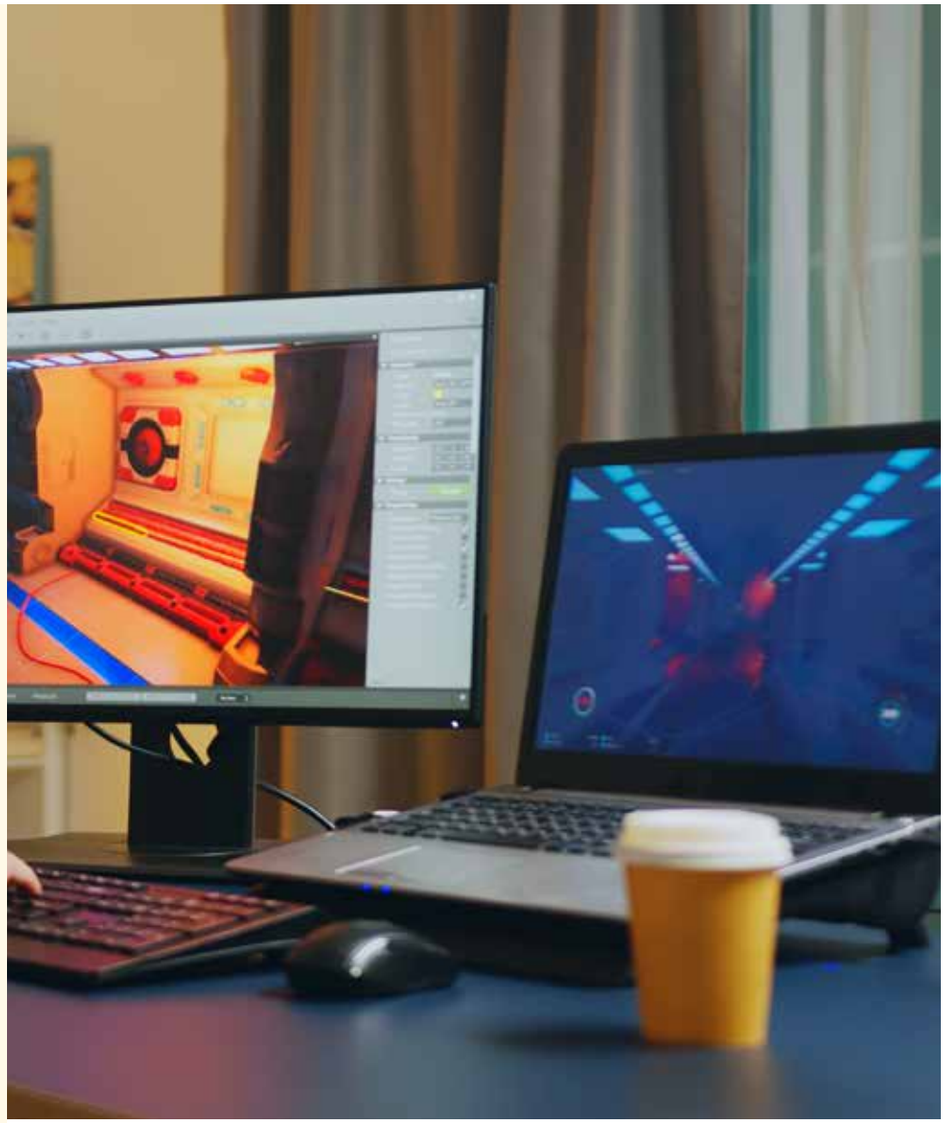
2020 EUROPEAN VIDEO GAMES INDUSTRY INSIGHTS REPORT



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

European Games Developer Federation

EUROPE'S VIDEO GAMES INDUSTRY

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FOREWORD

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

The video games industry showed its resilience during the pandemic

2020 was a difficult year for the European video games community, as it was for so many. Too many of us lost loved ones, friends, and colleagues.

With all the disruption, the development of new games and new game launches were predictably impacted. And while the games industry was better equipped for remote work than many others in Europe, it was not without its challenges. Small European businesses, in particular, faced substantial difficulties in securing new deals, pitching for investment and hiring new employees. The lockdowns also triggered mental health challenges in the workforce that companies were quick to respond to.

However, with millions of people around the world turning to video games as a source of entertainment and safe connection between friends during lockdown, we also saw a massive increase in engagement. We used our global reach and influence as a force for good, promoting public health messaging, making significant financial donations, and providing free educational and fitness games. We know from studies that video games helped players feel happier, less anxious and more connected. Some also spoke of video games positively impacting their mental health during lockdown.

In 2020, the EU had 4,600 game developer studios and publishers. Together, these companies employed 74,000 people in th EU (98,219 people in Europe) and had a combined turnover of €16.6bn in the EU.

Within the European Union, France continues to be the leader in game development. Germany and Sweden are close behind in terms of the number of game developer studios, Poland and Spain in terms of publishers, Germany and Poland in terms of employees, and Germany and Sweden in terms of total industry turnover. The rise of the Swedish and Polish games industries was particularly noteworthy, demonstrating how the games sector is becoming an important engine of digital growth in both small EU and Central-Eastern European member states.

According to our data collection, around 22% of people working in Europe's video games sector are women and, while this ratio is higher than in other ICT industries (17%), we are committed to double down on actively addressing this imbalance.

This report shows that 2020 was a period of unprecedented challenge, but it also shows our industry's incredible resilience in response to the crisis, as millions of people discovered the joys and benefits of playing our games for the first time.

Hendrik Lesser

EGDF President
CEO, Remote Control Productions

Dr. Olaf Coenen

ISFE Chair
VP, Global Commercial Management, Electronic Arts

INTRODUCTION

For this report, EGDF and ISFE have aggregated national industry data for 2020 from 25 European countries: Austria, Belarus, Belgium, Croatia, Czech Republic, Denmark, Estonia, Finland, France, Germany, Latvia, Lithuania, Iceland, Ireland, Italy, Norway, Poland, Portugal, Romania, Serbia, Slovakia, Spain, Sweden, Turkey, and the United Kingdom.

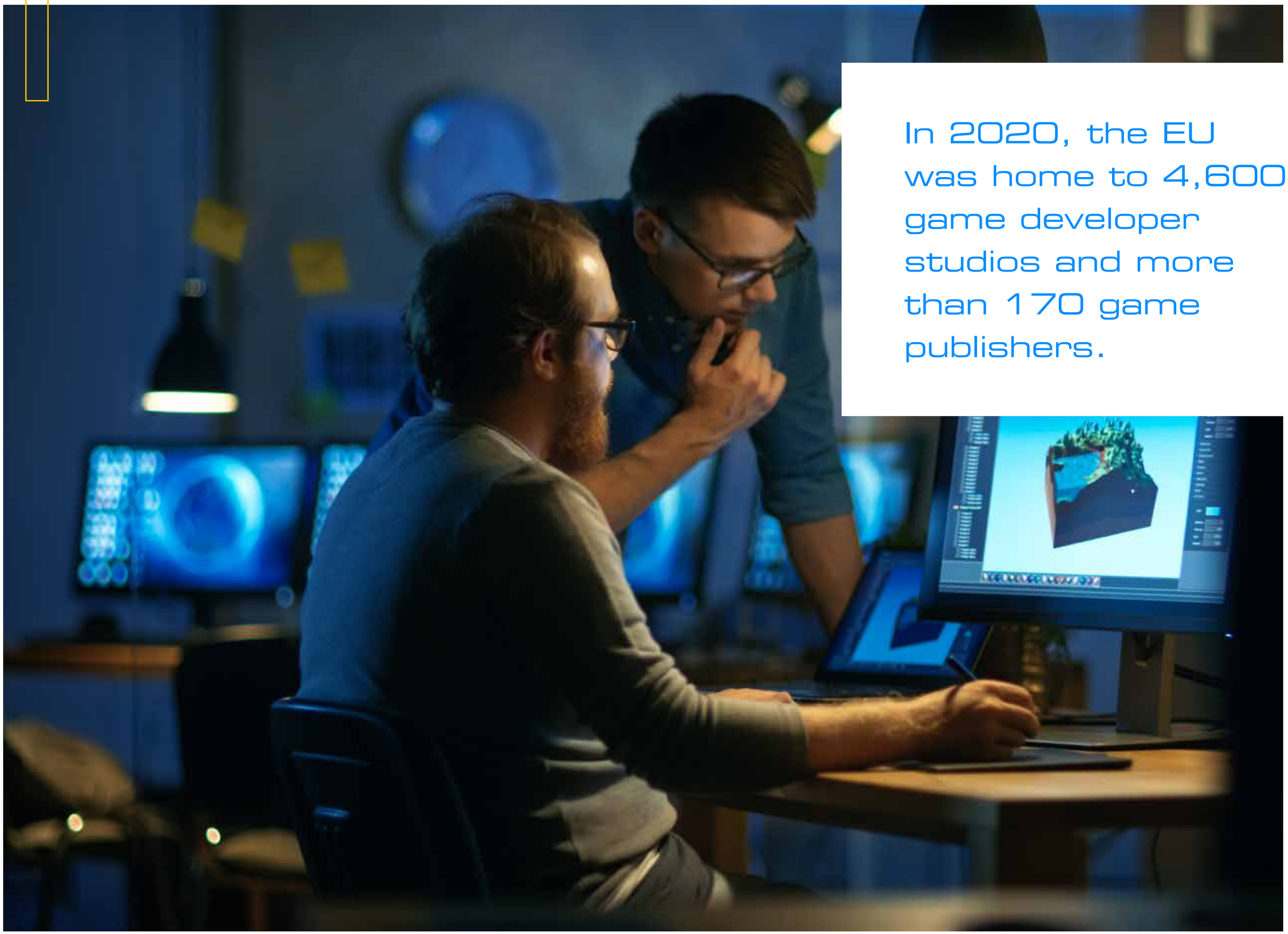
The report has two main parts. The first part presents Europe-wide data for 2020 (total numbers, comparative data, etc.). The second part is made up of country-specific information (2018-2020, depending on the available data for each specific country).

EGDF uses methodology that makes the data as comparable as possible between the countries.

Different national trade associations use different methodologies for collecting the data. In some countries, data is based on national surveys and in some countries, data is collected from public registers.

Links to national reports are available on page 25 in this report and at www.egdf.eu/data-and-studies.

EUROPEAN VIDEO GAMES INDUSTRY DATA



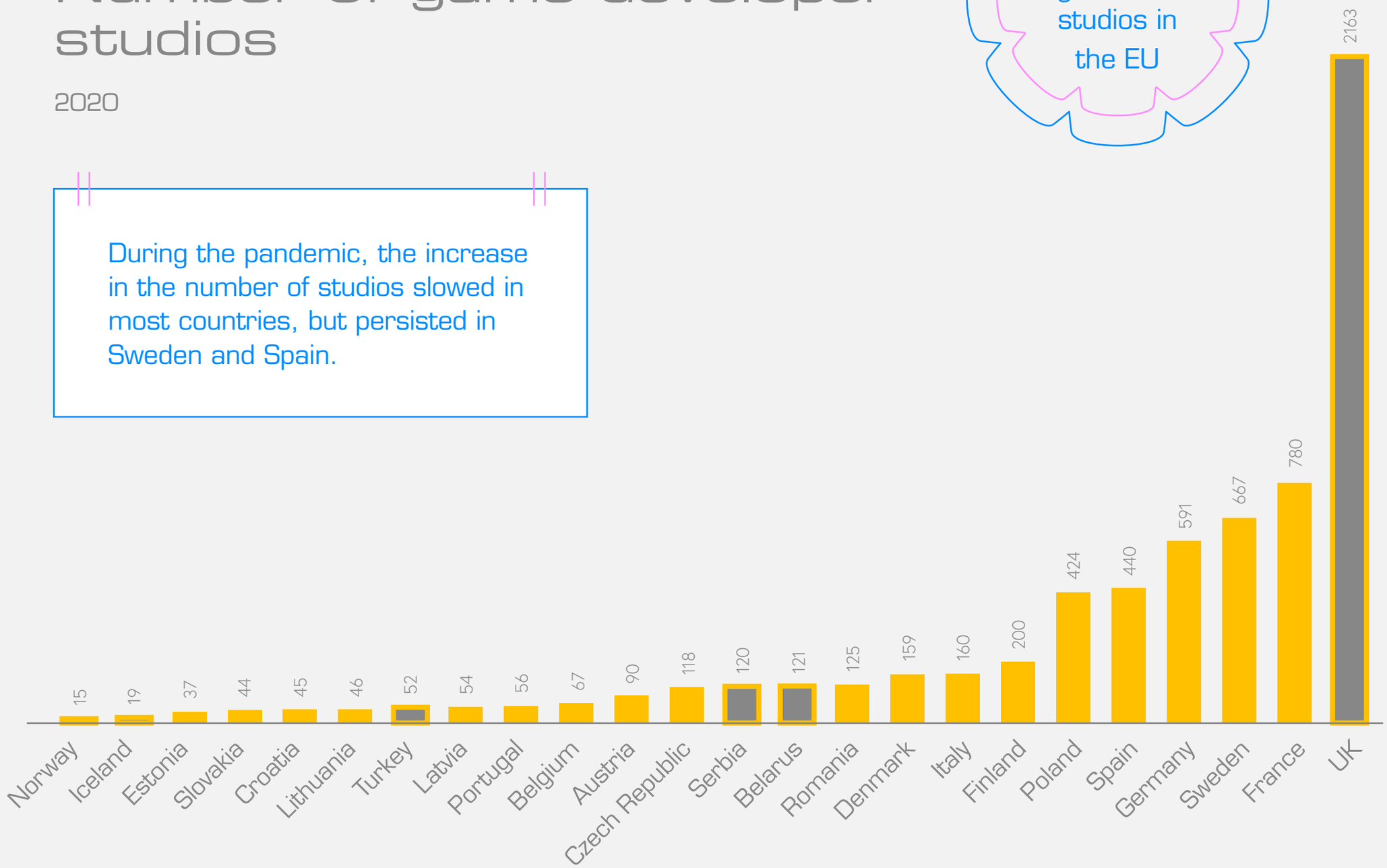
In 2020, the EU was home to 4,600 game developer studios and more than 170 game publishers.

Number of game developer studios

2020

4,600 game dev studios in the EU

During the pandemic, the increase in the number of studios slowed in most countries, but persisted in Sweden and Spain.



What is the total number of active game developer studios in your country?

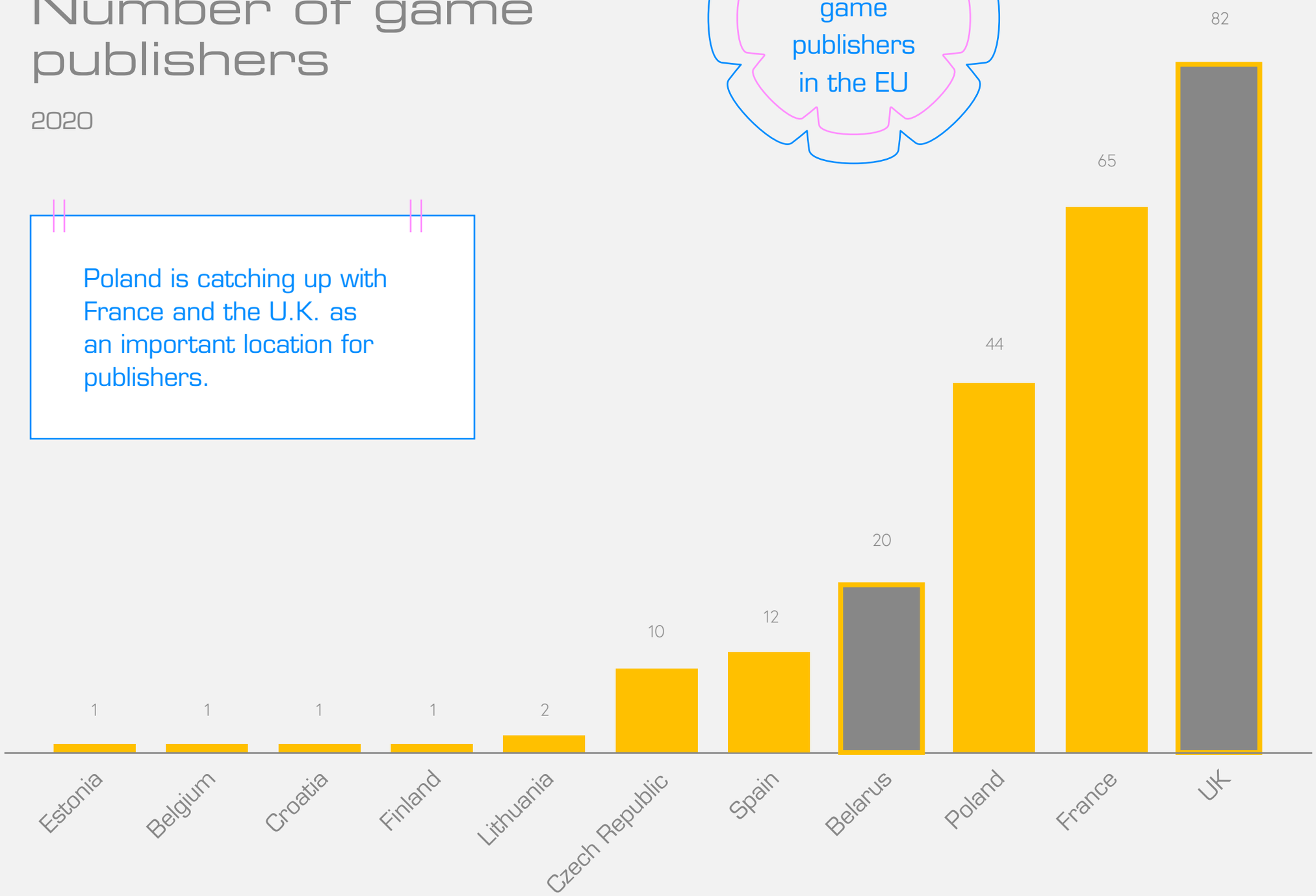
Notes: i) The high number of studios in UK may be attributable in part to the ease of company creation and the probable lag in company deregistration in the UK. ii) Both studios doing self-publishing or using external publishers are taken into account. iii) Data in grey is from non-EU countries. iii) No data are available for countries not included.

Number of game publishers

2020

170 game publishers in the EU

Poland is catching up with France and the U.K. as an important location for publishers.



