2023 EUROPEAN VIDEO GAMES INDUSTRY

INSIGHT
REPORT

By European Games Developer Federation (EGDF) Supported by Video Games Europe

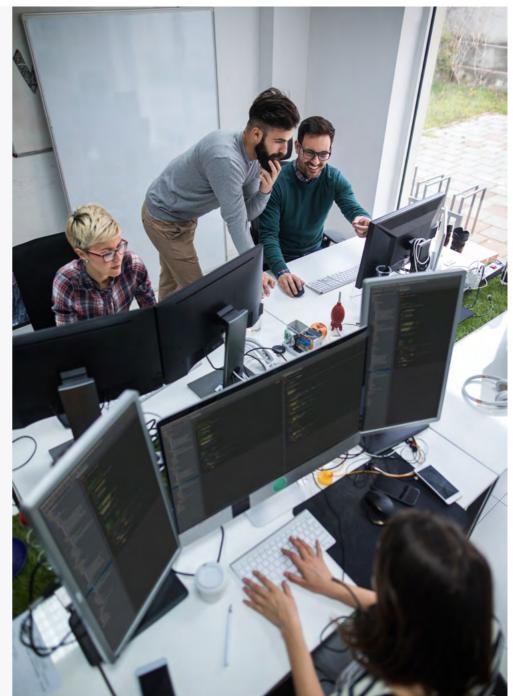








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FOREWORD



From Hendrik Lesser, President of EGDF and Hester Woodliffe, VGE Chair

The European Video Game Industry Insights Report, developed in collaboration between the European Games Developer Federation (EGDF) and Video Games Europe, remains the only comprehensive report tracking the state of the European game industry. It provides detailed data on the number of studios, employees, and industry turnover by country. Over the years, it has become a vital resource for monitoring the evolution of Europe's dynamic game development ecosystem.

2023 presented significant challenges for the European industry. A global downturn in the games market, coupled with a sharp decline in private investment, impacted the ecosystem heavily - marking the first time the EU's combined industry turnover experienced a decline. Fortunately, the contraction was modest — just over 1% (approximately EUR 0.2 billion) — with the total turnover reaching EUR 18.7 billion. As a sector that has successfully embraced digital transformation, the video game industry continues to be a key driver of digital growth and employment across many EU member states. To sustain this momentum and continue this success story, it is essential that the competitiveness of the European game industry is protected and regulatory obligations are fit for purposes and do not produce unintended consequences.

Despite the economic headwinds, the industry demonstrated remarkable resilience. The number of game development studios in the EU grew from 5,300 to 5,900, and employment rose from 90,000 to 91,000. This growth, in a year marked by layoffs and studio closures, underscores the sector's adaptability and strong

foundation for future expansion. Public support mechanisms played a crucial role in this stability. Countries with robust support systems, such as Germany, were better equipped to protect their studios and workforce. While new studios bring fresh innovation and creativity, they often face greater vulnerability due to limited resources, offer more limited benefits, and more vulnerable to changes in access to funding (both public and private).

This year's report also includes, for the first time in several years, data from Turkey. While the methodology differs slightly from other European countries, it is clear that Turkey — and Istanbul in particular — has emerged as a significant talent hub. This reflects the positive impact of sustained government investment in the sector.

Finally, it is important to acknowledge that the recent challenges have also affected the capacity of some national trade associations to collect annual data. As a result, this year's report does not include updated figures from France and Poland — two of Europe's most important game development hubs. Their 2022 data have been used in the aggregate EU figures to ensure continuity.

Looking ahead, the European video game industry stands at a pivotal moment. The resilience shown in 2023, combined with continued innovation, growing talent pools, and targeted public support, provides a strong foundation for renewed growth. With the right policy environment and investment climate, Europe is well-positioned to lead the next chapter of global game development.



Hendrik Lesser
EGDF President
CEO Remote Control
Productions



Hester WoodliffeVGE Chair
SVP Publishing WB Games



INTRODUCTION

For this report, with the support of VGE, EGDF has aggregated national industry data for 2023 from 22 European countries:

Austria, Belgium, Croatia, Czechia, Estonia, Finland, Germany, Greece, Ireland, Italy, Latvia, Lithuania, The Netherlands, North Macedonia, Portugal, Romania, Serbia, Slovakia, Spain, Sweden, Turkey and The United Kingdom.

Please note that aggregated EU level data also includes latest available data points from countries that so far have not collected 2023 data.

The report has two main parts. The first part presents Europe-wide data for 2023 (total numbers, comparative data, etc.). The second part comprises country-specific information (2019-2023, depending on the available data for each specific country).

EGDF uses a 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 others, data is collected from public registers. Some countries have updated part of their data points from previous years based on more accurate recent data, better aligned with the industry methodology explained in the Annex III of this report.

Links to national reports are available at Annex I of this report and at www.egdf.eu/data-and-studies.



EUROPEAN VIDEO GAMES INDUSTRY





1757

5,900

game dev studios in

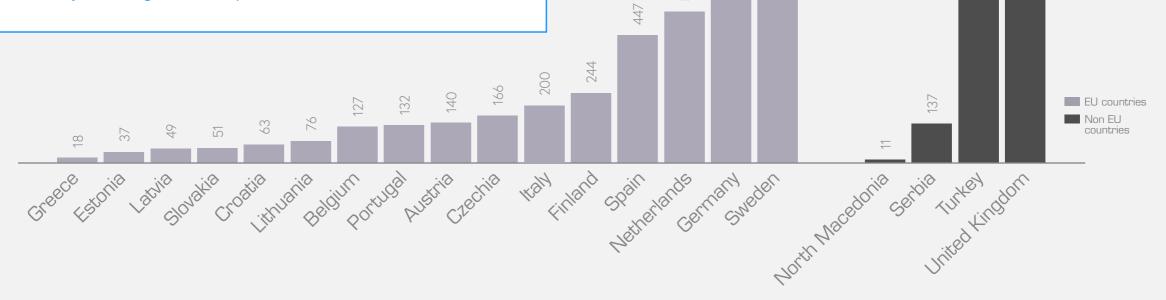
the EU*

010



2023

- The total number of game developer studios in the EU grew from 5300 in 2022 to 5900 studios in 2023.
- There is no single reason for this development. In some countries, like Finland and the Netherlands, new studios were formed when local studios were closed down. Some countries, like Portugal and Serbia, benefited from the talent exodus from Russia. In some countries, like the UK, public support instruments enabled the new wave of studios despite the private investment winter. Some countries, like Italy, improved their data collection methodology.
- However, at the same time, due to the industry downturn, the total number of studios started to decline in Romania, Czechia, and many smaller game development countries.



What is the total number of active game developer studios in your country in 2023?

Both studios doing self-publishing or using external publishers are taken into account (Number)

 $Notes: \ ^*70\% \ of \ data \ volume \ is \ from \ year \ 2023, 30\% \ from \ 2022 \ ^{**} \ Data \ from \ Poland \ and \ France, the \ two \ biggest \ gamedev \ countries \ in \ the \ EU, is \ missing \ from \ 2023 \ figures.$



91,000

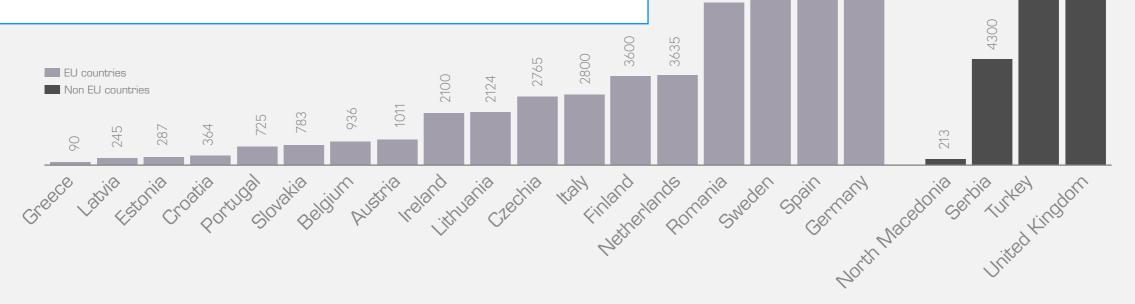
people

employed in

the EU*



- Despite challenging times, the total number of people employed by the industry in the EU grew from 90,000 in 2022 to 91,000 in 2023. This demonstrates that, in general, the European game industry could absorb the outcomes of waves of industry layoffs in 2023. Especially bigger, more successful studios were finally able to partly overcome the talent shortages they had struggled with for years.
- The growth of the employee base was particularly big in Serbia, where the industry talent base almost doubled due to game industry talent relocating to the country from Russia, Belarus and Ukraine.
- Meanwhile, the Dutch industry was particularly badly hit by the layoffs, as the country lacks public support instruments to soften the impact of the private investment winter.
- Although we are missing data from France and Poland, the new data from Turkey places it among the key game industry hubs in Europe.

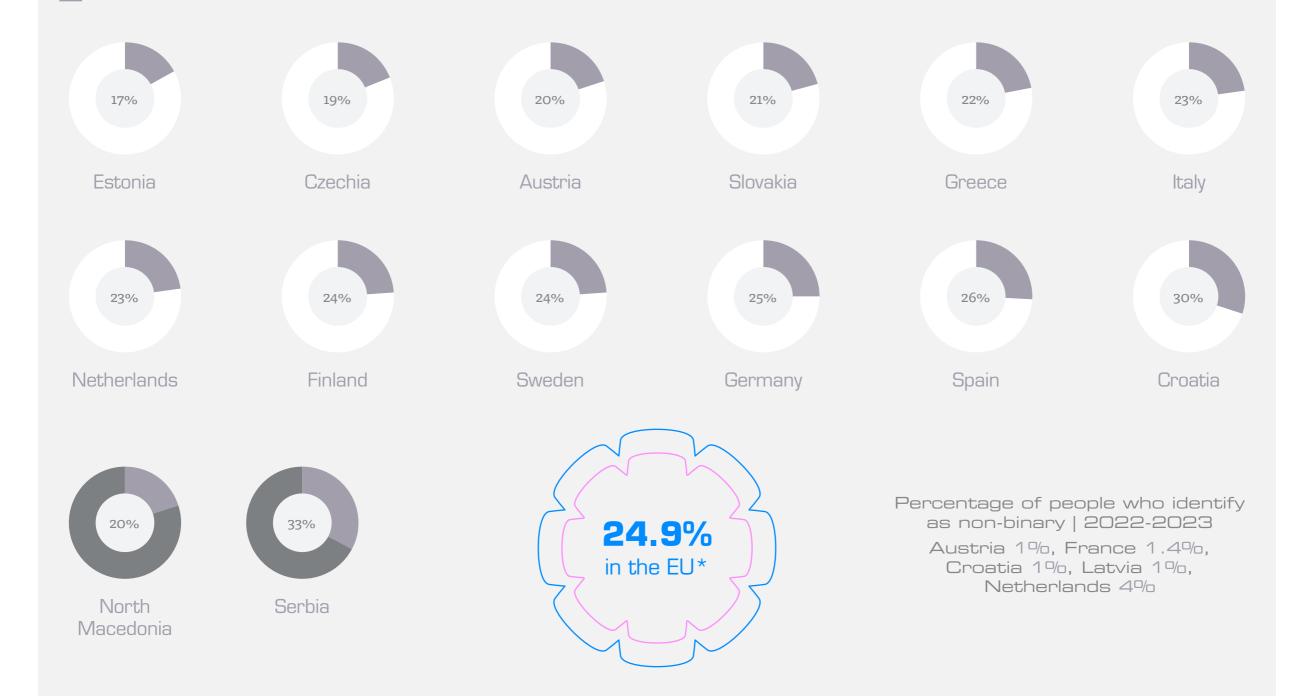


What was the number of people working for game developer studios and publishers in your country in 2023?

Notes: * 65% of data volume is from year 2023, 35% from 2022. ** Data from Poland and France, the two biggest gamedev countries in the EU, is missing from 2023 figures.



Percentage of women working in the industry



What percentage of the people, working for the local game developer studios and publishers, were women in 2023?

