

European Game Industry in 2018



EGDF Report on the European Games Industry in 2018

For this report EGDF has aggregated national data from 2018 on the state of local games industry from 19 European countries: Belgium, Denmark, Poland, Slovakia, Sweden, Finland, UK, Netherlands, Norway, Germany, Czechia, France, Romania, Slovenia, Serbia, Bulgaria, Turkey, Greece and Ireland.

This first time, EGDF has developed methodology to make the data more comparable between countries. For this reason, data on the national reports does not necessarily fully match with the data reported on the national reports.

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. When data is based on estimations, it is marked by * and by gray color in the charts. Where data is marked N/A, EGDF has no available data collected from the respective countries.

Links to national reports are available at Annex 1 and at <http://www.egdf.eu/data-and-studies/>

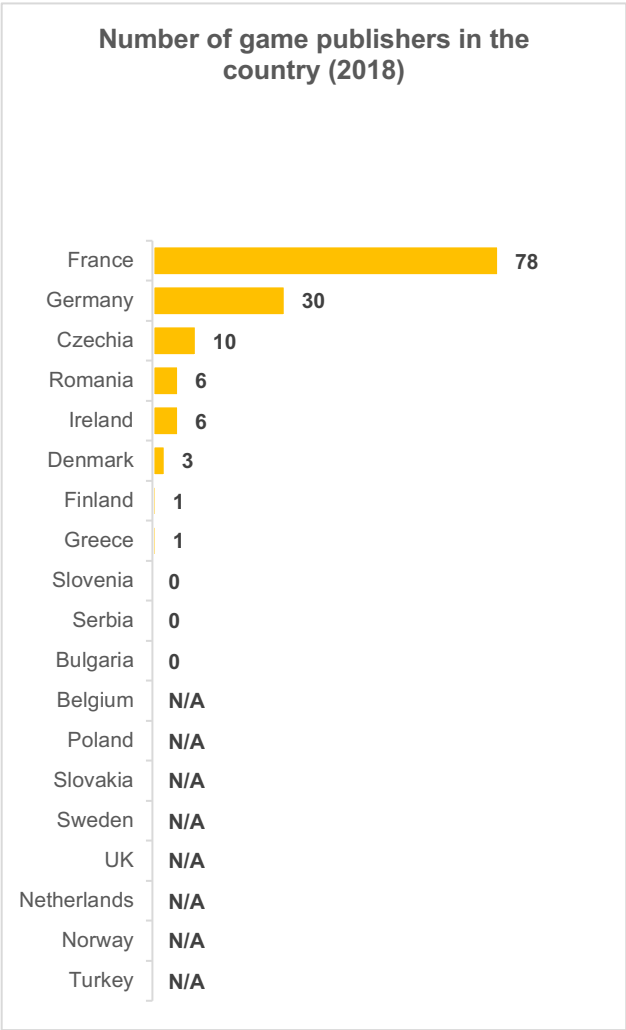
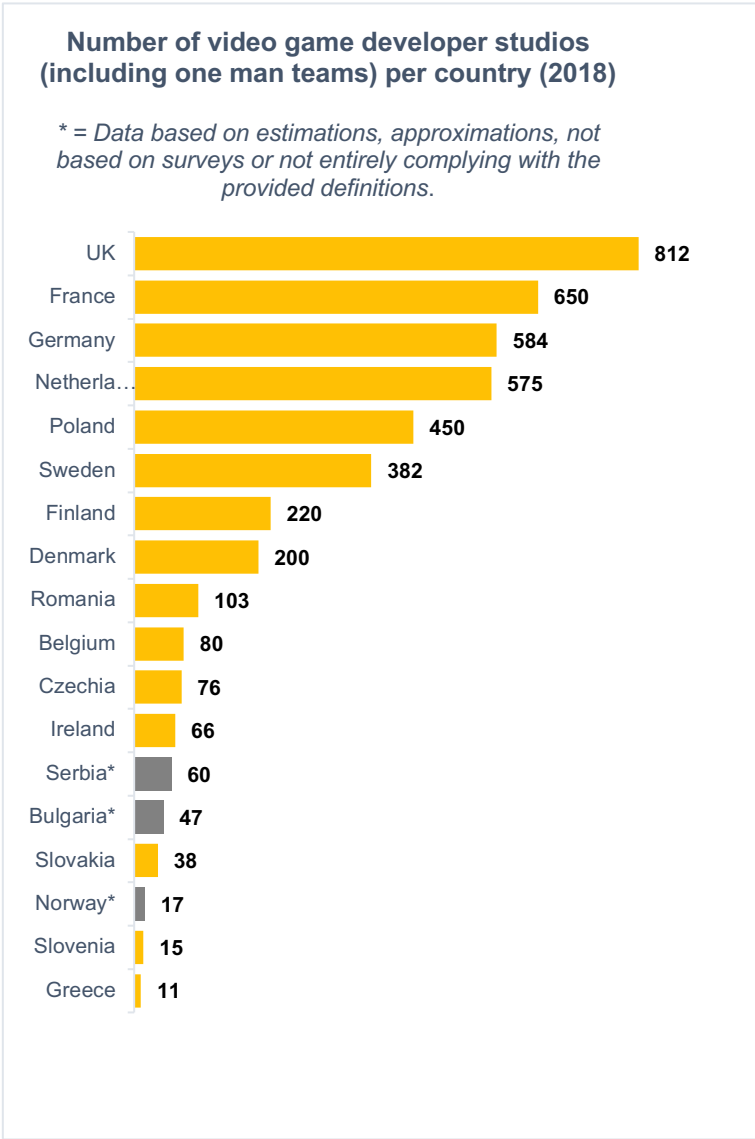
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1. European games industry in 2018

