2019 EUROPEAN VIDEO GAMES INDUSTRY INSIGHTS REPORT

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

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

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

4913 game dev studios¹

* #N/B: Not available

¹ Europe: 4913 game dev studios
Number of game publishers

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

203 game publishers

* Numbers marked with an asterisk (*) indicate estimations, approximations, or data 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

<table>
<thead>
<tr>
<th>COUNTRY</th>
<th>YEAR</th>
<th>PC/MAC</th>
<th>CONSOLE</th>
<th>MOBILE/ TABLET</th>
<th>BROWSER</th>
<th>VR/AR</th>
<th>OTHER</th>
</tr>
</thead>
<tbody>
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<td>Belgium</td>
<td>2019</td>
<td>32%</td>
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<td>16%</td>
<td>17%</td>
<td>17%</td>
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</tr>
<tr>
<td></td>
<td>2018</td>
<td>29%</td>
<td>16%</td>
<td>18%</td>
<td>10%</td>
<td></td>
<td>27%</td>
</tr>
<tr>
<td>Czechia</td>
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<td></td>
<td></td>
<td>67%</td>
<td>41%</td>
<td>16%</td>
<td>8%</td>
</tr>
<tr>
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<td>2018</td>
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<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Finland</td>
<td>2019</td>
<td>38%</td>
<td>7%</td>
<td>63%</td>
<td>1%</td>
<td>3%</td>
<td>50%</td>
</tr>
<tr>
<td></td>
<td>2018</td>
<td>52%</td>
<td>14%</td>
<td>59%</td>
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<td></td>
</tr>
<tr>
<td>France</td>
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<td>80%</td>
<td>45%</td>
<td>70%</td>
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<tr>
<td></td>
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<tr>
<td></td>
<td>2018</td>
<td>51.50%</td>
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<tr>
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<td>15%</td>
<td>5%</td>
<td>70%</td>
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<td></td>
<td>10%</td>
</tr>
<tr>
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<td>PC/MAC</td>
<td>CONSOLE</td>
<td>MOBILE/ TABLET</td>
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<tr>
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<tr>
<td></td>
<td>2018</td>
<td>75%/50%</td>
<td>35%</td>
<td>46%/40%</td>
<td>13%</td>
<td>6%</td>
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<td>Poland</td>
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<td>84%/41%</td>
<td>40%</td>
<td>55%</td>
<td>12%</td>
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<tr>
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<td>51.70%</td>
<td>69%</td>
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</tr>
<tr>
<td></td>
<td>2018</td>
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<td>Romania</td>
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<td></td>
<td></td>
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<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Serbia</td>
<td>2019</td>
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<td>5.56%</td>
<td>38.89%</td>
<td>6.94%</td>
<td>8.33%</td>
<td>6.94%</td>
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<td>11%</td>
<td>38%</td>
<td>10%</td>
<td>13%</td>
<td>4%</td>
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<tr>
<td>Slovakia</td>
<td>2019</td>
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<td>27%</td>
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<td></td>
<td>18%</td>
<td>9%</td>
</tr>
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<td></td>
<td>2018</td>
<td>53%</td>
<td>3%</td>
<td>36%</td>
<td>6%</td>
<td>3%</td>
<td></td>
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<tr>
<td>Slovenia</td>
<td>2019</td>
<td>15%</td>
<td></td>
<td>80%</td>
<td></td>
<td></td>
<td>5%</td>
</tr>
<tr>
<td></td>
<td>2018</td>
<td></td>
<td></td>
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<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Spain AEVI</td>
<td>2019</td>
<td>57.52%</td>
<td>28.76%</td>
<td>40.31%</td>
<td>2.88%</td>
<td>7.74%</td>
<td>1.99%</td>
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<tr>
<td>Spain DEV</td>
<td>2019</td>
<td>76%/36%</td>
<td>43%</td>
<td>68%</td>
<td>20%</td>
<td>7%</td>
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<tr>
<td></td>
<td>2018</td>
<td>75%/45%</td>
<td>38%</td>
<td>67%</td>
<td>23%</td>
<td>11%</td>
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</tr>
<tr>
<td>Sweden</td>
<td>2019</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>2018</td>
<td>56%</td>
<td>50%</td>
<td>48%/27%</td>
<td></td>
<td></td>
<td>17%</td>
</tr>
</tbody>
</table>
In 2019, the video games industry employed 87,628 across Europe.
Number of people working in the industry