Note: * 65% of data points is from year 2023, 35% from 2022. ** Data from Poland and France, the two biggest gamedev countries in the EU, is missing from 2023 figures

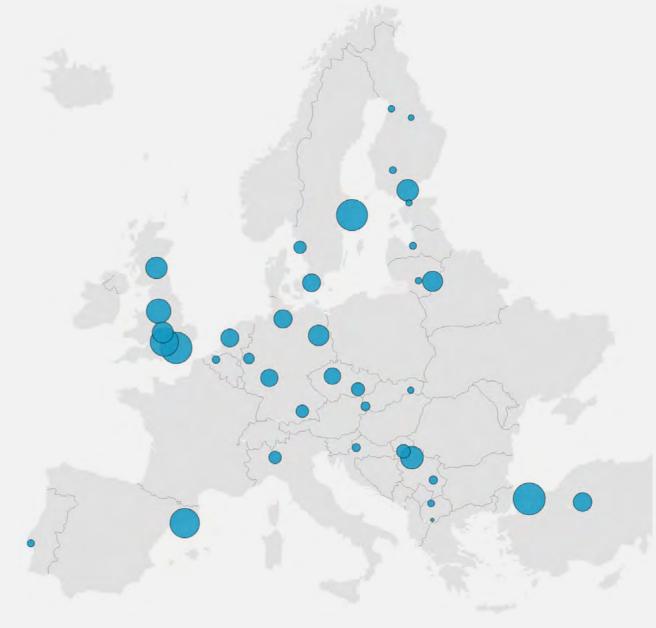
*** Data in grey is from non-EU countries



Key reported European game dev hubs by the number of employees

Largest hubs (main per country)

Lai.	gest habs thailt per country)	
1	Istanbul, Turkey	6150
2	London, United Kingdom	5930
3	Stockholm, Sweden	5820
4	Barcelona, Catalonia, Spain	5170
5	Oxford-Guildford, United Kingdom	4750
6	Manchester-Liverpool, England, United Kingdom	3500
7	Belgrade, Serbia	3000
8	Helsinki, Finland	2700
9	City of Edinburgh, Scotland, United Kingdom	2650
10	Royal Leamington Spa, United Kingdom	2510
11	Berlin, Germany	2430
12	Vilnius, Lithuania	2300
13	Ankara, Turkey	1930
14	Hamburg, Germany	1870
15	Amsterdam, Netherlands	1790
16	Malmö, Sweden	1770
17	Frankfurt, Germany	1660
18	Prague, Czechia	1500
19	Novi Sad, Serbia	1000
20	Brno, Czechia	900



List the main game dev hubs in your country and the number of employees they had in 2023.

^{*} Data from Poland, France and Romania is missing from 2023 figures

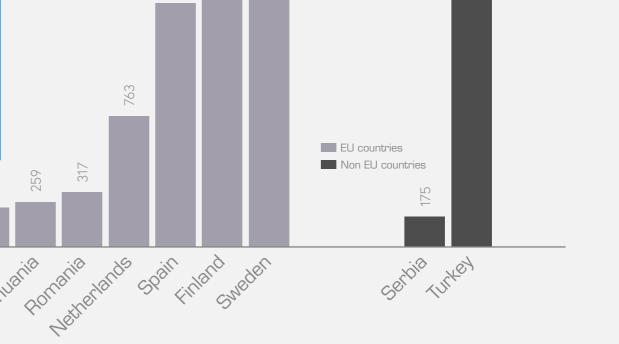


in the EU*



2023 (million euros)

- The global game industry downturn reached Europe in 2023, and the combined industry turnover declined slightly from EUR 18,9 to EUR 18,7 billion.
- However, the impact of the downturn in the industry was not equal across Europe. In most countries, the industry turnover practically stagnated. In 2023, the most significant drop in Europe was witnessed in Finland (before a bounce back in 2024), where the industry faced a perfect storm of mobile game market downturn and the closure of some big studios. In some countries, like in Netherlands, studios also moved to the general ICT sector as game markets went down.
- In some countries, the industry turnover also continued to grow. Some countries, like Portugal, attracted new studios. In countries like Italy and Portugal, the growth can be explained by improved data collection methodology.



What was the total turnover of local game developer studios and publishers located in your country in 2023?

Notes: * 70% of data volume is from year 2023, 30% from 2022 ** Data from Poland and France, the two biggest gamedev countries in the EU, is missing from 2023 figures.





Number of companies that published new titles | 2023



What was the number of game developer studios located in your country that published new games during 2023?

Number of new self-published titles | 2023



How many of these new titles were self-published?

Number of new titles published by local developers | 2023



What was the number of new titles published by game developer studios in your country in 2023?

Number of new titles published by external publishers | 2023



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.



Percentage of games developed for various platforms

2023

Table 1: In the countries below, platforms are tracked through a multiple choice question allowing companies to list all platforms platforms they are currently developing games for.

		PLATFORMS									
COUNTRY	YEAR	PC/MAC	CONSOLE/ HANDHELD CONSOLES	MOBILE/ TABLET	BROWSER	VR/AR	OTHER				
Austria	2020	71.70%	33.30%	65%	16.70%	N/A	N/A				
Belarus	2022	4.90%	5.30%	94%	N/A	2%	N/A				
Belgium	2023	100%	92%	63%	20%	37%	9%				
Croatia	2023	64%	41%	35%	N/A	6%	N/A				
Czechia	2020	64%	N/A	45%	N/A	N/A	N/A				
Denmark	2022	49%	4%	46%	8%	N/A	N/A				
Estonia	2020	65%	14%	28%	N/A	11%	N/A				
Finland	2023	61%	38%	61%	N/A	N/A	28%				
Germany	2023	60%	60%	47%	19%	19%	N/A				
Greece	2023	89%	11%	22%	11%	0%	N/A				
Ireland	2020	74%	56%	19%	22%	7%	N/A				
Italy	2023	86%	44%	37%	N/A	N/A	17%				

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.



Table 1 (cont.): In the countries below, platforms are tracked through a multiple choice question allowing companies to list all platforms they are currently developing games for.

		PLATFORMS									
COUNTRY	YEAR	PC/MAC	CONSOLE/ HANDHELD CONSOLES	MOBILE/ TABLET	BROWSER	VR/AR	OTHER				
Latvia	2023	75%	N/A	25%	N/A	N/A	N/A				
Lithuania	2023	67%	17%	38%	4%	16%	N/A				
Netherlands	2023	85%	44%	48%	23%	22%	N/A				
North Macedonia	2023	67%	N/A	33%	N/A	N/A	N/A				
Romania	2023	72%	20%	24%	N/A	N/A	N/A				
Serbia	2023	51%	23%	43%	8%	11%	N/A				
Slovakia	2023	73%	16%	32%	9%	13%	N/A				
Spain	2023	89%	54%	52%	24%	16%	N/A				
Sweden	2018	56%	50%	48%/27%	N/A	N/A	17%				

Table 2: In the countries below, platforms are tracked through a single choice question allowing companies to list the main platform they are currently developing games for (Serbia, Slovenia, UK) or the share is based on the platform of the games released by the local gamedev studios during the year (Romania)

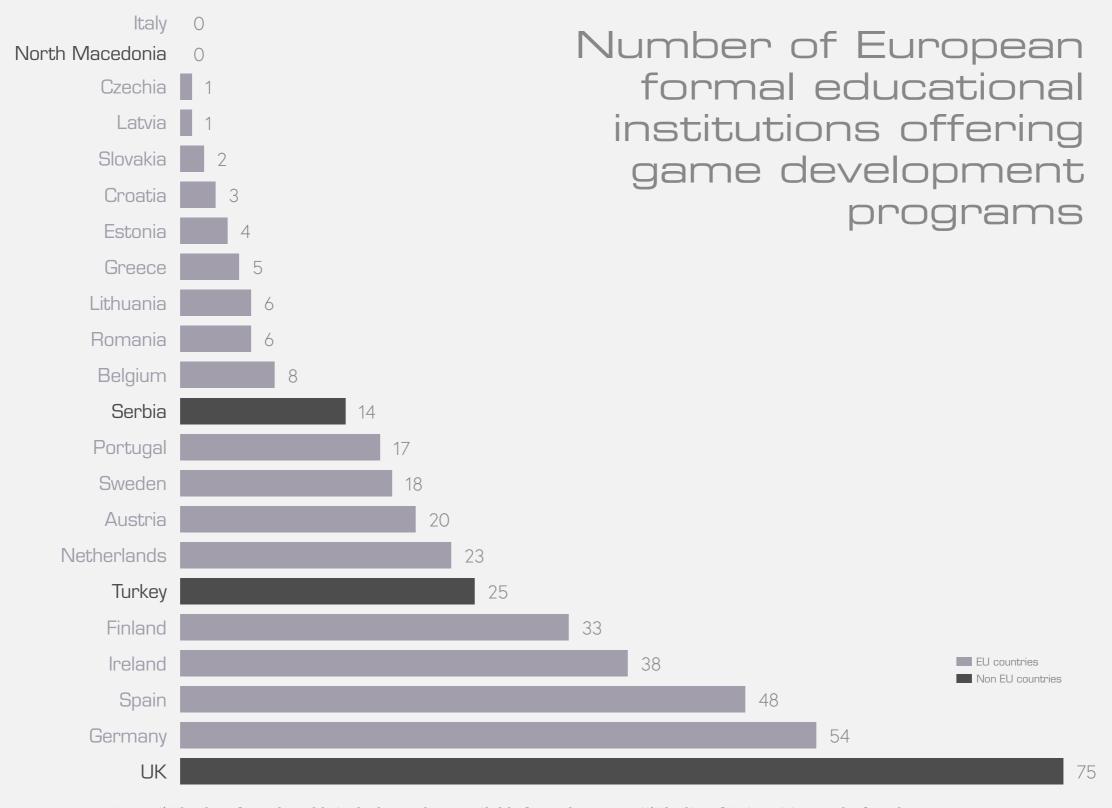
	PLATFORMS									
COUNTRY	YEAR	PC/MAC	CONSOLE	MOBILE/ TABLET	BROWSER	VR/AR	OTHER			
Portugal	2021	8.30%	8.30%	33%	8.30%	8.30%	8.30%			
UK	2023	42%	11%	33%	3%	8%	N/A			