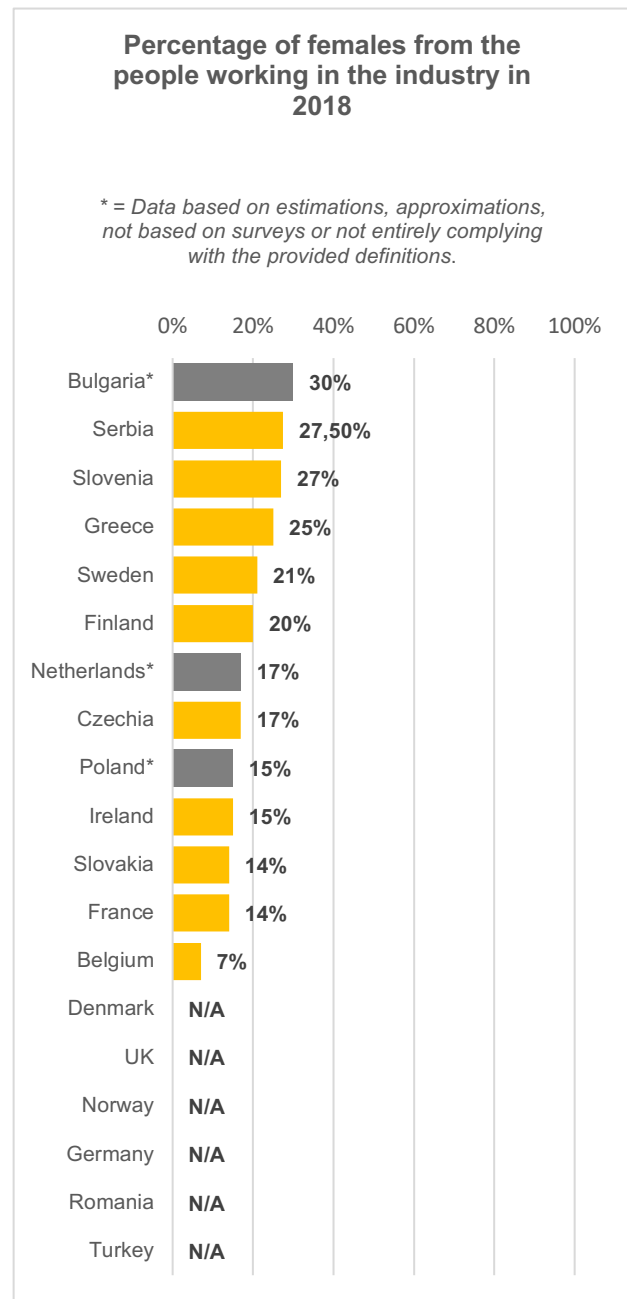
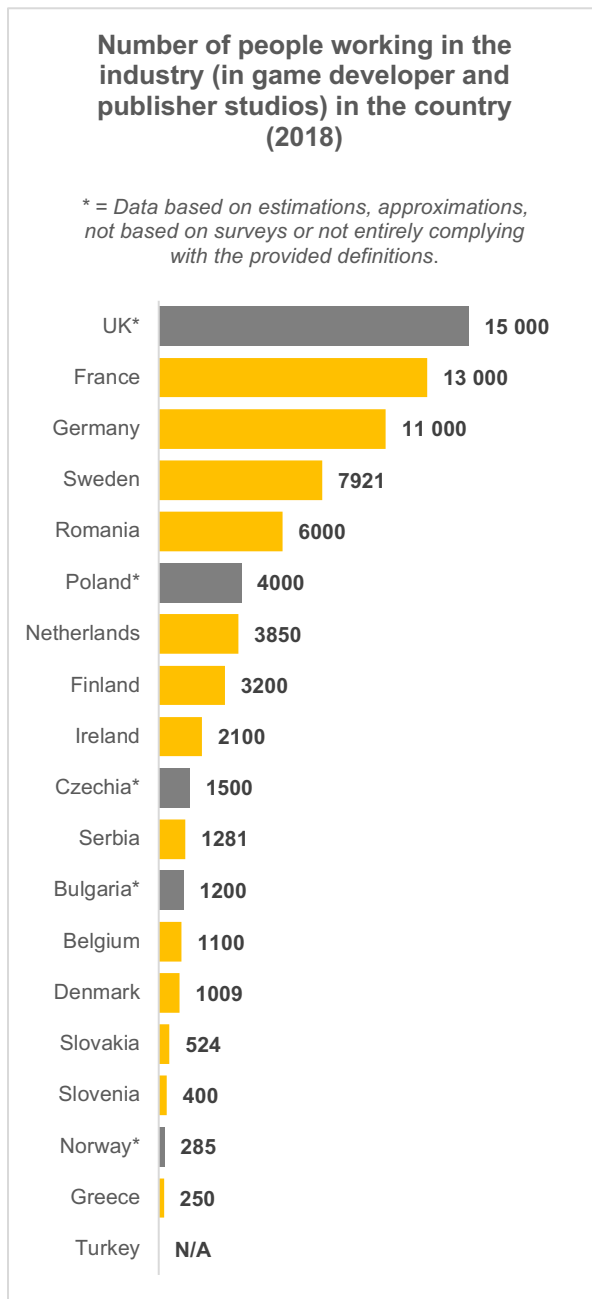
4906
Game dev studios
137
Game publishers
77916
People employed