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
Local developers earned a total of 12 billion euros in 2019.
Total revenue earned by local game developer studios

<table>
<thead>
<tr>
<th>Country</th>
<th>2018</th>
<th>2019</th>
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<tbody>
<tr>
<td>Latvia</td>
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<td>Portugal</td>
<td>93</td>
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<tr>
<td>Norway</td>
<td>59</td>
<td>60</td>
</tr>
<tr>
<td>Slovakia</td>
<td>80</td>
<td>124</td>
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<tr>
<td>Slovenia</td>
<td>18</td>
<td>57</td>
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<tr>
<td>Italy</td>
<td>84</td>
<td>138</td>
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<tr>
<td>Belgium</td>
<td>116</td>
<td>150</td>
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<tr>
<td>Serbia</td>
<td>184</td>
<td>177</td>
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<tr>
<td>Denmark</td>
<td>618</td>
<td>813</td>
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<tr>
<td>Lithuania</td>
<td>165</td>
<td>168</td>
</tr>
<tr>
<td>Ireland</td>
<td>84</td>
<td>184</td>
</tr>
<tr>
<td>Czechia</td>
<td>80</td>
<td>100</td>
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<tr>
<td>Romania</td>
<td>384</td>
<td>397</td>
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<td>Netherlands</td>
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<td>Poland</td>
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<td>177</td>
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<td>Germany</td>
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<td>813</td>
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<td>Spain DEV</td>
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<td>Finland</td>
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<tr>
<td>France</td>
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</table>

* 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

* 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

* Data based on estimations, approximations, not based on surveys or not entirely complying with the provided definitions.
Number of new self-published titles

* 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

<table>
<thead>
<tr>
<th>Country</th>
<th>2018</th>
<th>2019</th>
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<tr>
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<tr>
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<tr>
<td>Slovenia</td>
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<td>Romania</td>
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<td>6</td>
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<tr>
<td>Spain AEVI</td>
<td>#N/B</td>
<td>#N/B</td>
</tr>
<tr>
<td>UK</td>
<td>#N/B</td>
<td>#N/B</td>
</tr>
<tr>
<td>France</td>
<td>#N/B</td>
<td>#N/B</td>
</tr>
<tr>
<td>Germany</td>
<td>30*</td>
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</table>

* 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

<table>
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<tr>
<th>COUNTRY</th>
<th>CULTURAL STATE AID FOR VIDEO GAME PRODUCTION</th>
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</thead>
<tbody>
<tr>
<td></td>
<td>Grants</td>
</tr>
<tr>
<td></td>
<td>In general</td>
</tr>
<tr>
<td>Belgium (all)</td>
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</tr>
<tr>
<td>Czechia</td>
<td>✓</td>
</tr>
<tr>
<td>Denmark</td>
<td>✓</td>
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<tr>
<td>Finland</td>
<td>✓</td>
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<tr>
<td>France</td>
<td>✓</td>
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<tr>
<td>Germany</td>
<td>✓</td>
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<tr>
<td>Italy</td>
<td></td>
</tr>
<tr>
<td>Ireland</td>
<td>✓</td>
</tr>
<tr>
<td>Latvia</td>
<td>✓</td>
</tr>
<tr>
<td>Lithuania</td>
<td>✓</td>
</tr>
<tr>
<td>COUNTRY</td>
<td>CULTURAL STATE AID FOR VIDEO GAME PRODUCTION</td>
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<td>-------------------------------------------</td>
</tr>
<tr>
<td></td>
<td>Grants</td>
</tr>
<tr>
<td></td>
<td>In general</td>
</tr>
<tr>
<td>Netherlands</td>
<td>✓</td>
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<tr>
<td>Norway</td>
<td>✓</td>
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<tr>
<td>Poland</td>
<td>✓</td>
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<tr>
<td>Portugal</td>
<td>✓</td>
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<tr>
<td>Romania</td>
<td>✓</td>
</tr>
<tr>
<td>Serbia</td>
<td>✓</td>
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<tr>
<td>Slovakia</td>
<td>✓</td>
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<tr>
<td>Spain</td>
<td>✓</td>
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<tr>
<td>Sweden</td>
<td>✓</td>
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<tr>
<td>Slovenia</td>
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<tr>
<td>UK</td>
<td>✓</td>
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</table>
## R&D aid for game developer studios