FUNDING AND EDUCATION INSTITUTIONS FOR THE VIDEO GAMES INDUSTRY





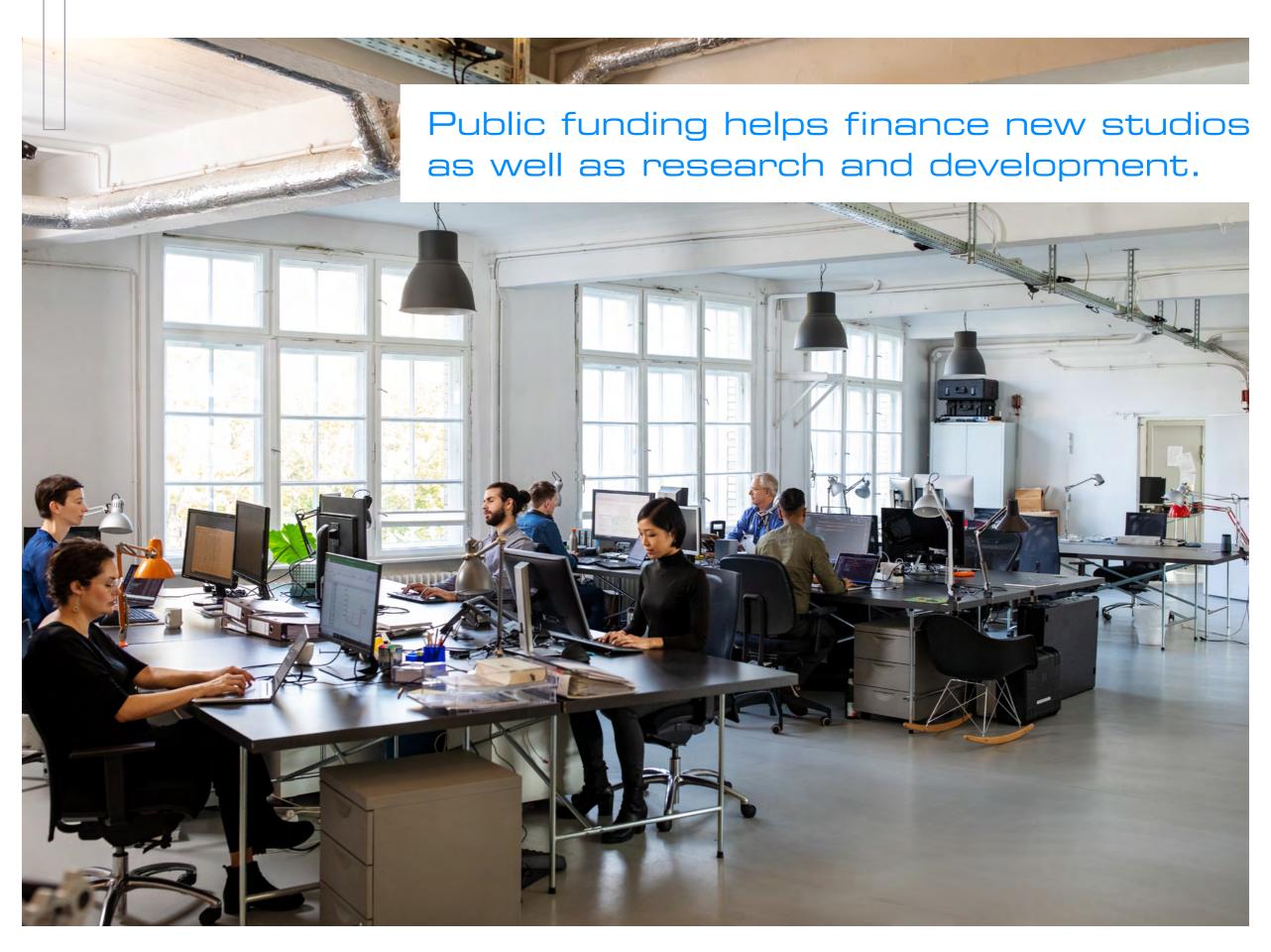


Notes: i) The data from the table is the latest data available for each country. ii) The list of Universities can be found at page 62.

iii) the number for Italy, it is a non-exhaustive number, it is an empirical evaluation, based on a survey from 2021 that was later integrated.









Cultural aid for game production

COUNTRY		(CULTURA	L STATE AID FOR	VIDEO G	AME PRODUCTIO	N		
		Grants		Loans	Tax credits		Equ	ity funding	None
	General	Dedicated to game dev studios	General	Dedicated to game dev studios	General	Dedicated to game dev studios	General	Dedicated to game dev studios	
Austria	~								
Belgium (all)	~	VAF/	~		~	Taxshelter	~	PMV	
		Gamefonds						MediaInvest	
Belarus									~
Croatia	~	Croation Audiovisual Centre							
Czechia	~		~						
Denmark	~	Spilordningen					~		
Estonia	~		~		~		~		
Finland	~								
France	~	<u>FAJV</u>	~	<u>FPJV</u>	~	<u>Crédit d'Impôt</u> <u>Jeu Vidéo</u>	~		
Germany	~	Computer-spiele- förderung des Bundes	~				~		
Greece		Cash Rebate Digital Games							
Iceland									~
Italy	~					Tax Credit per la produzione di videogiochi			



COUNTRY		(CULTURA	L STATE AID FOR	VIDEO G	AME PRODUCTIO	N		
		Grants		Loans		Tax credits		uity funding	None
	General	Dedicated to game dev studios	General	Dedicated to game dev studios	General	Dedicated to game dev studios	General	Dedicated to game dev studios	
Ireland					~				
Latvia									~
Lithuania	~								
Netherlands	~	Stimulerings-fonds Creatieve Industrie							
North Macedonia	~		~						
Norway	~	Norwegian film institute	~						
Poland	~	Polish Creative Industries Development Center	~						
Portugal									~
Romania									~
Serbia	~								
Slovakia	~	Slovak Art Council							
Spain	~		~	CREA-SGR	~		~		
Sweden									~
Slovenia	~								
Turkey	~						~		
UK	~	UK Games Fund		<u>Creative</u> <u>England</u>	~	Game Tax Relief			



R&D aid for game developer studios

COUNTRY				R&D AID	FOR INNO	OVATION			
		Grants		Loans	Т	ax credits	1	Equity funding	None
	General	Dedicated to game dev studios	General	Dedicated to game dev studios	General	Dedicated to game dev studios	General	Dedicated to game dev studios	
Austria	~		~		~		~		
Belgium	~				~	Innovatieaftrek			
Belarus									~
Croatia	~		~						
Czechia	~								
Denmark	~				~				
Estonia	~		~		~				
Finland	~		~						
France	~	FAJV	~		~		~		
Germany	~		~		~				
Greece	~								
Iceland	~								
Ireland	~				~				
Italy									
Latvia									~
Lithuania	~		~						
Netherlands	~		~		~		~		



COUNTRY		R&D AID FOR INNOVATION											
		Grants		Loans	Т	ax credits		None					
	General	Dedicated to game dev studios	General	Dedicated to game dev studios	General	Dedicated to game dev studios	General	Dedicated to game dev studios					
North Macedonia	~		~										
Norway	~		~										
Poland	~		~		~		~						
Portugal	~				~								
Romania									~				
Serbia					~								
Slovakia	~				~								
Slovenia	~		~				~						
Spain	~		~		~								
Sweden					~								
Turkey	~	Kolay Destek			~	<u>Yatirima Destek</u>							
UK	~				~								



Aid for SMEs for launching a new studio

COUNTRY			SN	/IE AID FOR LAUNC	CHING A N	NEW STUDIO			
		Grants	Loans		Tax credits		Eq	None	
	General	Dedicated to game dev studios	General	Dedicated to game dev studios	General	Dedicated to game dev studios	General	Dedicated to game dev studios	
Austria	~		~						
Belgium	~		~	PMV	~		~	ForsVC and INVIGA	
Belarus									~
Croatia	~	Ministry of Culture- Entrepreneurship in Culture	~						
Czechia	~								
Denmark	~		~				~		
Estonia			~		~				
Finland	~								
France	~		~		~		~		
Germany	~		~				~		
Greece	~	Cash Rebate Digital Games		Cash Rebate Digital Games					
Latvia									~
Lithuania	~		~		~				
Iceland									~



COUNTRY			SM	IE AID FOR LAUNC	CHING A I	NEW STUDIO			
		Grants	Loans		-	Tax credits	Eq	None	
	General	Dedicated to game dev studios	General	Dedicated to game dev studios	General	Dedicated to game dev studios	General	Dedicated to game dev studios	
Ireland	~						~		
Italy									~
Netherlands			~		~		~		
North Macedonia	~		~						
Norway	~		~						
Poland	~		~		~		~		
Portugal	~								
Romania									~
Serbia	~		~		~		~		
Slovakia	~								
Slovenia	~		~				~		
Spain	~		~				~		
Sweden									~
Turkey	~								
UK	~								

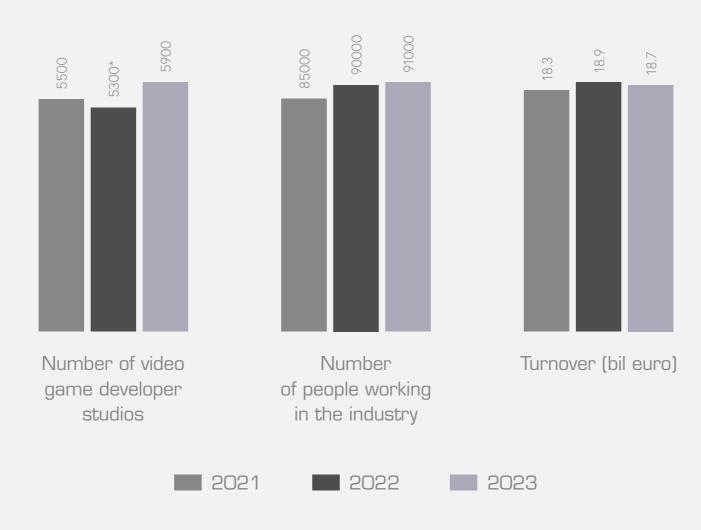


2023 VIDEO GAMES INDUSTRY

KEY NUMBERS







Note: * the decrease in the number of game developer studios comes from the improving in the France data collection methodology.



GOUNTRY FOCUS

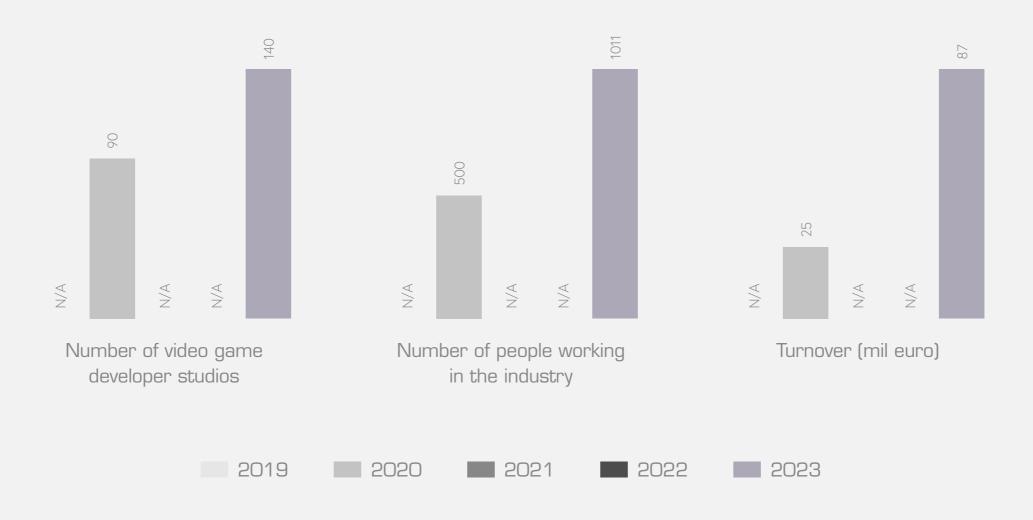
In the following pages, we share available country-specific data. However, work is in progress to ensure common methodology across all countries in the future.



Austria

PGDA - Pioneers of Game Developers Austria - Verband österreichischer Spieleentwickler



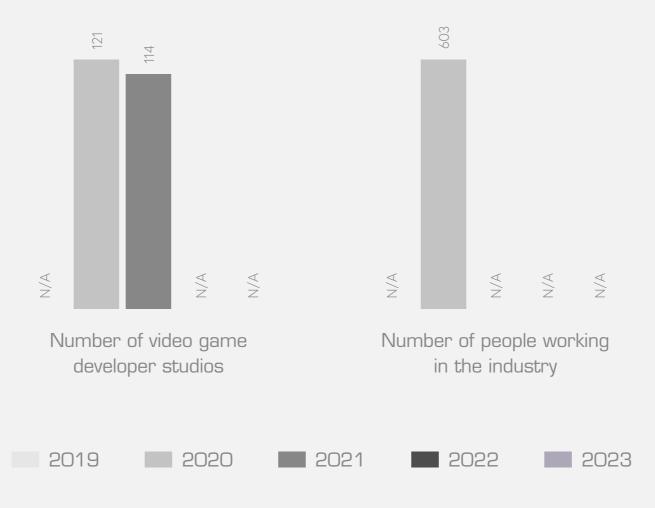




Belarus

BelGameDev



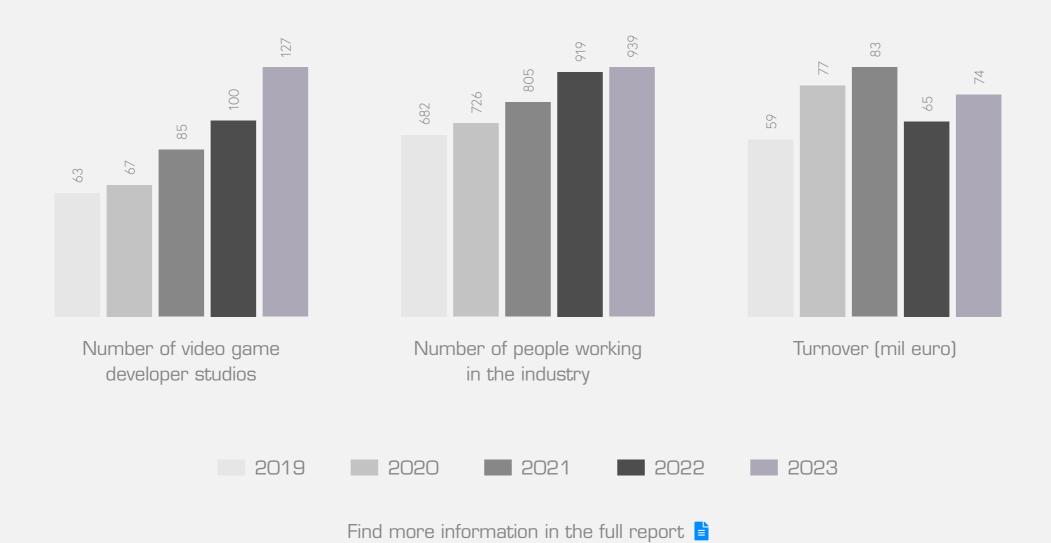




Belgium

BelgianGames (FLEGA, WALGA and games.brussels)