2. Game developer studios and publisher per country





3. People working for the industry

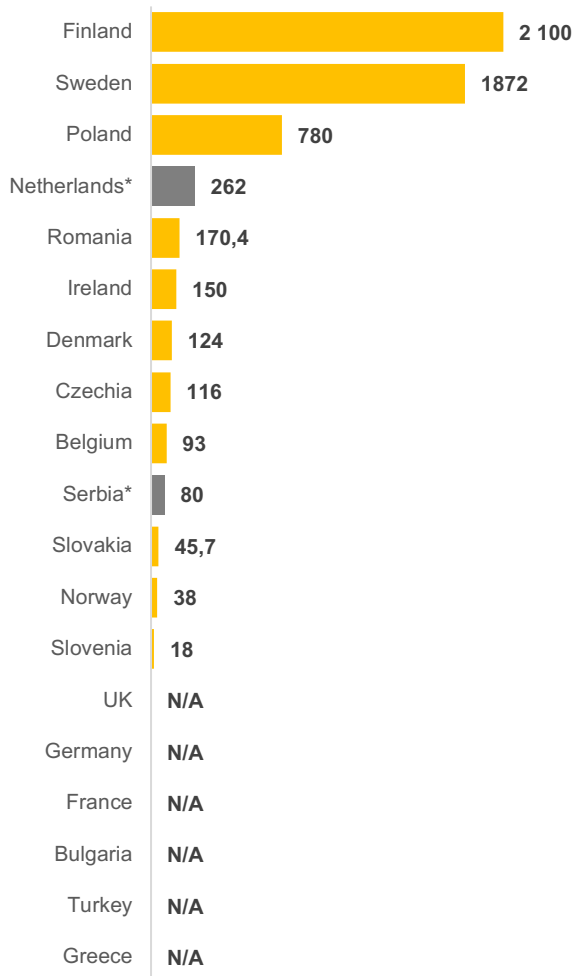




4. Revenue generated by the industry

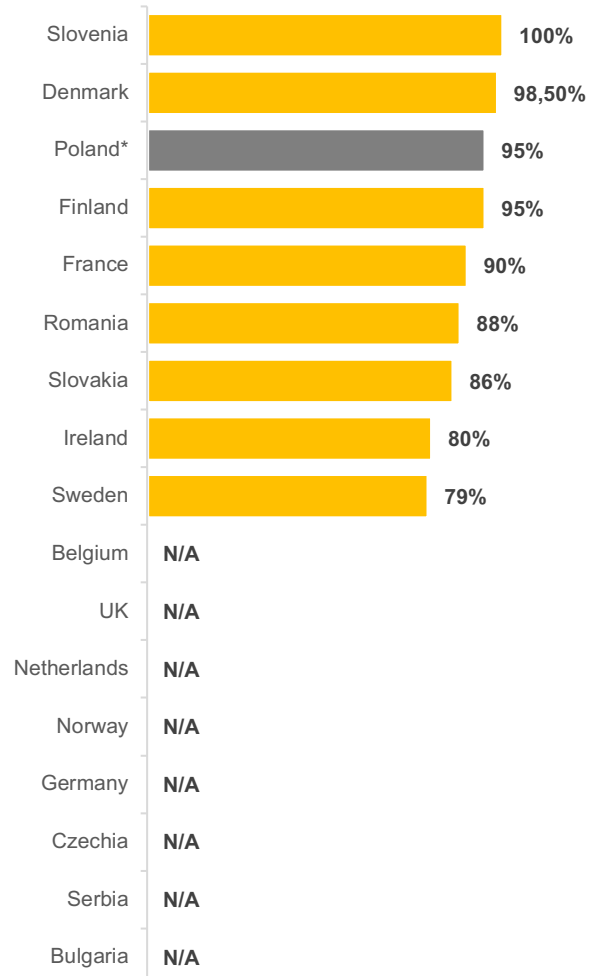
Total revenue of local game developer studios and publishers in 2018 (million euro)

