided definitions



New title
releases came
to market
via range of
avenues.

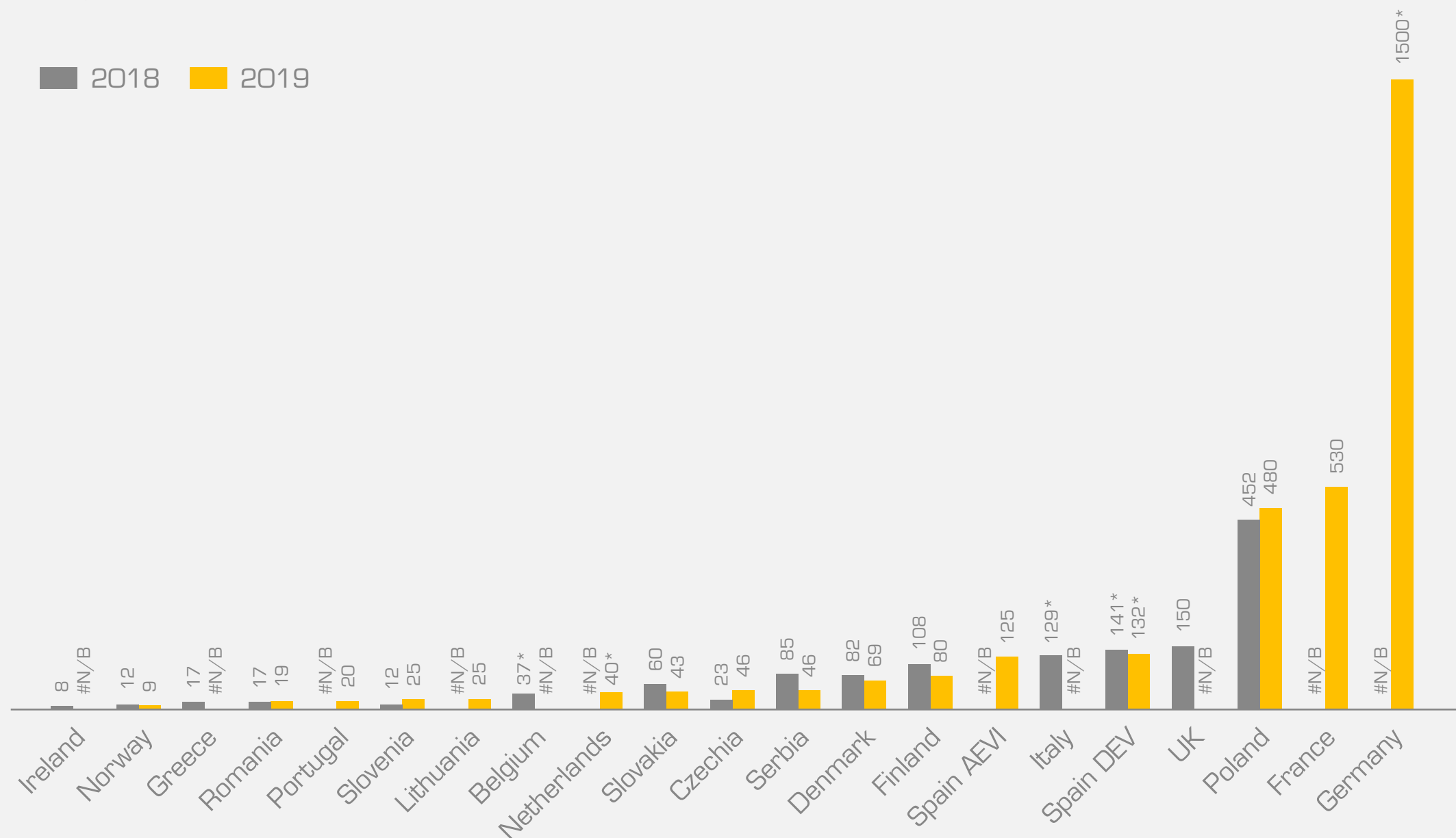
Number of companies that published new titles



* Data based on estimations, approximations, not based on surveys or not entirely complying with the provided definitions