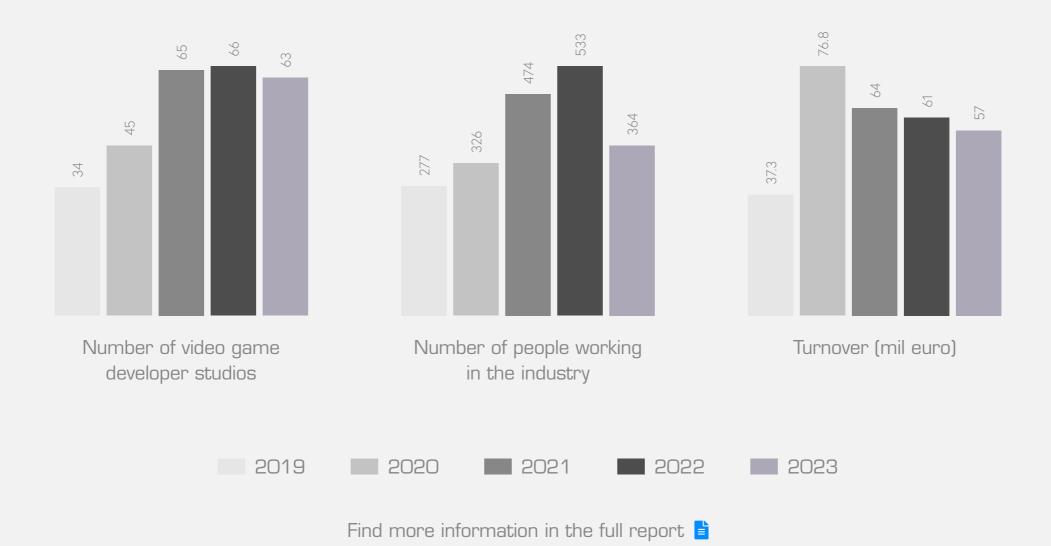




Croatia

Croatian Game Development Alliance



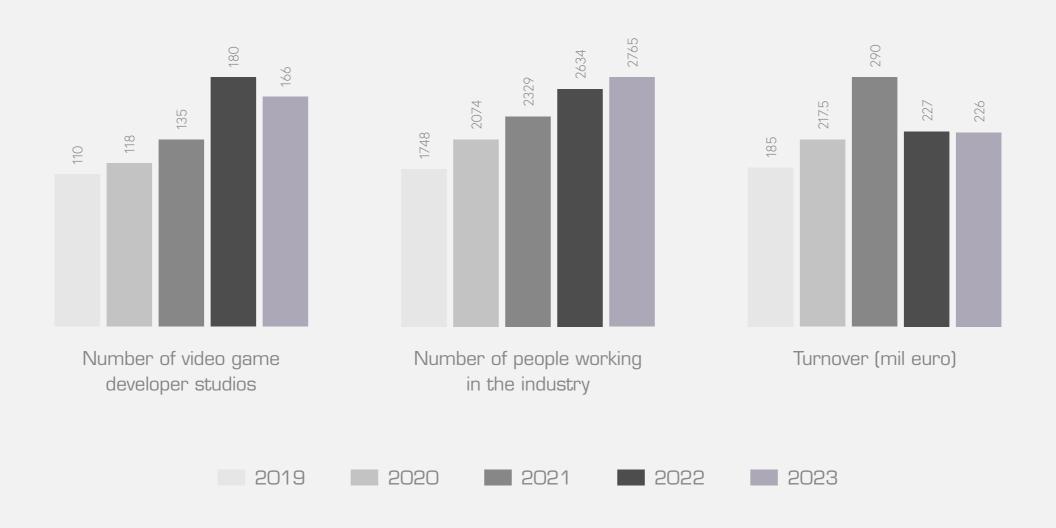




Czechia

Czech Game Developers Association



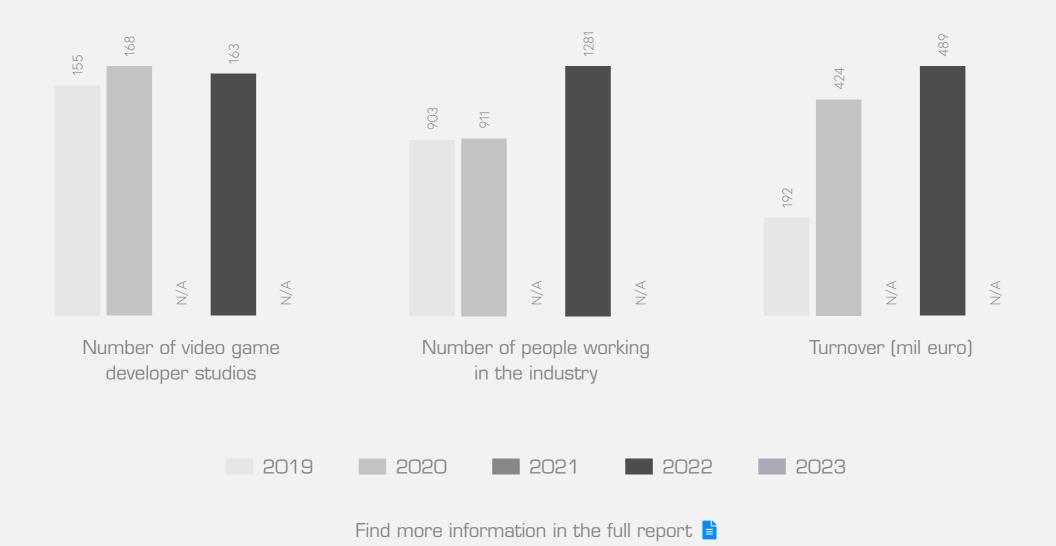




Denmark

Danish Producers' Association





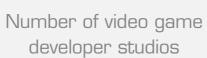


Estonia

GameDev Estonia MTÜ

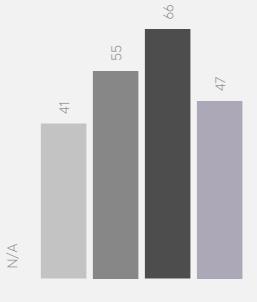








Number of people working in the industry



Turnover (mil euro)

2019

2020

2021

2022

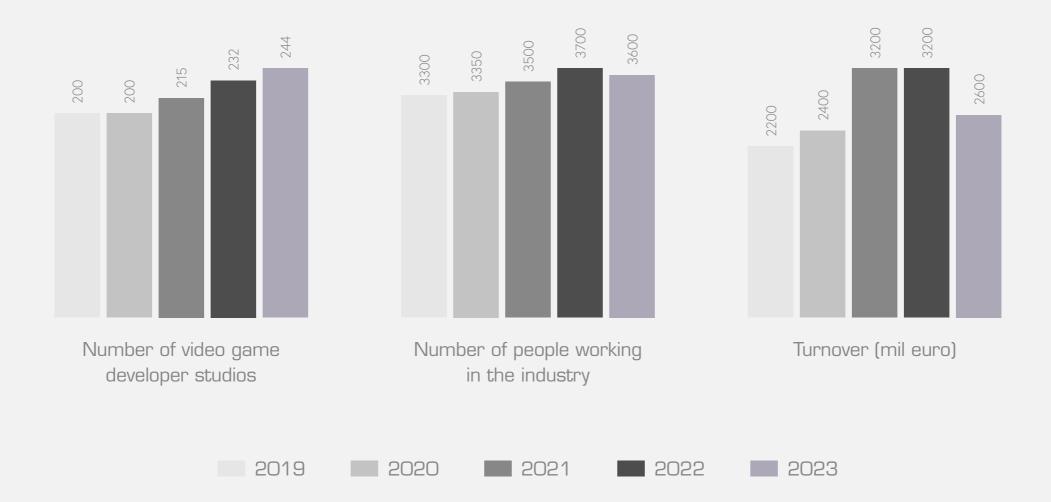
2023



Finland

Neogames Finland Assn.



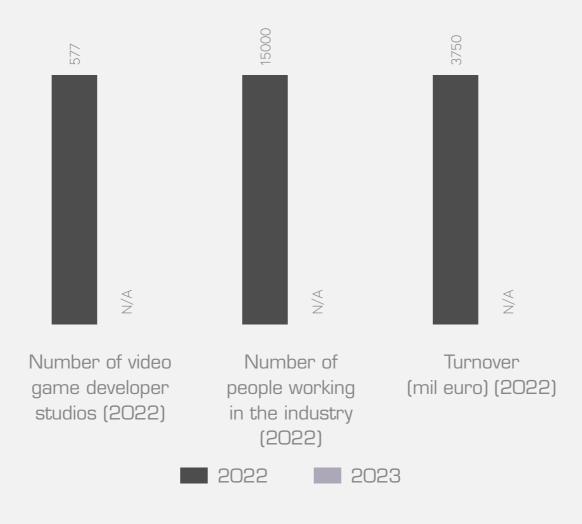




France

Le Syndicat National du Jeu Vidéo





Find more information in the full report 🖹

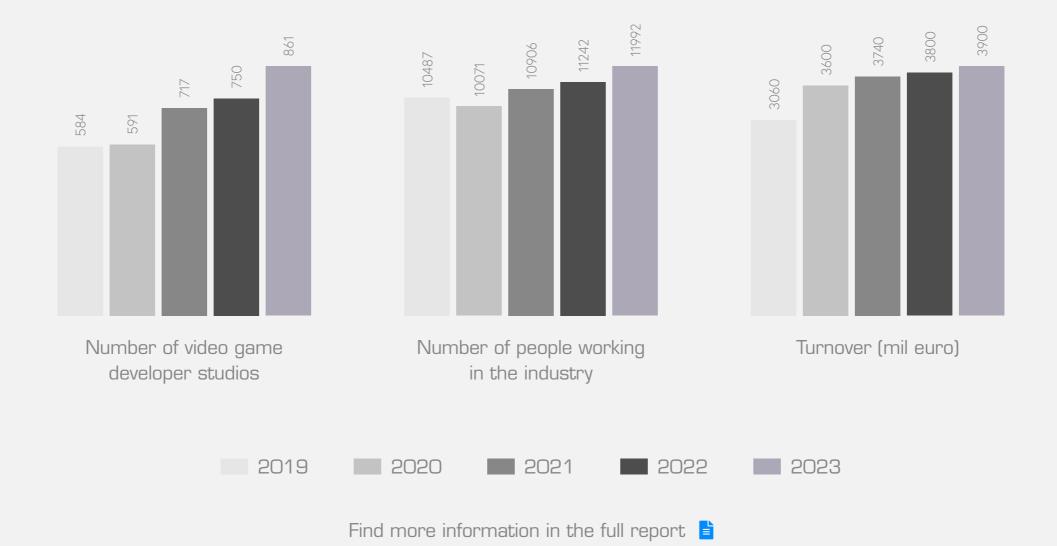
Note: France reviewed their methodology in 2022 and this is the reason we have only the 2022 data.