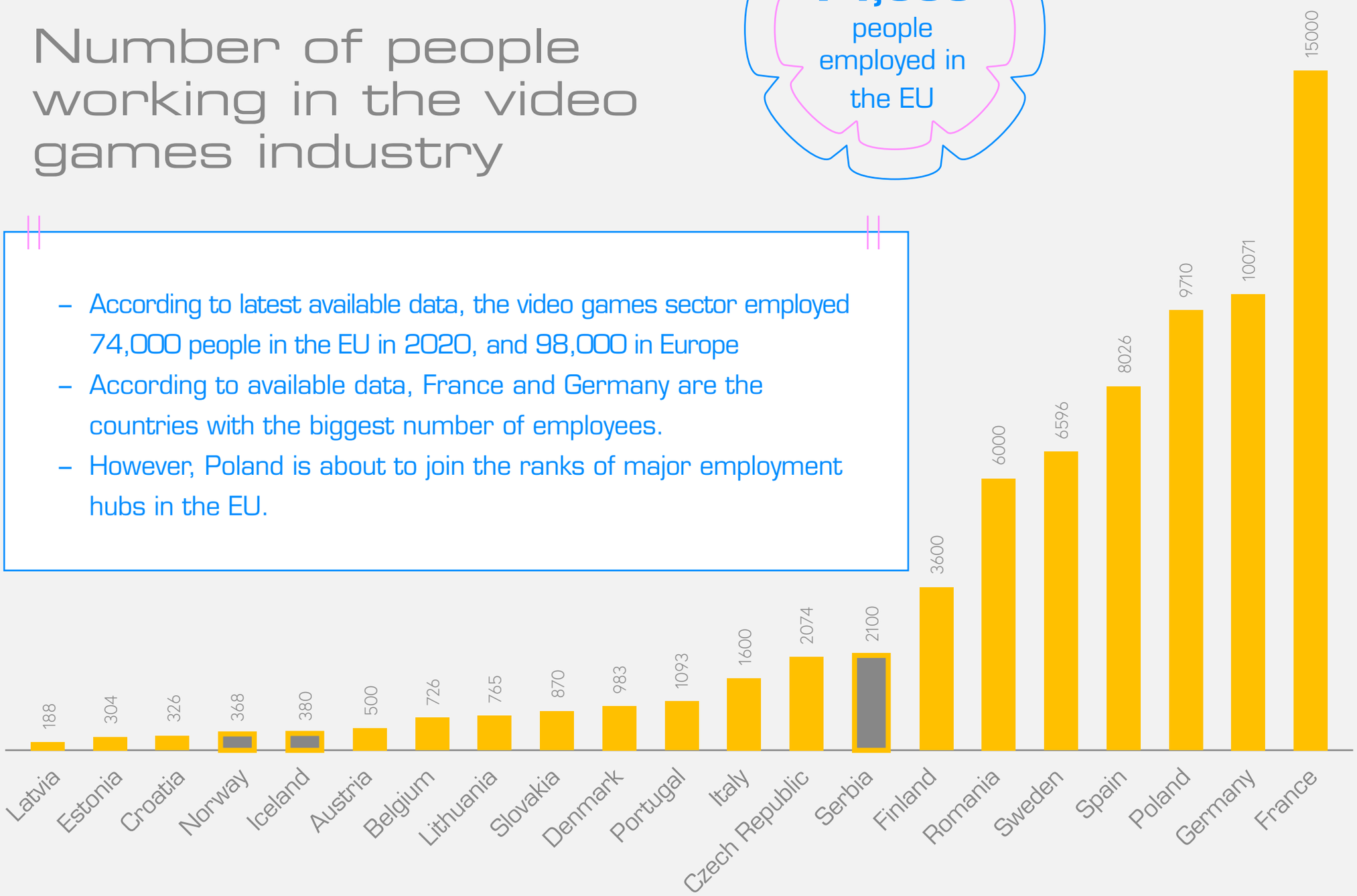
What is the number of active third-party publishers located in your country in 2020?

Notes: i) Please refer to page 64 or further details. ii) Data in grey is from non-EU countries. iii) No data are available for countries not included.

Number of people working in the video games industry

74,000
people employed in the EU

- According to latest available data, the video games sector employed 74,000 people in the EU in 2020, and 98,000 in Europe
- According to available data, France and Germany are the countries with the biggest number of employees.
- However, Poland is about to join the ranks of major employment hubs in the EU.

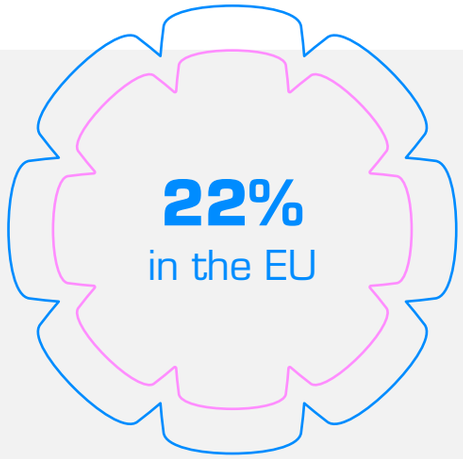


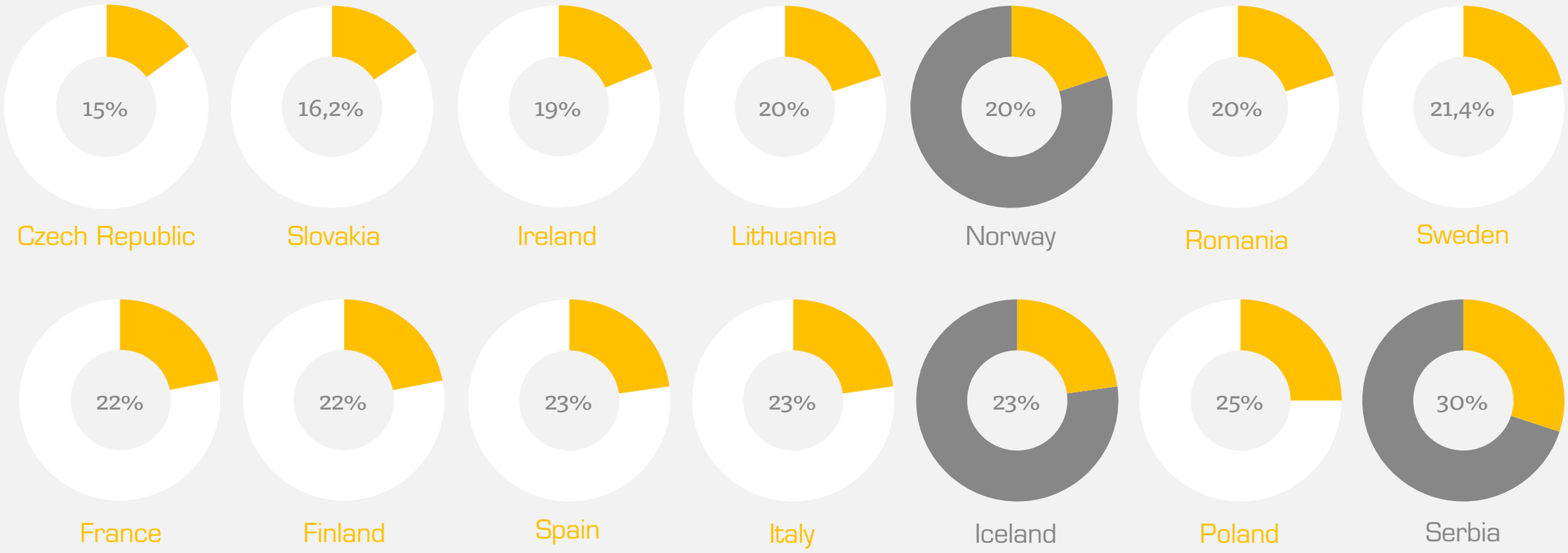
What was the number of people working for game developer studios and publishers in your country in 2020?

Note: i) Please refer to page 64 for further details. ii) Data in grey is from non-EU countries.

Percentage of women working in the industry

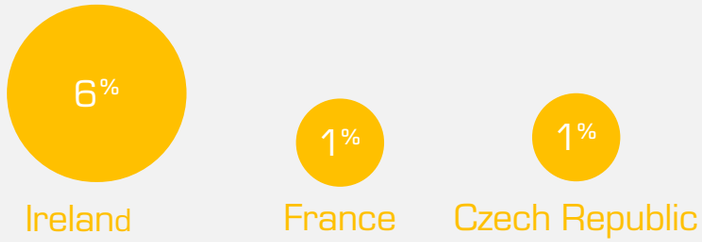
2020





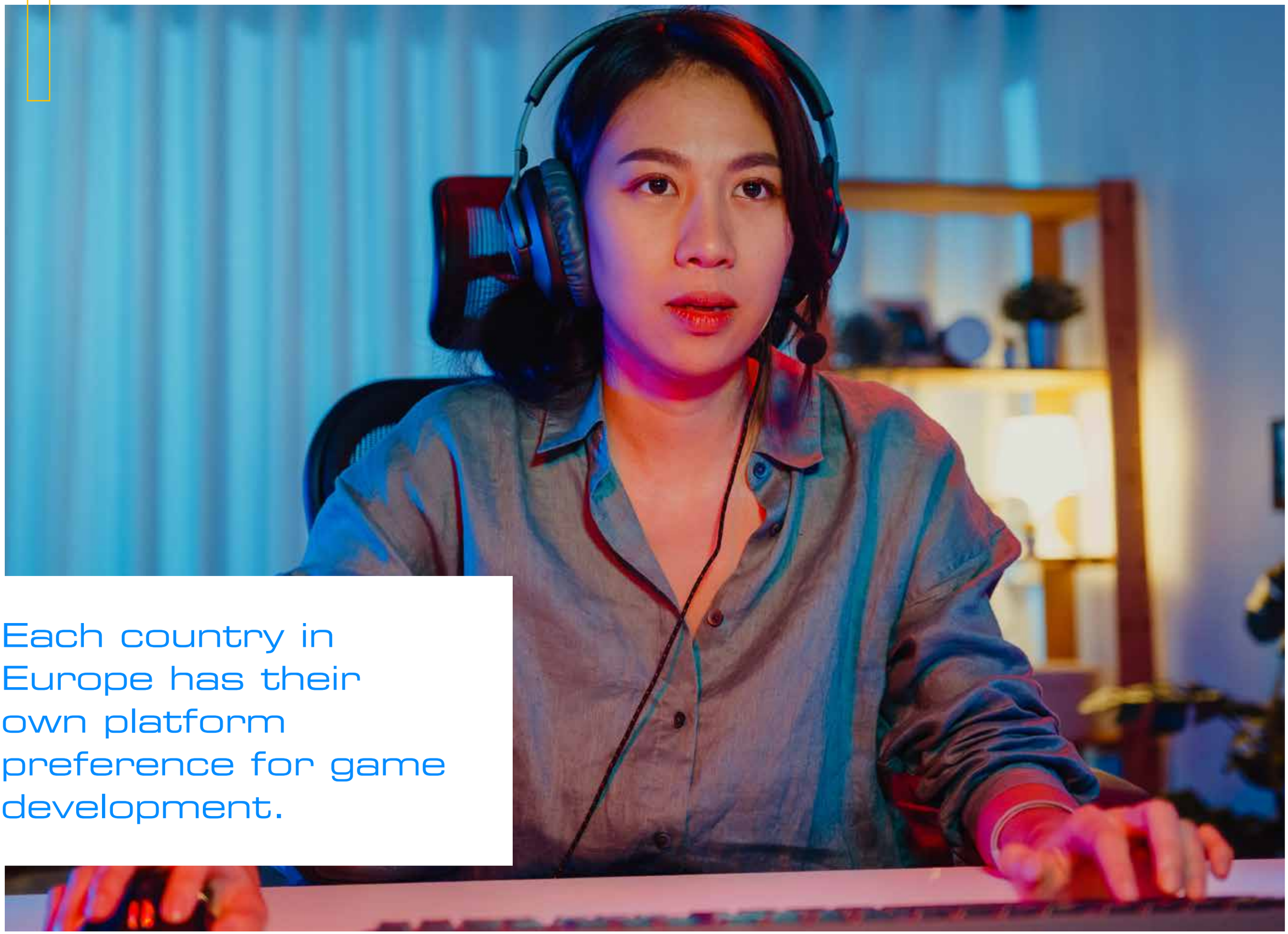
Poland, Italy and Spain are at the forefront of gender equality. However, the industry has more work to do.

Percentage of people who identify as non-binary | 2020



What percentage of the people, working for the local game developer studios and publishers, were women in 2020?

Notes: i) Please refer to page 64 for further details. ii) Data in grey is from non-EU countries. iii) No data are available for countries not included.



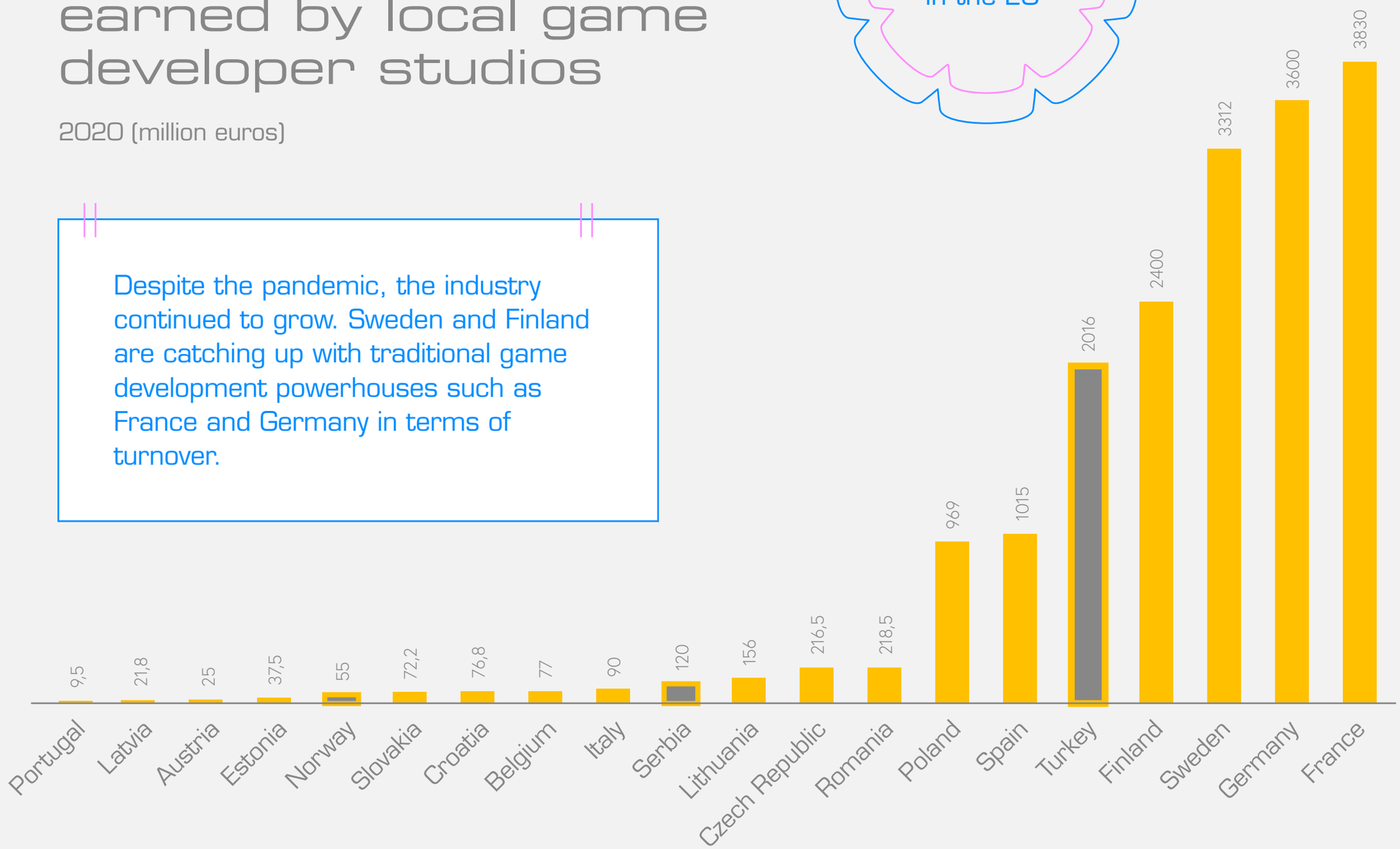
Each country in Europe has their own platform preference for game development.

Total turnover earned by local game developer studios

2020 (million euros)

€16.6bn
in the EU

Despite the pandemic, the industry continued to grow. Sweden and Finland are catching up with traditional game development powerhouses such as France and Germany in terms of turnover.



What was the total turnover of local game developer studios and publishers located in your country in 2020?

Note: Data in grey is from non-EU countries.

Number of companies that published new titles | 2020

Estonia	5
Lithuania	8
Latvia	10
Slovakia	15
Romania	27
Croatia	38
Czech Republic	39
Serbia	41
Finland	60
Belarus	83
Spain	132
France	400

What was the number of game developer studios located in your country that published new games during 2020?

Number of new titles published by local developers | 2020

Estonia	5
Norway	5
Latvia	17
Lithuania	24
Slovakia	26
Belgium	31
Romania	33
Serbia	41
Croatia	49
Czech Republic	58
Finland	80
Belarus	83
Spain	162
Poland	280
France	1350

What was the number of new titles published by game developer studios in your country in 2020?

Number of new self-published titles | 2020

Estonia	4
Latvia	9
Lithuania	20
Croatia	24
Slovakia	24
Serbia	27
Belgium	29
Romania	31
Czech Republic	54
Belarus	64
France	635

How many of these new titles were self-published?