Number of new titles published by local developers

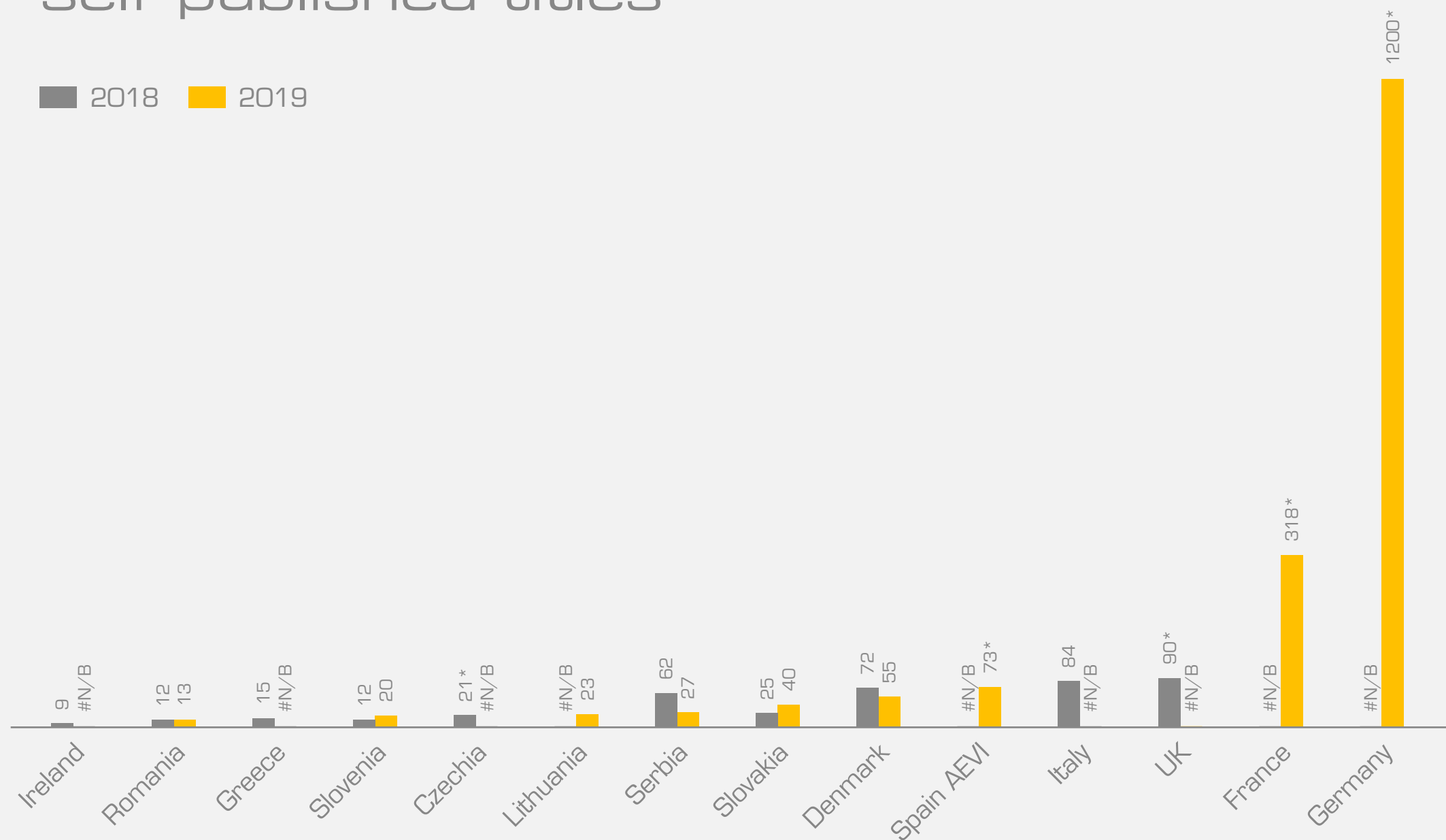
■ 2018 ■ 2019



* Data based on estimations, approximations, not based on surveys or not entirely complying with the provided definitions

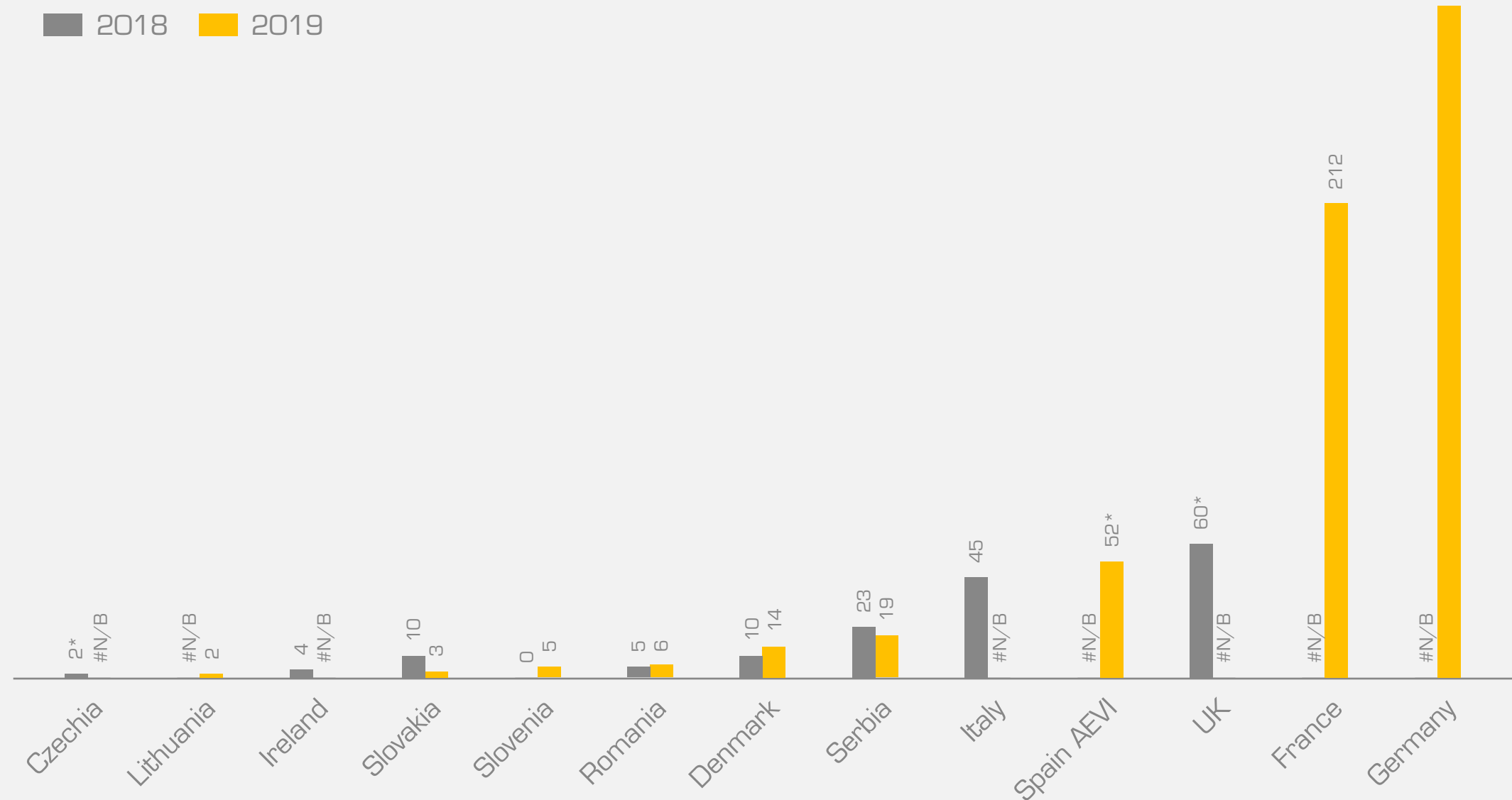
Number of new self-published titles

2018 2019



* Data based on estimations, approximations, not based on surveys or not entirely complying with the provided definitions