Germany

game - Verband der deutschen Games-Branche e.V



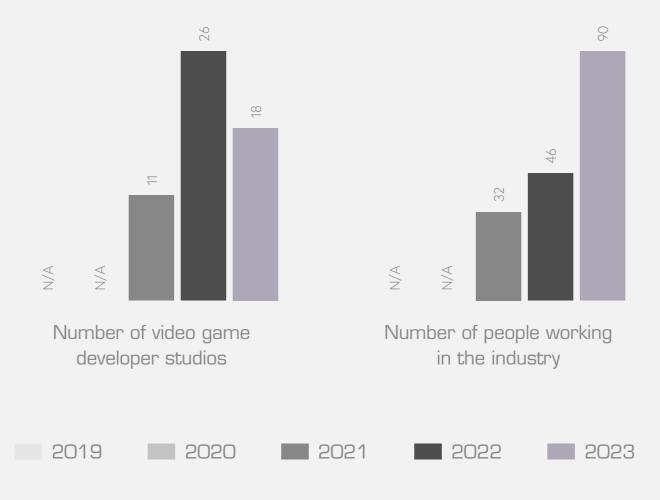




Greece

Game Developers Association Greece



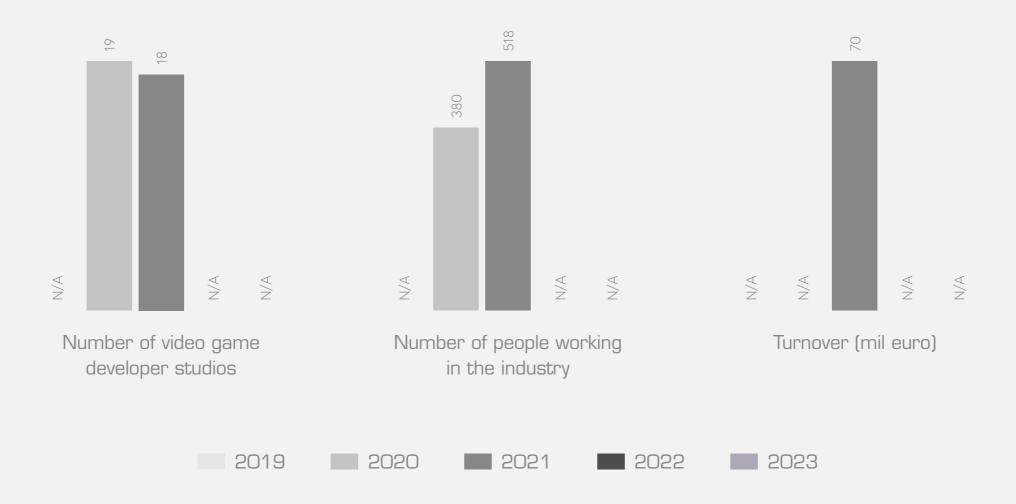




Iceland

Icelandic Game Industry



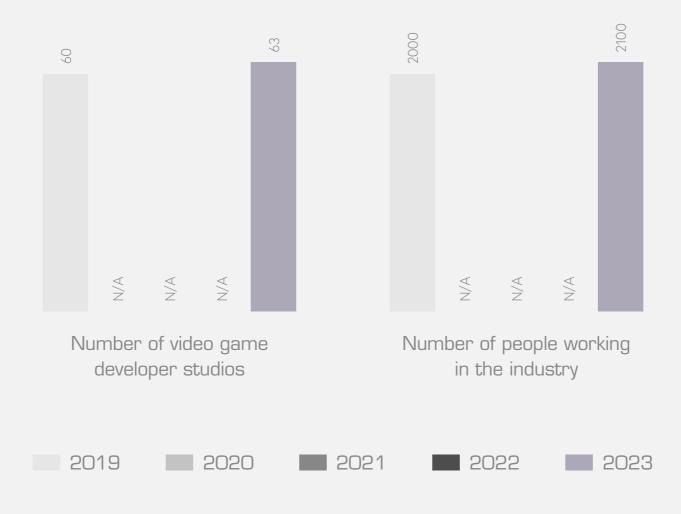




Ireland

IMIRT - Irish Game Makers Association



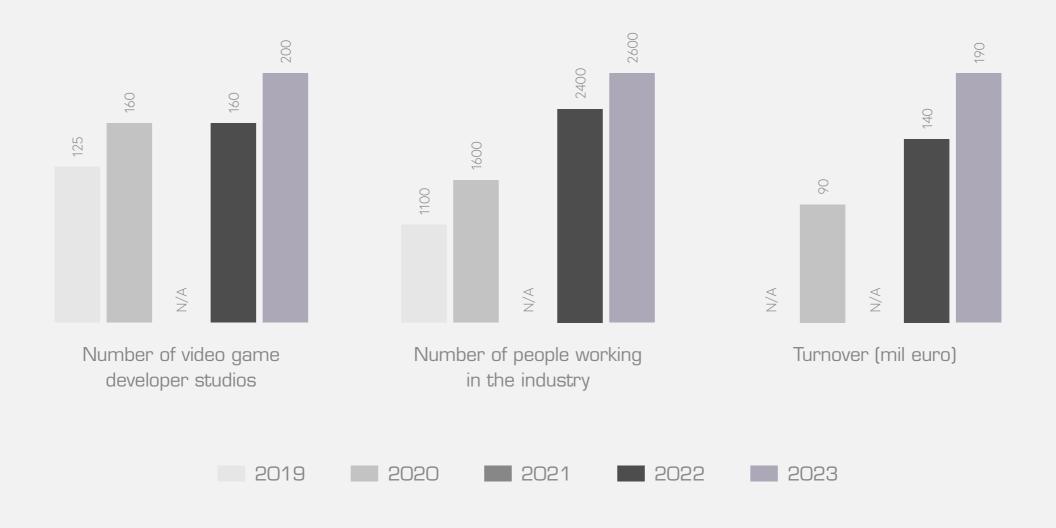




Italy

IIDEA - Italian Interactive & Digital Entertainment Association





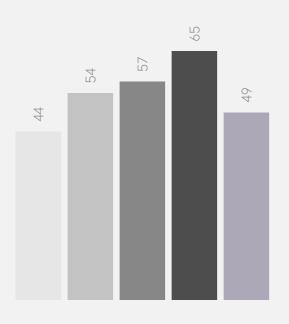
Note: 2023 numbers estimated



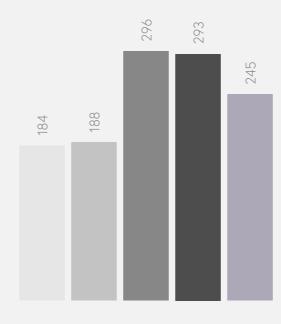
Latvia

Latvian Game Developers Association

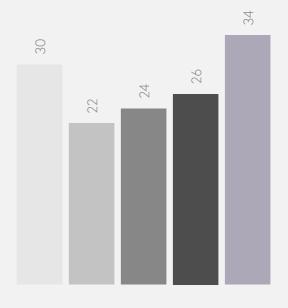




Number of video game developer studios



Number of people working in the industry



Turnover (mil euro)

2019

2020

2021

)21 **I**

2022

2023

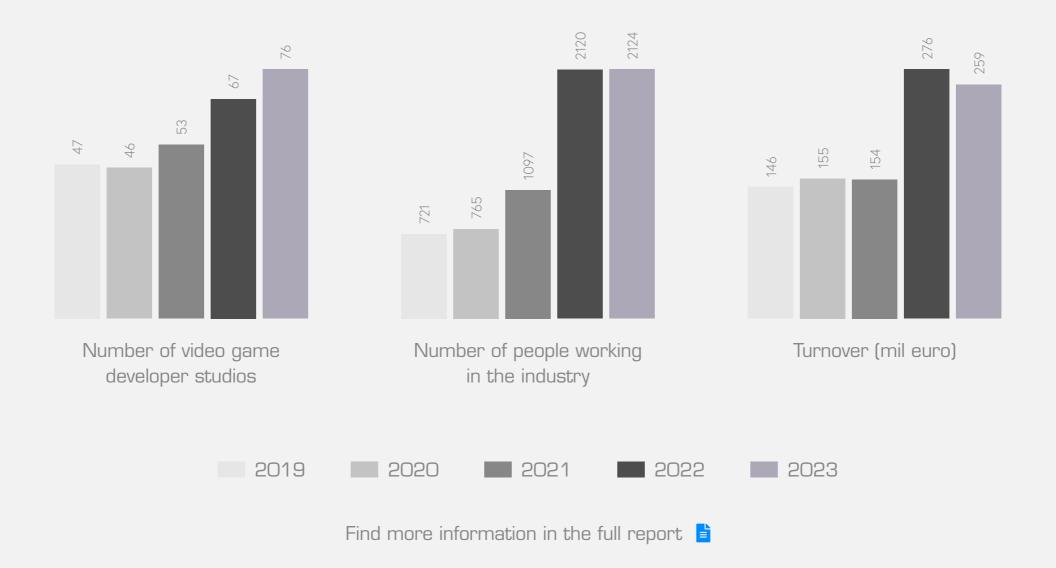
Find more information in the full report



Lithuania

Lithuanian Game Developers Association



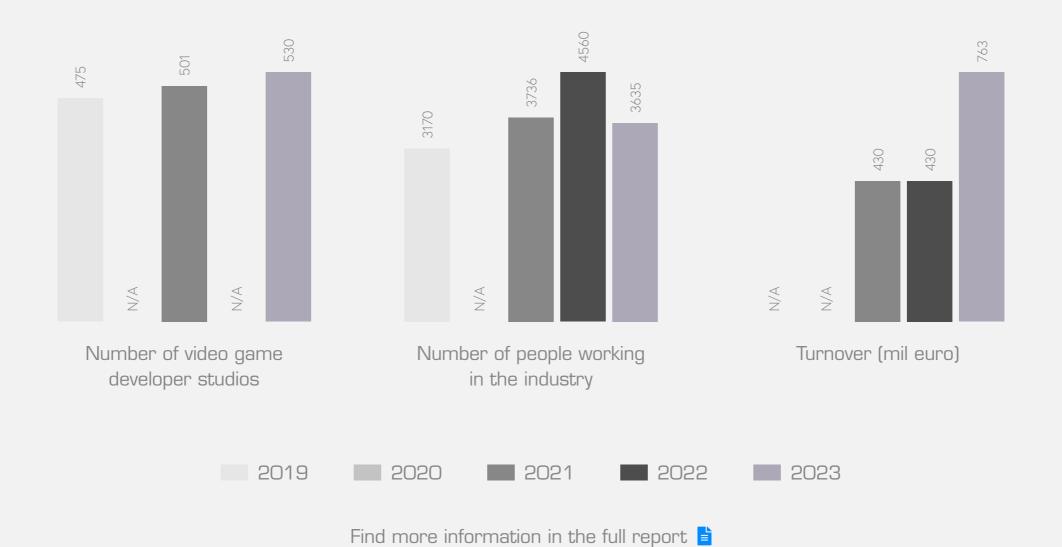




Netherlands

The Dutch Games Association





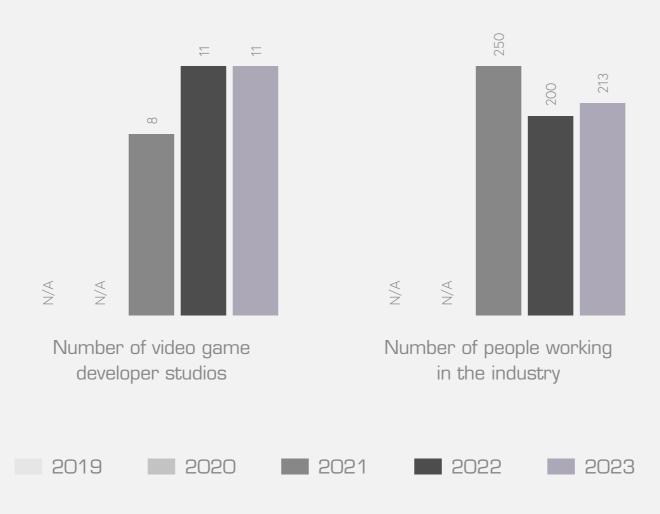
Note: Methodology for turnover reporting has changed in 2023.