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

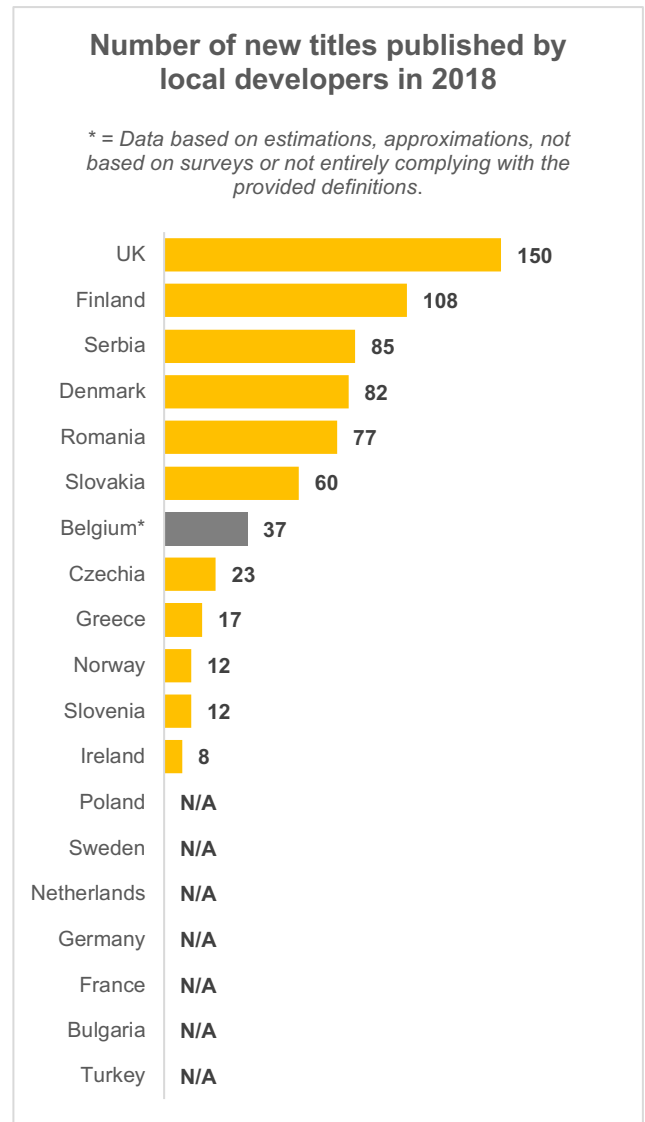
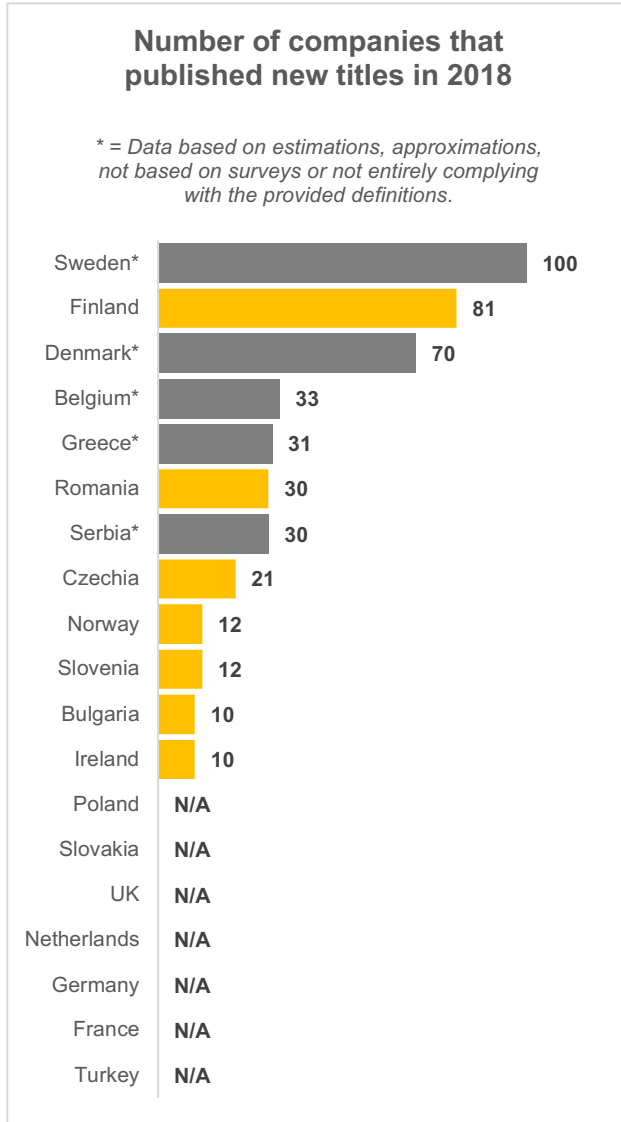


Percentage of how much of total revenue was accumulated by the top 10% studios in 2018