Number of new titles published by external publishers



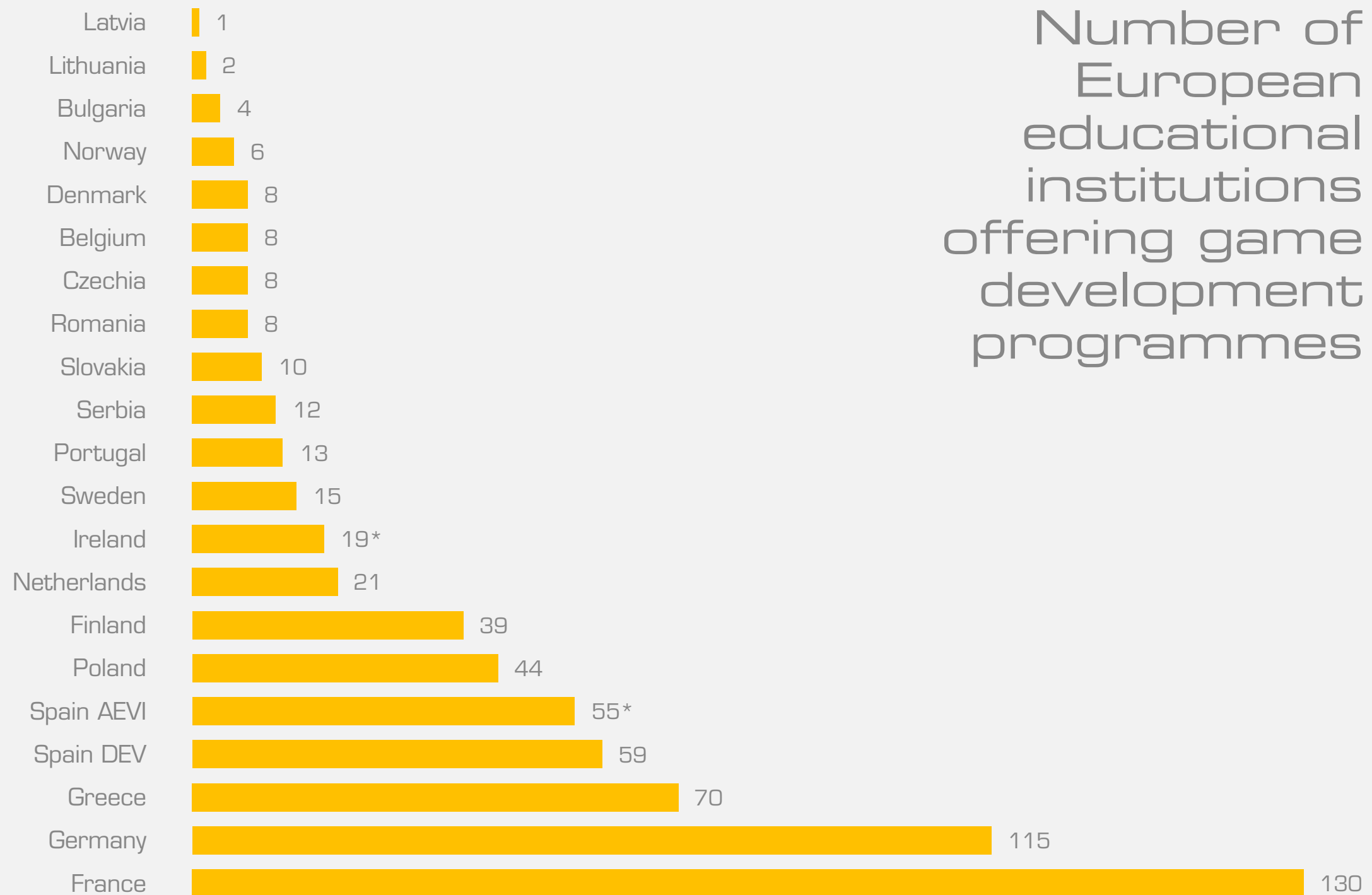
* Data based on estimations, approximations, not based on surveys or not entirely complying with the provided definitions

INSIGHTS FOR THE VIDEO GAMES INDUSTRY

Game
development
programmes
are increasingly
available
across Europe.



Number of European educational institutions offering game development programmes



Numbers are based on the latest available data



Public funding is helping support new studios as well as research and development.

Public funding support for game developer studios

COUNTRY	CULTURAL STATE AID FOR VIDEO GAME PRODUCTION								
	Grants		Loans		Tax credits		Equity funding		None
	In general	Dedicated to game dev	In general	Dedicated to game dev	in general	dedicated to game dev	in general	dedicated to game dev	
Belgium (all)	✓	<u>VAF/ Gamefonds</u>	✓						
Czechia	✓		✓						
Denmark	✓	<u>Spil-ordningen</u>					✓		
Finland	✓								
France	✓	<u>FAJV</u>	✓	<u>FPJV</u>	✓	<u>Crédit d'Impôt Jeu Vidéo</u>	✓	✓	
Germany	✓	<u>Computer-spiele-förderung des Bundes</u>	✓	✓			✓		
Italy		<u>First playable fund COVID19 support</u>							
Ireland	✓				✓				
Latvia	✓								
Lithuania	✓		✓		✓				