North Macedonia

Macedonian Game Developers Association



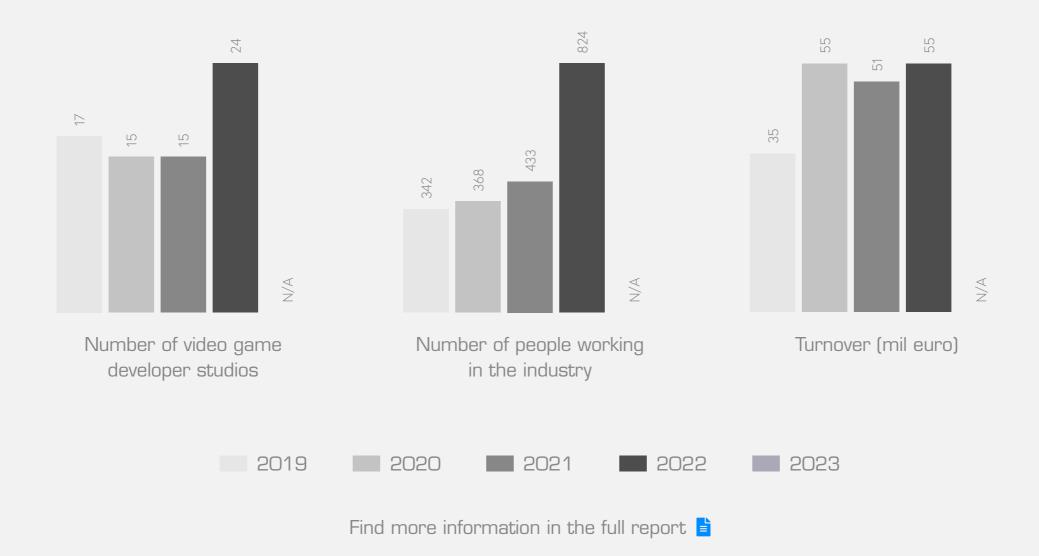




Norway

Virke Norwegian Producers Association



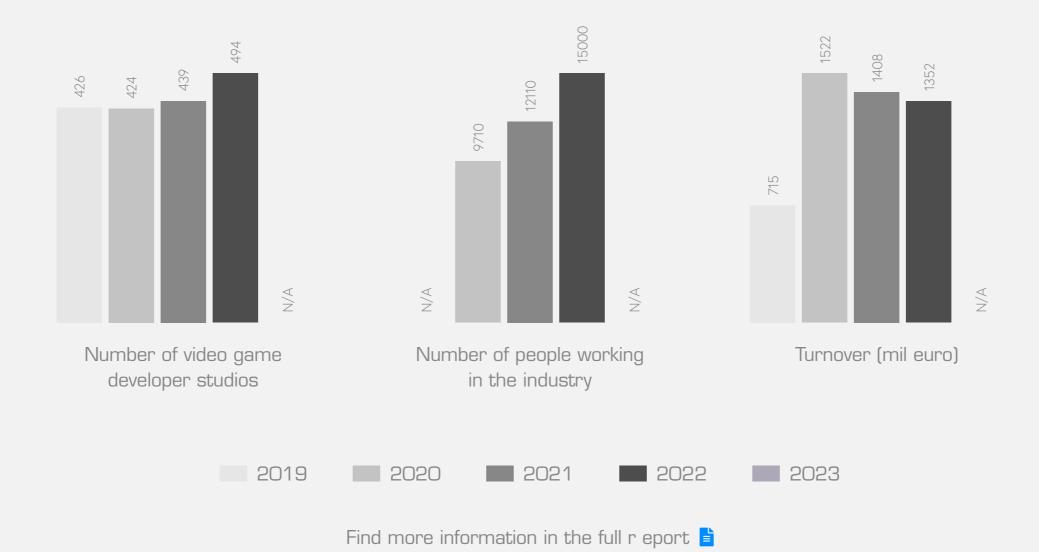




Poland

Indie Games Poland



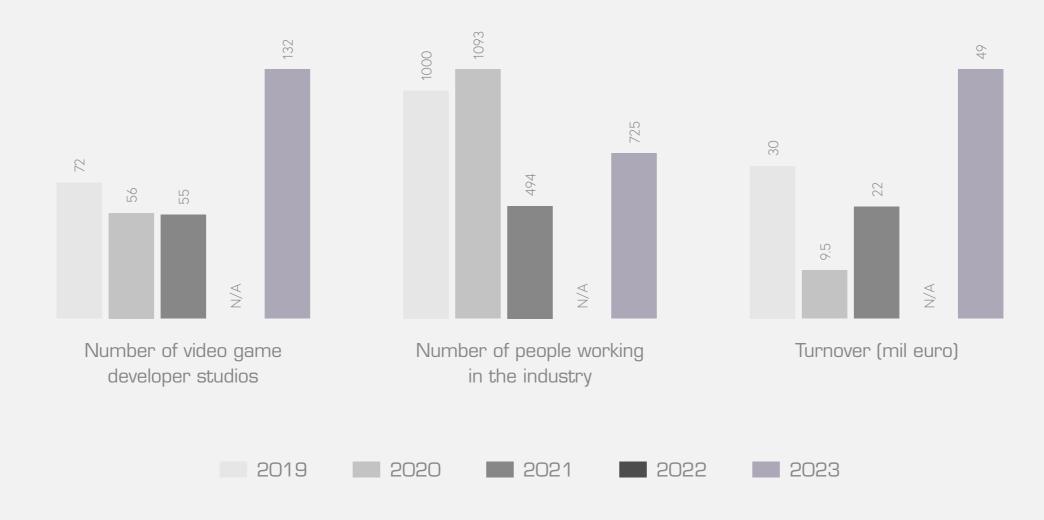




Portugal

Associação Produtores de Videojogos Portugueses





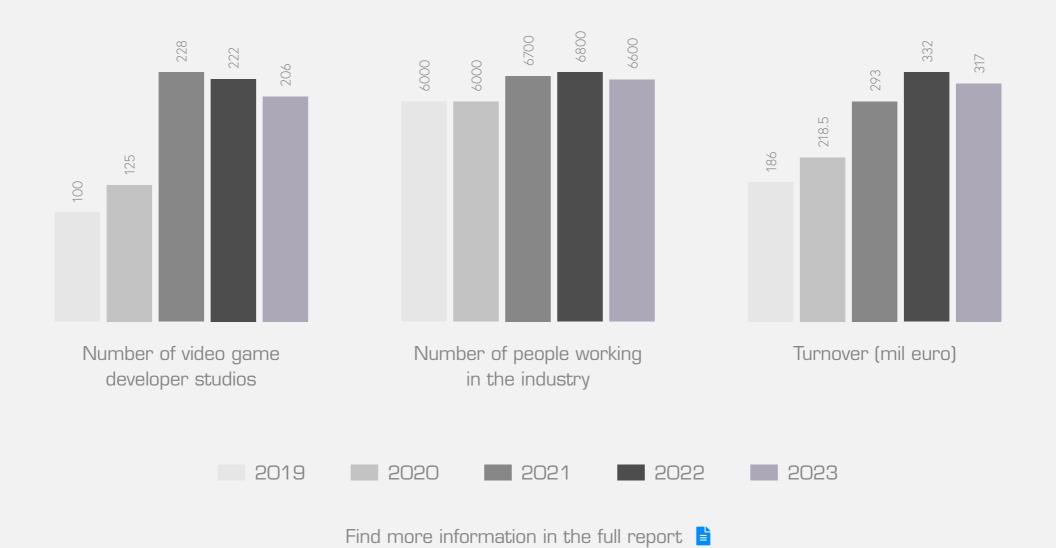
Note: The methodology used to collect the data has changed compared to previous years



Romania

Romanian Game Developers Association





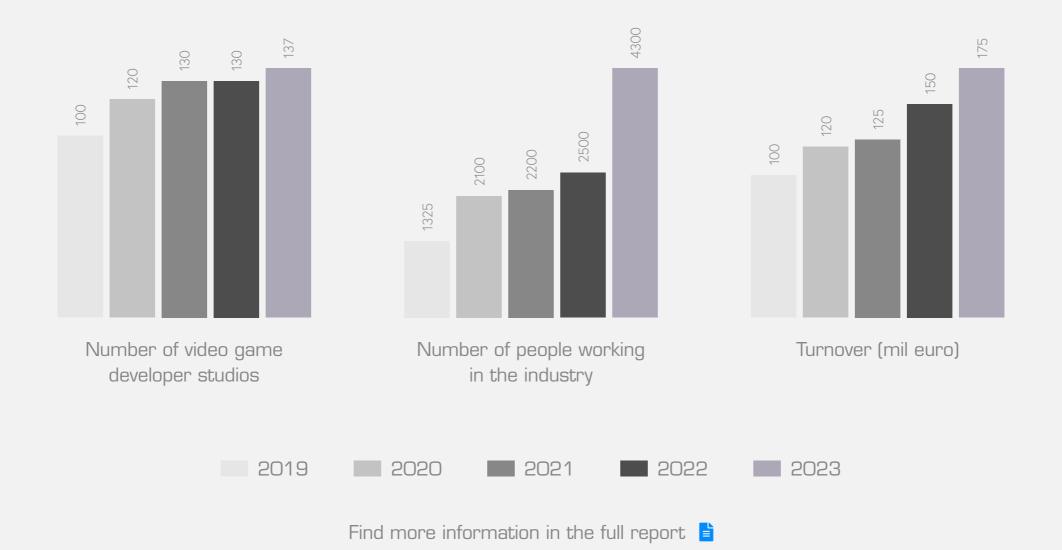
Note: The methodology used to collect the data has changed compared to previous years