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



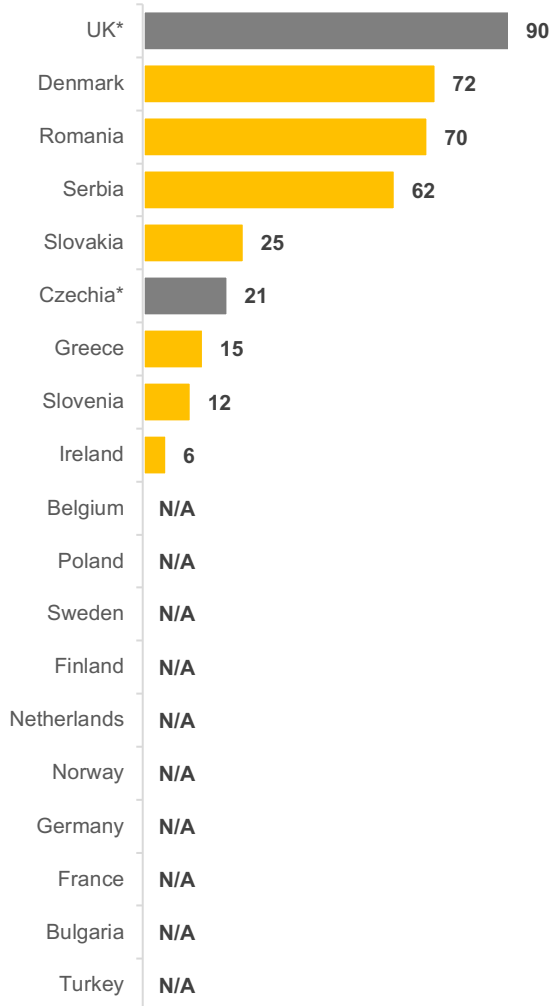
5. New games





Number of new titles from 2018 which were self-published titles