COUNTRY	CULTURAL STATE AID FOR VIDEO GAME PRODUCTION								
	Grants		Loans		Tax credits		Equity funding		None
	In general	Dedicated to game dev	In general	Dedicated to game dev	in general	dedicated to game dev	in general	dedicated to game dev	
Netherlands	✓	<u>Stimule-ringsfonds Creatieve Industrie</u>							
Norway	✓	<u>Norwegian film institute</u>	✓		✓				
Poland	✓	✓	✓						
Portugal	✓				✓				
Romania									✓
Serbia	✓				✓				
Slovakia	✓	<u>Slovak Art Council</u>			✓				
Spain	✓	<u>RED.ES</u>	✓	<u>CREA-SGR (COVID19 support)</u>			✓		
Sweden			✓						
Slovenia	✓								
UK		<u>UK Games Fund</u>		<u>Creative England</u>		<u>Game Tax Relief</u>			

R&D aid for game developer studios

COUNTRY	R&D AID FOR INNOVATION								
	Grants		Loans		Tax credits		Equity funding		None
	In general	Dedicated to game dev	In general	Dedicated to game dev	in general	dedicated to game dev	in general	dedicated to game dev	
Belgium	✓				✓				
Czechia	✓								
Denmark					✓				
Finland	✓	Business Finland Funding For Game Business Development	✓	Business Finland Funding For Game Business					
France	✓		✓		✓	Crédit d'Impôt Jeu Vidéo			
Germany	✓	FAJV	✓						
Ireland	✓		✓						
Italy					✓				
Latvia	✓		✓				✓		
Lithuania	✓		✓				✓		
Netherlands	✓		✓		✓		✓		
Poland	✓	GAMEINN	✓		✓				

COUNTRY	R&D AID FOR INNOVATION								
	Grants		Loans		Tax credits		Equity funding		None
	In general	Dedicated to game dev	In general	Dedicated to game dev	in general	dedicated to game dev	in general	dedicated to game dev	
Portugal	✓				✓				
Romania	✓				✓				
Serbia	✓				✓				
Slovakia	✓				✓				
Slovenia	✓						✓		
Spain	✓		✓		✓	R&D tax credit for advanced software development activities			
Sweden					✓				
Norway	✓		✓						
UK	✓		✓		✓				

Aid for SMEs for launching a new studio

COUNTRY	SME AID FOR LAUNCHING A NEW STUDIO								
	Grants		Loans		Tax credits		Equity funding		None
	In general	Dedicated to game dev	In general	Dedicated to game dev	in general	dedicated to game dev	in general	dedicated to game dev	
Belgium	✓		✓	✓	✓		✓		
Czechia	✓								
Denmark			✓				✓		
Finland	✓		✓				✓		
France	✓		✓		✓	✓	✓		
Germany			✓				✓		
Latvia			✓				✓		
Lithuania			✓		✓		✓		
Ireland	✓				✓		✓		
Italy	✓		✓						
Poland	✓		✓		✓			✓	
Portugal			-		✓				
Netherlands			✓		✓		✓		
Norway	✓		✓				✓		
Romania	✓								
Serbia	✓				✓				

COUNTRY	SME AID FOR LAUNCHING A NEW STUDIO								
	Grants		Loans		Tax credits		Equity funding		None
	In general	Dedicated to game dev	In general	Dedicated to game dev	in general	dedicated to game dev	in general	dedicated to game dev	
Slovakia	✓		✓						
Slovenia	✓						✓		
Spain	✓		✓		✓		✓		
Sweden									✓
UK	✓		✓		✓				

VIDEO GAMES INDUSTRY REPORTS BY COUNTRY

AUSTRIA

2018: [Game Development Studie](#)

BELGIUM

2019: [Belgian Games Industry](#)

CZECH REPUBLIC

2018: [Czech Video Game Industry](#)

2019: [Czech Games Industry Study](#)

DENMARK

2019: [Danske Indholdsproducenter Danske Indholdsproducenter.pdf \(pro-f.dk\)](#)

FINLAND

2018: [Finnish Game Industry 2018 Report](#)

2019: [Finish Game Industry 2019 Report](#)

FRANCE:

2019: [Annual survey of the video game, 2020 edition, Industry in France](#)

GERMANY

2018: [The German Games Industry 2019 Report and Guide to the German Games Industry](#)

2019: [Market data](#)

ITALY

2018: [Quarto censimento dei game developer italiani 2019](#)

LATVIA

2019: [Latvian game developer industry data 2019: Latvijas spēļu izstrādātāju industrijas dati 2019](#)

LITHUANIA

2019: [Lietuvos žaidimų industrijos kelrodis](#)

NORWAY

2018: [VIRKE SPILL-rapporen 2019/2020](#)

2019: [Game Report](#)

POLAND

2019: [The Game Industry of Poland – report 2020](#)

PORTUGAL

2019: [Atlas do setor dos videojogos em Portugal](#)

ROMANIA

2018: [Romanian Games Industry Report 2019](#)

2019: [Romanian Game Development Industry Snapshot 2020](#)

SERBIA

2018: [Serbian Gaming Industry Report](#)

2019: [Serbian gaming industry report](#)

SLOVAKIA

2018: [Slovak Game Industry](#)

2019: [Slovak Game Development Industry](#)

SPAIN

2018: [DEV: Libro Blanco del Desarrollo Español de Videojuegos de 2019](#)

2019: [DEV: Libro Blanco del Desarrollo Español de Videojuegos de 2019](#)

2019: [AEVI: Video Games Industry in Spain \(AEVI\)](#)

SWEDEN

2018: [Spelutvecklarindex 2019: here and here](#)

2019: [Game Developer Index 2020](#)

UKRAINE

2018: [Game Development in Ukraine 2018](#)

Annex 1 : Educational institutions providing study programs in game development in Europe

Belgium: 8 institutions

DIRECTORY – FLEGA

- AP Hogeschool
- Digital Arts and Entertainment
- Haute Ecole Albert Jacquard
- Interface3
- Karel de Grote-Hogeschool
- LUCA School of Arts
- Syntra Vlaanderen
- Technocité

Czech Republic: 8 institutions

page 85 [gamehighedO1report v3 lowres.pdf \(gda.cz\)](#)

- Faculty of Arts, Masaryk University
- University of West Bohemia (Pilsen)
- Academy of Arts Architecture and Design (Prague)
- Film and TV School of The Academy of Performing Arts (Prague).