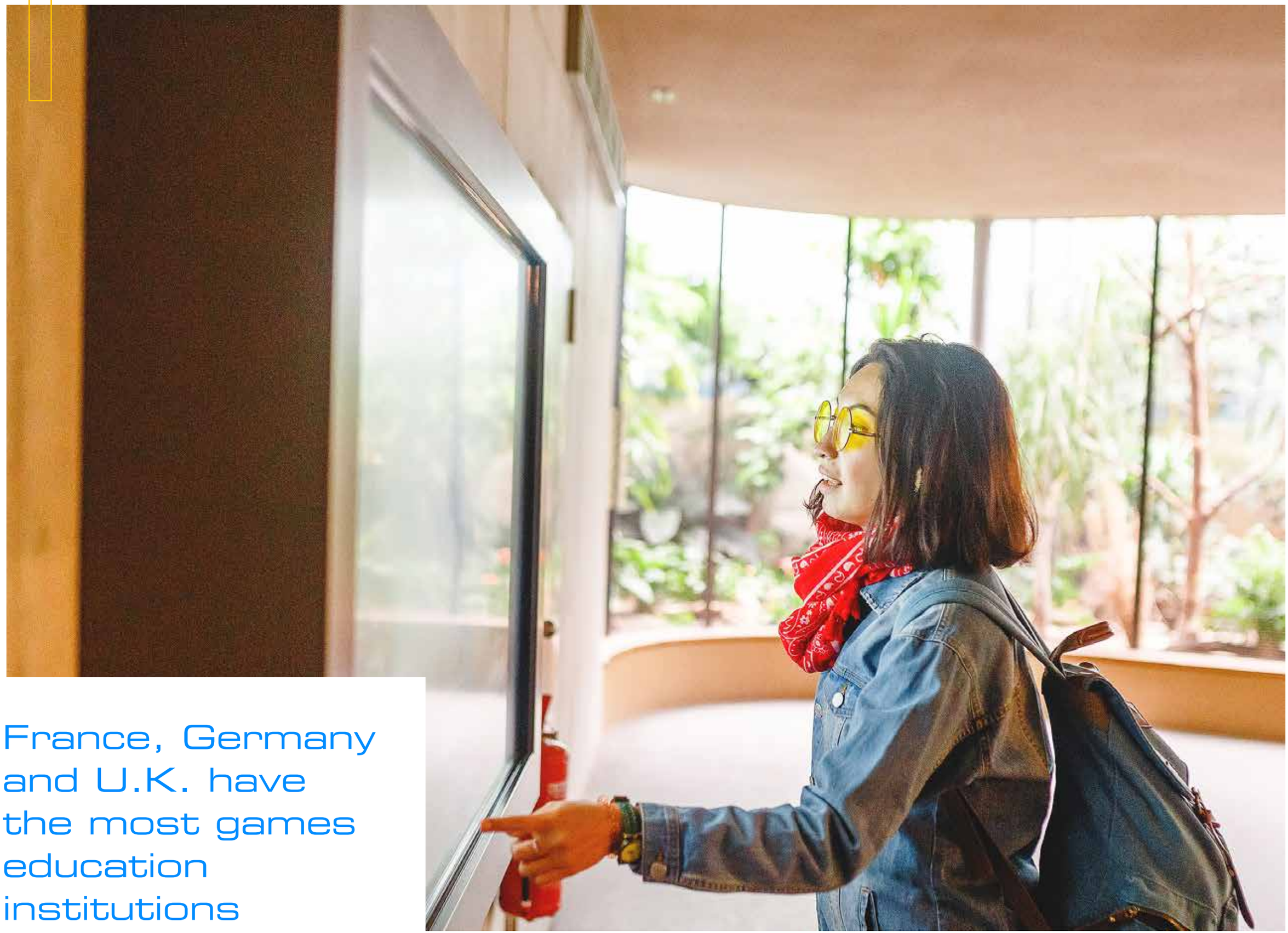
Number of companies that published by external publishers | 2020

Estonia	1
Slovakia	2
Czech Republic	4
Lithuania	4
Latvia	8
Serbia	14
Belarus	19
Romania	22
Croatia	25
France	715

How many of these new titles were published by an external publisher?

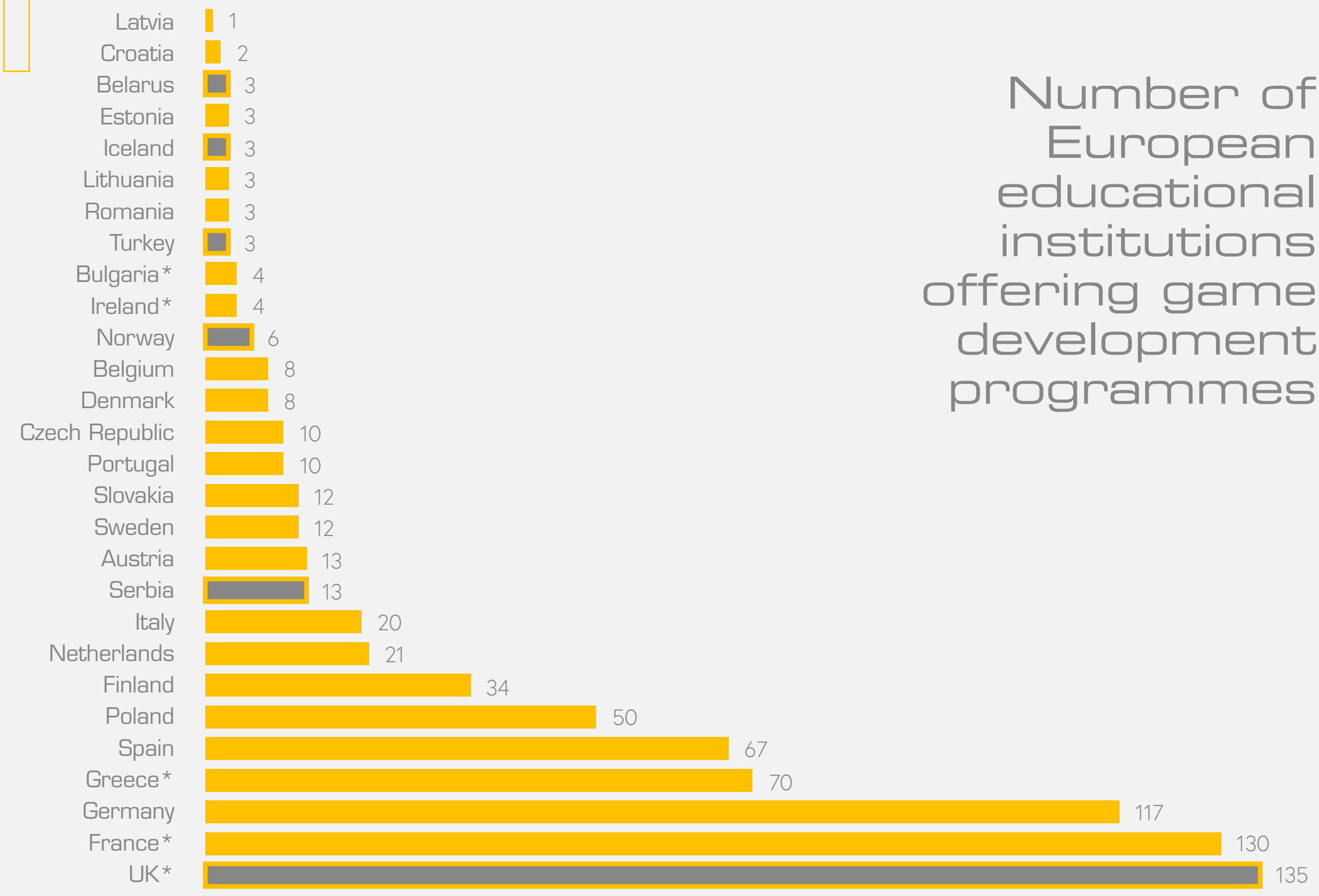
Notes: i) No data are available for countries not included. ii) Please refer to question 4 in the Questionnaire for further details.

FUNDING AND EDUCATION INSTITUTIONS INSIGHTS FOR THE VIDEO GAMES INDUSTRY

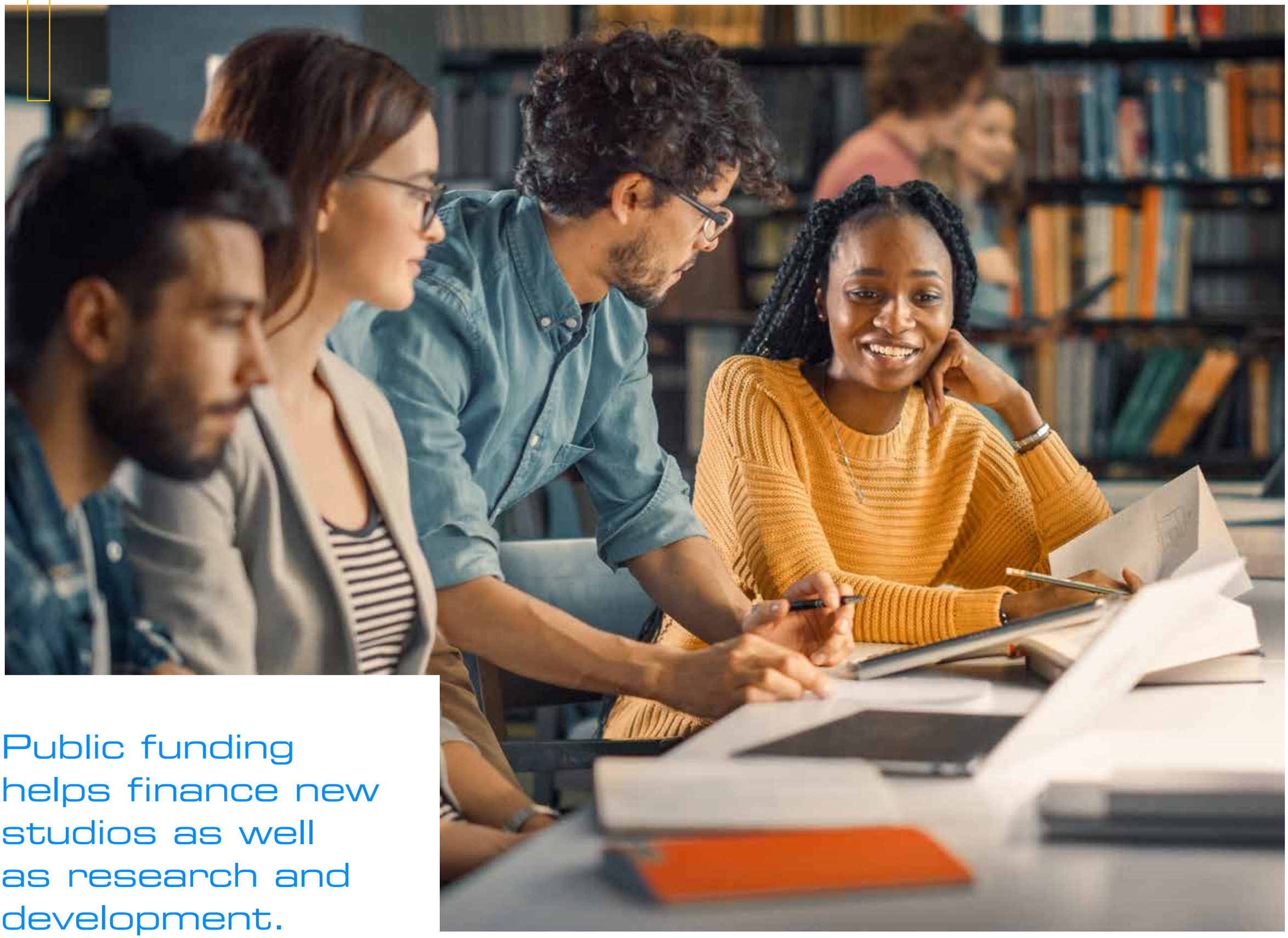


France, Germany and U.K. have the most games education institutions

Number of European educational institutions offering game development programmes



*Notes: i) *Data from Bulgaria, Greece, and Ireland was collected in 2018; data from France was collected in 2019; and data from the United Kingdom was collected in 2021. ii) Please refer to page 28 or further details. iii) Data in grey is from non-EU countries.*



Public funding helps finance new studios as well as research and development.

Cultural aid for game production

COUNTRY	CULTURAL STATE AID FOR VIDEO GAME PRODUCTION								
	Grants		Loans		Tax credits		Equity funding		None
	General	Dedicated to game dev	General	Dedicated to game dev	General	Dedicated to game dev	General	Dedicated to game dev	
Austria	✔		✔				✔		
Belgium (all)	✔	VAF/ Gamefonds	✔		✔				
Croatia	✔								
Czech Republic	✔		✔						
Denmark	✔	Spil-ordningen					✔		
Estonia	✔		✔		✔		✔		
Finland	✔	Digidemo							
France	✔	FAJV	✔	FPJV	✔	Crédit d'Impôt Jeu Vidéo	✔		
Germany	✔	Computer-spiele-förderung des Bundes/ Dautcher Computerspielpreis	✔				✔		
Italy		First playable fund COVID19 support				Tax Credit Videogiochi			
Ireland	✔				✔				
Latvia	✔								

COUNTRY	CULTURAL STATE AID FOR VIDEO GAME PRODUCTION								
	Grants		Loans		Tax credits		Equity funding		None
	General	Dedicated to game dev	General	Dedicated to game dev	General	Dedicated to game dev	General	Dedicated to game dev	
Lithuania	✔								
Netherlands	✔	Stimule-ringsfonds Creatieve Industrie							
Norway	✔	Norwegian film institute	✔				✔		
Poland	✔	www.gov.pl/web/kultura/rozwoj-sektorow-kreatywnych4	✔						
Portugal	✔				✔				
Romania									✔
Serbia	✔		✔						
Slovakia	✔	Slovak Art Council			✔				
Spain	✔	Grans for video game development	✔	CREA-SGR (COVID19 support)	✔		✔		
Sweden									✔
Slovenia	✔								
Turkey	✔						✔		
UK	✔	UK Games Fund/ UK Global Screen Fund	✔	Creative England	✔	Game Tax Relief			

R&D aid for game developer studios

COUNTRY	R&D AID FOR INNOVATION								
	Grants		Loans		Tax credits		Equity funding		None
	General	Dedicated to game dev	General	Dedicated to game dev	General	Dedicated to game dev	General	Dedicated to game dev	
Austria					✔		✔		
Belgium	✔				✔				
Czech Republic	✔								
Denmark					✔				
Estonia	✔		✔		✔				
Finland	✔	Business Finland Funding For Game Busines Develop-ment	✔	Business Finland Funding For Game Busines	✔		✔		
France	✔	FAJV	✔		✔		✔		
Germany	✔		✔		✔				
Iceland	✔		✔		✔		✔		
Ireland	✔				✔				
Italy	✔				✔				
Latvia									✔

COUNTRY	R&D AID FOR INNOVATION								
	Grants		Loans		Tax credits		Equity funding		None
	General	Dedicated to game dev	General	Dedicated to game dev	General	Dedicated to game dev	General	Dedicated to game dev	
Lithuania	✓		✓				✓		
Netherlands	✓		✓		✓		✓		
Norway	✓		✓						
Poland	✓	GAMEINN	✓		✓		✓		
Portugal	✓				✓				
Romania	✓				✓				
Serbia	✓				✓				
Slovakia	✓				✓		✓		
Slovenia	✓						✓		
Spain	✓		✓		✓	R&D tax credit for advanced software devel-op-ment activities			
Sweden					✓				
Turkey	✓		✓		✓				
UK	✓		✓		✓				

Aid for SMEs for launching a new studio

COUNTRY	SME AID FOR LAUNCHING A NEW STUDIO								
	Grants		Loans		Tax credits		Equity funding		None
	General	Dedicated to game dev	General	Dedicated to game dev	General	Dedicated to game dev	General	Dedicated to game dev	
Belgium	✓						✓		
Belgium	✓		✓		✓		✓		
Croatia	✓								
Czech Republic	✓								
Denmark			✓				✓		
Estonia			✓		✓		✓		
Finland	✓		✓				✓		
France	✓		✓		✓		✓		
Germany	✓		✓				✓		
Latvia									✓
Lithuania			✓						
Iceland	✓						✓		
Ireland	✓						✓		
Italy			✓						
Poland	✓		✓		✓				

COUNTRY	SME AID FOR LAUNCHING A NEW STUDIO								
	Grants		Loans		Tax credits		Equity funding		None
	General	Dedicated to game dev	General	Dedicated to game dev	General	Dedicated to game dev	General	Dedicated to game dev	
Portugal	✓								
Netherlands			✓		✓		✓		
Norway	✓		✓				✓		
Romania	✓								
Serbia	✓				✓				
Slovakia	✓		✓						
Slovenia	✓						✓		
Spain	✓		✓		✓		✓		
Sweden									✓
Turkey	✓		✓		✓		✓		
UK	✓		✓		✓				

VIDEO GAMES INDUSTRY REPORTS BY COUNTRY

AUSTRIA
PGDA - Pioneers of Game Developers Austria - Verband österreichischer Spieleentwickler

BELGIUM
BelgianGames (FLEGA, WALGA and games.brussels)

CZECH REPUBLIC
Czech Game Developers Association

FINLAND
Neogames Finland Assn.

FRANCE
SNJV

GERMANY
game - Verband der deutschen Games-Branche e.V.

ICELAND
Icelandic Game Industry

ITALY
IIDEA - Italian Interactive & Digital Entertainment Association

LATVIA
Latvian Game Developers Association

NORWAY
Virke Norwegian Producers Association

POLAND
Polish Association of Game Developers and Distributors

ROMANIA
RGDA

SERBIA
Serbian Games Association

SLOVAKIA
Slovak Game Developers Association

SPAIN
Spanish Video Game Association (AEVI)

SWEDEN
Dataspelsbranschen/ Swedish Games Industry

UNITED KINGDOM
(Ukie): The video game sections of the 2017-2019 screen business report have excellent reporting on the UK games industry.