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

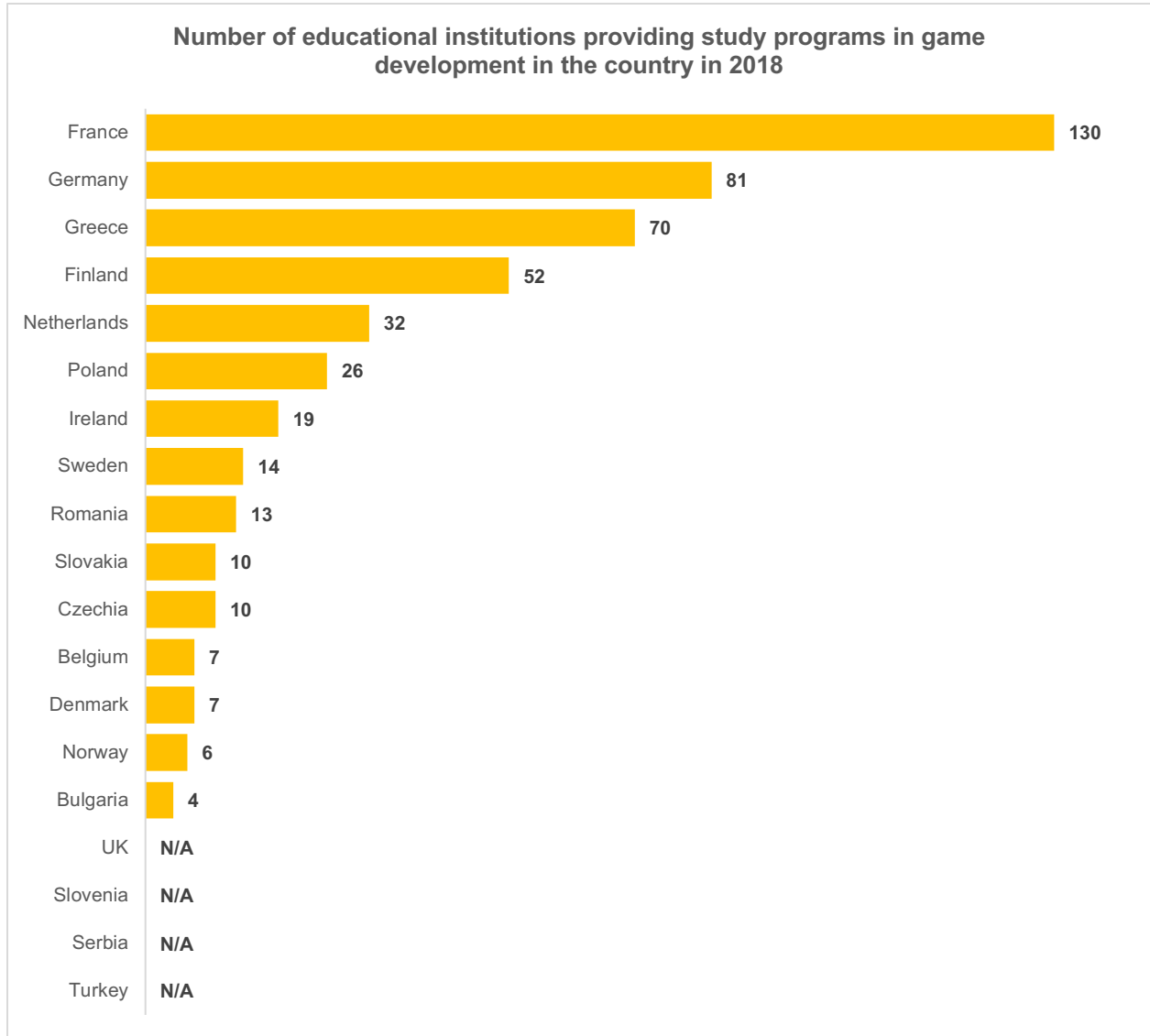


Number of new titles from 2018 which were published by an external publishers or other