- Brno University of Technology, Faculty of Information Technology
- Czech Technical University in Prague
- The Faculty of Fine Arts and Music in University of Ostrava
- Faculty of Multimedia Communications

Denmark: 6 institutions

- Dania Games
- IT university of Copenhagen
- Aalborg University
- The University of Southern Denmark
- National Film School of Denmark
- KADAK (The Royal Danish Academy of Fine Arts, Schools of Architecture, Design and Conservation)

Finland: 39 institutions

Games education - Neogames

Universities

- Aalto University
- Tampere University
- LUT University
- University of Eastern Finland
- University of Jyväskylä
- University of Lapland
- University of Turku

Universities of Applied Sciences

- Centria University of Applied Sciences
- Kajaani University of Applied Sciences
- Karelia-ammattikorkeakoulu
- JAMK University of Applied Sciences
- Haaga-Helia
- LAB University of Applied Sciences
- Lapland University of Applied Sciences
- Oulun ammattikorkeakoulu
- Metropolia University of Applied Sciences
- Savonia

Finland: University of Applied Sciences

- South-Eastern Finland University of Applied Sciences
- Tampere University
- Turku University of Applied Sciences

Vocational Upper Secondary Education and Training

- Ahlmannin koulun säätiö
- Careeria
- Business College Helsinki
- Helsinki Vocational College
- HEO
- Kainuun ammattiopisto
- Kauhajoen evankelinen opisto
- Kouvolan seudun ammattiopisto
- Joutsenon opisto
- Laajasalon opisto
- Lybeckerin opisto
- Omnian ammattiopisto
- Oulun seudun ammattiopisto
- Pohjois-Karjalan koulutuskuntayhtymä
- Prakticum
- Sataedu

- Suupohjan koulutuskuntayhtymä
- Taitotalo
- Turun ammatti-instituutti

Germany: 115 institutions

game - Ausbildungskompass Games: game
- Ausbildungskompass Games (ausbil-
dungskompass-games.de)

- Akademie Deutsche Pop Hamburg
- Bauhaus Universität Weimar
- Berufliche Schule für Medien und Kommunikation
- bib International College Bergisch Gladbach
- bib International College Paderborn
- bib International College Hannover
- btk Hochschule
- Burg Giebichenstein Kunsthochschule Halle
- design akademie berlin | SRH Hochschule für Kommunikation und Design
- Designakademie Rostock

- Designschule Leipzig
- Designschule Schwerin
- Duale Hochschule Baden-Württemberg Ravensburg
- Fachhochschule Aachen
- Fachhochschule Aalen
- Fachhochschule Potsdam
- Fachhochschule Wedel Gemeinnützige Schulgesellschaft mbH
- FH Dresden
- Filmakademie Baden-Württemberg
- Filmuniversität Babelsberg
- Filmuniversität Babelsberg KONRAD WOLF und Universität Potsdam in Kooperation mit dem Erich Pommer Institut
- Filmuniversität Babelsberg KONRAD WOLF und Universität Potsdam in Kooperation mit dem Erich Pommer Institut
- Freie Universität Berlin
- Friedrich-Albert-Lange Berufskolleg Duisburg
- Games Academy Berlin

Germany:

- Games Academy Frankfurt
- GPB - Gesellschaft für Personalentwicklung und Bildung GmbH
- Hamburg Media School
- HAW Hamburg
- HBK Essen
- hdpk SRH Hochschule der populären Künste
- HFBK Hamburg
- HMKW Hochschule für Medien, Kommunikation und Wirtschaft
- HMKW Hochschule für Medien, Kommunikation und Wirtschaft
- Hochschule Anhalt
- Hochschule Aschaffenburg
- Hochschule Augsburg
- Hochschule Bonn-Rhein-Sieg
- Hochschule Bremerhaven
- Hochschule Darmstadt
- Hochschule der Medien
- Hochschule Flensburg
- Hochschule Fulda
- Hochschule Furtwangen
- Hochschule für angewandtes Management
- Hochschule für Bildende Künste Braunschweig
- Hochschule für Musik, Theater und Medien Hannover
- Hochschule für Schauspielkunst "Ernst Busch"
- Hochschule Hannover
- Hochschule Harz
- Hochschule Heilbronn
- Hochschule Kaiserslautern
- Hochschule Kempten
- Hochschule Macromedia
- Hochschule Macromedia
- Hochschule Macromedia
- Hochschule Mainz - Fachbereich Gestaltung
- Hochschule Mittweida
- Hochschule Neu-Ulm
- Hochschule Offenburg
- Hochschule Ravensburg-Weingarten
- Hochschule RheinMain
- Hochschule Trier
- Hochschule Worms
- HTK Academy
- HTW Berlin
- HTW Dresden
- Humboldt-Universität zu Berlin
- IUBH Internationale Hochschule
- Kunsthochschule für Medien Köln
- Kunsthochschule Kassel
- Leuphana Universität Lüneburg
- Macromedia Akademie
- mAHS, media Akademie – Hochschule Stuttgart
- Mediadesign Hochschule Berlin
- Mediadesign Hochschule Düsseldorf
- Mediadesign Hochschule München
- Merz Akademie
- Ostbayrische Hochschule
- OSZ IMT
- PIXL VISN
- S4G School for Games GmbH
- SAE Insititute Hamburg
- SAE Insititute München
- SAE Institute