Ukie's 2020 consumer valuation may also be of interest:

EDUCATIONAL INSTITUTIONS PROVIDING STUDY PROGRAMMES IN GAME DEVELOPMENT IN EUROPE

Educational institutions providing study programs in game development in Europe

Austria: 13 institutions
- TU Graz
- HTL Spengergassez
- FH Salzburg
- FH Vorarlberg
- FH Hagenberg
- FH Wien BFI
- TU Wien
- FH St.Pölten
- SAE Wien
- Uni Klagenfurt
- Donau-Universität
- FH Technikum Wien
- FH Johanneum

Belarus: 3 institutions
- Belarus State University
- Belarusian State University of Informatics and Radioelectronics
- Institute of Modern Knowledge

Belgium: 8 institutions
- 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
- 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

Estonia: 3 institutions
- Mainor
- Tallinn University
- Tartu University

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

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

Finland

- Lapland University of Applied Sciences
- Oulun ammattikorkeakoulu
- Metropolia University of Applied Sciences
- Savonia
- 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

France: 130 institutions

Germany: 115 institutions

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
- Games Academy Frankfurt

Germany:

- 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
- 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 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
- BAF Bayerische Akademie für Fernsehen und Digitale Medien
- 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
- SAE Institute Berlin
- SAE Institute Bochum
- SAE Institute Köln
- School of Games

Germany:

- 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

Iceland: 3 institutions

- Keilir
- Tækniskólinn
- Reykjavík University

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

- 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

- The Strzemiński Academy of Art in Lodz
- 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

Poland

- 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: 10 institutions

Licenciatura

- ETIC - Animacao e Videojogos
- Instituto Politécnico De Bragança
- Instituto Politécnico De Leiria
- IADE - Games Development

Portugal:

- Universidade Lusófona Do Porto
- Universidade Lusófona Do Lisboa
- Instituto Politécnico Do Cávado E Ave
- Instituto Politécnico da Maia
- IPCA - Engenharia de desenvolvimento de jogos digitais
- UBI - Design de Jogos

Romania: 3 institutions

State Universities

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

Architecture

Romania

- National University of Theatre Arts and Cinematography

Serbia: 12 institutions

- "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: 11 institutions

- Game Development and Design
- Butterfly Effect
- Digital Games Theory
- Department of Visual Effects
- Department of Game design
- Academy of Fine Arts and Design Bratislava / MediaLab
- Comenius University in Bratislava
- Secondary Technical School Hálova
- Vocational Art School Košice
- Vocational Art School Trenčín Academy of Animation
- University of St. Cyril and Methodius in Trnava

Spain: 60 institutions

- 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 Tecnologies Interactives (ENTI)
- Escola Pia Granollers
- Escuela de Arte y Superior de Diseño Deià
- 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

Spain:

- 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)
- 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

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)

UK: 136 institutions

- Abertay University
- Aberystwyth University

UK:

- ACM
- Anglia Ruskin University Higher Education Corporation
- University of the Arts, London
- Bangor University
- Bath Spa University
- University of Bedfordshire
- Birmingham City University
- Blackburn College
- Blackpool and the Fylde College
- The University of Bolton
- Bournemouth University
- The University of Bradford
- Bradford College
- University of Brighton
- Brunel University London
- Buckinghamshire New University
- Burnley College
- Cambridge Ruskin International College Limited
- Canterbury Christ Church University
- Cardiff and Vale College
- Cardiff Metropolitan University
- University of Central Lancashire
- University of Chester
- University of Chichester
- City College Plymouth
- City, University of London
- The City of Liverpool College
- City of Wolverhampton College
- Colchester Institute
- Cornwall College
- Coventry College
- Coventry University
- The University of Cumbria
- De Montfort University
- University of Derby
- Dudley College of Technology
- The University of East London
- Edge Hill University
- Edinburgh Napier University
- The University of Essex
- Falmouth University
- Farnborough College of Technology
- Futureworks
- Gateshead College
- Glasgow Caledonian University
- Glasgow School of Art.
- University of Gloucestershire
- Gloucestershire College
- Glyndwr University
- Goldsmiths, University of London

University of Greenwich

- Heart of Worcestershire College
- Heriot-Watt University
- Hertford Regional College
- University of Hertfordshire
- University of Huddersfield
- Hugh Baird College
- University of Hull
- Hull College Group
- Institute of Contemporary Music Performance
- Keele University
- Kingston University
- University of Leeds
- Leeds Beckett University
- University of Lincoln
- The University of Liverpool
- Liverpool John Moores University
- Coleg Llandrillo
- The London College
- London Metropolitan University
- London South Bank University

UK:

- Luminate Education Group
- The Manchester College
- Manchester Metropolitan University
- Middlesex University
- Newcastle College
- Newcastle University
- North Lindsey College
- North Warwickshire and South Leicestershire College
- The University of Northampton
- Northern Skills Group
- University of Northumbria At Newcastle
- Norwich University of the Arts
- Nottingham Trent University
- Nova Centric Limited
- The Oldham College
- Pearson College London
- Petroc
- University of Plymouth
- Plymouth College of Art
- University of Portsmouth
- Ravensbourne University London
- Rnn Group
- Royal Holloway, University of London
- SAE Institute Ltd
- The University of Salford
- Salford City College
- Sheffield College, the
- Sheffield Hallam University
- Solent University, Southampton
- South Essex College of Further and Higher Education
- South Gloucestershire and Stroud College
- University of South Wales/Prifysgol De Cymru
- University of Southampton
- Southport College
- St Helens College
- Staffordshire University
- University of Suffolk
- University of Sunderland
- University of Sussex
- Tec Partnership
- Teesside University
- Truro and Penwith College
- Ulster University
- University Centre South Devon
- University Centre Weston
- University for the Creative Arts
- UWE Bristol
- Wakefield College
- University of Wales: Trinity Saint David
- Warwickshire College
- West Herts College
- The University of West London
- University of the West of Scotland
- West Suffolk College
- The University of Westminster
- Wiltshire College and University Centre
- University of Winchester
- University of Wolverhampton
- University of Worcester
- Coleg Y Cymoedd
- Yeovil College
- York St John University

COUNTRY FOCUS

In the following pages, we share available country-specific data. However, work is in progress to ensure common methodology across all countries in the future.

Austria

PGDA - Pioneers of Game Developers Austria -
Verband österreichischer Spieleentwickler

90	500	25
Number of video game developer studios	Number of people working in the industry	Turnover (mil euro)

Find more information in the full report

Belarus

BelGameDev

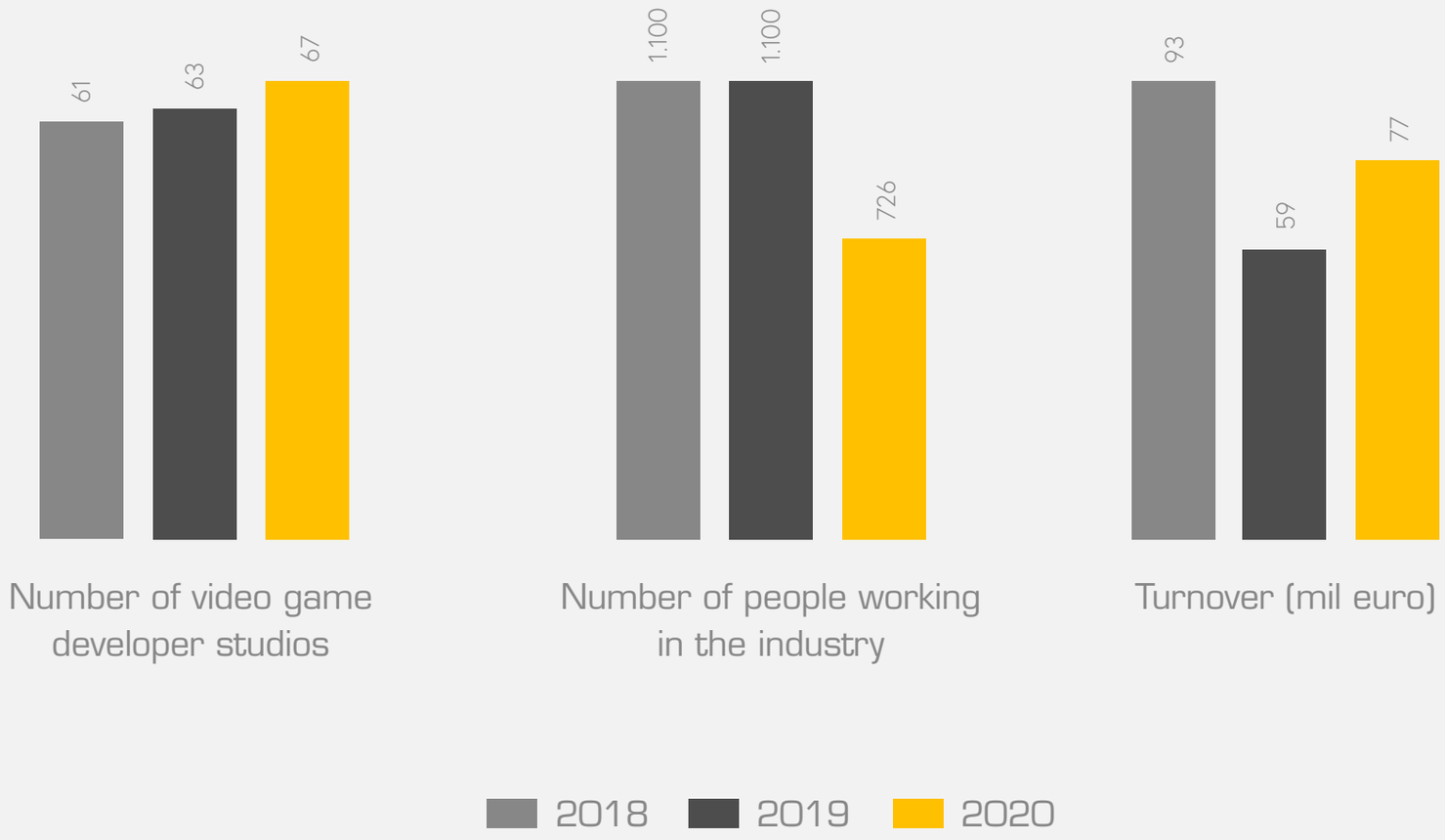
121

Number of video game
developer studios

2020

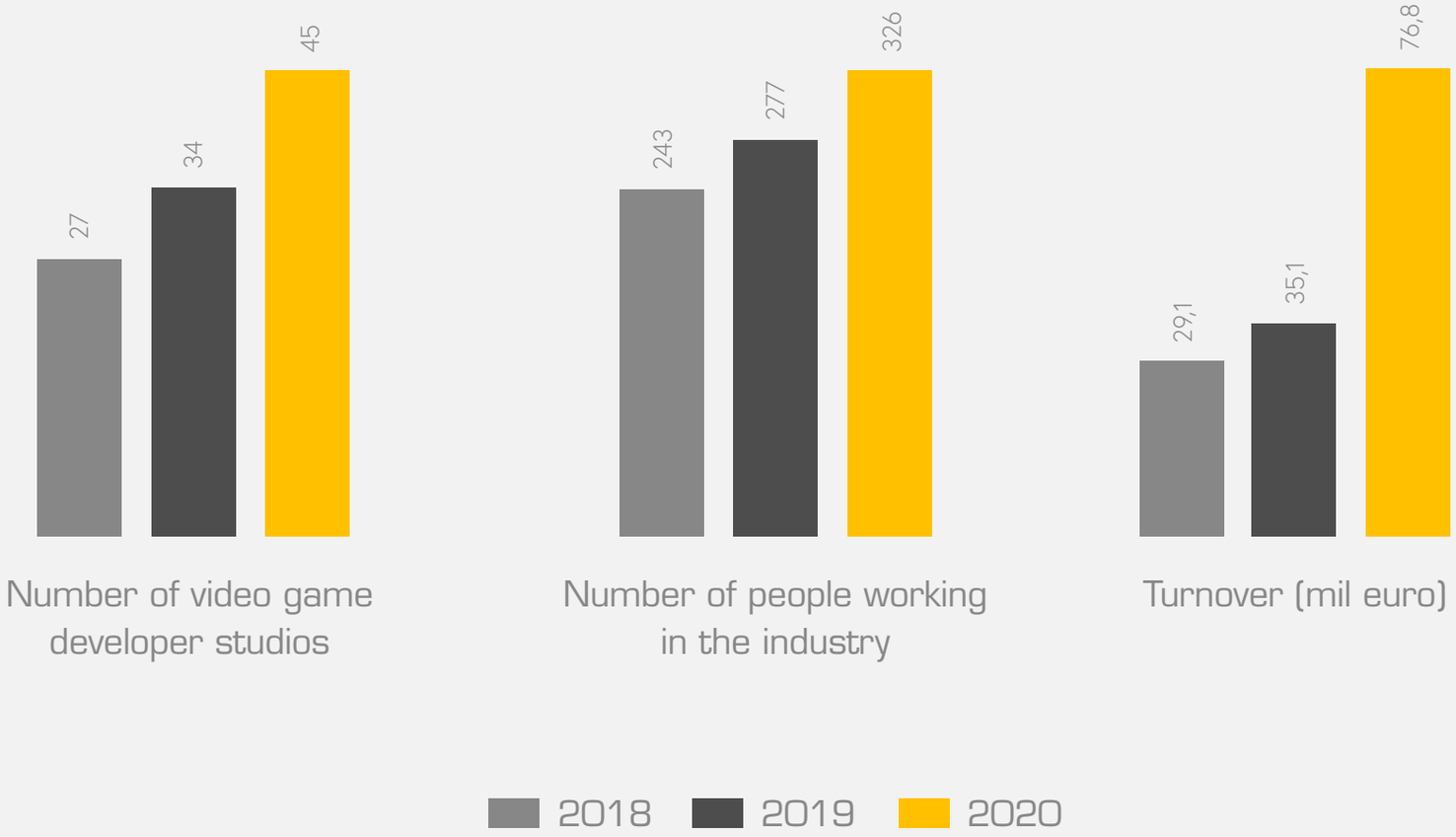
Belgium

BelgianGames (FLEGA, WALGA and games.brussels)



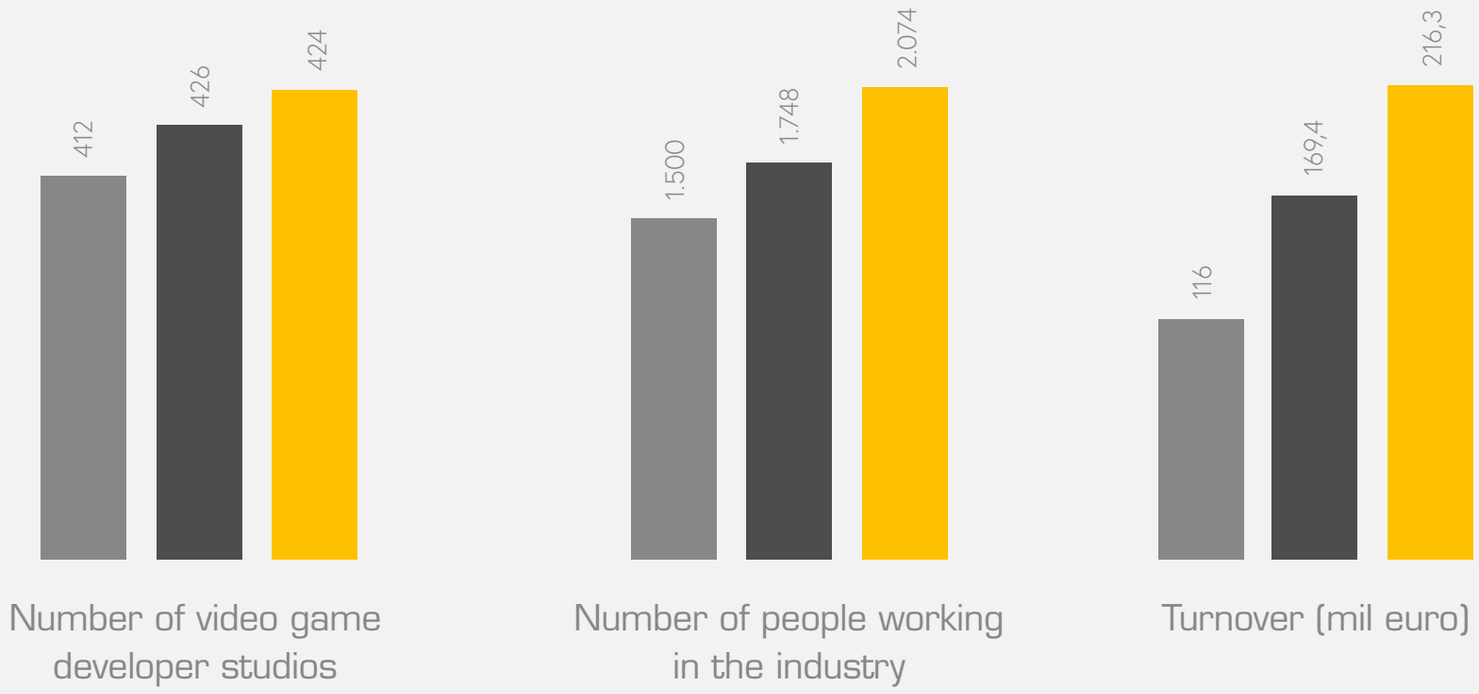
Croatia

Croatian Game Development Alliance



Czech Republic

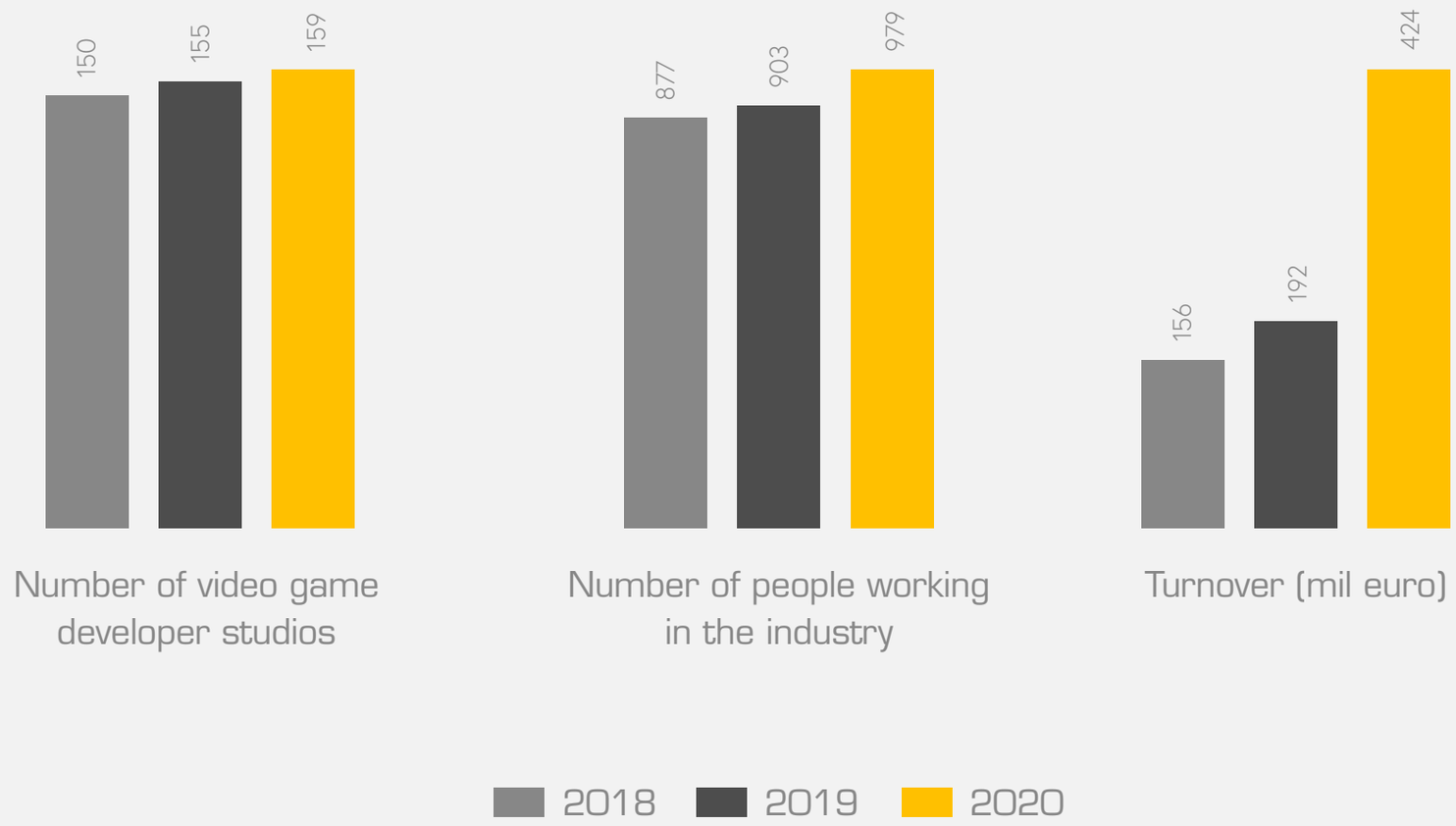
Czech Game Developers Association



Find more information in the full report

Denmark

Danish Producers' Association



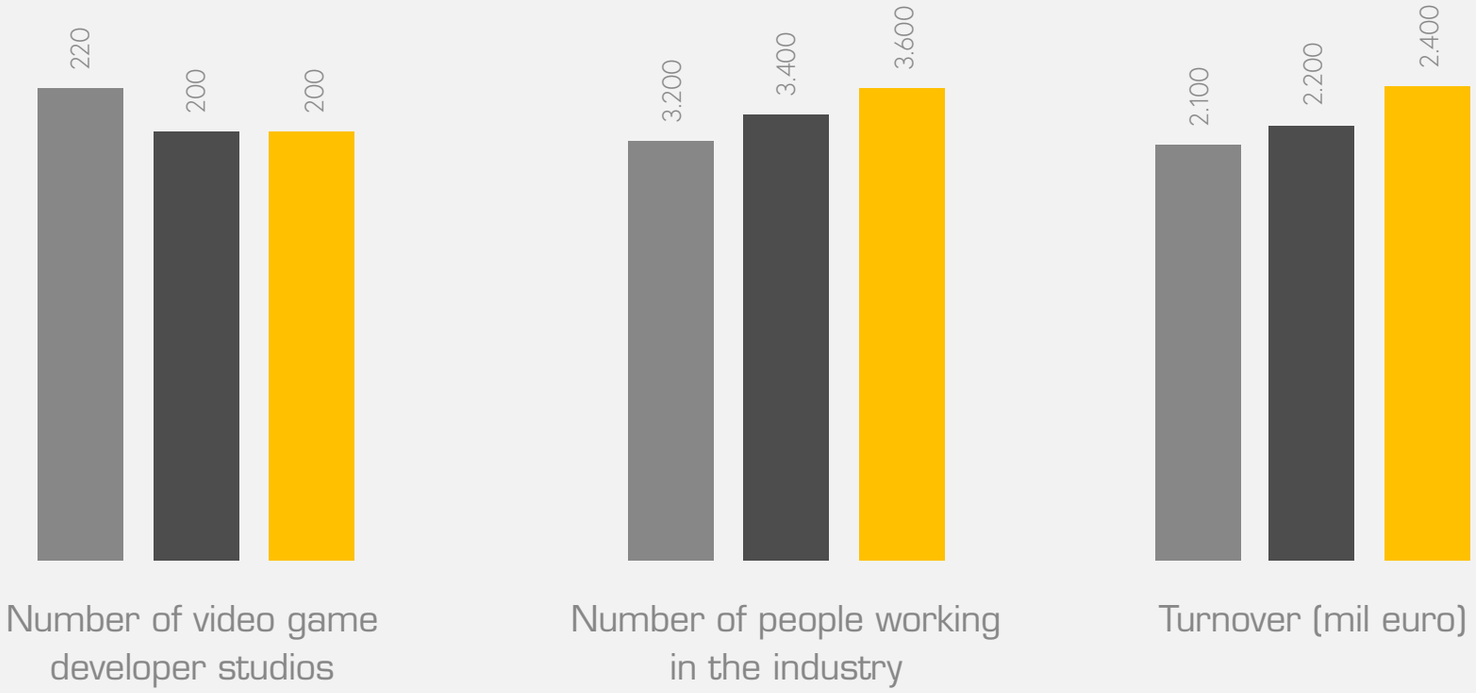
Estonia

GameDev Estonia MTÜ

37	304	37,2
Number of video game developer studios	Number of people working in the industry	Turnover (mil euro)

Finland

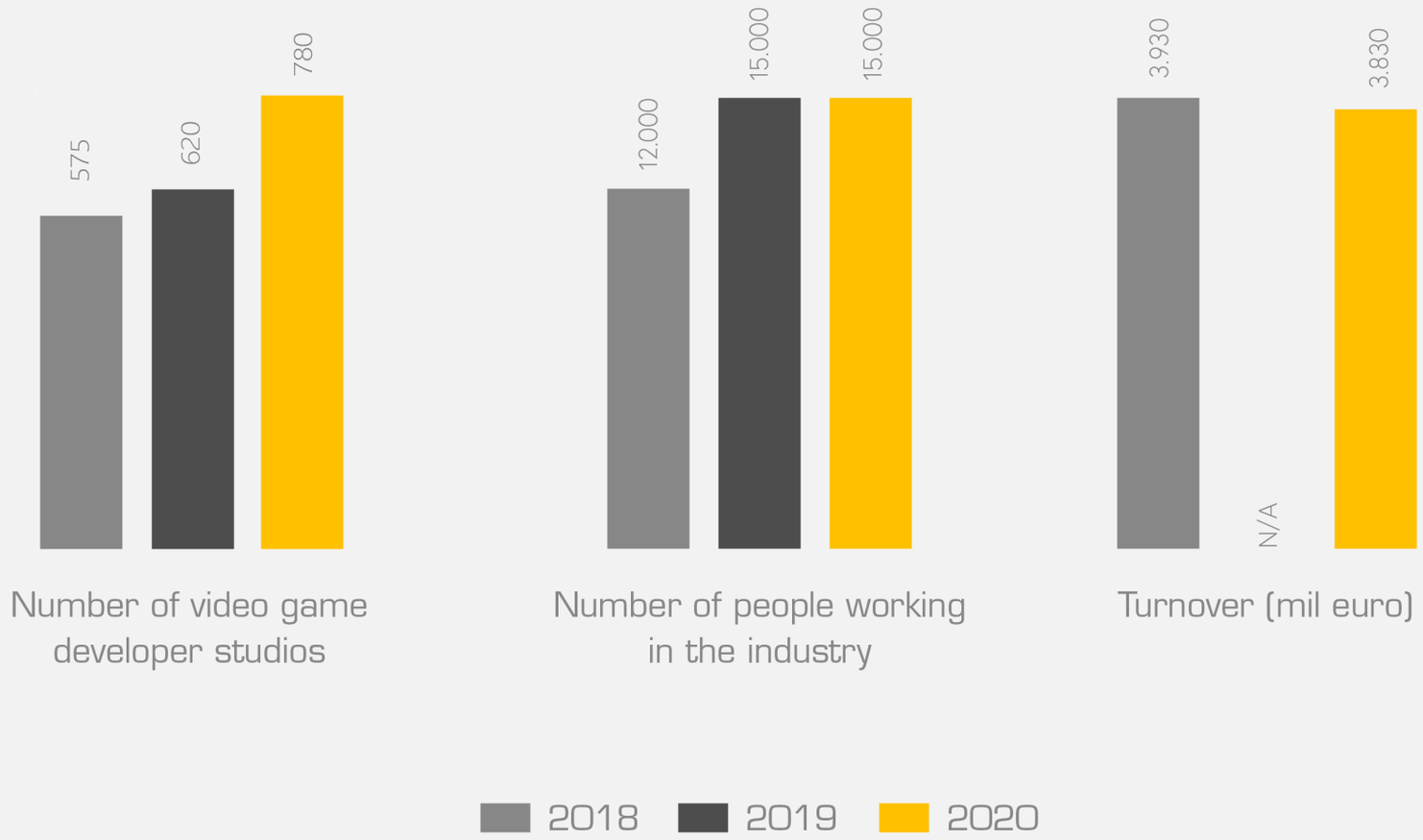
Neogames Finland Assn.



Find more information in the full report

France

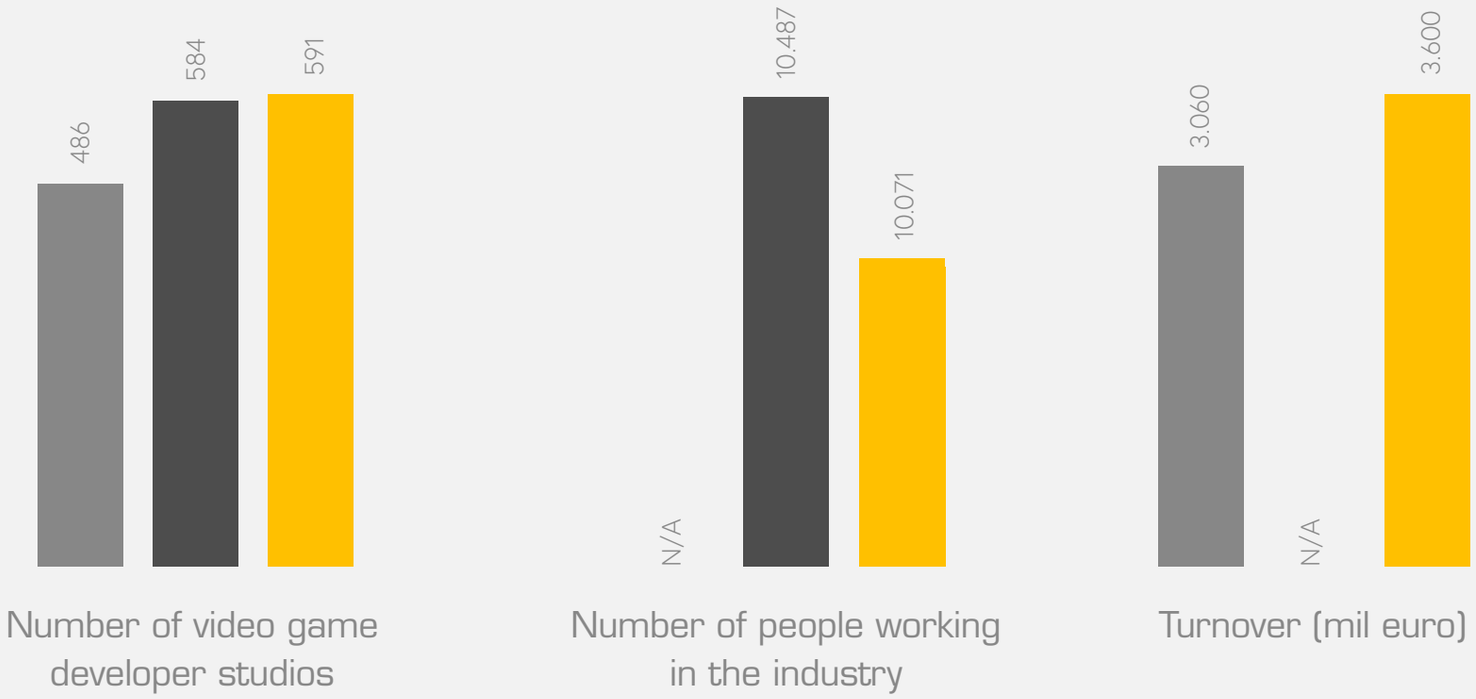
Le Syndicat National du Jeu Vidéo



Find more information in the full report

Germany

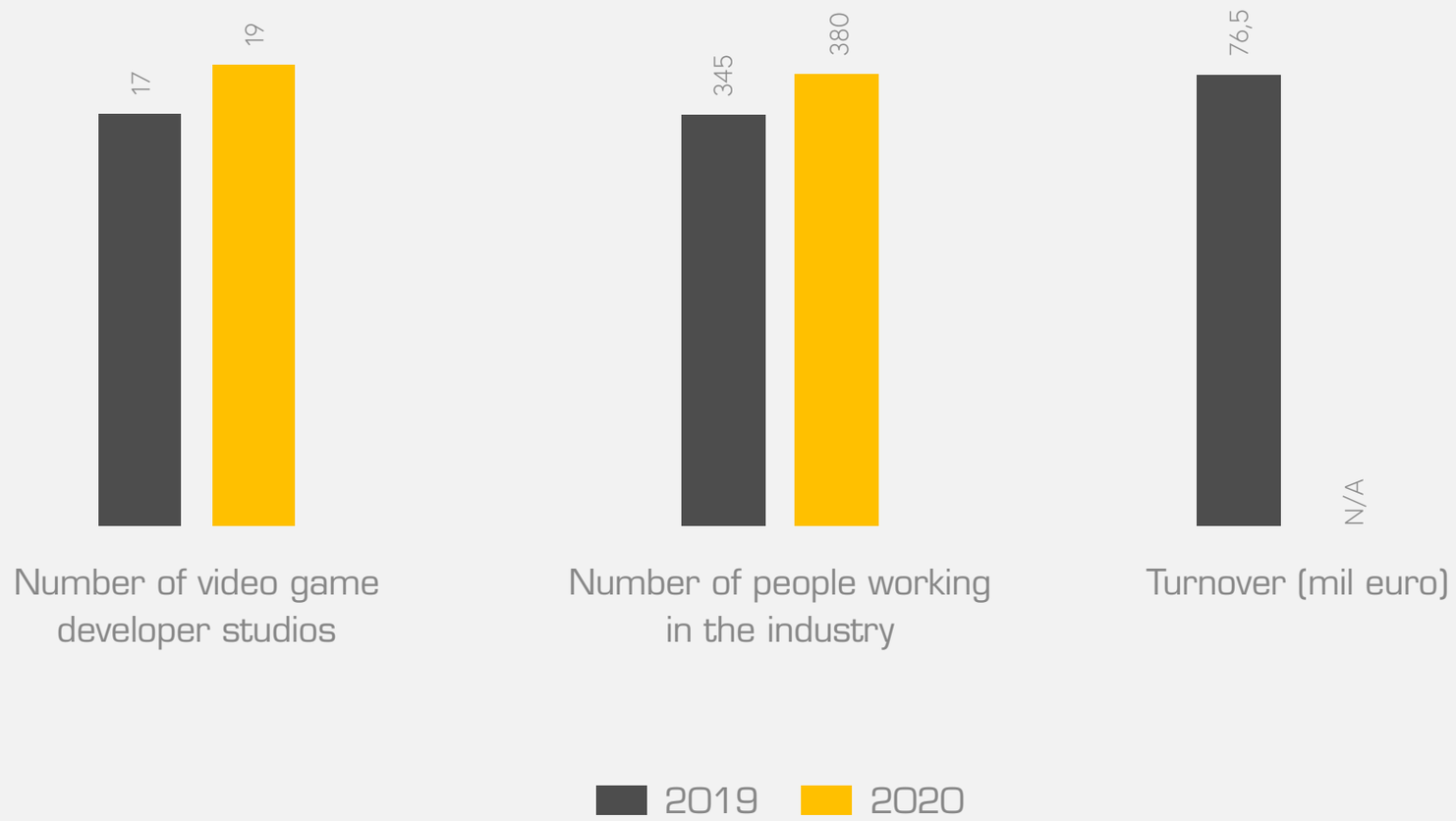
game - Verband der deutschen Games-Branche e.V



Find more information in the full report

Iceland

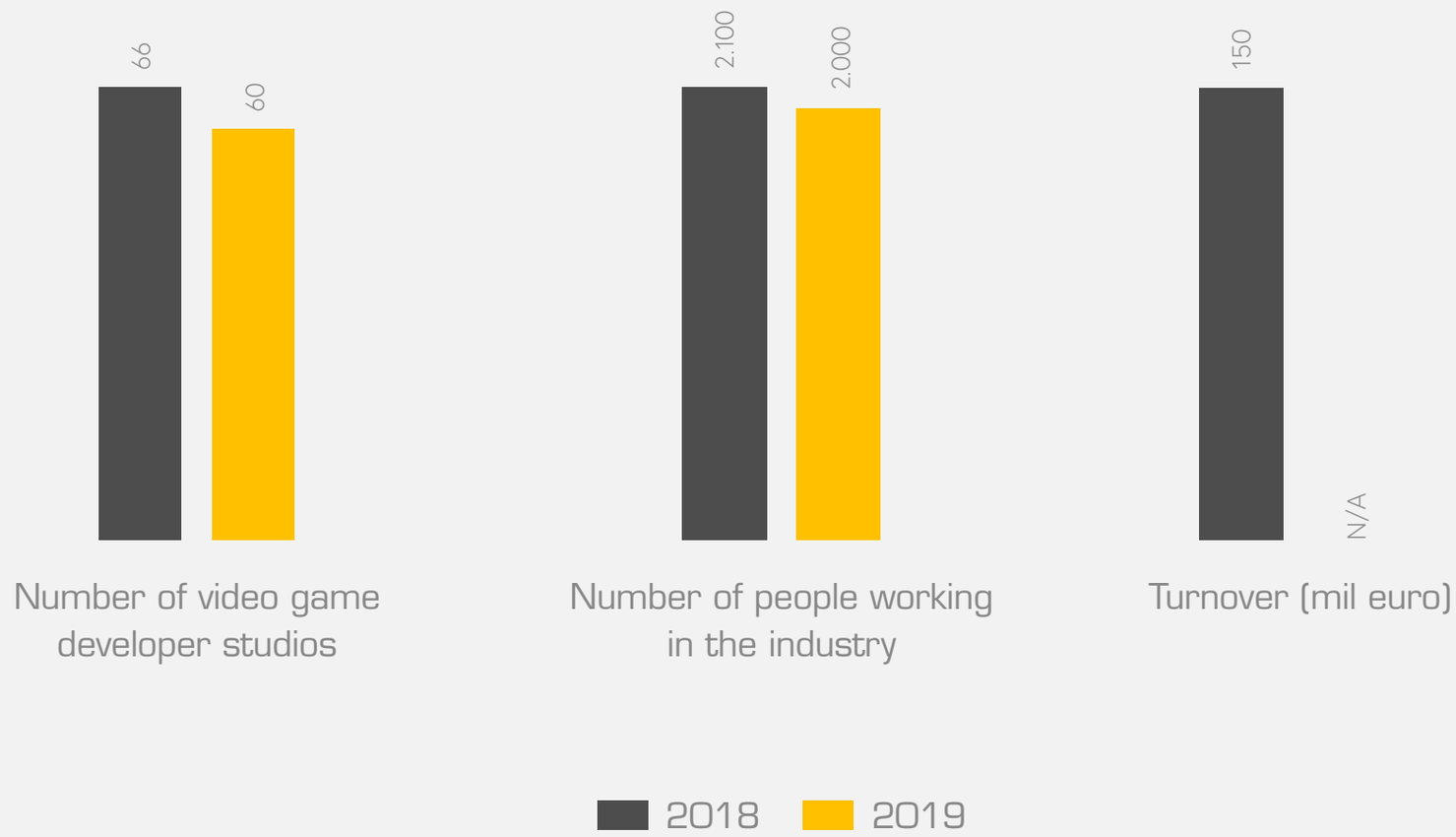
Icelandic Game Industry



Find more information in the full report

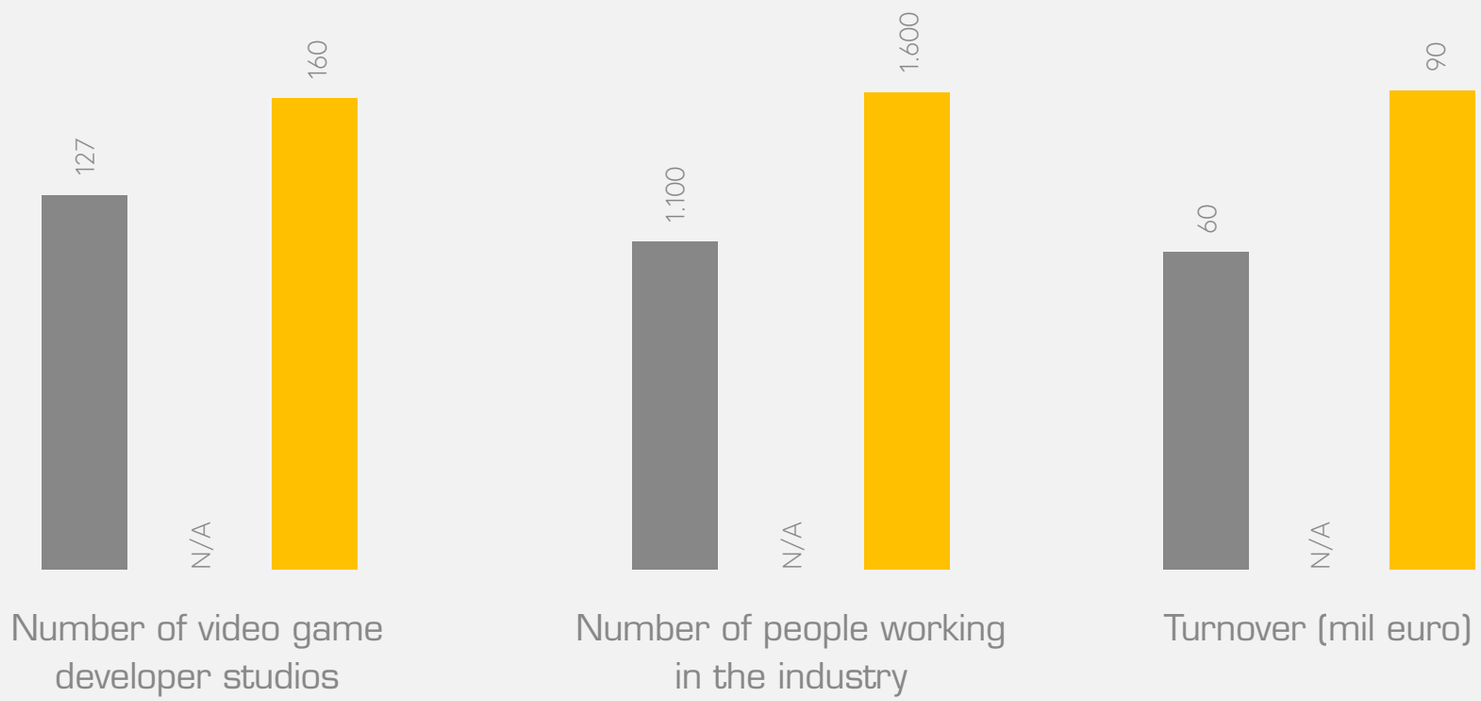
Ireland

IMIRT - Irish Game Makers Association



Italy

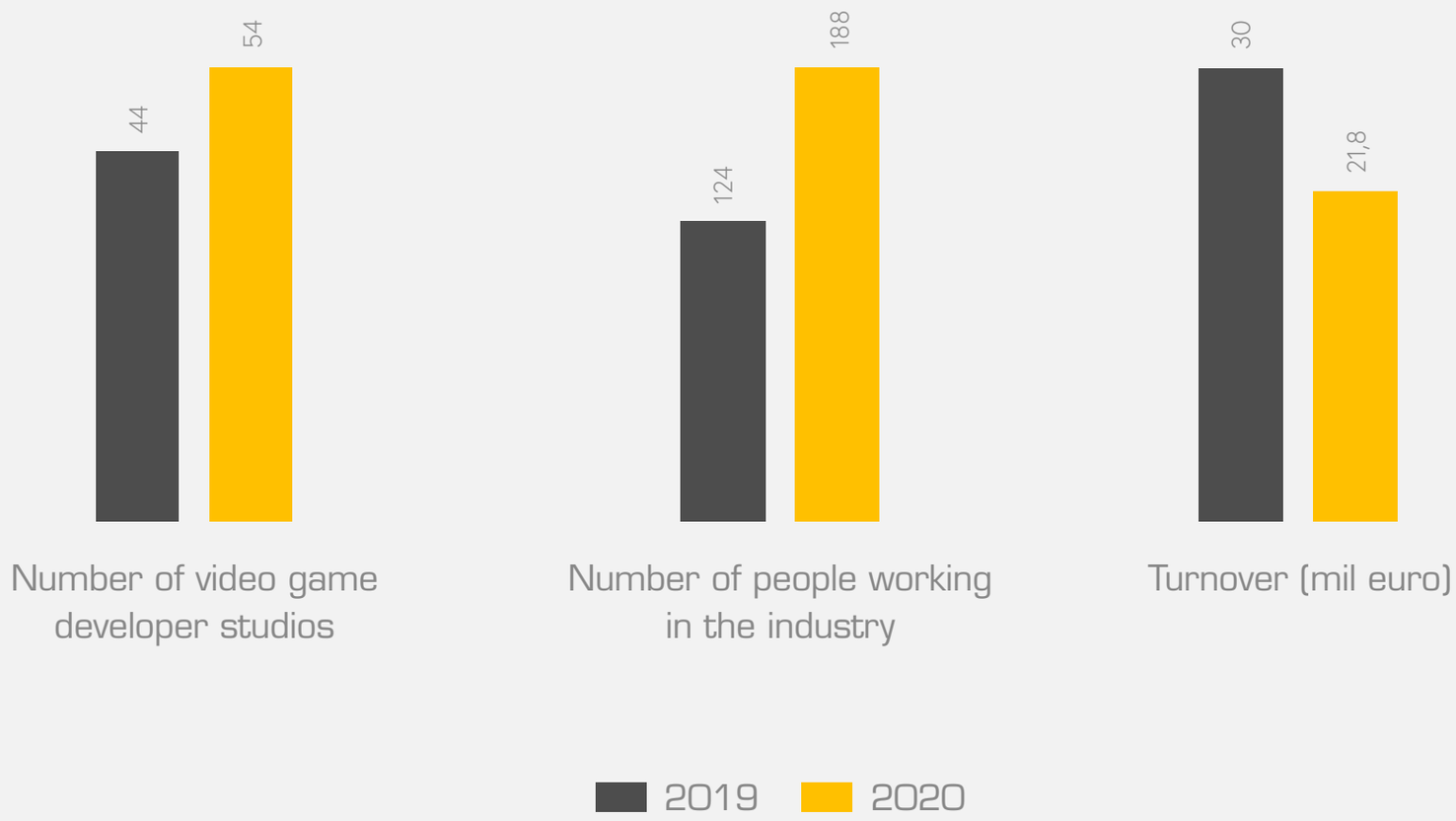
IIDEA - Italian Interactive & Digital Entertainment Association



Find more information in the full report

Latvia

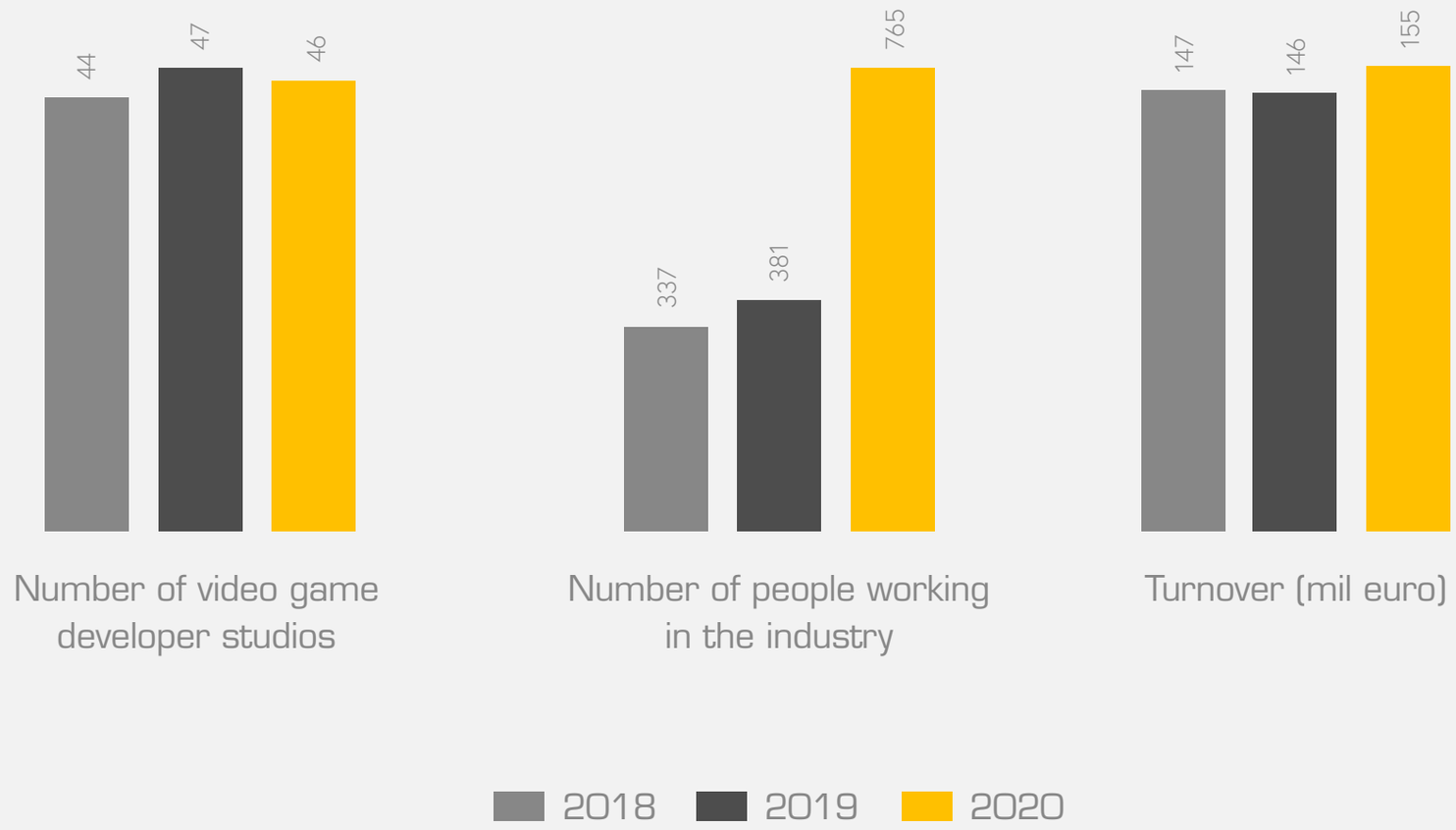
Latvian Game Developers Association



Find more information in the full report

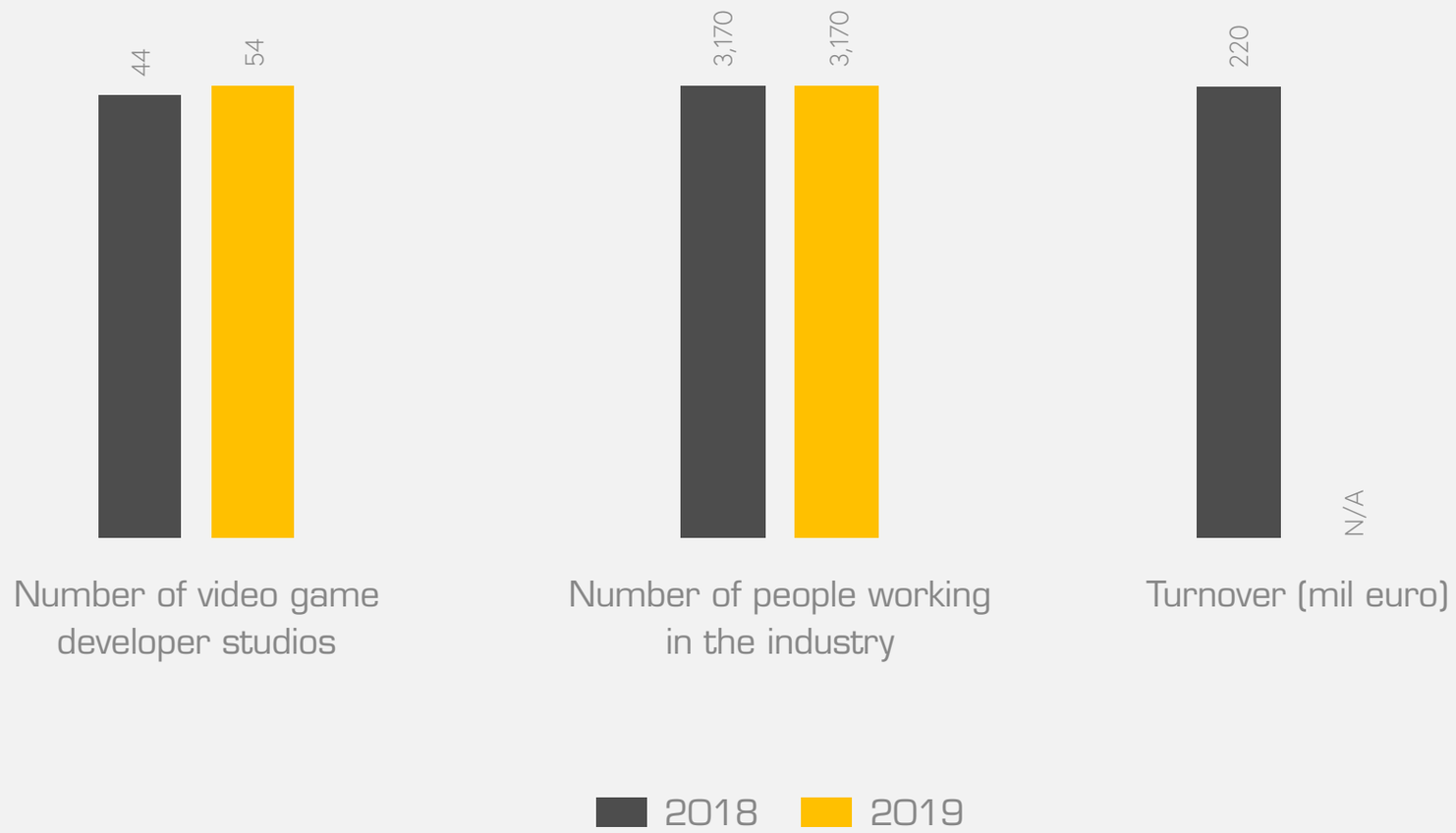
Lithuania

Lithuanian Game Developers Association



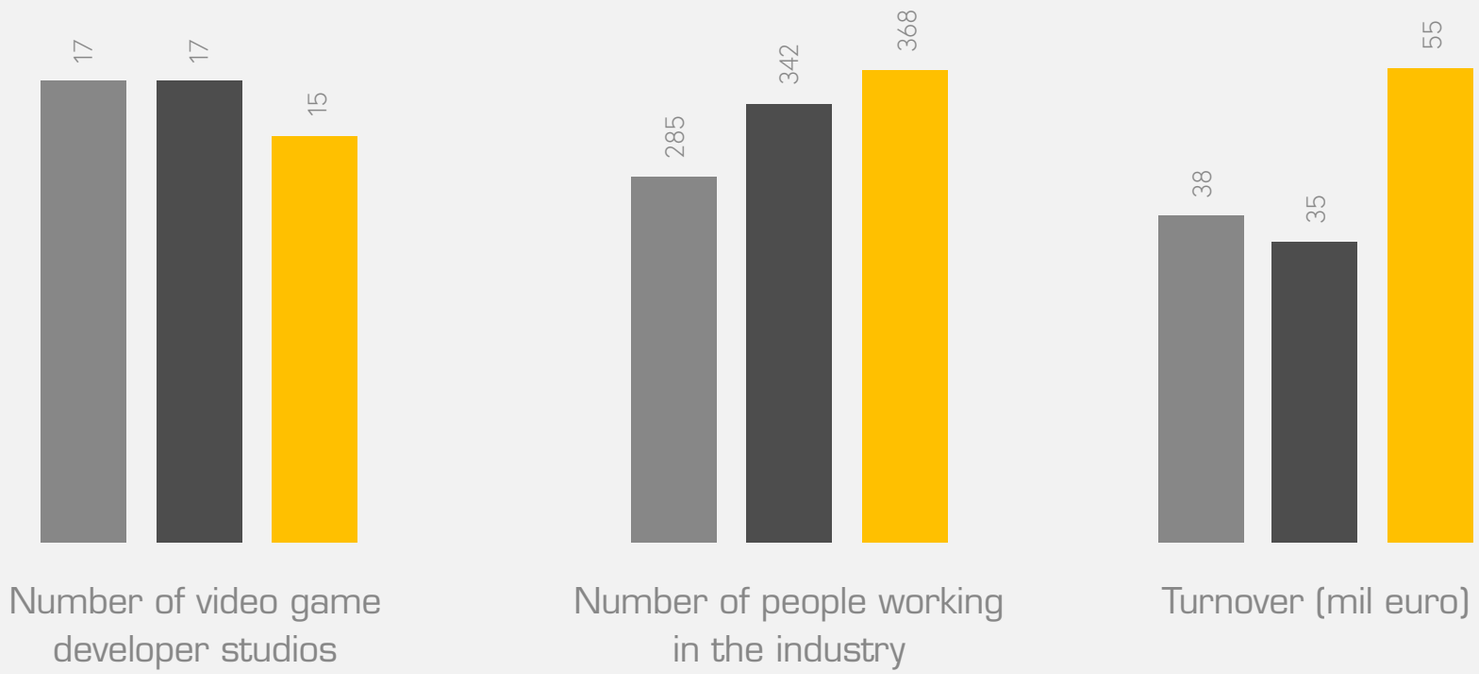
Netherlands

The Dutch Games Association



Norway

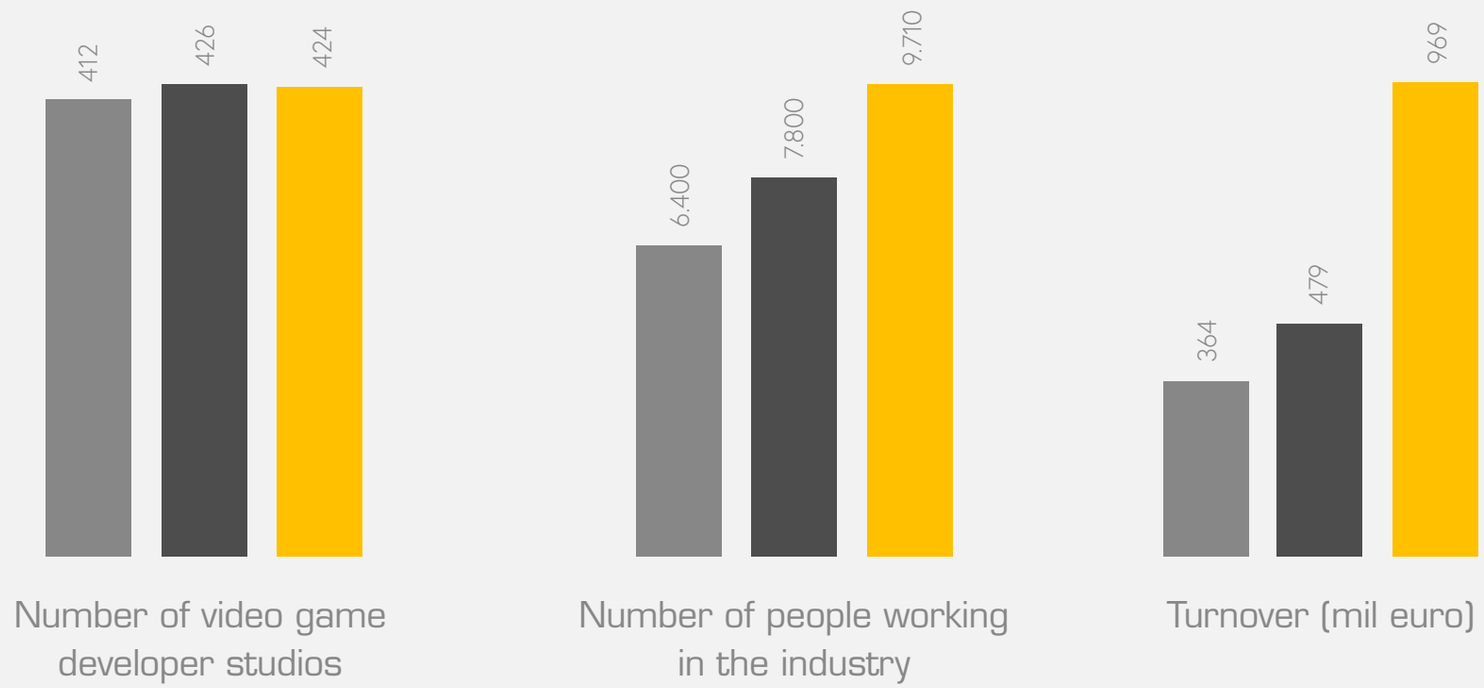
Virke Norwegian Producers Association



Find more information in the full report

Poland

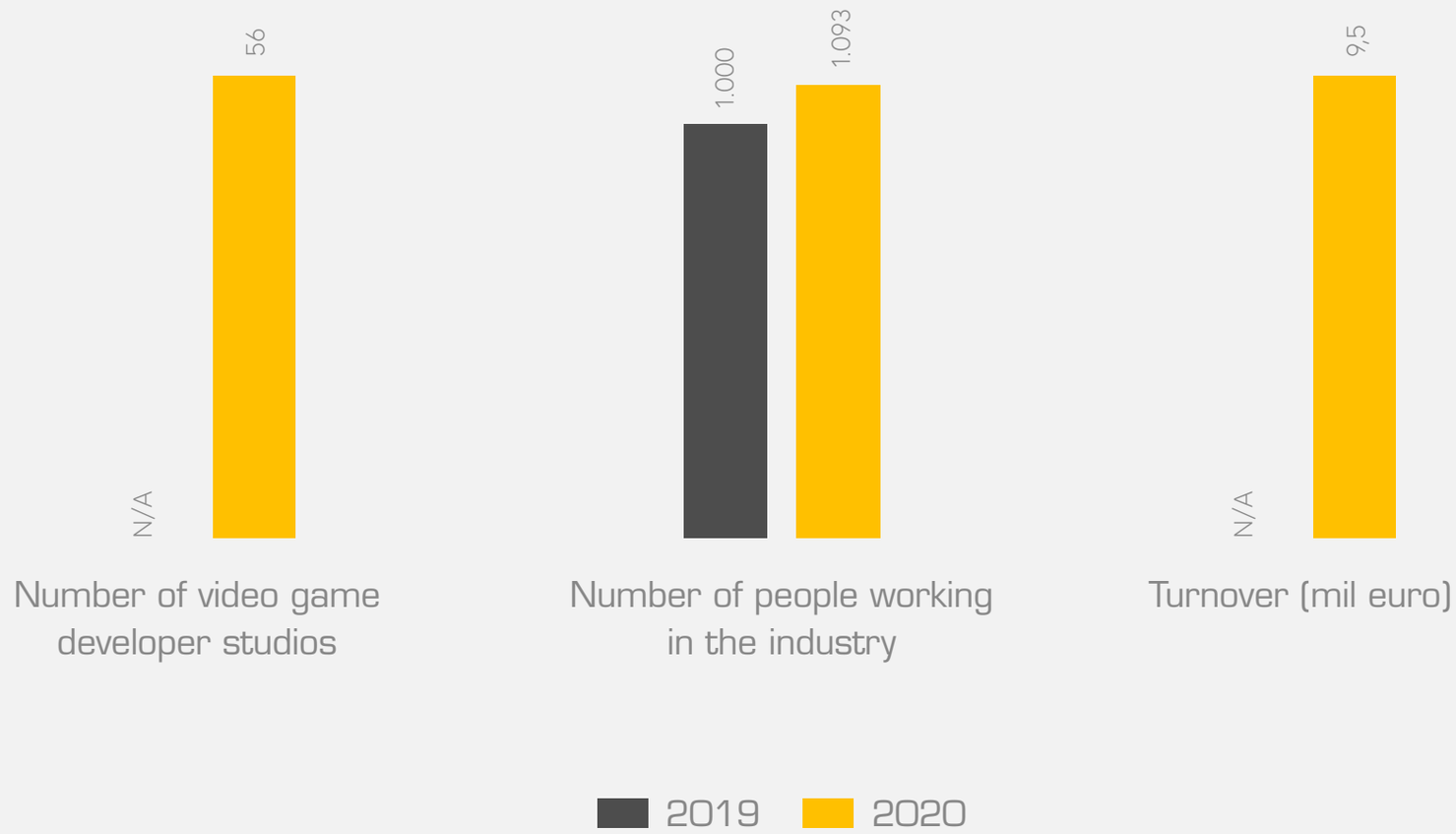
Indie Games Poland



Find more information in these full reports:

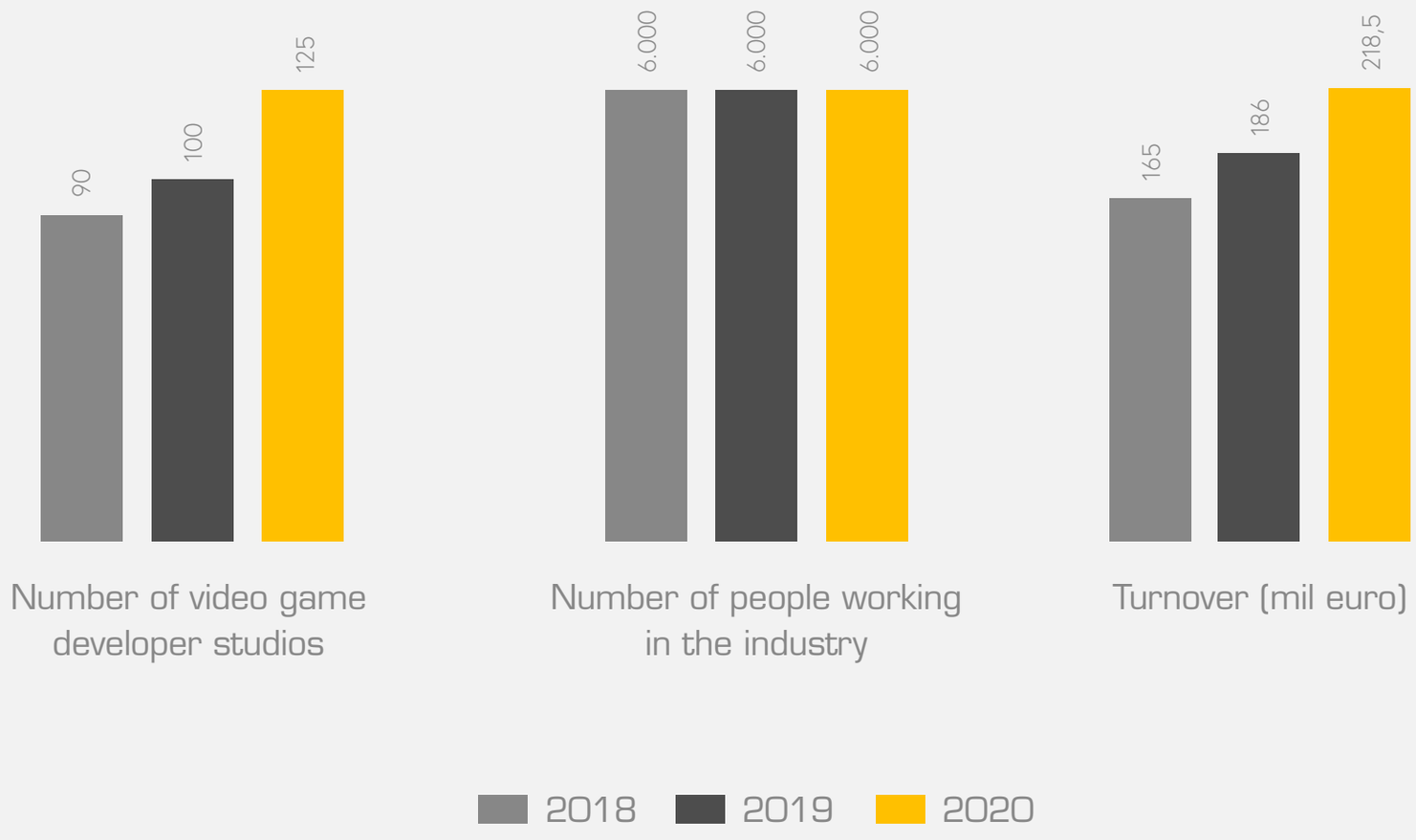
Portugal APVP

Associação Produtores de Videojogos Portugueses



Romania

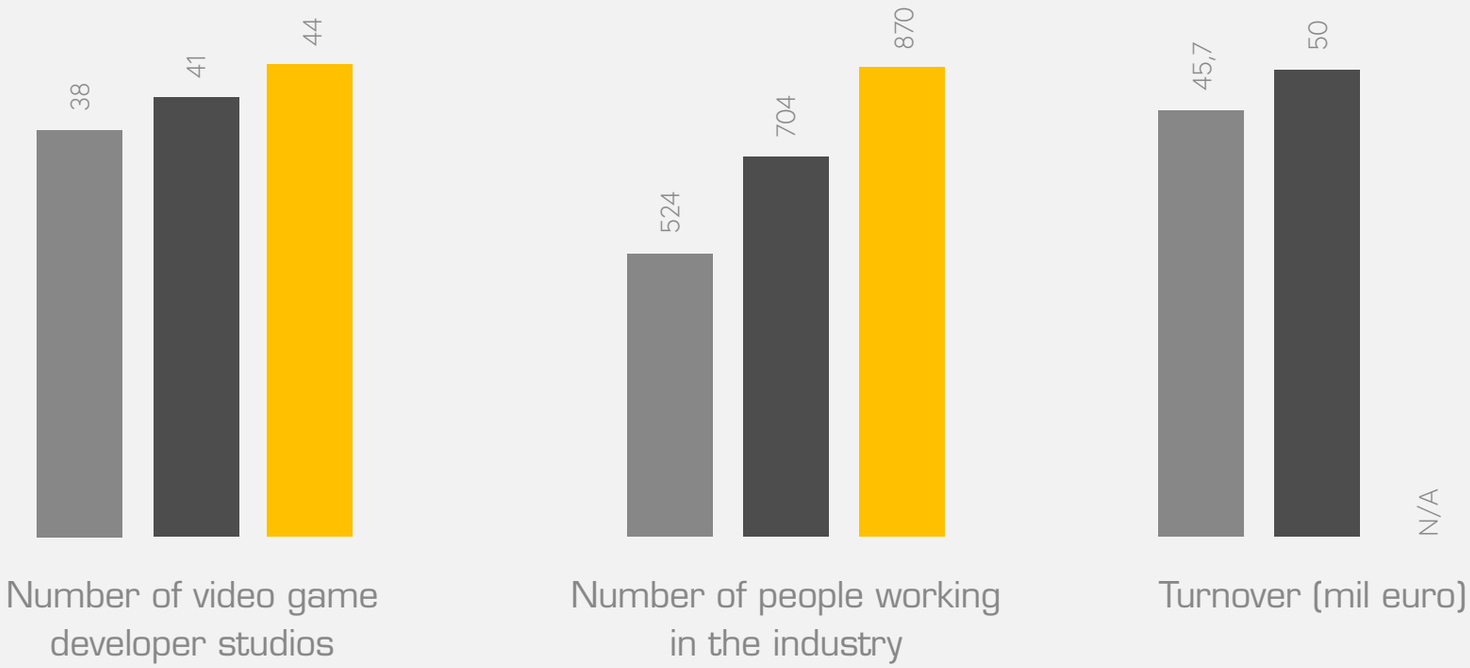
Romanian Game Developers Association



Find more information in the full report

Slovakia

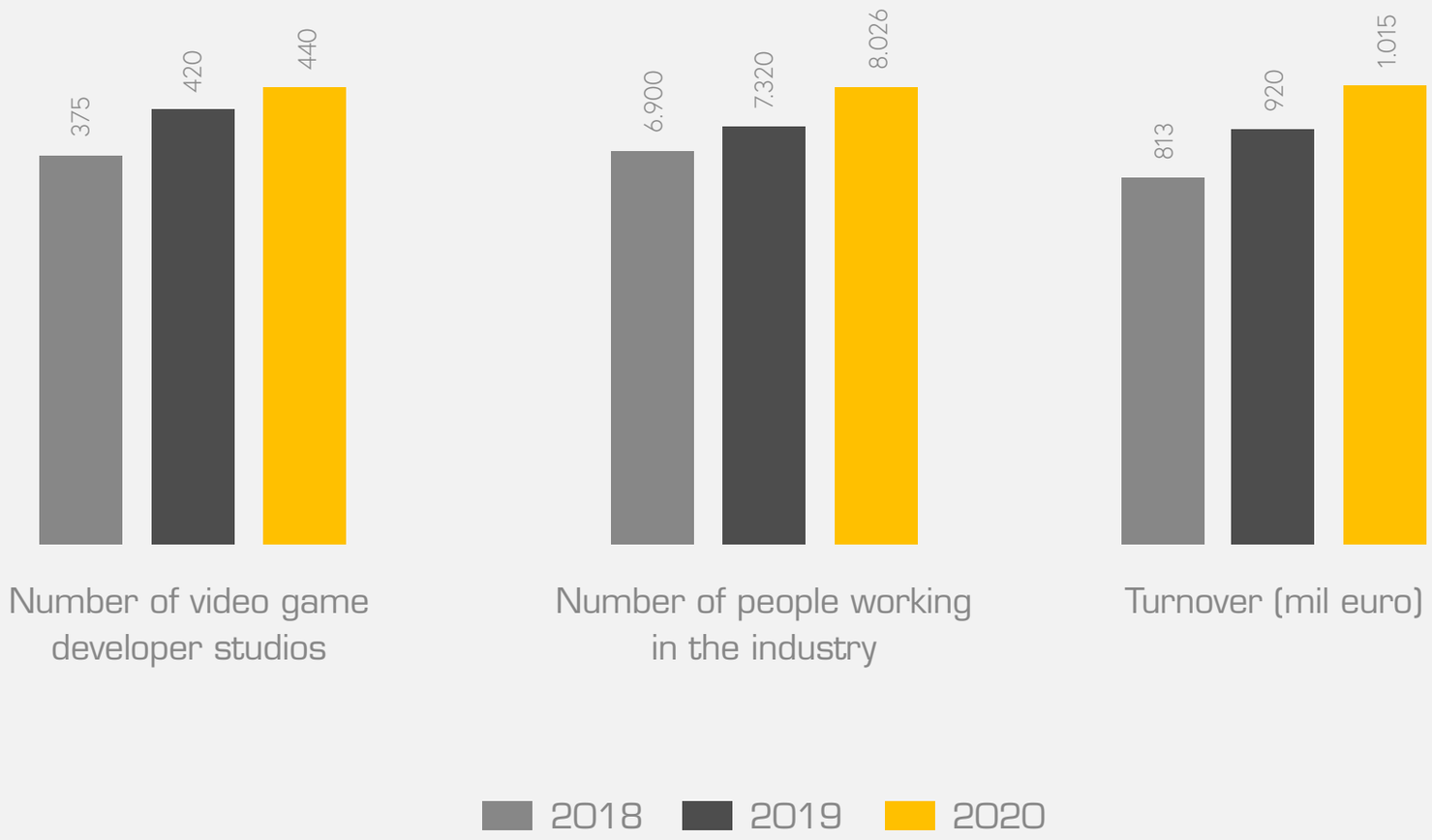
Slovak Game Developers Association



Find more information in the full report

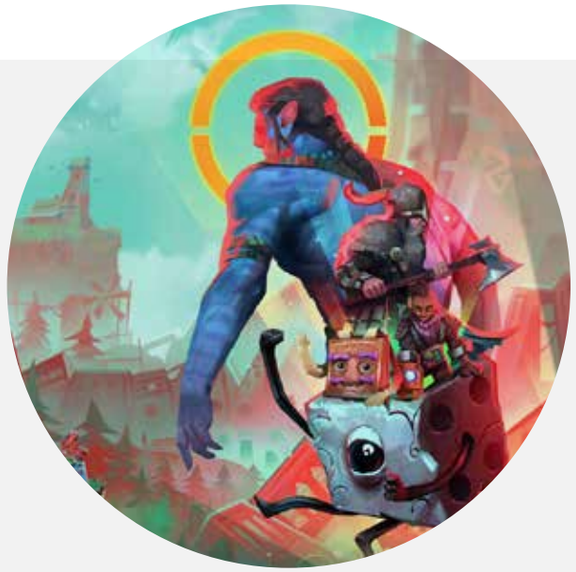
Spain

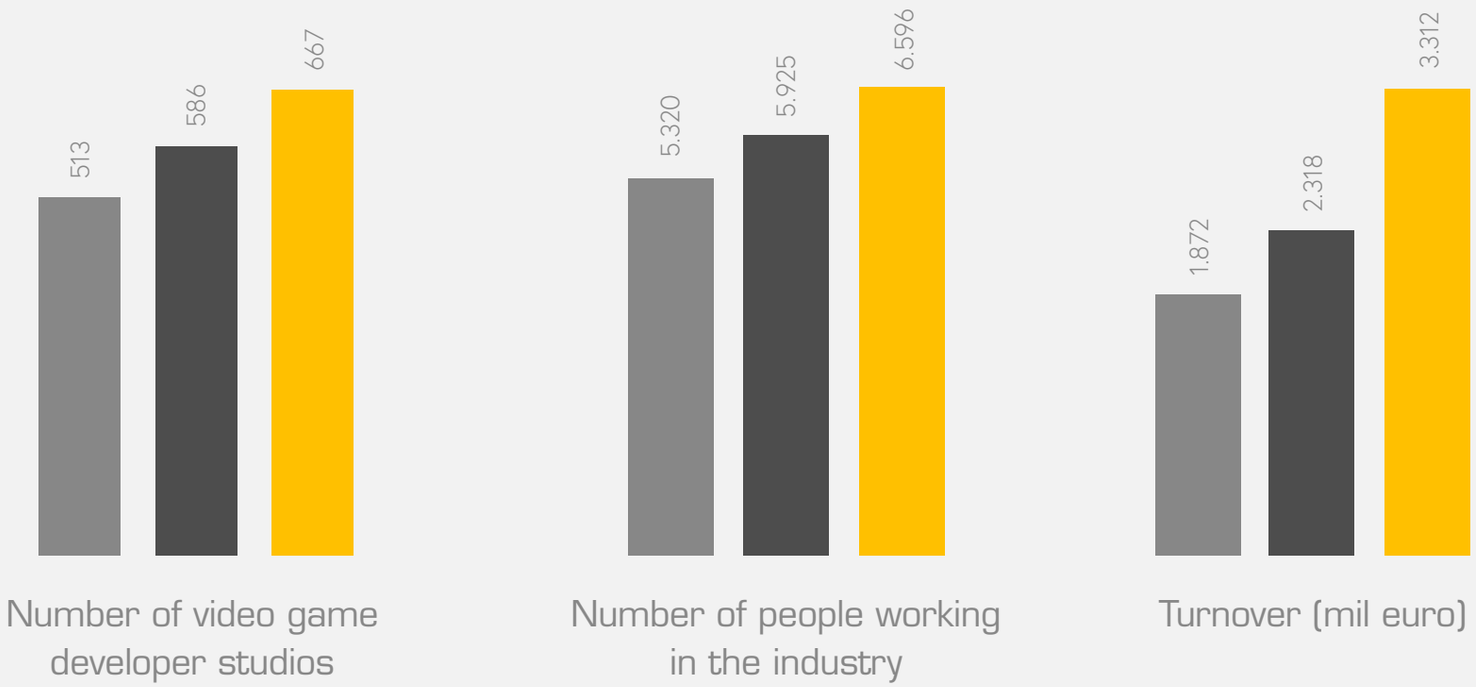
Spanish Desarrollo español de videojuegos



Sweden

Dataspelsbranschen/ Swedish Games Industry





Find more information in the full report

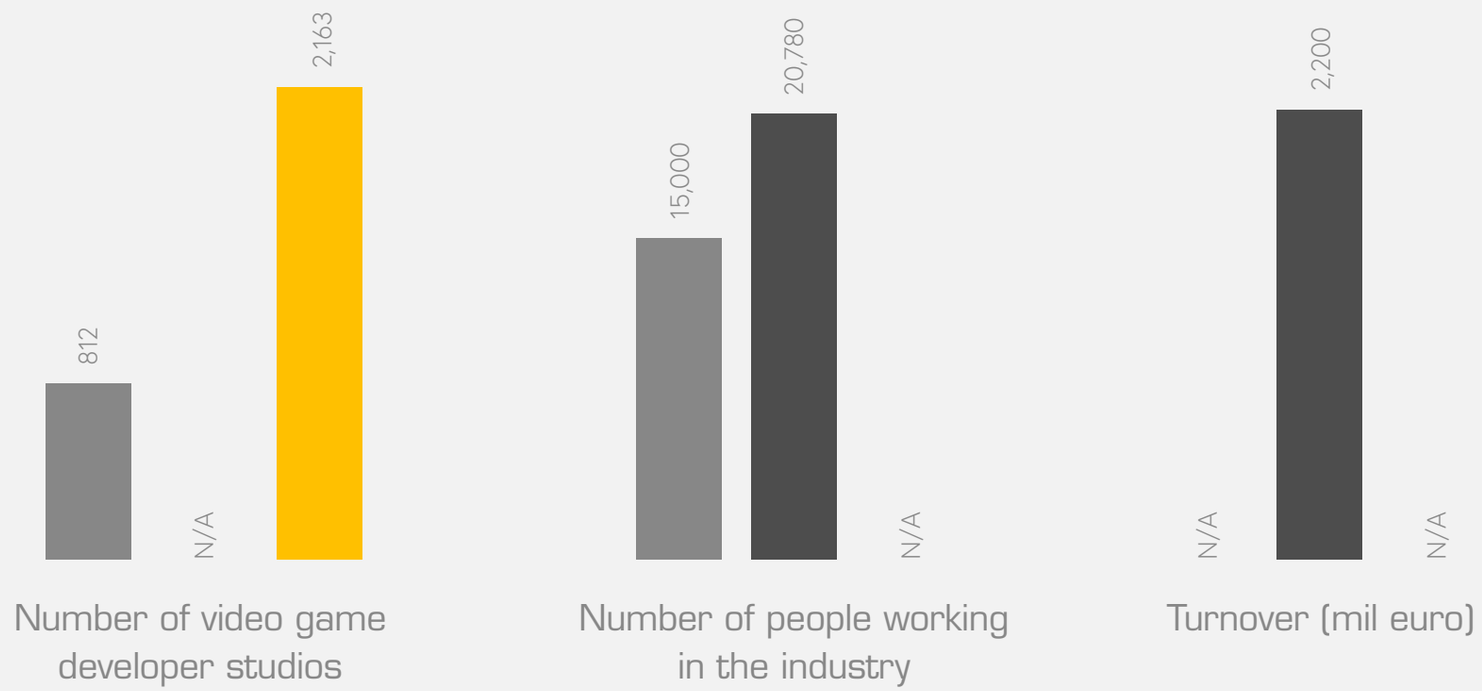
Turkey

TOGED (Game Developers Association of Turkey)

52	N/A	2016
Number of video game developer studios	Number of people working in the industry	Turnover (mil euro)

United Kingdom

TIGA and Ukie



The video game sections of the 2017-2019 screen business report have excellent reporting on the UK games industry:
Ukie's 2020 consumer valuation:

* Data from TIGA ** Data from Ukie

QUESTIONNAIRE

Questionnaire

0. Methodology:

Definitions:

--> *A game developer studio- is a sole trader or a self-employed person engaged in an economic activity or a company that is registered in the local trade register, 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 third-party publisher is a company registered in the local trade register that publishes third-party games on behalf of game developer studios that developed them.*

--> *Do not include data from service providers that is not also a game developer studio or publisher.*

--> *A service provider is a company that does not make significant artistic contributions to new games. Service provider is for example a business, legal or HR consulting company, QA testing services or analytics services. Service provider is also a company which role is strictly limited to creating assets (for example music or graphics) for other game developer studios or only porting existing games for new platforms.*

--> *Do not include retail game distribution companies and retailers.*

--> *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 often has to be evaluated case by case.*

0.1. How was the data collected? For example, is data based on information collected from a business register or on interviewing companies? Did you collect the data by yourself or is the data aggregated from third party sources? If yes, what was the source of the data? (Open question)

0.2. 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)

0.3. All in all, what is the number of developers and publishers you were able to get data from? Do not include service providers into this number. (Number)

0.4. What is the strength of your data? Have you faced any challenges in collecting the data? (e.g. data is focused on large companies, mediums size companies, one man studios or

early-stage start-ups and established companies or mobile, console, PC, VR etc. game developers). Has there been major changes in your data collection methodology? How much the data was extrapolated? (Open question)

0.5 If you have published a report on 2020 data, please send us a link to it:

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

Definitions:

DO INCLUDE:

--> *A game developer studio- is a sole trader or a self-employed person engaged in an economic activity or a company that is registered in the local trade register, 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 third-party publisher is a company registered in the local trade register that publishes third-party games on behalf of game developer studios that developed them.*

--> *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 often has to be evaluated case by case.*

DO NOT INCLUDE:

--> *Do not include retail game distribution companies and retailers.*

--> *Do not include data from service providers that is not also a game developer studio or publisher.A service provider is a company that does not make significant artistic contributions to new games. Service provider is for example a business, legal or HR consulting company, QA testing services or analytics services. Service provider is also a company which role is strictly limited to creating assets (for example music or graphics) for other game developer studios or only porting existing games for new platforms.*

--> *Do not include holding companies. A holding company is a company that holds stocks of game developer studios and third-party publishers.*

1.1. Number of active game developer studios and publishers in your country

1.1.1. What was the total number of active game developer studios and publishers located in your country in 2020?

1.1.2. What is the total number of active game developer studios in your country? Both studios doing self-publishing or using external publishers are taken into account (Number)

1.1.3 What was the number of active third-party publishers located in your country in 2020? (Number)
Please note that a company can be at the same time game developer studio and a third-party publisher.

1.2. What is the number of local holding companies investing in game developer studios and third-party publisher in your country?

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

Definitions:

DO INCLUDE:

--> *Employees: 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.*

--> *Remote working employees in third countries: If a studio has remote working employees in third countries, they should be included in the employment data of the country where the studio is registered in.*

DO NOT INCLUDE:

--> *Employees in subsidiaries in third countries: 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.*

--> *Subcontractors in third countries: If a studio has a subcontractor (a company) in a third country, this should not be included in the employing data.*

2.1 What was the number of people working for game developer studios and publishers in your country in 2020? (Number)

2.2 Gender of employees

2.2.1. What percentage of the people, working for the local game developer studios and publishers, were women in 2020? (Percentage)

2.2.2. What percentage of the people, working for the local game developer studios and publishers, were men in 2020? (Percentage)

2.2.3. What percentage of the people, working for the local game developer studios and publishers, were other genders in 2020? (Percentage)

2.3. Gender of CEOs

2.3.1. What is the number of women CEOs in your country?

2.3.2. What is the share of women CEOs in your country?

2.3.3. What is the number of men CEOs in your country?

2.3.4. What is the share of men CEOs in your country?

2.3.5. What is the number of other gender CEOs in your country?

2.3.6. What is the share of other gender CEOs in your country?

3. Revenue generated by the industry.

Definitions:

DO INCLUDE:

--> *Industry turnover means the net revenue generated by all game developer studios and publishers established in your country, including subsidiaries of big global games industry conglomerates. For non-euro countries, please use annual average currency exchange rate for the year.*

DO NOT INCLUDE:

--> *The turnover does not mean the revenue generated by consumers sales of games in your country (e.g. revenue from retailers of platforms from selling games to players in your country; a.k.a. data on market size).*

3.1. What was the total turnover of local game developer studios and publisher located in your country in 2020? (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

DO INCLUDE:

--> *New games: 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.*

--> *Coproductions: coproduction is a game that is produced jointly by a number of different games developer studios. In co-prduction revenue generated is typically split between paricipating parties and IP created is co-owned.*

4.1. What was the number of game developer studios located in your country that published new games during 2020? Please include both the companies that self-published new games and companies that used third-party publisher for publishing new games. Coproduction games should be included in the data of each contributing country. (Number)

4.2. What was the number of new titles published by game developer studios in your country in 2020? Please include both the companies that self-published new games and companies that used third-party publisher for publishing new games. Games developed by the local subsidiaries of

big global industry conglomerates should be included in this number. (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? (Percentage) Please explain your methodology of calculating this.

5. Game education

Definitions

DO INCLUDE:

--> *Educational institution: is a formal private or public educational institution proving education leading to a degree.*

DO NOT INCLUDE:

--> *Different game education program in the same educational institution: 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.*

--> *Informal programs (e.g. private online programs run by game developer studios and publishers) should not be included in this data.*

5.1. What is the number of educational institutions providing educational programs focused on game development? If one institution has more than one game focused degree programs, it should be calculated only once. Can you identify which ones of them are higher education institutions like universities or universities of applied sciences and which ones secondary education institutions like vocational colleges. (Number)

5.2. What is the number of non-formal institutions providing programs focused on game development? (Institutions which provide non-degree-oriented game education)

5.3. Please check the list that EGDF has published last year, and notice us if there are any changes. Can you provide links to this institutions?

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*

Please check the list that EGDF published last year.

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. Please provide a link to this funding program

6.1.3. Cultural loans and loan guarantees in general

6.1.4. Cultural loans and loan guarantees dedicated for game developer studios. Please provide a link to this funding program

6.1.5. Cultural tax credits in general

6.1.6. Cultural tax credits dedicated for game developer studios. Please provide a link to this funding program

6.1.7. Cultural equity funding in general

6.1.8. Cultural equity funding dedicated for game developer studios. Please provide a link to this funding program

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. Please provide a link to this funding program

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. Please provide a link to this funding program

6.2.5. R&D tax credits in general

6.2.6. R&D tax credits dedicated for game developer studios. Please provide a link to this funding program

6.2.7. R&D equity funding in general

6.2.8 R&D equity funding dedicated for game developer studios. Please provide a link to this funding program

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. Please provide a link to this funding program
- 6.3.3. SME loans and loan guarantees in general
- 6.3.4. SME loans and loan guarantees dedicated for game developer studios. Please provide a link to this funding program
- 6.3.5. SME tax credits in general
- 6.3.6. SME tax credits dedicated for game developer studios. Please provide a link to this funding program
- 6.3.7. SME equity funding in general
- 6.3.8. SME equity funding dedicated for game developer studios. Please provide a link to this funding program
- 6.3.9. None of the above

APPENDIX

Percentage of games developed for various platforms

2020

COUNTRY	PLATFORMS					
	PC/MAC	CONSOLE	MOBILE/ TABLET	BROWSER	VR/AR	OTHER
Austria	**72%**	33%	65%	17%	N/A	N/A
Belarus	8%	5%	**91%**	4%	3%	N/A
Czech Republic	**64%**	N/A	45%	N/A	N/A	N/A
Estonia	**65%**	14%	28%	N/A	11%	N/A
Finland	11%	21%	**64%**	N/A	2%	2%
Ireland	**86.36%**	59.09%	27.27%	18.18%	4.55%	N/A
Lithuania	20%	5%	**67%**	5%	11%	N/A
Poland	**72%**	31%	12%	N/A	5%	N/A
Portugal	9%	17%	**49%**	N/A	N/A	28%
Romania	48%	33%	**58%**	N/A	N/A	N/A
Serbia	33%	6%	**40%**	11%	N/A	10%
Spain	**79%**	41%	61%	26%	13%	6%

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?

Notes: i) A single studio may create games for many platforms at the same time. ii) No data are available for countries not included.

European
Games Developer
Federation

ABOUT EUROPEAN GAMES DEVELOPER FEDERATION

Uniting the industry

The European Games Developer Federation e.f. (EGDF) unites national trade associations representing game developer studios based in 22 European countries: Austria (PGDA), Belgium (FLEGA), Croatia (CGDA), Czech Republic (GDACZ), Denmark (Producentforeningen), Finland (Suomen pelinkehittäjät), France (SNJV), Germany (GAME), Italy (IIDEA), Lithuania (LZKA), Netherlands (DGA), Norway (Produsentforeningen), Poland (PGA, Indie Game Poland Foundation), Portugal (AVPV), Romania (RGDA), Serbia (SGA), Spain (DEV), Slovakia (SGDA), Sweden (Spelplan-ASGD), Switzerland (SGDA), Turkey (TOGED) and the United Kingdom (TIGA). For more information, visit https://www.egdf.eu/

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