<table>
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<th>R&amp;D AID FOR INNOVATION</th>
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<tbody>
<tr>
<td></td>
<td>Grants</td>
</tr>
<tr>
<td></td>
<td>In general</td>
</tr>
<tr>
<td>Belgium</td>
<td>✓</td>
</tr>
<tr>
<td>Czechia</td>
<td>✓</td>
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<tr>
<td>Denmark</td>
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</tr>
<tr>
<td>Finland</td>
<td>✓</td>
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<tr>
<td>France</td>
<td>✓</td>
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<tr>
<td>Germany</td>
<td>✓</td>
</tr>
<tr>
<td>Ireland</td>
<td>✓</td>
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<tr>
<td>Italy</td>
<td>✓</td>
</tr>
<tr>
<td>Latvia</td>
<td>✓</td>
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<td>Poland</td>
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<td>COUNTRY</td>
<td>R&amp;D AID FOR INNOVATION</td>
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<td>Grants</td>
</tr>
<tr>
<td></td>
<td>In general</td>
</tr>
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<tr>
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<tr>
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<tr>
<td>UK</td>
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## Aid for SMEs for launching a new studio

<table>
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<th>SME Aid for Launching a New Studio</th>
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<tr>
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<td>Grants: In general, Dedicated to game dev</td>
</tr>
<tr>
<td>Belgium</td>
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<tr>
<td>Czechia</td>
<td>✓</td>
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<td>Denmark</td>
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<tr>
<td>Finland</td>
<td>✓</td>
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<td>France</td>
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<td>Germany</td>
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<td>Latvia</td>
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<td>Lithuania</td>
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<td>Ireland</td>
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<td>Italy</td>
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<td>Poland</td>
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<td>Portugal</td>
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<tr>
<td>Netherlands</td>
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<td>Norway</td>
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<tr>
<td>Romania</td>
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<tr>
<td>Serbia</td>
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## COUNTRY SME AID FOR LAUNCHING A NEW STUDIO

<table>
<thead>
<tr>
<th>COUNTRY</th>
<th>SME Aid</th>
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<td>Slovenia</td>
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<tr>
<td>Spain</td>
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<td>Sweden</td>
<td>✓</td>
</tr>
<tr>
<td>UK</td>
<td>✓</td>
</tr>
</tbody>
</table>
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-rapporten 2019/2020
2019: Game Report

POLAND
2019: The Game Industry of Poland – report 2020

PORTUGAL
2019: Atlas do setor dos videogames em Portugal

ROMANIA
2018: Romanian Games Industry Report
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

- 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).

**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

- 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

**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 (ausbildungskompass-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
- Filminstitut Babelsberg
- Filminstitut Babelsberg KONRAD WOLF und Universität Potsdam in Kooperation mit dem Erich Pommer Institut
- Filminstitut 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
- hdpx 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
- 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 Institute Hamburg
- SAE Institute 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
- 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
- University of Ulster
- Bray Institute of Higher Education
- St. John's Central College of Further Education and Training
- Cenit College

Lithuania: 2 institutions
- Game Development – Vilniaus Verslo kolegija
- Vilnius Business College

Latvia: 1 institution
- Datorspēļu dizains un grafika - Ekonomikas un Kultūras augstskola

Poland: 44 institutions
- The Strzemiński Academy of Art in Lodz

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:
- 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
- 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

Tecnico Sup. Profissional
- Instituto Politécnico Da Maia
- Instituto Politécnico De Tomar
Portugal:
- Instituto Politécnico Do Porto
- Instituto Politécnico De Tomar
- Instituto Politécnico De Setúbal
- Instituto Politécnico De Bragança
- Instituto Politécnico De Leiria
- Universidade Lusófona Do Porto
- Instituto Politécnico Do Cávado E Ave
- Universidade Europeia