Germany:

- SAE Institute Berlin
- SAE Institute Bochum
- SAE Institute Köln
- School of Games
- SRH Hochschule Heidelberg
- Staatliche Hochschule für Gestaltung Karlsruhe
- TH Brandenburg
- TH Köln / Cologne Game Lab
- TU München
- University of Applied Sciences Europe
- Universität Bayreuth
- Universität Bonn
- Universität Bremen
- Universität der Künste Berlin
- Universität Hamburg
- Universität Koblenz-Landau
- Universität Magdeburg
- Universität Paderborn
- Universität Würzburg
- WAVE AKADEMIE für Digitale Medien
- Wilhelm Büchner Hochschule

Ireland: 19 institutions

- Pulse College
- Northern Regional College
- Athlone Institute of Technology
- Carlow Institute of Technology
- Waterford Institute of Technology
- Tralee Institute of Technology
- Limerick Institute of Technology
- Dundalk Institute of Technology
- Letterkenny Institute of Technology
- Dublin Institute of Technology
- TU Dublin
- University College Limerick
- Ballyfermot College of Further Education
- University of Ulster
- Bray Institute of Higher Education
- St. John's Central College of Further Education and Training
- Cenit College

Latvia: 1 institution

Datorspēļu dizains un grafika -
Ekonomikas un Kultūras augstskola

- RĪGAS MĀKSLAS UN MEDIJU
TEHNIKUMS

Lithuania: 2 institutions

- Game Development – Vilniaus Verslo kolegija
- Vilnius Business College

Norway: 6 institutions

- INN – Inland Norway University of Applied Sciences
- NTNU – Norwegian University of Science and Technology
- UiT – The Arctic University of Norway
- Nord University
- Kristiania University College
- Noroff – School of technology and digital media

Poland: 44 institutions

polskigamedev.pl/

ksztalcenie-dla-branzy-gier/

- The Strzemiński Academy of Art in Lodz

Poland:

- Maria Curie-Sklodowska University in Lublin
- University of Information Technology and Management in Rzeszow
- College of Economics and Computer Science in Krakow
- University of Information Technology and Management "Copernicus" in Wroclaw
- University of Social Sciences in Lodz,
- The Maritime University of Szczecin
- Lodz University of Technology
- Pedagogical University in Krakow
- University of Lower Silesia in Wroclaw
- Academy of Fine Arts in Warsaw
- Vistula University in Warsaw
- University of Opole
- Tischner European University in Kraków
- Kielce University of Technology
- University of Technology in Koszalin
- Czestochowa University of Technology
- Silesian University of Technology in

Gliwice

- Poznan University of Technology
- University of Silesia in Katowice
- Cracow University of Technology
- West Pomeranian University of Technology in Szczecin
- University of Applied Sciences in Nysa
- University of Zielona Gora
- WSB-NLU (Higher School of Business – National-Louis University) in Nowy Sacz
- Academy of Fine Arts in Katowice
- Academy of Art in Szczecin
- The Karol Godula Upper Silesian Academy of Entrepreneurship in Chorzow
- University of Silesia in Cieszyn
- Kozminski University in Warsaw
- University of Bialystok
- Kazimierz Wielki University in Bydgoszcz
- University of Humanities and Economics in Lodz
- The West Pomeranian Business School

in Szczecin

- University of Economics in Katowice
- School of Computer Science and Skills in Lodz,
- The Eugeniusz Geppert Academy of Art and Design in Wroclaw
- Collegium Da Vinci in Poznan
- Warsaw Film School
- Katowice Institute of Information Technologies
- Jagiellonian University in Krakow
- WSB University in Gdansk
- The University of Economics and Human Sciences in Warsaw
- Polish-Japanese Academy of Information Technology in Warsaw

Portugal: 13 institutions

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Tecnico Sup. Profissional

- Instituto Politécnico Da Maia
- Instituto Politécnico De Tomar

Portugal:

- Instituto Politécnico Do Porto
- Instituto Politécnico De Tomar
- Instituto Politécnico De Setúbal

Licenciatura

- Instituto Politécnico De Bragança
- Instituto Politécnico De Leiria
- Universidade Lusófona Do Porto
- Instituto Politécnico Do Cávado E Ave
- Universidade Europeia

Mestrado

- Universidade Da Beira Interior
- Universidade Do Porto
- Universidade Técnica De Lisboa

Romania: 11 institutions

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State Universities

- Politehnica University of Bucharest
- Ion Mincu University of Urbanism and Architecture

- National University of Theatre Arts and Cinematography

Private academies

- Game Dev Academy
- Amc Ro Studio
- Amber Academy
- Gameloft Learning Center
- Ubisoft
- Link Academy
- Pixellab Training Center
- Media Academy

Serbia: 12 institutions

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- “Master 4.0” program for IT and Business
- “Master 4.0” program for Creative Industries/Gaming
- College of Vocational Studies, Belgrade Polytechnic
- Faculty of Contemporary Arts Belgrade, Graphic Design department
- Faculty of Dramatic Arts in Belgrade

- Faculty of Technical Sciences, Novi Sad
- Metropolitan University, Faculty of Information Technology
- SAE Institute Belgrade
- Singidunum University, Faculty of Media and Communications
- University of Belgrade, Faculties of Organizational Sciences and Electrical Engineering
- University of Niš
- University of Novi Sad, Academy of Arts

Slovakia: 10 institutions

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([sgda.sk](#))

- University of St. Cyril and Methodius in Trnava
- Academy of Fine Arts and Design
- Butterfly Effect
- Academy of Filmmaking and Multimedia
- Vocational Art School (Škola umeleckého priemyslu)

Slovakia:

- Creative Arts Secondary School in Trenčín (Stredná umelecká škola v Trenčíne)
- Academy of Animation (Súkromná stredná umelecká škola animovanej tvorby)
- Gamecamp / Gamecraft / LevelUp
- OpenLab technological accelerator for high school students
- Summer Game De