Serbia

Serbian Games Association



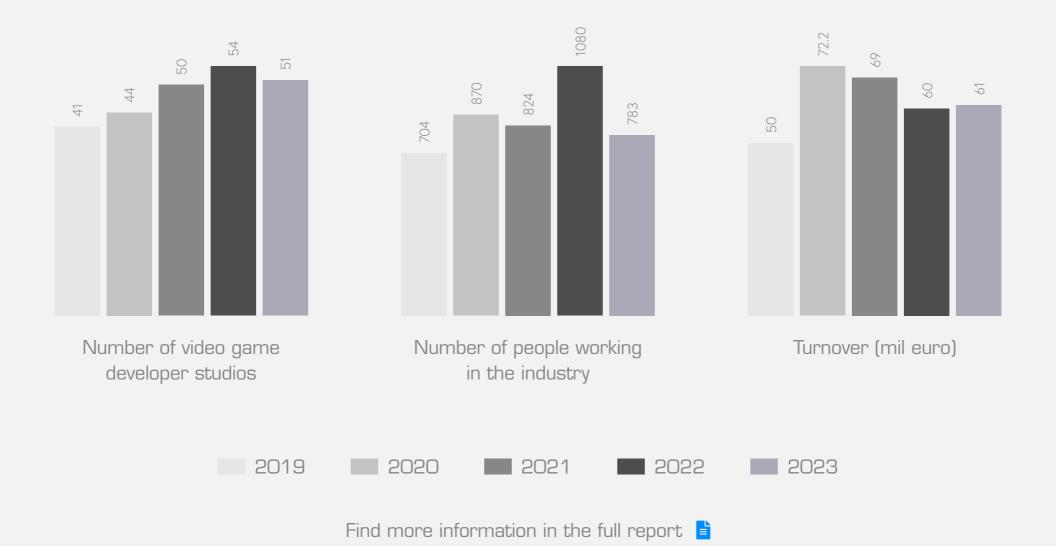




Slovakia

Slovak Game Developers Association

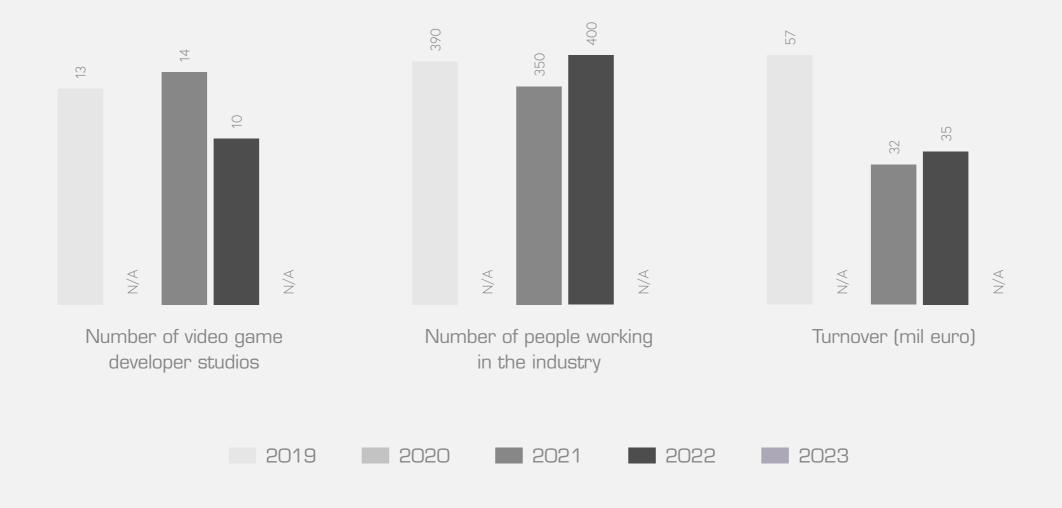




Slovenia

Slovenia Games Association



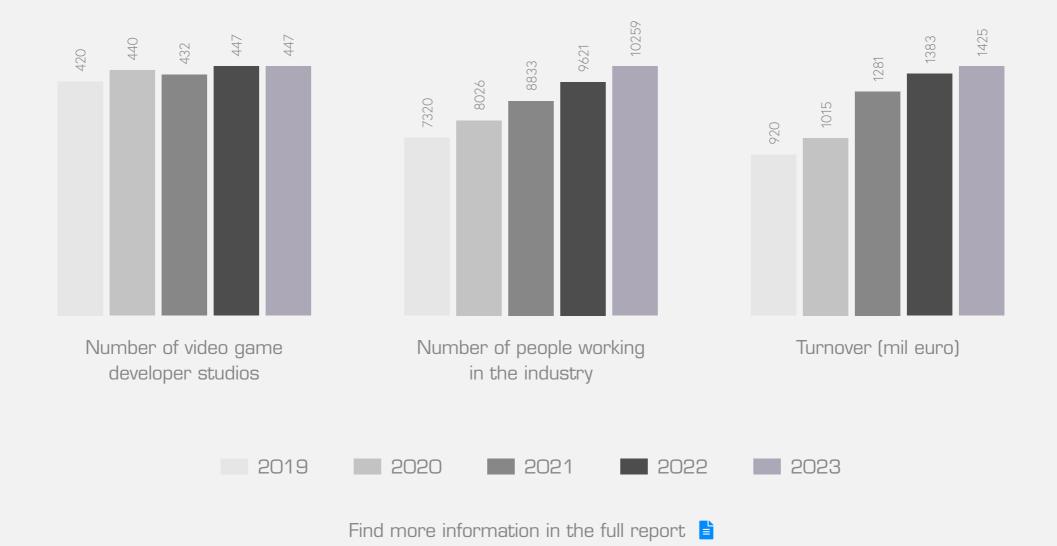




Spain

Spanish Desarrollo español de videojuegos



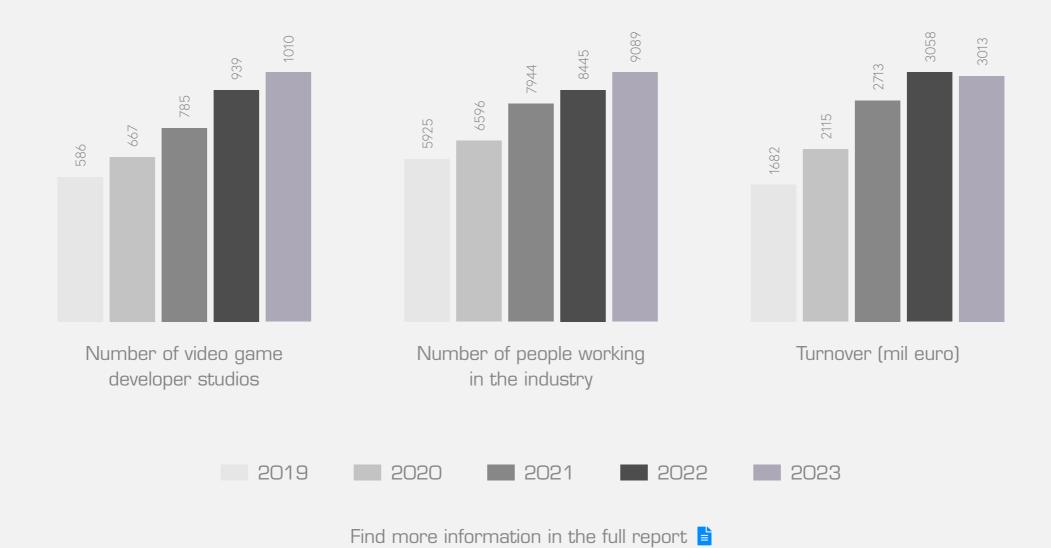




Sweden

Dataspelsbranschen/ Swedish Games Industry



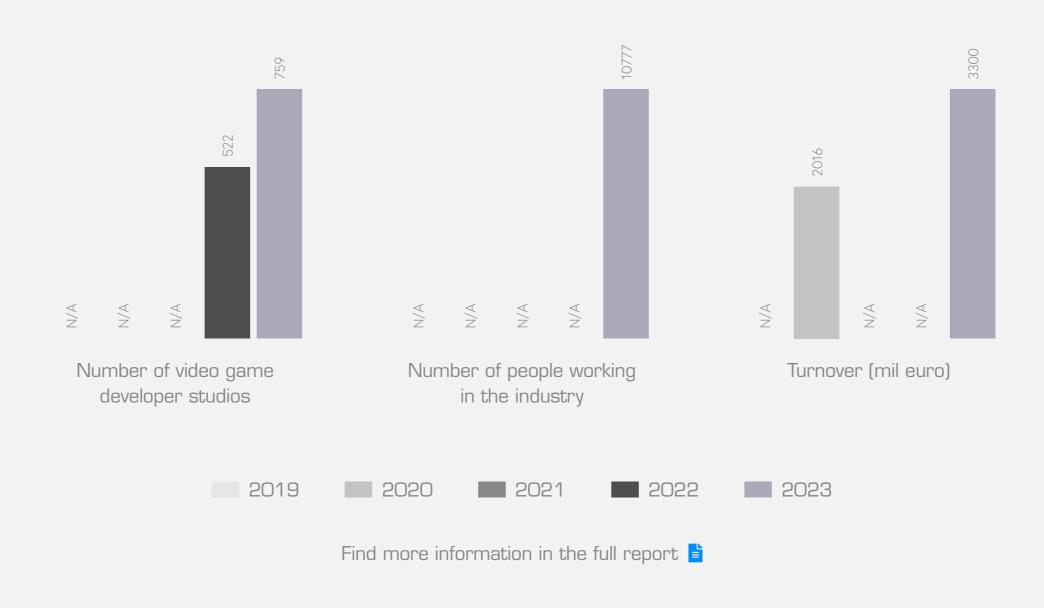




Turkey

TOGED (Game Developers Association of Turkey)



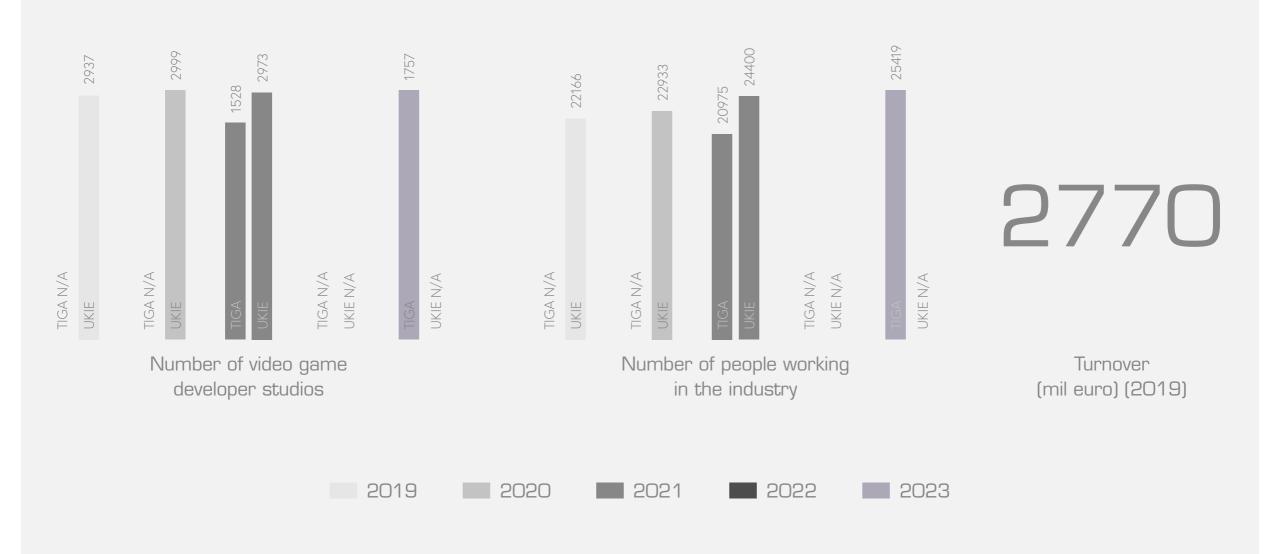




United Kingdom

TIGA and Ukie





Note: The associations have different methodologies for collecting the data.



APPENDIX



VIDEO GAMES INDUSTRY 2023 REPORTS BY GOUNTRY

ANNEX I



Video games industry 2023 reports by country

BELGIUM

BelgianGames (FLEGA, WALGA and games. brussels)



CROATIA

Croatian Game Development Alliance



GERMANY

game - Verband der deutschen Games-Branche e.V



LATVIA

Latvian Game Developers
Association



LITHUANIA

Lithuanian Game
Developers Association



NETHERLANDS

Dutch Games Association



ROMANIA

Romanian Game
Developers Association

SERBIA

Serbian Games Association



SLOVAKIA

Slovak Game Developers

Association



SPAIN

Spanish Desarrollo español de videojuegos



SWEDEN

Dataspelsbranschen/
Swedish Games Industry



TURKEY

Game Developers

Association of Turkey





EDUCATIONAL INSTITUTIONS PROVIDING STUDY PROGRAMMES

INGAME
DEVELOPMENT
INEUROPE

ANNEX II



Educational institutions providing study programs in game development in Europe

Austria: 16 institutions

- TU Graz 🌐
- HTL Spengergasse
- 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 🌐
- TGM 🏶
- Die Angewandte (*)
- Graphische (*)

Belarus: 3 institutions

- Belarus State University
- Belarusian State University of Informatics and Radioelectronics
- Institute of Modern Knowledge (*)

Belgium: 8 institutions 🏶

- AP Hogeschool
- Haute Ecole Albert Jacquard
- Haute Ecole Condorcet
- HOWEST Digital Arts and Entertainment
- Interface3
- LUCA School of Arts
- Syntra Vlaanderen
- Technocité

Croatia: 5 institutions

Formal Institutions

- Algebra University College (*)
- High School Sisak 🏶
- High School Novska 🌐

Non-formal institutions

- PISMO game development incubator (*)
- Machina Academy (*)

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
- 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 ducation 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
- 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



Germany

- 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
- GPB Gesellschaft für
 Personalentwicklung und Bildung GmbH
- Hamburg Media School
- HAW Hamburg
- HBK Essen
- hdpk SRH Hochschule der populären Künste
- HFBK Hamburg
- HMKW Hochschule für Medien,
 Kommunikation und Wirtschaft
- HMKW Hochschule für Medien,
 Kommunikation und Wirtschaft

- Hochschule Anhalt
- Hochschule Aschaffenburg
- Hochschule Augsburg
- Hochschule Bonn-Rhein-Sieg
- Hochschule Bremerhaven
- Hochschule Darmstadt
- Hochschule der Medien
- Hochschule Flensburg
- Hochschule Fulda
- Hochschule Furtwangen
- Hochschule für angewandtes
 Management
- Hochschule für Bildende Künste Braunschweig
- Hochschule für Musik, Theater und Medien Hannover
- Hochschule für Schauspielkunst "Ernst Busch"
- Hochschule Hannover
- Hochschule Harz
- Hochschule Heilbronn
- Hochschule Kaiserslautern
- Hochschule Kempten
- Hochschule Macromedia
- Hochschule 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 f