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
- Politehnica University of Bucharest
- Ion Mincu University of Urbanism and Architecture
- National University of Theatre Arts and Cinematography
- 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

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

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

Slovakia: 10 institutions
- 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 umleckého 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 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
- 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: Methodology of data collection

<table>
<thead>
<tr>
<th>COUNTRY</th>
<th>BASED ON A SURVEY AND/OR INTERVIEWS</th>
<th>BASED ON A DATA AVAILABLE IN NATIONAL BUSINESS REGISTER OR STATISTICS</th>
<th>NOTES</th>
</tr>
</thead>
<tbody>
<tr>
<td>Belgium</td>
<td>✓</td>
<td></td>
<td>The survey is sent to all active game studios in Belgium.</td>
</tr>
<tr>
<td>Czechia</td>
<td>✓</td>
<td>✓</td>
<td>The data does not include publishers.</td>
</tr>
<tr>
<td>Denmark</td>
<td></td>
<td>✓</td>
<td>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.</td>
</tr>
<tr>
<td>Finland</td>
<td>✓</td>
<td>✓</td>
<td>Data is collected bi-annually and includes only active game developer studios.</td>
</tr>
<tr>
<td>France</td>
<td>✓</td>
<td></td>
<td>Based on a joint data with regional industry associations in France.</td>
</tr>
<tr>
<td>Germany</td>
<td>✓</td>
<td></td>
<td>Data is collected through multiple ways: own surveys, buying data from private sources like GfK and YouGov and studies done by universities.</td>
</tr>
<tr>
<td>Ireland</td>
<td>✓</td>
<td></td>
<td>The association has collected a list of known game developers registered in Latvia that is updated whenever they find out about new developers.</td>
</tr>
<tr>
<td>Latvia</td>
<td>✓</td>
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<td></td>
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<tr>
<td>COUNTRY</td>
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</tr>
<tr>
<td>Lithuania</td>
<td>✔</td>
<td>✔</td>
<td>Data includes all the companies that are active in the games industry.</td>
</tr>
<tr>
<td>Netherlands</td>
<td>✔</td>
<td></td>
<td>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.</td>
</tr>
<tr>
<td>Norway</td>
<td>✔</td>
<td></td>
<td>The data includes members of local game developer association and other established companies in the industry with actual turnover.</td>
</tr>
<tr>
<td>Poland</td>
<td>✔</td>
<td>✔</td>
<td>Data is based on studies prepared by PARP, GIC &amp; 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.</td>
</tr>
<tr>
<td>Portugal</td>
<td>✔</td>
<td></td>
<td>The survey is sent to all the active developers’ studios and publisher.</td>
</tr>
<tr>
<td>COUNTRY</td>
<td>BASED ON A SURVEY AND/OR INTERVIEWS</td>
<td>BASED ON A DATA AVAILABLE IN NATIONAL BUSINESS REGISTER OR STATISTICS</td>
<td>NOTES</td>
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</tr>
<tr>
<td>Romania</td>
<td>✔</td>
<td>✔</td>
<td>Data includes both the member and the active non-member studios</td>
</tr>
<tr>
<td>Serbia</td>
<td>✔</td>
<td></td>
<td>Data includes both SGA members and several bigger studios/service providers which are non-members.</td>
</tr>
<tr>
<td>Slovakia</td>
<td>✔</td>
<td></td>
<td>Data is collected through a survey sent to all the game industry companies that the association knows.</td>
</tr>
<tr>
<td>Slovenia</td>
<td>✔</td>
<td></td>
<td>Data is based on a survey from 2018 and it is updated with data obtained from industry contacts each year.</td>
</tr>
<tr>
<td>Spain (DEV)</td>
<td>✔</td>
<td></td>
<td>The survey is sent to all Spanish game development studios (established as companies or not)</td>
</tr>
<tr>
<td>Spain (AEVI)</td>
<td></td>
<td>✔</td>
<td>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.</td>
</tr>
<tr>
<td>Sweden</td>
<td></td>
<td>✔</td>
<td></td>
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</tbody>
</table>
Annex 3: Questionnaire

0. Methodology:
0.1. How the data was collected? For example is data based on information collected from a business register or on interviewing companies? (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 companies you were able to get data from? (Number)
0.4. 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)
0.5. 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