Spain: 60 institutions

www.devuego.es/bd/mapa-centros/

- Escuela de Imagen y Sonido de Vigo (EISV)
- European Business Factory (EBF)
- Universidade da Coruña
- ESNE Asturias
- DigiPen Europe-Bilbao
- Escuela Superior de Imagen y Sonido ACEIMAR
- Universidad Internacional de la Rioja

(UNIR)

- Creanavarra- Pamplona
- CPA Salduie
- MasterD
- Universidad San Jorge (USJ)
- Unreal Training Hub
- Akiba School
- Centro de la Imagen y la Tecnología Multimedia (CITM - UPC)
- Escola de Noves Technologies Interactives (ENTI)
- Escola Pia Granollers
- Escuela de Arte y Superior de Diseño Deia
- Escuela IDesigner
- Fundación Obicex
- Level Up (Game Development Hub)
- Tecnocampus
- Universitat de Vic (UVic)
- Universitat Pompeu Fabra (UPF)
- UPC School
- CEV - Escuela Superior de Comunicación, Imagen y Sonido
- CICE

- e-Squad Academy
- Escuela CES - Escuela Superior de Imagen y Sonido
- Escuela Trazos
- ESNE
- Gametopia
- The Global eSports Academy
- U-tad
- Universidad Complutense de Madrid (UCM)
- Universidad de Alcalá
- Universidad Europea de Madrid
- Universidad Francisco de Vitoria
- Universidad Rey Juan Carlos
- Voxel School
- Escuela Superior de Arte y Tecnología (ESAT)
- Florida Replay
- Primer Frame
- UA School (Universal Arts School)
- Universitat Jaume I
- Cesur Murcia Audiovisual
- Escuela Superior Internacional de Diseño (ESI Murcia)

Spain:

- Arcan Studios
- Arcan Studios
- Aula Arcade
- Aula de Videojuegos
- Centro ArteBit
- Escuela Superior de Arte y Diseño (ESADA)
- Escuela Superior de Comunicación Audiovisual (ESCAV)
- Escuela Superior de Videojuegos y Arte Digital (EVAD)
- Gamia
- Polo Nacional de Contenidos Digitales
- Universidad de Málaga (UMA)
- V-ART Escuela Audiovisual
- Frogames- Palma de Mallorca
- Universidad de La Laguna- Teneri

Sweden: 15 institutions

Utbildningar — Spelutbildningar.se

Universities & Colleges

- Blekinge Institute of Technology

- Chalmers
- University of Skövde
- Luleå University of Technology
- Stockholm University of the Arts
- Uppsala University: Campus Gotland

YH educations

- Forsbergs Skola (Stockholm)
- PlaygroundSquad (Falun)
- The Game Assembly (Malmö / Stockholm)
- Yrgo (Gothenburg)
- Futuregames (Stockholm)
- Futuregames - QA / GAME TESTER (Boden)
- Futuregames - GAME PROGRAMS, PROJECT MANAGER IT & GAMES and FUTUREGAMES GAME & UX DESIGNER (Skellefteå)
- Visual Magic - VFX artist - 3D visualization (Skellefteå)
- Experience Designer - Games & Stories (Karlstad)

METHODOLOGY OF DATA COLLECTION

Annex 2: Metodology of data collection

COUNTRY	BASED ON A SURVEY AND/OR INTERVIEWS	BASED ON A DATA AVAILABLE IN NATIONAL BUSINESS REGISTER OR STATISTICS	NOTES
Belgium	✓		The survey is sent to all active game studios in Belgium.
Czechia	✓	✓	The data does not include publishers.
Denmark		✓	Companies are identified through their registration in the central business register (CVR) and have undergone a manual check to validate their central business purpose as game development or similar.
Finland	✓	✓	Data is collected bi-annually and includes only active game developer studios.
France	✓	✓	Based on a joint data with regional industry associations in France.
Germany	✓	✓	Data is collected through multiple ways: own surveys, buying data from private sources like GfK and YouGov and studies done by universities.
Ireland	✓		
Latvia	✓	✓	The association has collected a list of known game developers registered in Latvia that is updated whenever they find out about new developers.

COUNTRY	BASED ON A SURVEY AND/OR INTERVIEWS	BASED ON A DATA AVAILABLE IN NATIONAL BUSINESS REGISTER OR STATISTICS	NOTES
Lithuania	✓	✓	Data includes all the companies that are active in the games industry.
Netherlands	✓		Data is collected through Dutch Game Garden which has a register of active game companies in the Netherlands. Only active companies are included. Student teams are not part of the database.
Norway	✓		The data includes members of local game developer association and other established companies in the industry with actual turnover.
Poland	✓	✓	Data is based on studies prepared by PARP, GIC & IGP. Some numbers for 2019 are different than what we received from Spirdor because they did not correspond exactly to our definitions, especially where there were big differences between 2018 data and 2019. Some numbers for 2018 were changed because at the moment when the 2018 EGDF report was released the numbers were estimates and meantime we got the right numbers. And for some questions the answers are still estimates because the latest data was from 2017.
Portugal	✓		The survey is sent to all the active developers' studios and publisher.

COUNTRY	BASED ON A SURVEY AND/OR INTERVIEWS	BASED ON A DATA AVAILABLE IN NATIONAL BUSINESS REGISTER OR STATISTICS	NOTES
Romania	✓	✓	Data includes both the member and the active non-member studios
Serbia	✓		Data includes both SGA members and several bigger studios/service providers which are non-members.
Slovakia	✓		Data is collected through a survey sent to all the game industry companies that the association knows.
Slovenia	✓		Data is based on a survey from 2018 and it is updated with data obtained from industry contacts each year.
Spain (DEV)	✓		The survey is sent to all Spanish game development studios (established as companies or not)
Spain (AEVI)		✓	Data is collected through a business register and from Devuego. Devuego is one of the largest Spanish online databases for games, businesses, workers and events in the video game industry.
Sweden		✓	

Annex 3: Questionnaire

o. Methodology:

- o.1. How the data was collected? For example is data based on information collected from a business register or on interviewing companies? (Open question)
- o.2. How did you identify companies that were included in your data sets? E.g. did you only include your members or do you have a register of active game developer studios and publishers in your country? (Open question)
- o.3. All in all, what is the number of companies you were able to get data from? (Number)
- o.4. How well do the companies included in your survey/data base collection represent different types of companies in the national games ecosystem: e.g. large companies, mediums size companies, one man studios or early stage start-ups and established companies or mobile, console, PC, VR etc. game developers? (Open question)
- o.5. If you have published a report on 2019 data, please send us a link to it:

1. Number of game developer studios and publishers in your country

Definitions:

--> A game developer studio- is a game developer studio, whose

main source of turnover is coming from developing games (e.g. either developing their own IP or subcontracting game development to other studios) . This includes one man teams. Both studios doing self publishing and using external publishers are taken into account.

- > A publisher publishes third-party games on behalf of game developer studios that developed them.
- > A service provider, that is not a game developer studio or publisher, is a company that does not develop new games. Instead, it is, for example, only creating assets for other game developer studios or only porting existing games for new platforms.
- > An active company is a company that is registered in a trade register, has people working for the company and is generating turnover. In practice, this has to often be evaluated case by case.

- 1.1. What was the total number of game developer studios and publishers located in your country in 2019? (Number)
- 1.2. What was the number of publishers located in your country in 2019? (Number)

2. Number of people working for game developer studios and publishers in your country

Definitions:

- > By number of people working in the industry in your country, we mean full time equivalent (FTE) of employees, entrepreneurs, in-house freelancers etc. employed by game developer studios and publishers located in your country. This number should include remote workers.
- > If a game developer studios / publisher established in your country owns studios in other countries, people working in those studios based in foreign countries should not be included in this number.

- 2.1. What was the number of people working for game developer studios and publishers in your country in 2019? (Number)
- 2.2. What percentage of the people, working for the local game developer studios and publishers, were females in 2019? (Percentage)

3. Revenue generated by the industry

Definitions:

- > Turnover means the net revenue generated by all game developer studios and publishers located in the country. For non-euro countries, please use annual average currency

exchange rate for the year

- 3.1. What was the total turnover of local game developer studios and publisher located in your country in 2019? (Number in million euros)
- 3.2. How much of that revenue was generated by the biggest (in terms of revenue) 10% of studios and publishers? (Percentage)

4. New games

Definitions

- > What is a new game? Only a new game for global launch. Not alpha or soft launch or early access game. If a game is ported on a new platform, it is a new game only if it is significantly different from the old version.
- 4.1. What was the number of game developer studios located in your country that published new games during 2019? Please include both the companies that self-published new games and companies that used third-party publisher for publishing new games. (Number)
 - 4.2. What was the number of new titles published by game developer studios in your country in 2019? Please include both the companies that self-published new games and

companies that used third-party publisher for publishing new games. (Number)

4.2.1. How many of these new titles were self-published? (Number)

4.2.2. How many of these new titles were published by an external publisher? (Number)

4.3. What is the percentage of local game developer studios that develop games for the following platforms: PC/MAC, Console/Handheld consoles, mobile/tablet, browser, VR/AR or other? (Percentage)

5. Game education

Definitions

--> Game education program: a degree program focused on game development (from arts, programming, game design or any other perspective) or offering students an opportunity to specialize in game development

5.1. What is the number of educational institutions providing educational programs focused on game development? (Number)

5.2. Do you have a publicly available link to education institutions providing games education in your country? If yes, please share the link with us.

6. Public Support

Definitions:

--> Cultural aid: de minimis funding available for video game production, funding notified as cultural state aid in Brussels

--> R&D aid: de minimis aid available for technological innovation and business model development, R&D&I aid under GBER

--> SME aid: de minimis funding targeted for starting a company, SME aid under GBER

--> A dedicated funding instrument is a public funding instrument that specifically mentions game developer studios and publishers as its target groups

6.1. Do you have in your country (click all the boxes that apply to your country): Cultural state aid for video game production:

6.1.1. Cultural grants in general

6.1.2. Cultural grants dedicated for game developer studios

6.1.3. Cultural loans and loan guarantees in general

6.1.4. Cultural loans and loan guarantees dedicated for game developer studios

6.1.5. Cultural tax credits in general

6.1.6. Cultural tax credits dedicated for game developer studios

6.1.7. Cultural equity funding in general

6.1.8. Cultural equity funding dedicated for game developer studios

6.1.9. None of the above

6.2. Do you have in your country (click all the boxes that apply to your country): R&D Aid for innovation :

6.2.1. R&D grants in general

6.2.2. R&D grants dedicated for game developer studios

6.2.3. R&D loans and loan guarantees in general

6.2.4. R&D loans and loan guarantees dedicated for game developer studios

6.2.5. R&D tax credits in general

6.2.6. R&D tax credits dedicated for game developer studios

6.2.7. R&D equity funding in general

6.2.8 R&D equity funding dedicated for game developer studios

6.2.9. None of the above

6.3. Do you have in your country (click all the boxes that apply to your country): SME aid for launching a new studio:

6.3.1. SME grants in general

6.3.2. SME grants dedicated for game developer studios

6.3.3. SME loans and loan guarantees in general

6.3.4. SME loans and loan guarantees dedicated for game

developer studios

6.3.5. SME tax credits in general

6.3.6. SME tax credits dedicated for game developer studios

6.3.7. SME equity funding in general

6.3.8. SME equity funding dedicated for game developer studios

6.3.9. None of the above