 ür Medien K

 öln
- 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



Germany

- SAE Institute
- 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

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

Italy: 27 institutions

- Accademia di Brera
- AIV Accademia Italiana Videogiochi

- BigRock Institute of Magic Technologies
- Digital Bros Game Academy
- Event Horizon School
- IED Istituto Europeo di Design
- iMasterArt: Accademia delle Arti italiana
- ISAS International School of Arts and Sciences
- IUDAV Accademia del Videogame e
 Game Design
- IULM
- Link Campus University
- Luiss Guido Carli
- Politecnico di Milano
- Politecnico di Torino
- Rainbow Academy
- SAE Institute Milano
- Sapienza Università di Roma
- Scuola Holden
- Scuola Internazionale di Comics
- Scuola Mohole
- Skyup Academy
- Società d'Incoraggiamento d'Arti e Mestieri (SIAM)
- The Sign Comics & Arts Academy
- Università degli Studi di Milano
- Università degli studi di Verona
- Università di Camerino
- Vigamus Academy



Latvia: 1 institution

 RĪGAS MĀKSLAS UN MEDIJU TEHNIKUMS

Lithuania: 6 institutions

- Mykolas Romeris University (*)
- Kaunas University of Technology (*)
- VILNIUS TECH (*)
- Vytautas Magnus University (*)
- Vilnius Business College (*)
- SMK College of Applied
 Sciences

Netherlands: 23 institutions

- Artez
- Breda University of Applied Sciences (*)
- Fontys (
- Hanzehogeschool (*)
- HKU
- Haagse Hogeschool (*)
- Hogeschool Rotterdam (*)
- Hogeschool van Amsterdam (*)
- Saxion (*)
- Aventus (*)
- Deltion (*)
- Firda 🏶
- Grafisch Lyceum Utrecht (*)
- Mediacollege Amsterdam (*)

- ROC Midden Nederland (*)
- ROC Ter AA
- ROC van Amsterdam (*)
- ROC van Flevoland
- ROC van Twente (*)
- Sint Lucas
- Technova College 🏶
- SAE
- Universiteit Utrecht (*)

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
- 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



Poland

- 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: 21 institutions 🌐

Non-Formal Institutions

- Escola de Tecnologias Inovação E Criação
- Restart
- World Academy
- Odd School

Formal institutions

- Master D
- IPBragança ESACT
- IPCA Escola Superior De Tecnologia
- IPiaget Do Sul
- IPLeiria Escola Superior De Tecnologia E Gestão
- IPMaia Escola Superior De Tecnologia E Gestão
- IPP Escola Superior De Media
 Artes E Design
- IPS Escola Superior De Tecnologia
 De Setúbal
- IPT Escola Superior De Tecnologia
 De Abrantes
- UEuropeia IADE

ULisboa - Instituto Superior Técnico Portugal

- ULusófona De Humanidades
 E Tecnologia
- ULusófona Do Porto
- Universidade De Aveiro
- Universidade Da Beira Interior
- Universidade De Coimbra
- Universidade Do Portos

Romania: 7 institutions

State Universities

- The Politehnica University
 of Bucharest
- The Politehnica University of Timisoara
- The National University of Theatre Arts and Cinematography
- The University of Urbanism and
 Arhitecture Ion Mincu
- Universitatea Babeș-Bolyai din
 Cluj-Napoca

Non-Formal Insitutions

GameDev Academy



Serbia: 14 institutions

- Faculty of Dramatic Arts, University of Belgrade
- Academy of Arts, University of Novi Sad
- College of Vocational Studies, Belgrade
 Polytechnic
- Faculty of Applied Arts, University of Arts in Belgrade
- Faculty of Information Technology,
 Metropolitan University
- Faculty of Media and Communications,
 Singidunum University
- Faculty of Electronic Engineering,
 University of Niš
- "Master 4.0" program for Creative Industries/Gaming, Belgrade, Kragujevac, and Niš
- SAE Institute, Belgrade
- Faculty of Contemporary Arts, Belgrade
- Faculty of Technical Sciences,
 University of Novi Sad
- Faculty of Science, University of Kragujevac
- Belgrade Business School
- School of Computing, Union University in Belgrade

Slovakia: 12 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
- Skyro High School

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
- CICE
- e-Squad Academy
- Escuela CES Escuela Superior de Imagen y Sonido
- Escuela Trazos
- ESNE
- Gametopia



Spain

- 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: 18 institutions +

Universities & Colleges

- Blekinge Institute of Technology
- Chalmers
- University of Skövde
- Luleå University of Technology
- Stockholm University of the Arts
- Uppsala University: Campus Gotland
- Malmö University
- University of Gothenburg
- Linköping University

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)
- Audio Production Academy (Stockholm)
- Nackademin (Stockholm)
- Xenter Yrkeshögskola (Botkyrka)

Turkey: 25 institutions

- Arkin Creative Arts and Design
 University
- Bahcesehir University
- Beykoz University
- Dogu Akdeniz University
- Dogus University
- Hacettepe University
- Halic University
- Hasan Kalyoncu University
- International Cyprus University
- Isik University
- Istanbul Aydin University
- Istanbul Beykent University
- Istanbul Bilgi University



Turkey

- Istanbul Esenyurt University
- Istanbul Gedik University
- Istanbul Kent University
- Istanbul Nisantasi University
- Istanbul Technical University
- Istanbul Topkapi University
- Istinye University
- Izmir University of Economics
- Kahramanmaras Istiklal University
- Lefke European University
- Middle East Technical University
- Mugla Sitki Kocman University

UK: 136 institutions

- Abertay University
- Aberystwyth University
- 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

UK

- London South Bank University
- 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



QUESTIONNAIRE

ANNEX III



Questionnaire - 2023 data collection

o. 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.
- O.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)
- o.2. How did you identify companies that were included in your data sets? E.g. did you only include your members or do you have a register of active game developer studios and publishers in your country? (Open question)
- o.3. All in all, what is the number of developers and publishers you were able to get data from? Do not include service providers into this number. (Number)
- 0.4 If you have published a report on **2023** 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.
- --> A **local subsidiary** is a company owned in your country by a parent company, but with an own business ID.

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.
- -> A corporate group is a group of companies owned by a parent company. Do not include data of local subsidiaries in the data of a parent company located in your country. Do not include subsidiaries (local studios) owned by parent company in other countries. Subsidiaries should be reported independently
- -> Do not include **holding companies**. A holding company is a company that holds stocks of game developer studios and third-party publishers and does not have any own game development activities.
 - 1.1. Number of active game developer studios and publishers in your country in 2023
 - 1.1.1. What was the total number of active game developer studios and publishers located in your country in 2023? (Number)Please make sure that you do not count twice companies which are both a game developer and third-party publisher.
 - 1.1.2. What is the total number of active game developer



- studios in your country in 2023? 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 2023? (Number)
- 1.1.4. What was the number of active service provider companies located in your country in 2023? (Number) Service provider company directly linked with the creating assets for the video games. (ex: QA service) Do not include the local marketing community management or other supporting activities.
- 1.1.5. What type of service providers are you including?

2. Number of people working for game developer studios and publishers in your country, in 2023

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.
 - 2.1.1 What was the number of people working for game developer studios and publishers in your country in 2023? (Number)
 - 2.1.2. Are staff, in general, working for game developer studios and publishers in your country: (it can be estimated if you do not have exactly data) in 2023/2024, or the latest data available: scale 0 to 10 where 0 is only other forms of employment (freelancers, independent contractors, employer on record etc.) and 10 is only directly employed employees.

 (In other words, what is the rough estimated percentage of directly employed employees of all staff working in the industry)
 - 2.1.3 Are you able to give any estimates on how many employees will be there in the industry? If each, in which form are you collecting this data.



- 2.1.4 Are you going to have the same number of employees, more employees or less?
- 2.2 Gender of employees in 2023
- 2.2.1. What percentage of the people, working for the local game developer studios and publishers, were females in 2023? (Percentage)
- 2.2.2. What percentage of the people, working for the local game developer studios and publishers, were male in 2023? (Percentage)
- 2.2.3. What percentage of the people, working for the local game developer studios and publishers, were other genders in 2023? (Percentage)
- 2.3 Talent hubs
- 2.3.1 Please list the main game dev hubs in your country and the number of employees they have (definition: Main game dev hub a city / conurbation) (example: Bucharest 4000, Timisoara 500, Cluj 300)

3. Revenue generated by the industry in 2023

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).
 - 3.0. What was the total turnover of local game developer studios and publisher located in your country in 2023? (Number in million euros)
 - 3.1. Industry consolidation/concentration in the hands of few biggest studios (subtitle) in 2023
 - 3.1.1. How much of that revenue was generated by the biggest (in terms of revenue) 10% of studios and publishers in 2023? (Percentage)

4. New games in 2023

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.



- --> **Co-productions**: co-production is a game that is produced jointly by a number of different games developer studios. In co-production revenue generated is typically split between participating parties and IP created is co-owned.
 - 4.0. What was the number of game developer studios located in your country that published new games during 2023? Please include both the companies that self-published new games and companies that used third-party publisher for publishing new games. Co-production games should be included in the data of each contributing country. (Number)
 - 4.1. What was the number of new titles published by game developer studios in your country in 2023? 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)
 - 4.1.1. How many of these new titles were self-published? (Number)
 - 4.1.2. How many of these new titles were published by an external publisher? (Number)

- 4.2. Platforms in 2023
- 4.2.1. 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)
- 4.2.2. Please explain your methodology of calculating this.

5. Game education, the latest data available

Definitions

DO INCLUDE

- --> Game educational institution: is a formal, officially registered, private or public educational institution proving education leading to a degree in game research or game development recognized by European Qualification Framework. A program leading to a degree in game research or game development means a degree program focused and specialized on game research (e.g. ludology or media studies) or development (from arts, programming, game design or any other perspective).
- --> Non-formal game education institution: Institutions which provide non-degree-oriented game education

DO NOT INCLUDE

--> Different game education program in the same educational institution



- --> Education institutions providing degree programs where games are only included in a few courses
- -> **Training programs** (e.g. private online programs run by game developer studios and publishers) should not be included in this data. (**no matter the length of program**)
 - 5.0. What is the number of educational institutions providing formal educational programs focused on game research (e.g. ludology) or game development (the latest data available, please mention the year)? If one institution has more than one game focused degree programs, it should be calculated only once. (Number)
 - 5.1. What is the number of non-formal game education institution providing programs focused on game development (the latest data available, please mention the year)?
 - 5.2. Please check the list of educational institutions that EGDF has published last year and notice us if there are any changes. Can you provide links to these institutions? If possible, please identify what EQF degree levels each of these educational institution covers. Usually, universities are level 6 to 8, Polytechnics and Universities Applied Science are

level 6 to 7, Vocational education is level 4. You can access national qualification frameworks and relevant degree levels here: https://www.cedefop.europa.eu/en/country-reports/european-inventory-of-nqfs

6. Public Support, the latest data available (please mention the year)

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 of public support instruments that EGDF published last year.

- 6.0. From what year is your data?
- 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



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, WALGA), Croatia (CGDA), Czechia (GDACZ), Estonia (GameDev Estonia), Finland (Suomen pelinkehittäjät), France (SNJV), Germany (GAME), Italy (IIDEA), Lithuania (LZKA), Netherlands (DGA), Norway (Produsentforeningen), Poland (PGA, Indie Games Poland Foundation), Portugal (APVP), Romania (RGDA), Serbia (SGA), Slovakia (SGDA), Spain (DEV), Sweden (Spelplan-ASGD), Switzerland (SGDA), Turkey (TOGED) and the United Kingdom (TIGA). For more information, visit https://www.egdf.eu/



Contact for EGDF:

Jari-Pekka Kaleva,

Managing Director, European Games Developer

Federation (EGDF)

Phone: +358 40 716 3640

Email: jari-pekka.kaleva@egdf.eu