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



6. Games education



7. Available public support for game developer studios per country

Country	Cultural state aid for production				R&D aid for innovation				SME aid for launching a game dev studio			
	Grants	Loans *	Tax Credits	Equity	Grants	Loans *	Tax Credits	Equity	Grants	Loans *	Tax Credits	Equity
Belgium	X		X		X	X	X		X	X	X	
Denmark	X			X	X				X	X		X
Poland	X	X			X		X		X	X		
Slovakia	X								X			
Sweden							X					
Finland	X				X	X			X	X		X
UK			X				X		X			
Netherlands	X		X		X		X		X	X	X	
Norway	X	X	X		X	X	X		X	X	X	
Germany	X	X		X	X				X			
Czechia												
France	X	X	X	X	X		X		X	X		X
Romania									X		X	
Slovenia									X	X		
Serbia							X					
Bulgaria												
Turkey												
Greece		X	X		X	X		X	X	X	X	X
Ireland	X			X	X			X	X			X

Annex 1: National studies on the state of games industry in Europe in 2018

Austria:

Game Development Studie 2019: <https://www.wko.at/branchen/information-consulting/unternehmensberatung-buchhaltung-informationstechnologie/game-development-studie-2019.pdf>

Czechia:

Czech Video Game Industry 2019: <https://gda.cz/wp-content/uploads/2019/08/CzechGamesIndustry.pdf>

Finland:

Finnish Game Industry 2018 Report: <http://www.neogames.fi/wp-content/uploads/2019/04/FGIR-2018-Report.pdf>

Germany:

The German Games Industry 2019 Report: https://www.game.de/wp-content/uploads/2018/08/game-Jahresreport-2019_web.pdf and https://www.game.de/wp-content/uploads/2017/02/2019-10-31-Guide-to-the-German-Games-Industry_NEU.pdf

Norway:

VIRKE SPILL-rapporen 2019/2020: <https://www.virke.no/globalassets/3.bransjer/service-og-kultur/producentforeningen/virke-spillrapporten-2019.pdf>

Italy:

Quarto censimento dei game developer italiani 2019: http://www.aesvi.it/cms/view.php?dir_pk=902&cms_pk=2975

Romania:

Romanian Games Industry Report 2019: http://rgda.ro/wp-content/uploads/2019/11/RGDA_2019-report.pdf

Slovakia:

Slovak Game Industry 2019: <http://sgda.sk/wp-content/uploads/2019/08/Slovak-Game-Industry-2019.pdf>

Spain:

Libro Blanco del Desarrollo Español de Videojuegos 2018:
<http://hostmaster.dev.org.es/images/stories/docs/Libro%20Blanco%20DEV%202018.pdf>

Serbia:

Serbian Gaming Industry Report 2018 <http://sga.rs/wp-content/uploads/2019/11/SGA-Report-Digital.pdf>

Sweden:

Spelutvecklarindex 2019:
https://static1.squarespace.com/static/5a61edb7a803bb7a65252b2d/t/5db6be7415366869893e1866/1572257420429/Spelutvecklarindex2019_v3.pdf and
https://static1.squarespace.com/static/5a61edb7a803bb7a65252b2d/t/5db812f3df1a2166b947a58a/1572344586626/GDI19_web.pdf

Ukraine:

Game Development in Ukraine 2018: <https://42.unit.city/gamedev/update2018>

Annex 2: Educational institutions providing study programs in game development in Europe in 2018

BELGIUM

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

BULGARIA

- Sofia University
- Soft Uni
- Arc Academy
- Technical University - Sofia

CZECHIA

- Academy of Performing Arts Prague
- Czech Technical University in Prague, Faculty of Electrical Engineering
- Czech Technical University in Prague, Faculty of Information Technology
- Brno University of Technology, Faculty of Information Technology
- Charles University in Prague, Faculty of Mathematics and Physics
- University of West Bohemia in Pilsen, Faculty of Design and Arts
- Higher vocational school graphic in Jihlava
- Secondary School of Film, Multimedia and Computer Technologies
- since 2020 also Prague FAMU
- [+ 8 universities](#) that offer courses relating to the game development (*Annex 5 at page 55*)

DENMARK

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

FINLAND

- [52 institutions](#)

FRANCE

- 130+ schools & universities

GREECE

- [SAE Institute](#), Bachelor in Games Programming (BSC) & Game Design
- New York College in Athens, University of Bolton (UK), Undergraduate Studies: BSc in Computer Games Programming
- [IEK OMHROS](#), Web Developer, Video Games |
- Mediterranean College in Athens, University of Derby, Undergraduate Studies: BSc (Hons) Computer Games Programming, BSc (Hons)
- AKTO Game Design (BA) | EK Intergraphics, Game Development
- IST Executive Diploma in Games Development
- 13 Public Technical Schools on Informatics Applications
- Technicians (Multimedia / Web Design – Development / Video Games)
- 50 higher education departments in computer programming/ ICT/Computer science/ computer engineering

IRELAND

- 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

GERMANY

- [57 public institutions](#), [24 private institutions](#) - page 51

NETHERLANDS

- 32 institutions



NORWAY

- 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

- [26 institutions](#) - pages 92-94

SLOVAKIA

- 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)
- 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 Dev

SLOVENIA

- No specific game development studies, just regular technical and art studies.

SWEDEN

Universities and university colleges:

- Blekinge Tekniska Högskola
- Chalmers
- Högskolan i Skövde
- Luleå tekniska universitet
- Stockholms konstnärliga högskola
- Uppsala Universitet: Campus Gotland

Higher vocational educations:

- Forsbergs Skola
- FutureGames
- Indiespelutvecklare(folkhögskola)
- PlaygroundSquad
- The Game Assembly
- Upper secondary educations
- LBS Kreativa Gymnasiet
- Mediagymnasiet Nacka Strand

ROMANIA

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
- Nobleprog
- Media Academy
- Edukube
- Link Academy
- Pixellab training center

Industry Initiatives

- AMC RO Studio
- Amber Academy
- Gameloft Learning Center
- Ubisoft

For more information [Pages 45-47](#)

Annex 3: 2018 Questionnaire

I. Game developer studios and publishers in your country

What is the number of video game developer studios (including one-man teams) and game developer publishers you have in your country?

Definitions:

- A game developer studio is a game developer studio, whose main source of turnover is coming from developing game.
- A publisher is a studio that is publishing games on behalf of game developer studios. It gets most of its turnover from publishing games that are not developed by itself.

Do you have a non-exhaustive list of all game developers and publishers in your country on your website ? Please give us a link to your website.

II. Number of new games published by studios located in your country in 2018:

a) How many companies published new titles in 2018? How many new titles were published by local developers in 2018?

Definitions:

- What is a new game? Only a new game for global launch. Not alpha or soft launch or early access game. If game is ported on a new platform, only if it is significantly different from another version.

b) On what platforms were these titles published? PC / Console / Mobile / Multi-Platform / OTHER (e.g. browser games, chat games etc.)

c) How many self-published titles and how many by external publishers or OTHER (please describe)?

III. Workforce

What is the number of people working in the industry (meaning game developer and publisher studios) in your country?

How many of them are females?

Definition:

- By number of people working in the industry in your country, We mean full time employees, entrepreneurs, in-house freelancers etc.

IV. Game education

Please provide a list of the educational institutions providing study programs in game development in your country.

V. The total revenue incurred by companies developing video games in your country (in euros €).

a) What is the total revenue of your local game developer studios and publishers in 2018?

b) How concentrated is your industry? How much of your total revenue was accumulated by your top 10% studios?

Definition:

- Revenue means the net sales generated by a business. Use annual average 2018 currency exchange rate

VI. Public support

How does the legislative environment look like in your country? Click the box, if yes.

Cultural state aid:

- Grants:
- Loans (including loan guarantees):
- Tax credits:
- Equity:

R&D:

- Grants:
- Loans (including loan guarantees):
- Tax credits:
- Equity:

SME:

- Grants:
- Loans (including loan guarantees):
- Tax credits:
- Equity: