

2024 EUROPEAN VIDEO GAMES INDUSTRY INSIGHT REPORT

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



European
Games Developer
Federation



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FOREWORD



From Hendrik Lesser, President of EGDF and Clemens Mayer-Wegelin, VGE Chair

The European Video Game Industry Insights Report, jointly produced by the European Games Developer Federation (EGDF) and Video Games Europe, provides a comprehensive overview of Europe's game development landscape.

In 2024, the European games industry continued to navigate a demanding environment. Global markets remained volatile, private investment remained cautious, and inflation meant that modest growth translated into broadly flat performance in real terms. The key mantra for European studios and publishers was to stay calm and survive.

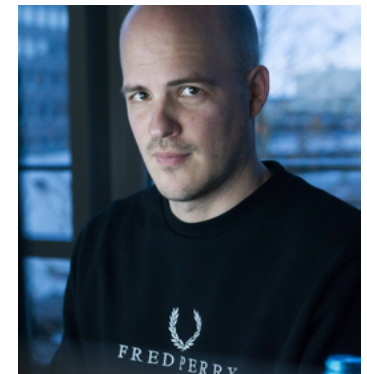
Against this backdrop, the 2024 insight report highlights that the European industry proved notably resilient. Growth continued in several countries, both in revenue and the number of studios, lifting both indicators at the European level. However, layoffs, consolidations, and declining employment led to stagnation and in some countries a small decrease in employment - the first such dip in the sector for the first time. This dual reality is central to 2024: the well-positioned intellectual property (IP) holders and studios with strong player bases or financial cushions kept growing, while many small to mid-sized teams faced slower sales, fewer publishing deals and tougher access to capital. That Europe still produces a high number of new games start-ups under these conditions demonstrates the true entrepreneurial spirit running through the industry.

Challenging conditions demonstrate how important public support schemes are for European, national and regional game industry ecosystems - acting as crucial shock absorbers. As seen in previous years, where funding frameworks are robust and predictable, studios

are better able to protect jobs and keep pipelines alive. A Goldmedia study cited in the German report finds that every €1 of games funding can generate €3.40 in extra tax and social-security revenue, €4.80 in additional investment and €8.70 in gross value added - clear evidence of the fiscal leverage that predictable support delivers.

In 2024, we saw industry commitment to sustainable development becoming more visible across nations. Sweden led the way as the first country to publish an estimate of direct emissions from its game development sector: around 1,959 tCO_{2e} corresponding to 0.014% of national industrial emissions. The Dutch report notes that roughly one-third of studios follow formal climate or resource policies, while the Croatian survey finds that 23% have reduction targets. Initiatives such as Playing for the Planet and the Sustainable Games Alliance continue to drive this work forward. As more countries include sustainability data, we look forward to including these indicators in the European-level report in the coming years.

All in all, the resilience shown in 2024 - combined with continued innovation, a strong talent pool, specialised strengths in mobile, PC, applied games, and targeted public support - provided the European industry a strong foundation to build on through 2025 and 2026. The near-term priority remains navigating uneven growth, investment scarcity and geopolitical uncertainty. As macroeconomic and funding conditions stabilise, and with the right policy environment competitive, predictable funding instruments and fit-for-purpose regulation alongside a more pluralistic mix of capital sources, Europe is well-positioned to lead the next chapter of global game development.



Hendrik Lesser

EGDF President
CEO of Remote Control
Productions



**Clemens
Mayer-Wegelin**

VGE Chair
General Counsel Europe,
Nintendo of Europe SE

INTRODUCTION

For this report, with the support of VGE, EGDF has aggregated national industry data for 2024 from 28 European countries:

Austria, Belgium, Bulgaria, Croatia, Cyprus, Czechia, Denmark, Estonia, Finland, France, Germany, Iceland, Italy, Latvia, Lithuania, Luxembourg, Netherlands, North Macedonia, Norway, Poland, Portugal, Romania, Serbia, Slovakia, Spain, Sweden, The United Kingdom, Turkiye

Please note that aggregated EU level data also includes latest available data points from countries that so far have not collected 2024 data.

The report has two main parts. The first part presents Europe-wide data for 2024 (total numbers, comparative data, etc.). The second part comprises country-specific information (2020-2024, 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 DATA

In 2024 the EU
was home
to 6600 game
developers studios



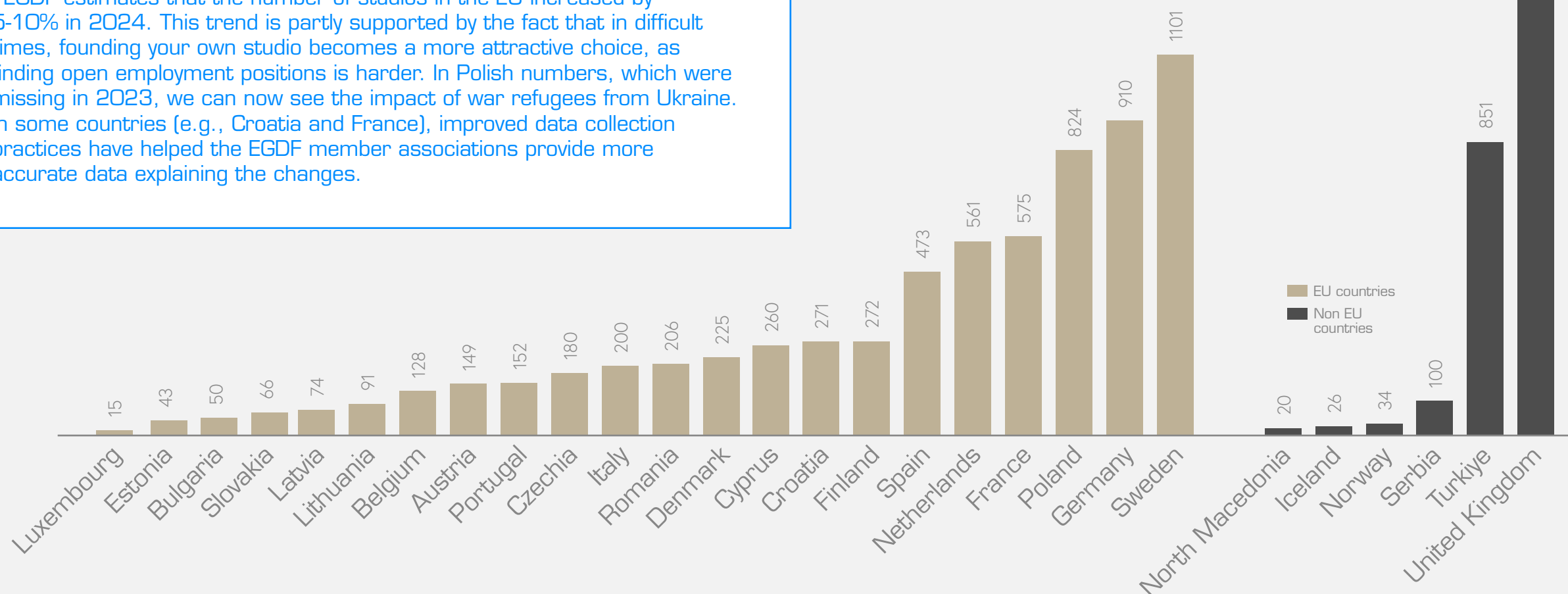
Number of game developer studios

2024

6,600
game dev studios in the EU

- 2024 report includes data from Bulgaria and Cyprus for the first time, so the total number of studios is not comparable to the previous reports.

- EGDF estimates that the number of studios in the EU increased by 5-10% in 2024. This trend is partly supported by the fact that in difficult times, founding your own studio becomes a more attractive choice, as finding open employment positions is harder. In Polish numbers, which were missing in 2023, we can now see the impact of war refugees from Ukraine. In some countries (e.g., Croatia and France), improved data collection practices have helped the EGDF member associations provide more accurate data explaining the changes.



What is the total number of active game developer studios in your country in 2024?
Both studios doing self-publishing or using external publishers are taken into account (Number)

Number of people working for the game developer studios and publishers

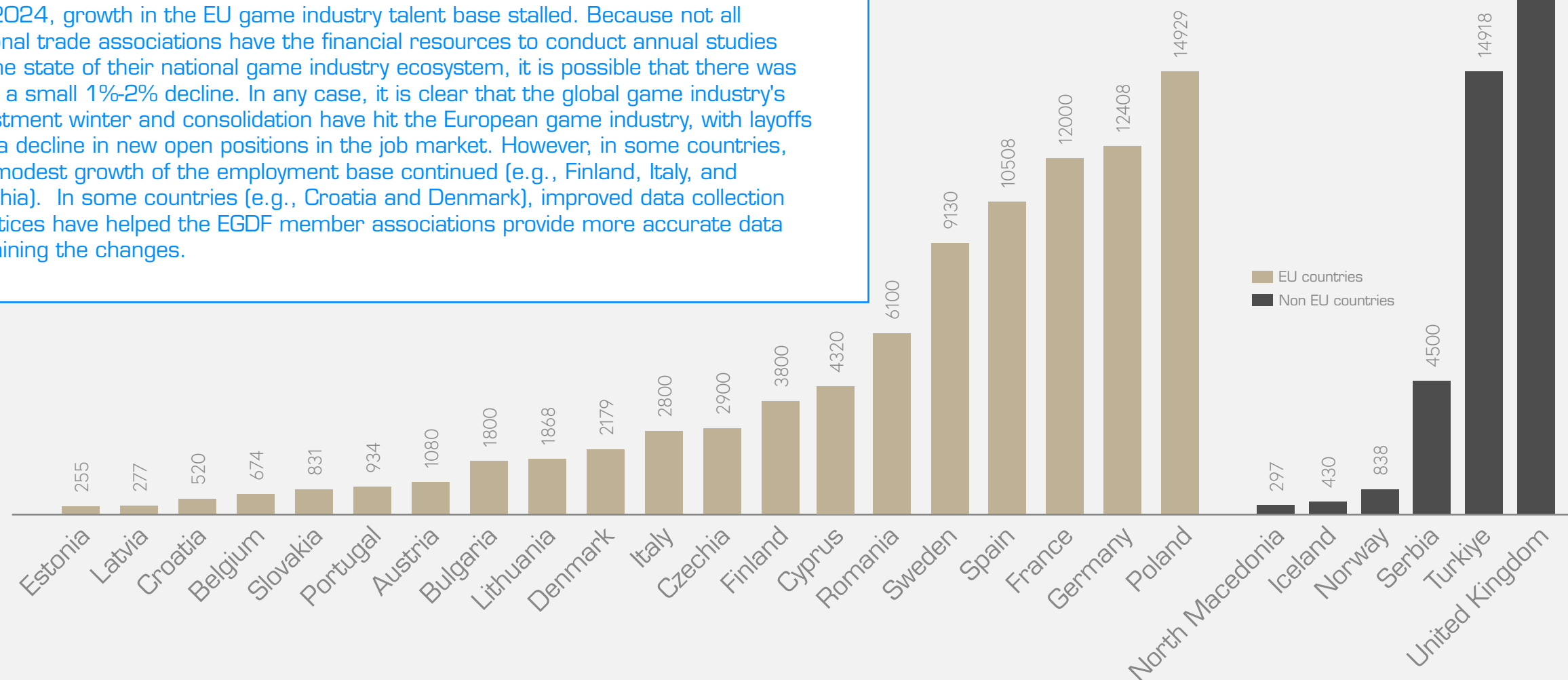
2024

95,000

people
employed in
the EU

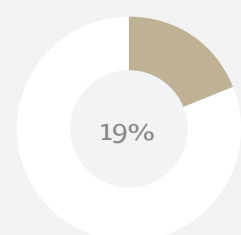
- 2024 report includes data from Bulgaria and Cyprus for the first time, so the total size of the industry employee base is not comparable to the previous reports.

- In 2024, growth in the EU game industry talent base stalled. Because not all national trade associations have the financial resources to conduct annual studies on the state of their national game industry ecosystem, it is possible that there was even a small 1%-2% decline. In any case, it is clear that the global game industry's investment winter and consolidation have hit the European game industry, with layoffs and a decline in new open positions in the job market. However, in some countries, the modest growth of the employment base continued (e.g., Finland, Italy, and Czechia). In some countries (e.g., Croatia and Denmark), improved data collection practices have helped the EGDF member associations provide more accurate data explaining the changes.

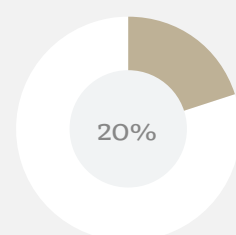


What was the number of people working for game developer studios and publishers in your country in 2024?

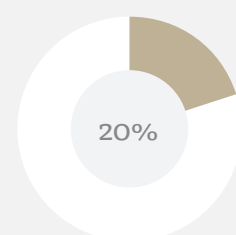
Percentage of women working in the industry



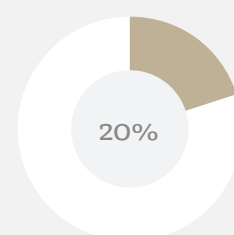
Czech Republic



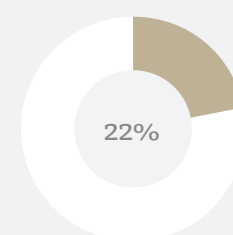
Austria



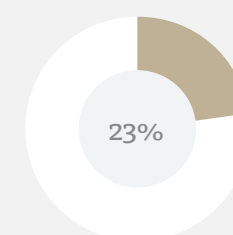
France



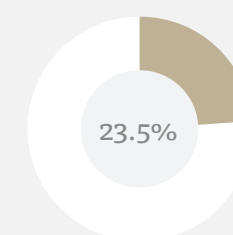
Slovakia



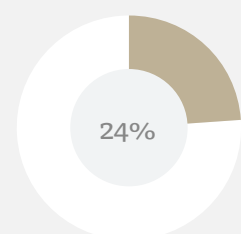
Portugal



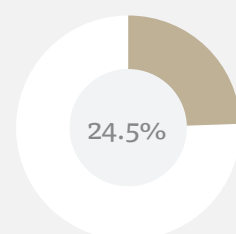
Netherlands



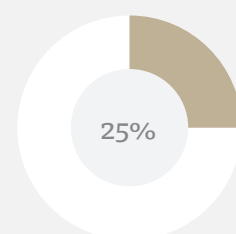
Sweden



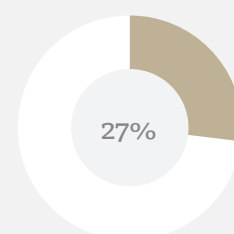
Finland



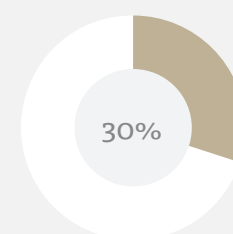
Poland



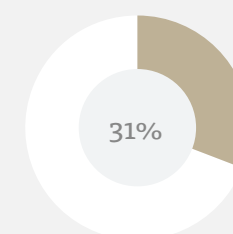
Latvia



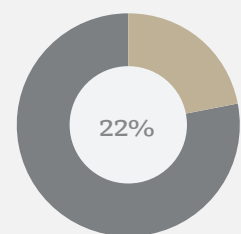
Spain



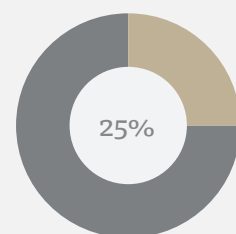
Germany



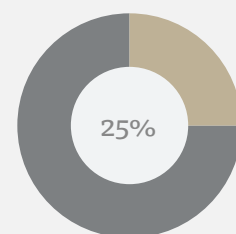
Croatia



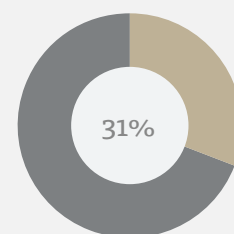
Norway



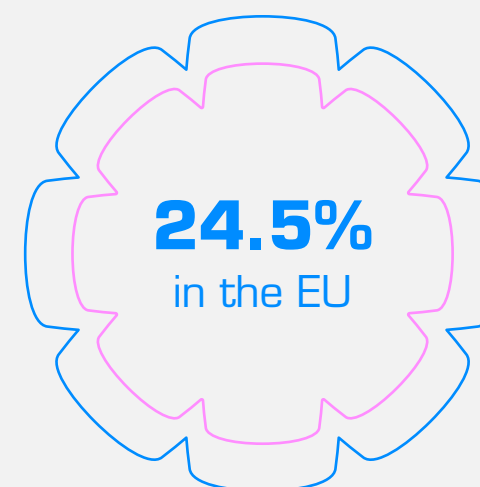
Iceland



North Macedonia



Serbia



Percentage of people who identify as non-binary | 2023-2024

Austria 1%,
Croatia 1%,
Germany 1%,
France 1%,
Netherlands 4%,
Poland 1%,
North Macedonia 1%

What percentage of the people, working for the local game developer studios and publishers, were women in 2024?

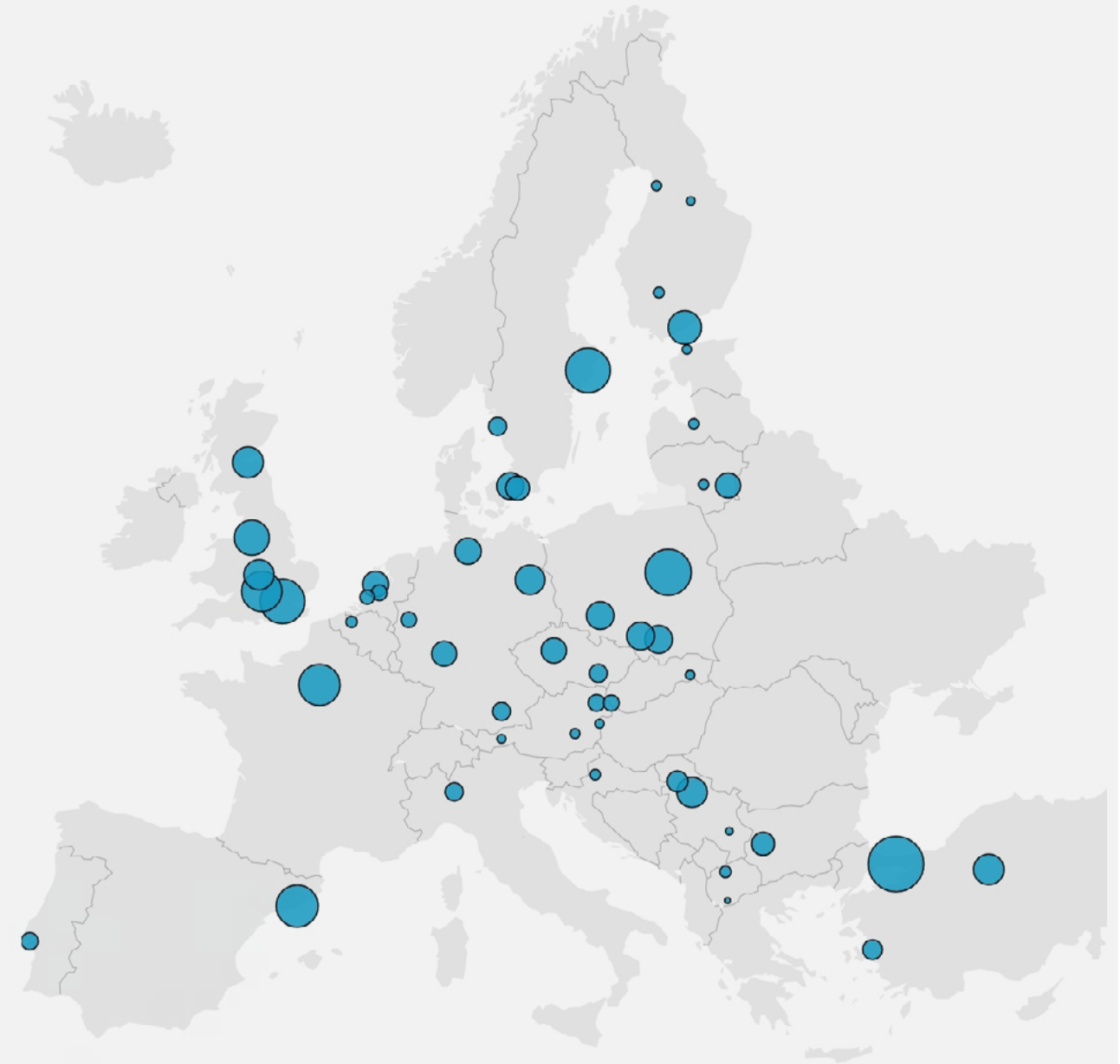
* Data in grey is from non-EU countries

Key reported European game dev hubs by the number of employees

Largest hubs

1	Istanbul, Turkiye	9370
2	Warsaw, Poland	6340
3	London, United Kingdom	5930*
4	Stockholm, Sweden	5900
5	Barcelona, Catalonia, Spain	5360
6	Paris, France	5000
7	Oxford-Guildford, United Kingdom	4750*
8	Manchester-Liverpool, United Kingdom	3500*
9	Helsinki, Finland	3130
10	Edinburgh, United Kingdom	2650*
11	Ankara, Turkiye	2610
12	Belgrade, Serbia	2550
13	Royal Leamington Spa, United Kingdom	2520*
14	Berlin, Germany	2430*
15	Krakow, Poland	2100
16	Wrocław, Poland	2100
17	Katowice, Poland	2100
18	Copenhagen, Denmark	1960
19	Hamburg, Germany	1870*
20	Amsterdam, Netherlands	1790

* Data from 2023

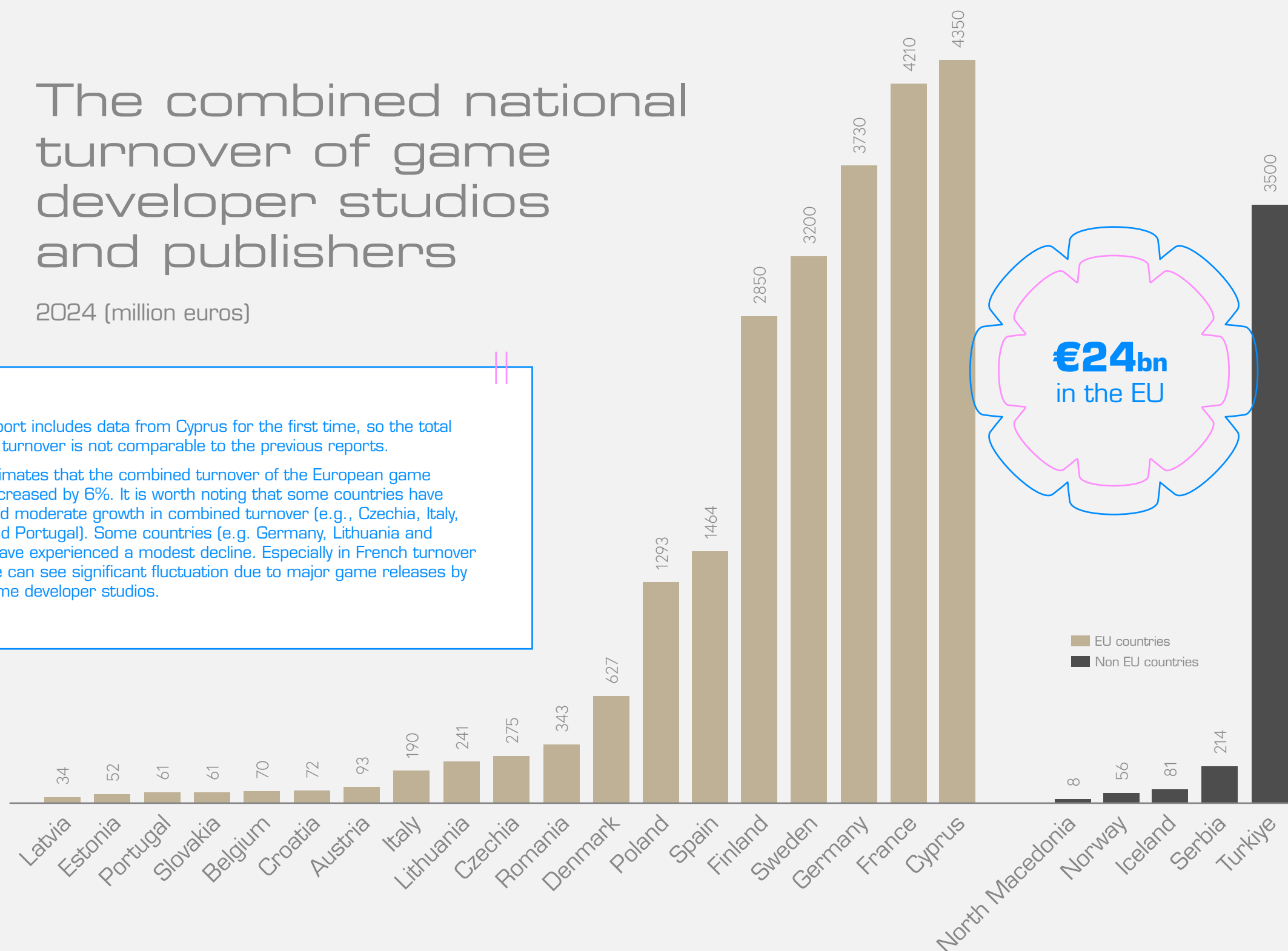


List the main game dev hubs in your country and the number of employees they had in 2024.

The combined national turnover of game developer studios and publishers

2024 (million euros)

- 2024 report includes data from Cyprus for the first time, so the total number of turnover is not comparable to the previous reports.
- EGDF estimates that the combined turnover of the European game industry increased by 6%. It is worth noting that some countries have experienced moderate growth in combined turnover (e.g., Czechia, Italy, Finland, and Portugal). Some countries (e.g. Germany, Lithuania and Belgium) have experienced a modest decline. Especially in French turnover figures, we can see significant fluctuation due to major game releases by leading game developer studios.



What was the total turnover of local game developer studios and publishers located in your country in 2024?



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

Number of companies that published new titles | 2024



What was the number of game developer studios located in your country that published new games during 2024?

Number of new titles published by local developers | 2024



What was the number of new titles published by game developer studios in your country in 2024?

Number of new self-published titles | 2024



How many of these new titles were self-published?

Number of new titles published by external publishers | 2024



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

2024

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

COUNTRY	PLATFORMS						
	YEAR	PC/MAC	CONSOLE/ HANDHELD CONSOLES	MOBILE/ TABLET	BROWSER	VR/AR	OTHER
Austria	2024	52.0%	21.0%	65.0%	13.0%	N/A	N/A
Belgium	2024	85.0%	N/A	N/A	N/A	N/A	N/A
Croatia	2024	98.5%	31.0%	1.5%	N/A	6.0%	N/A
Denmark	2022	49.0%	4.0%	46.0%	8.0%	N/A	N/A
Finland	2024	61.0%	38.0%	61.0%	N/A	N/A	20%
France	2024	40.2%	40.1%	15.4%	N/A	N/A	2%
Germany	2024	79.0%	41.0%	37.0%	17.0%	16.0%	N/A
Greece	2023	89.0%	11.0%	22.0%	11.0%	0.0%	N/A
Iceland	2024	73.0%	11.5%	23.0%	7.7%	7.7%	
Italy	2023	86.0%	44.0%	37.0%	N/A	N/A	17%
Latvia	2024	94.0%	0.0%	5.0%	N/A	1.0%	N/A
Lithuania	2024	67.0%	13.0%	13.0%	8.0%	8.0%	N/A

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.

COUNTRY	PLATFORMS						
	YEAR	PC/MAC	CONSOLE/ HANDHELD CONSOLES	MOBILE/ TABLET	BROWSER	VR/AR	OTHER
Netherlands	2024	85.0%	37.0%	47.0%	7.0%	10.0%	10.0%
North Macedonia	2024	30.0%	20.0%	68.0%	3.0%	3.0%	3.0%
Poland	2024	71.8%	11.7%	11.5%	2.3%	3.1%	
Romania	2024	67.0%	5.0%	29.0%	N/A	4.0%	N/A
Serbia	2024	76.0%	48.0%	80.0%	28.0%	24.0%	12.0%
Slovakia	2024	76.6%	24.7%	37.7%	16.9%	15.6%	10.4%
Spain	2024	95.0%	63.0%	48.0%	27.0%	22.0%	18.0%

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 or the share is based on the platform of the games released by the local gamedev studios during the year

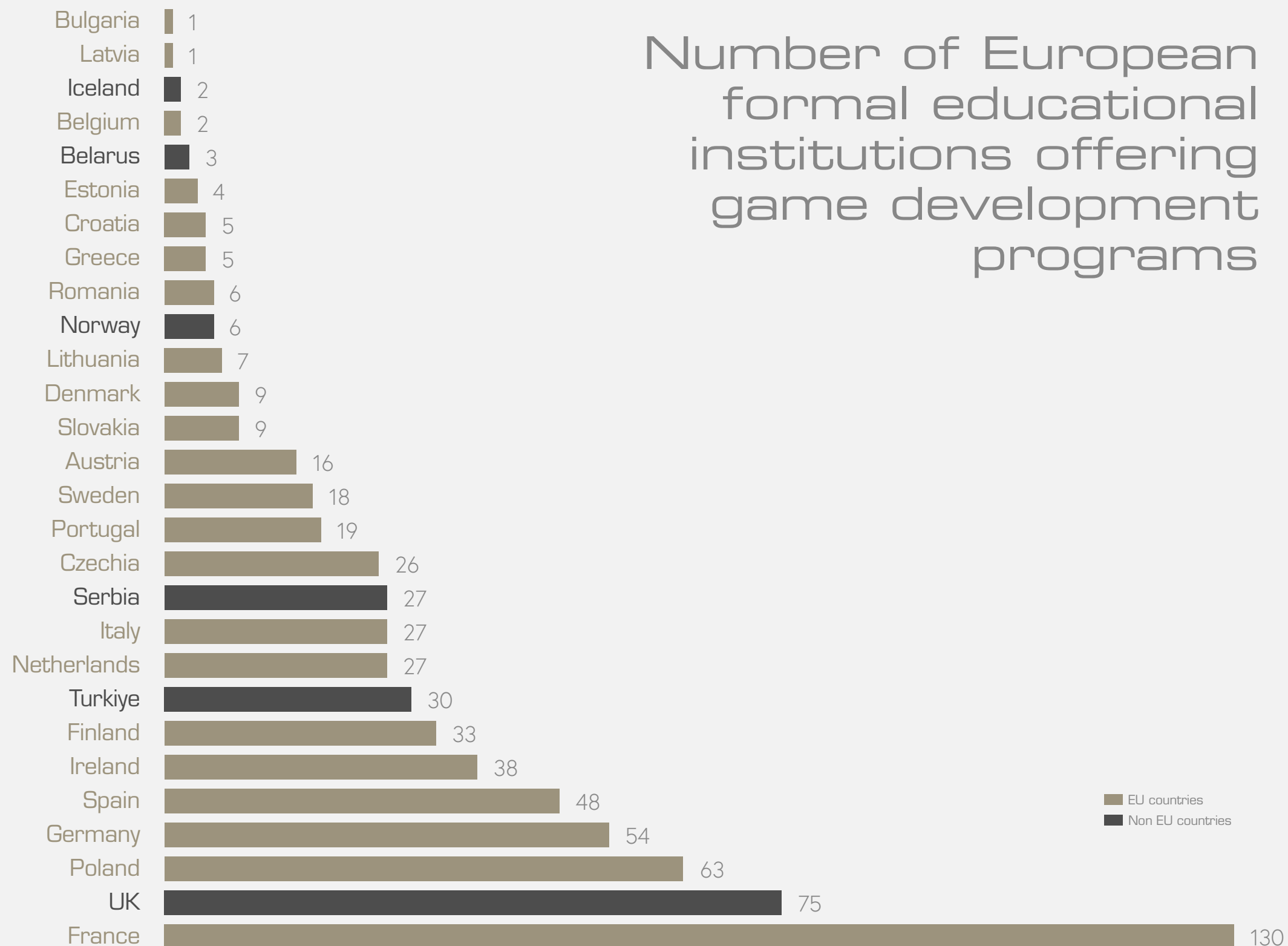
COUNTRY	PLATFORMS						
	YEAR	PC/MAC	CONSOLE	MOBILE/ TABLET	BROWSER	VR/AR	OTHER
Portugal	2021	8.30%	8.30%	33%	8.30%	8.30%	8.30%
UK	2024	41.5%	10.9%	33.2%	2.5%	8.0%	N/A

FUNDING AND EDUCATION INSTITUTIONS INSIGHTS FOR THE VIDEO GAMES INDUSTRY



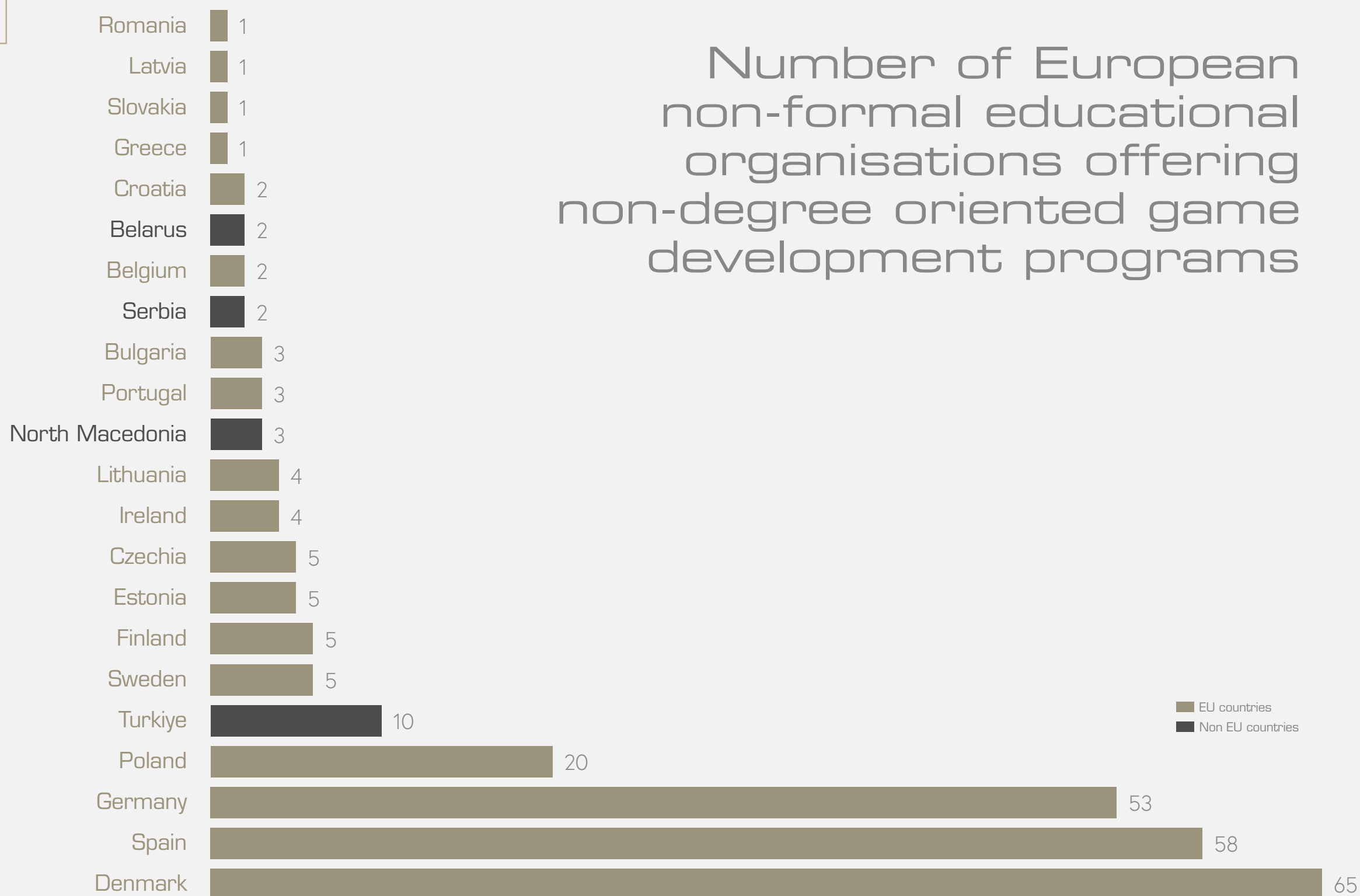
France, Poland and U.K.
have the most games
education institutions

Number of European formal educational institutions offering game development programs



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.

Number of European non-formal educational organisations offering non-degree oriented game development programs



The data from the table is the latest data available for each country.

A close-up, low-angle shot of a person's hands typing on a silver laptop keyboard. The scene is bathed in warm, golden light from a window in the background, creating a soft, out-of-focus effect. In the background, another person's hands are visible, one holding a pen over a document. A pair of glasses rests on the desk next to the laptop. The overall atmosphere is professional and productive.

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

Cultural aid for game production

COUNTRY	CULTURAL STATE AID FOR VIDEO GAME PRODUCTION								
	Grants		Loans		Tax credits		Equity funding		None
	General	Dedicated to game dev studios	General	Dedicated to game dev studios	General	Dedicated to game dev studios	General	Dedicated to game dev studios	
Austria	✓								
Belgium (all)	✓	<u>VAF/</u>	✓		✓	Taxshelter	✓	PMV MediaInvest	
Belarus									✓
Croatia	✓	<u>Croatian Audiovisual Centre</u>			✓				
Czechia	✓		✓						
Denmark	✓	<u>NIMBI</u>					✓		
Estonia	✓		✓		✓		✓		
Finland	✓								
France	✓	<u>FAJV</u>	✓	<u>FPJV</u>	✓	<u>Crédit d'Impôt Jeu Vidéo</u>	✓		
Germany	✓	<u>BMFTR</u>	✓				✓		
Greece		<u>Cash Rebate Digital Games</u>							
Iceland									✓
Italy	✓					<u>Tax Credit per la produzione di videogiochi</u>			

COUNTRY	CULTURAL STATE AID FOR VIDEO GAME PRODUCTION								
	Grants		Loans		Tax credits		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	
Ireland					✓				
Latvia									✓
Lithuania	✓								
Netherlands	✓	<u>Stimulerings-fonds Creatieve Industrie</u>							
North Macedonia	✓		✓						
Norway	✓	<u>Norwegian film institute</u>	✓						
Poland	✓	<u>Creative Industries Institute (IPK)</u>	✓						
Portugal									✓
Romania									✓
Serbia	✓								
Slovakia	✓								
Spain	✓	<u>Ministry of Culture</u>	✓	<u>CREA-SGR</u>	✓		✓	<u>ENISA</u>	
Sweden									✓
Slovenia	✓								
Turkiye	✓						✓		
UK	✓	<u>UK Games Fund</u>		<u>Creative UK</u>	✓	<u>Video Games Expenditure Credit</u>			

R&D aid for game developer studios

COUNTRY	R&D AID FOR INNOVATION								
	Grants		Loans		Tax credits		Equity funding		None
	General	Dedicated to game dev studios	General	Dedicated to game dev studios	General	Dedicated to game dev studios	General	Dedicated to game dev studios	
Austria	✓		✓		✓		✓		
Belgium	✓				✓	<u>Innovatieaftrek</u>			
Belarus					✓				✓
Croatia	✓		✓		✓				
Czechia	✓	<u>Technology Incubation</u>							
Denmark	✓				✓				
Estonia	✓		✓		✓				
Finland	✓		✓		✓				
France	✓		✓		✓				
Germany	✓		✓		✓				
Greece	✓				✓				
Iceland	✓								
Ireland	✓				✓				
Italy									
Latvia					✓				✓
Lithuania	✓		✓						
Netherlands					✓				

COUNTRY	R&D AID FOR INNOVATION								
	Grants		Loans		Tax credits		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	
North Macedonia	✓		✓						
Norway	✓		✓						
Poland	✓		✓		✓		✓		
Portugal	✓				✓				
Romania									✓
Serbia			✓		✓		✓		
Slovakia	✓				✓				
Slovenia	✓		✓				✓		
Spain	✓		✓		✓	<u>Agencia Tributaria</u>			
Sweden					✓				
Turkiye	✓	<u>Kolay Destek</u>			✓	<u>Yatirima Destek</u>			
UK	✓				✓				

Aid for SMEs for launching a new studio

COUNTRY	SME AID FOR LAUNCHING A NEW STUDIO								
	Grants		Loans		Tax credits		Equity funding		None
	General	Dedicated to game dev studios	General	Dedicated to game dev studios	General	Dedicated to game dev studios	General	Dedicated to game dev studios	
Austria	✓		✓				✓		
Belgium	✓		✓	<u>PMV</u>	✓		✓		
Belarus									✓
Croatia	✓	<u>PISMO</u>	✓						
Czechia	✓								
Denmark	✓		✓				✓		
Estonia			✓		✓				
Finland	✓								
France	✓		✓		✓		✓		
Germany	✓		✓				✓		
Greece	✓								
Latvia									✓
Lithuania	✓		✓		✓				
Iceland	✓								

COUNTRY	SME AID FOR LAUNCHING A NEW STUDIO								
	Grants		Loans		Tax credits		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	
Ireland	✓						✓		
Italy									
Netherlands					✓				
North Macedonia	✓		✓						
Norway	✓		✓						
Poland	✓		✓		✓		✓		
Portugal	✓								
Romania									✓
Serbia	✓		✓		✓		✓		
Slovakia	✓								
Slovenia	✓		✓				✓		
Spain	✓	<u>ENISA</u>	✓						
Sweden									✓
Turkiye	✓								
UK	✓								

2024 VIDEO GAMES INDUSTRY KEY NUMBERS



6600

Number of video game
developer studios

95000

Number of people working
in the industry

24

Turnover (bn euro)

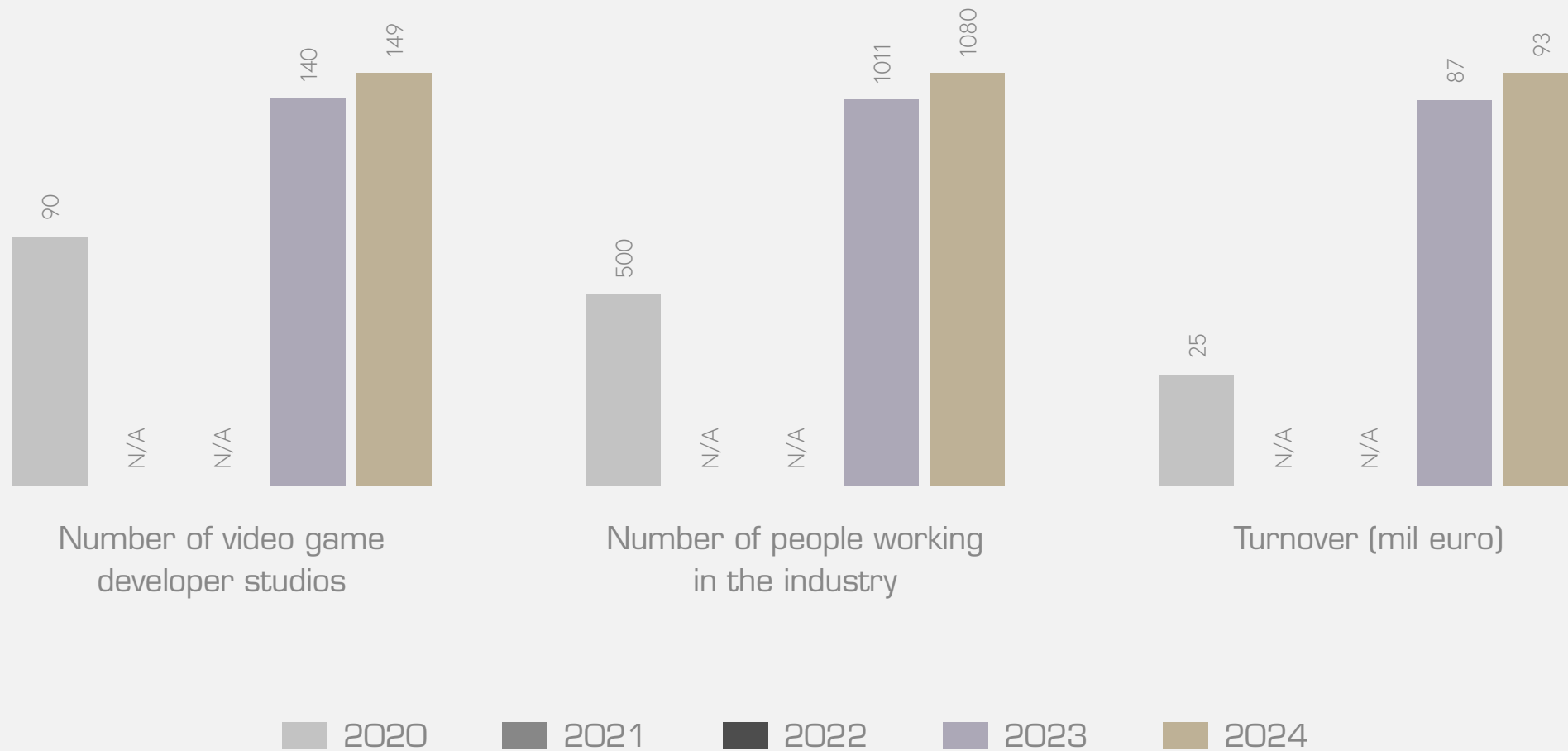
Note: As new countries such as Bulgaria and Cyprus were added to the 2024 report, we can't compare the numbers with earlier years.

COUNTRY FOCUS

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

Austria

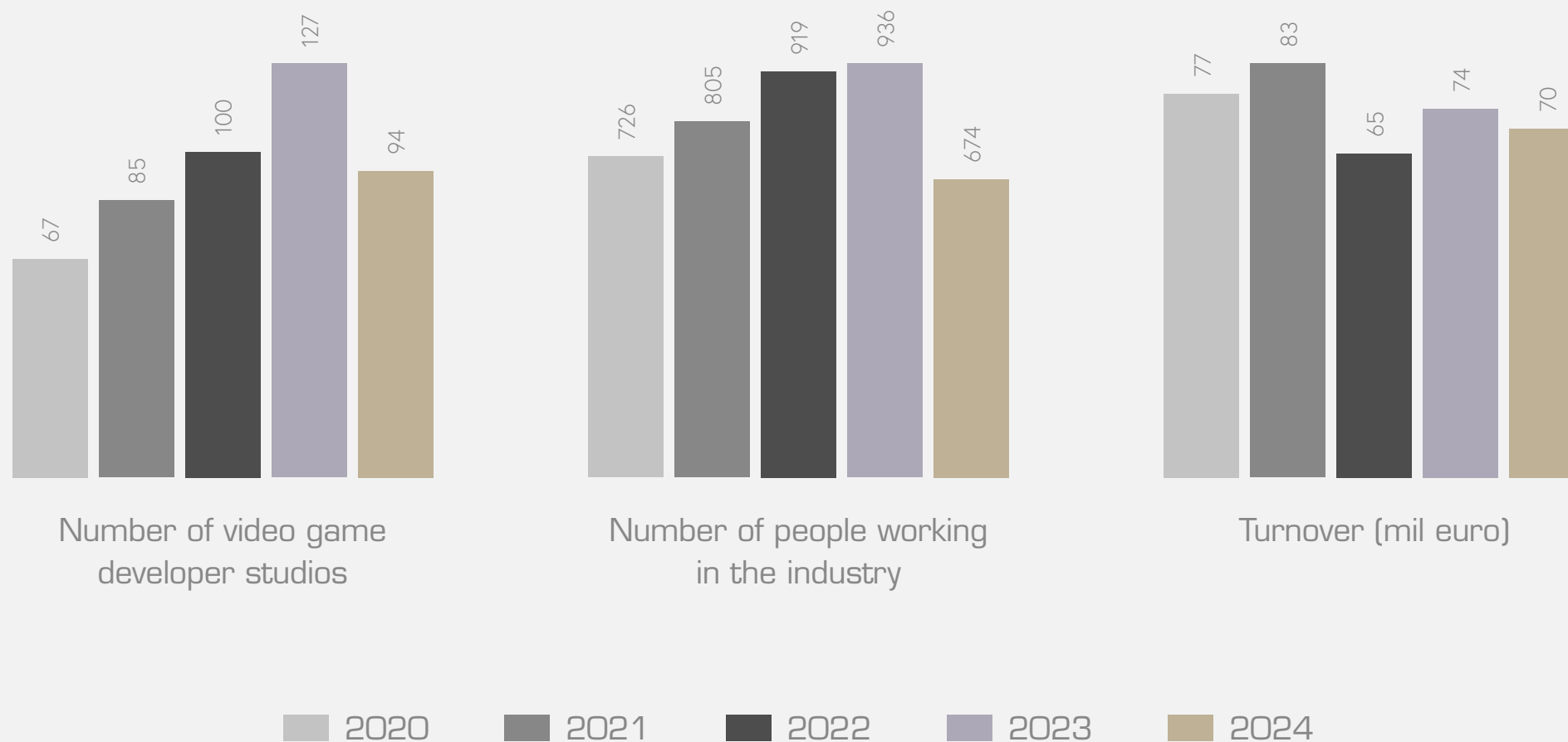
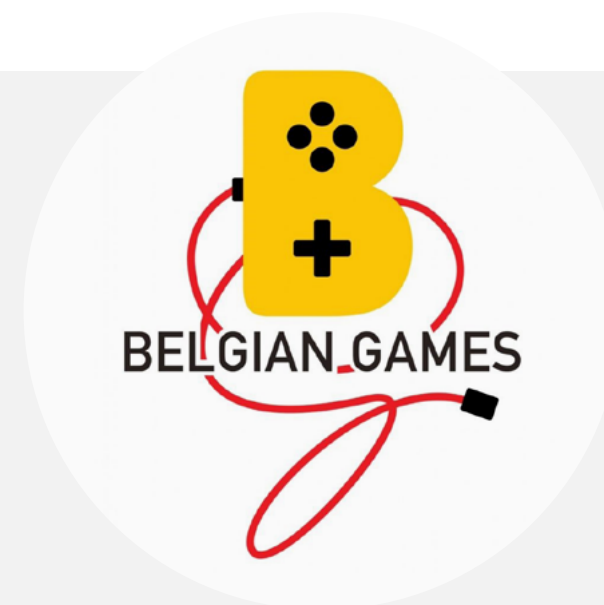
PGDA - Pioneers of Game Developers Austria -
Verband österreichischer Spieleentwickler



Find more information in the full report [📄](#)

Belgium

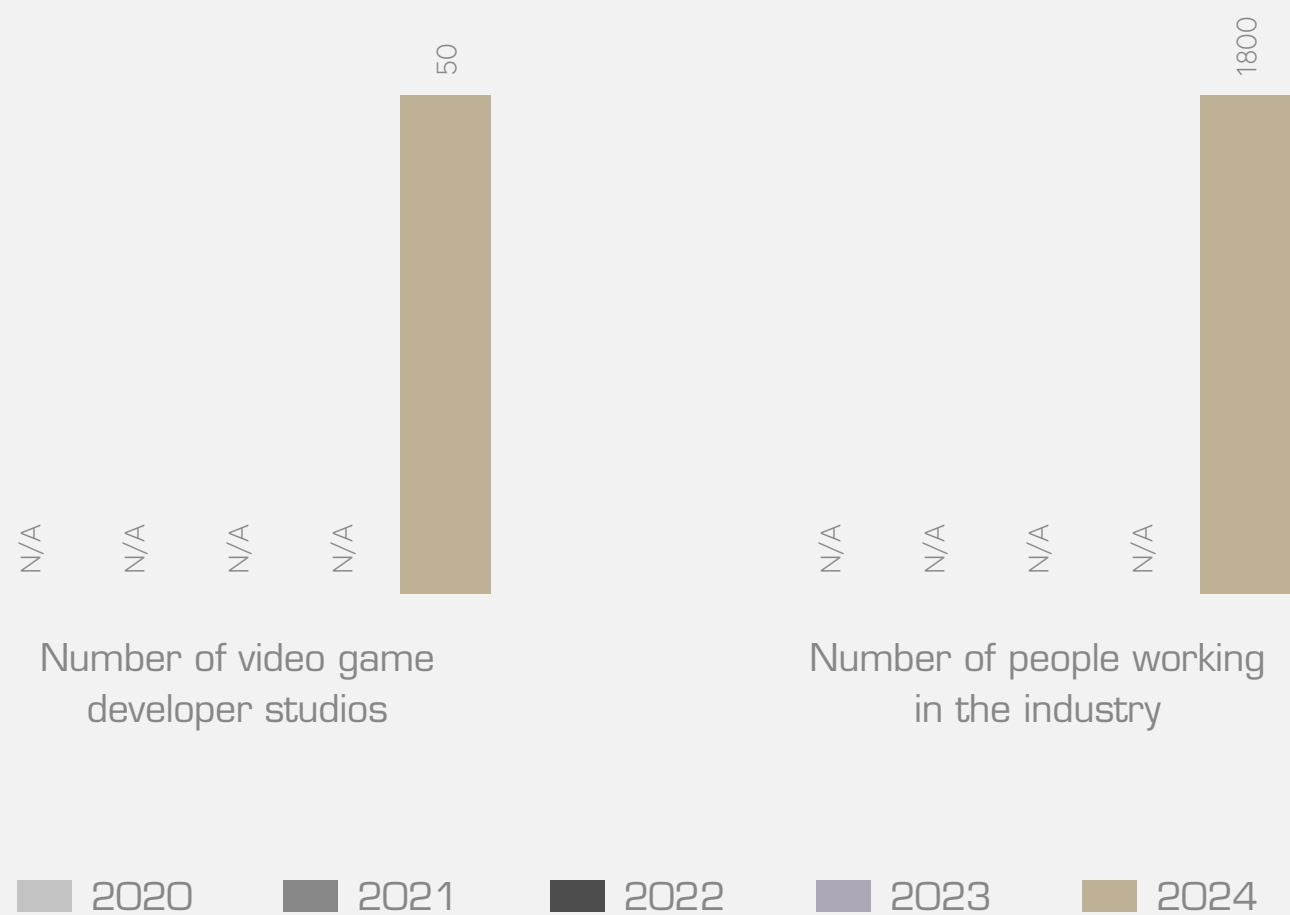
BelgianGames (FLEGA, WALGA and games.brussels)



Find more information in the full report [📄](#)

Bulgaria

Createch Bulgaria

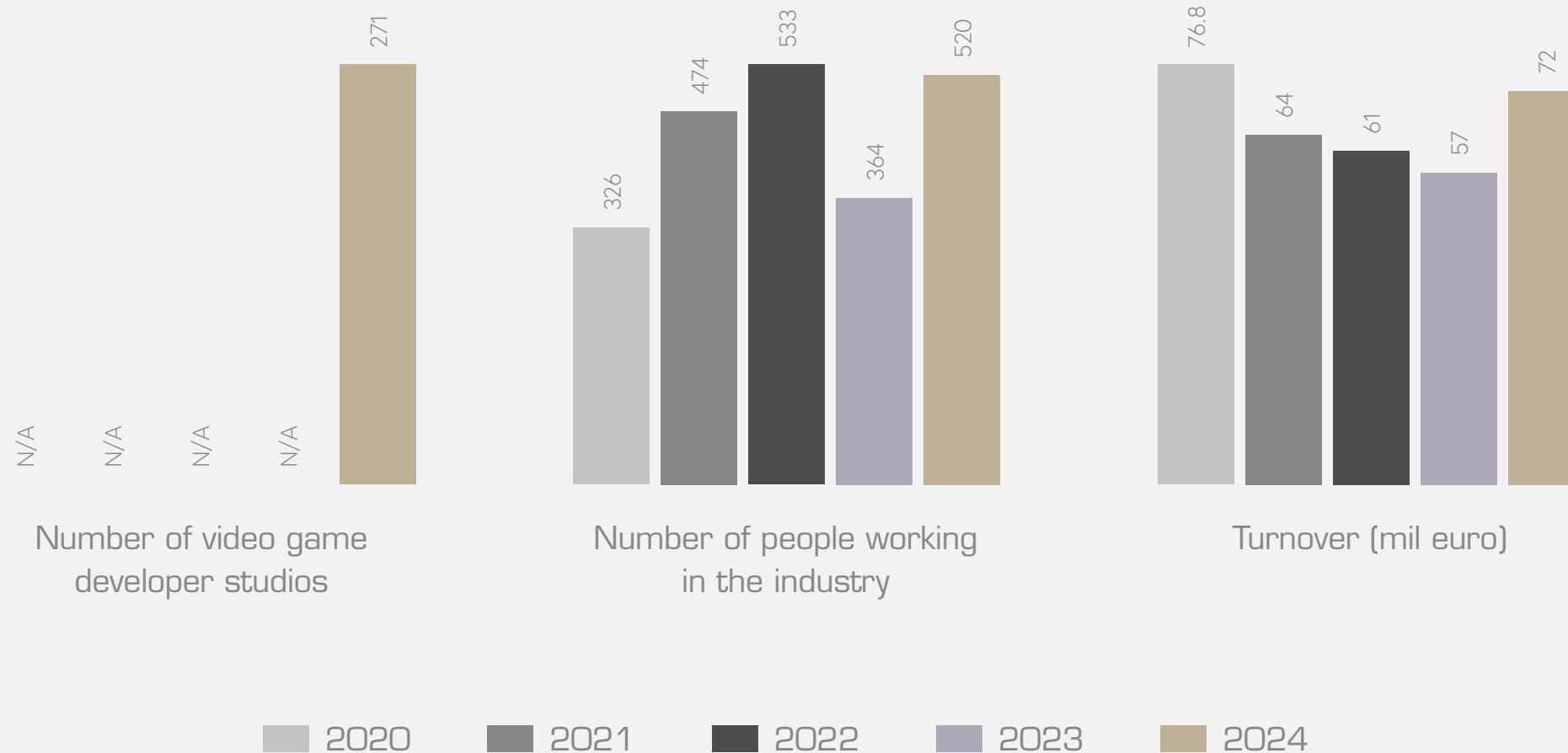


Note: numbers are estimated.

Croatia

Croatian Game Development Alliance

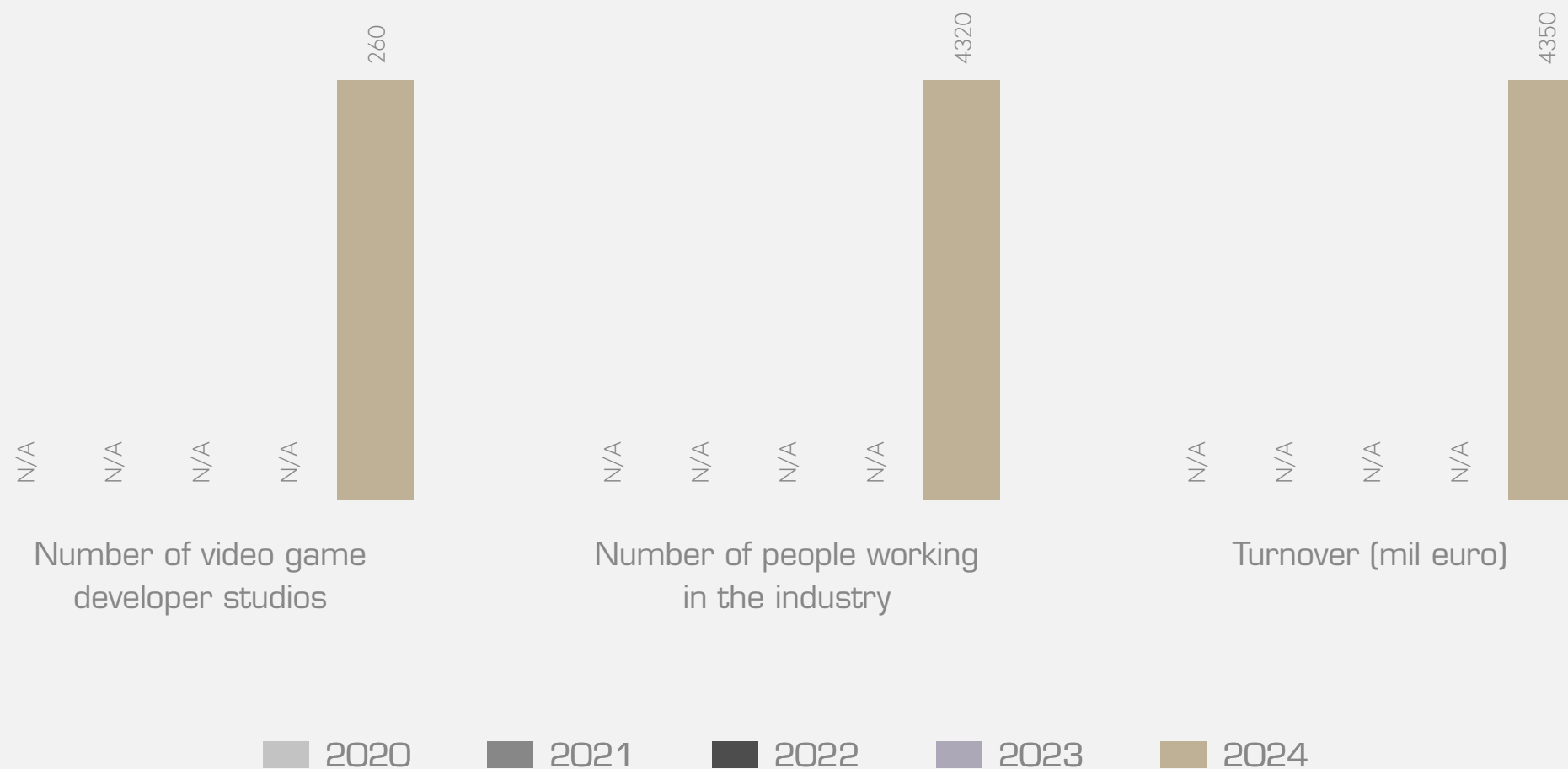
CGDA



Find more information in the full report [📄](#)

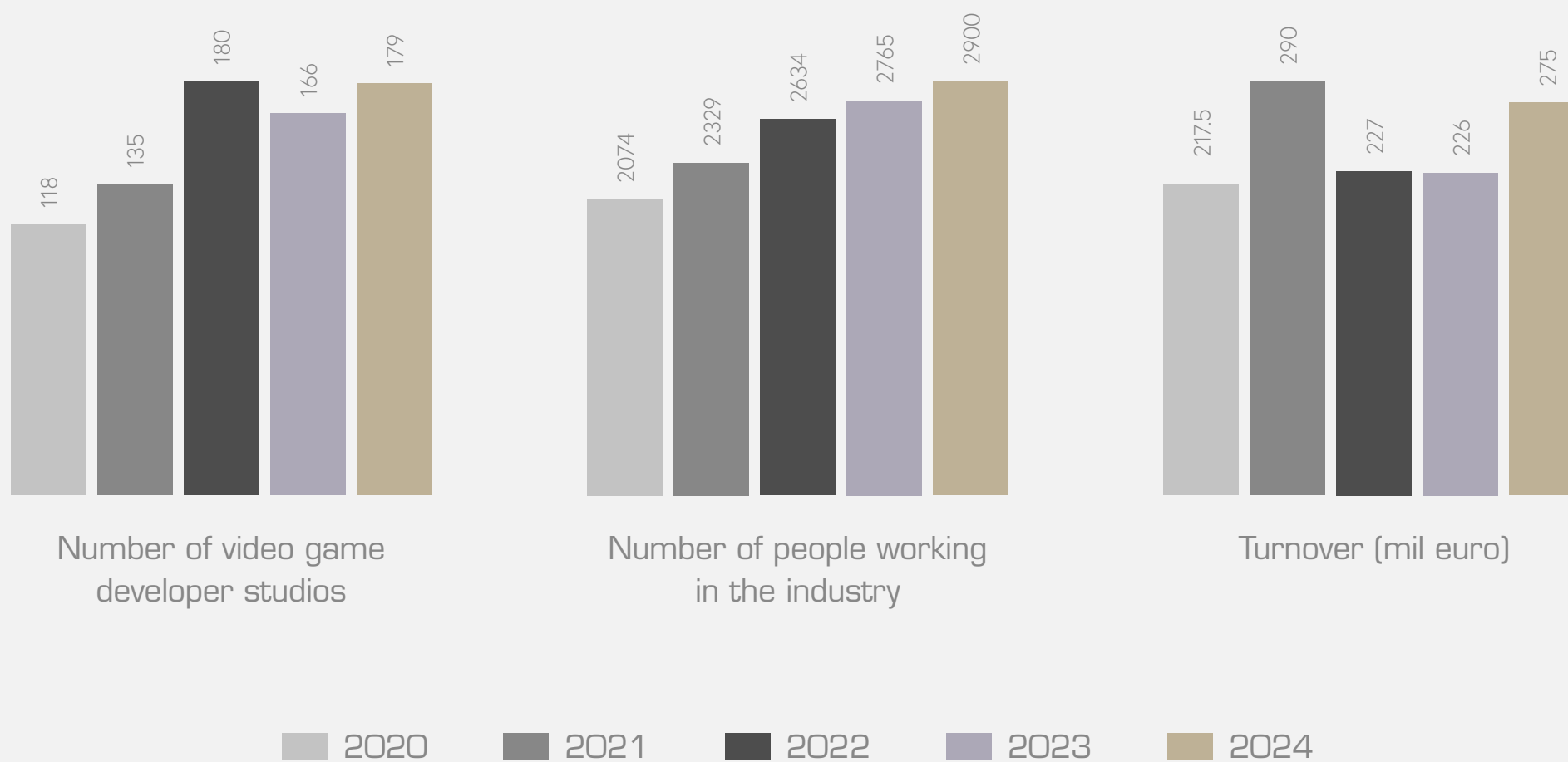
Cyprus

Cyprus Game Makers Association



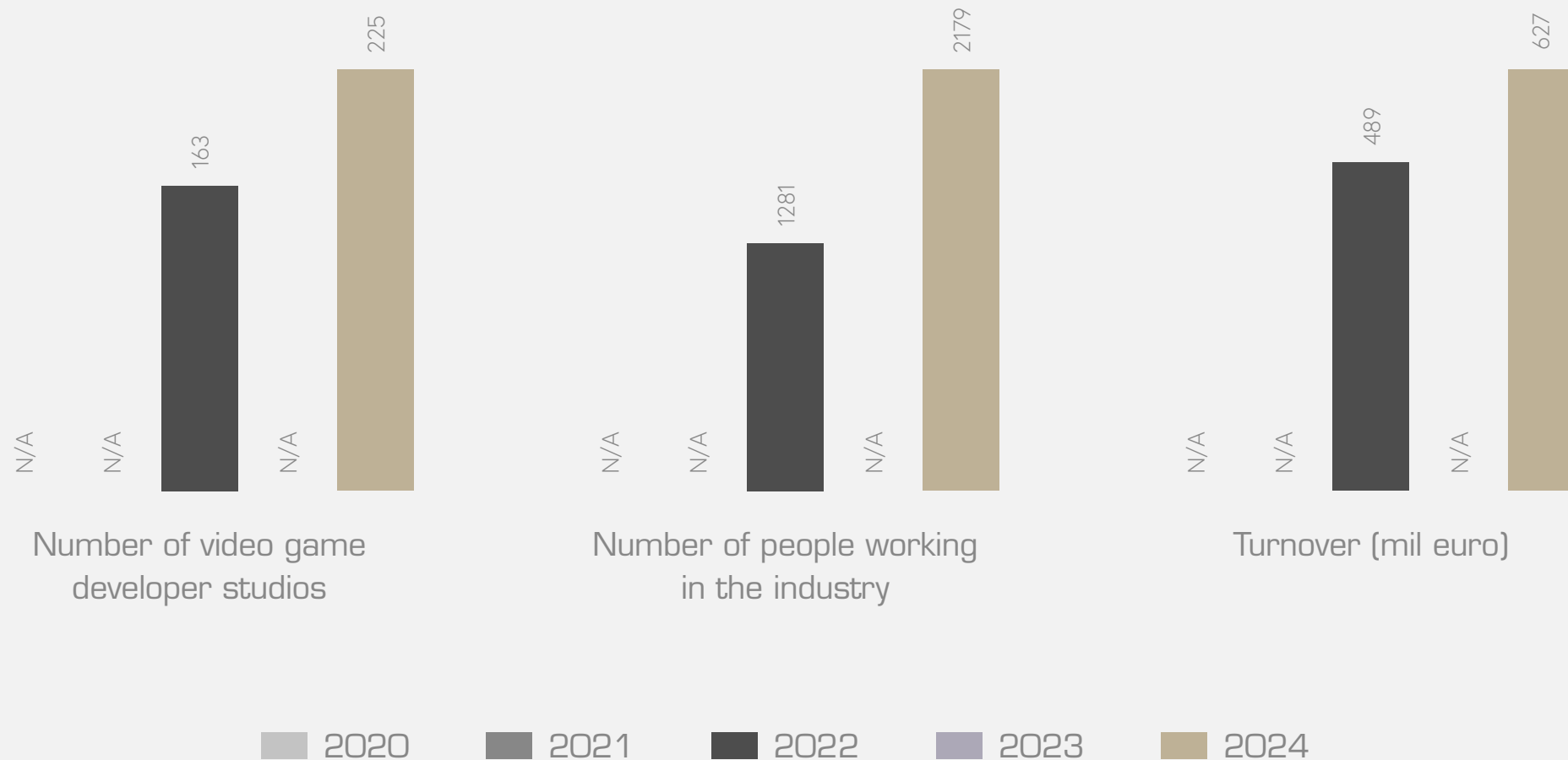
Czechia

Czech Game Developers Association

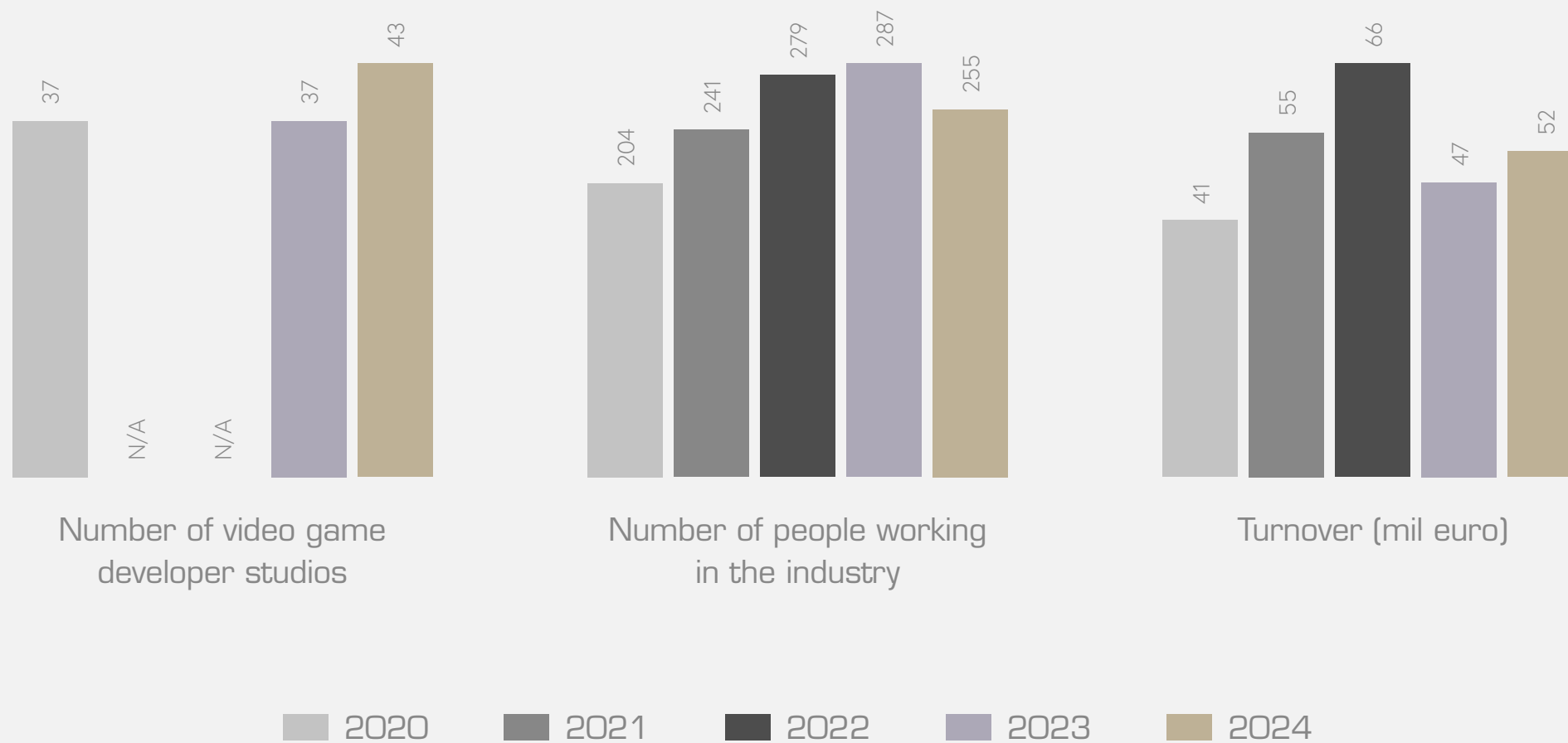


Denmark

Games Denmark

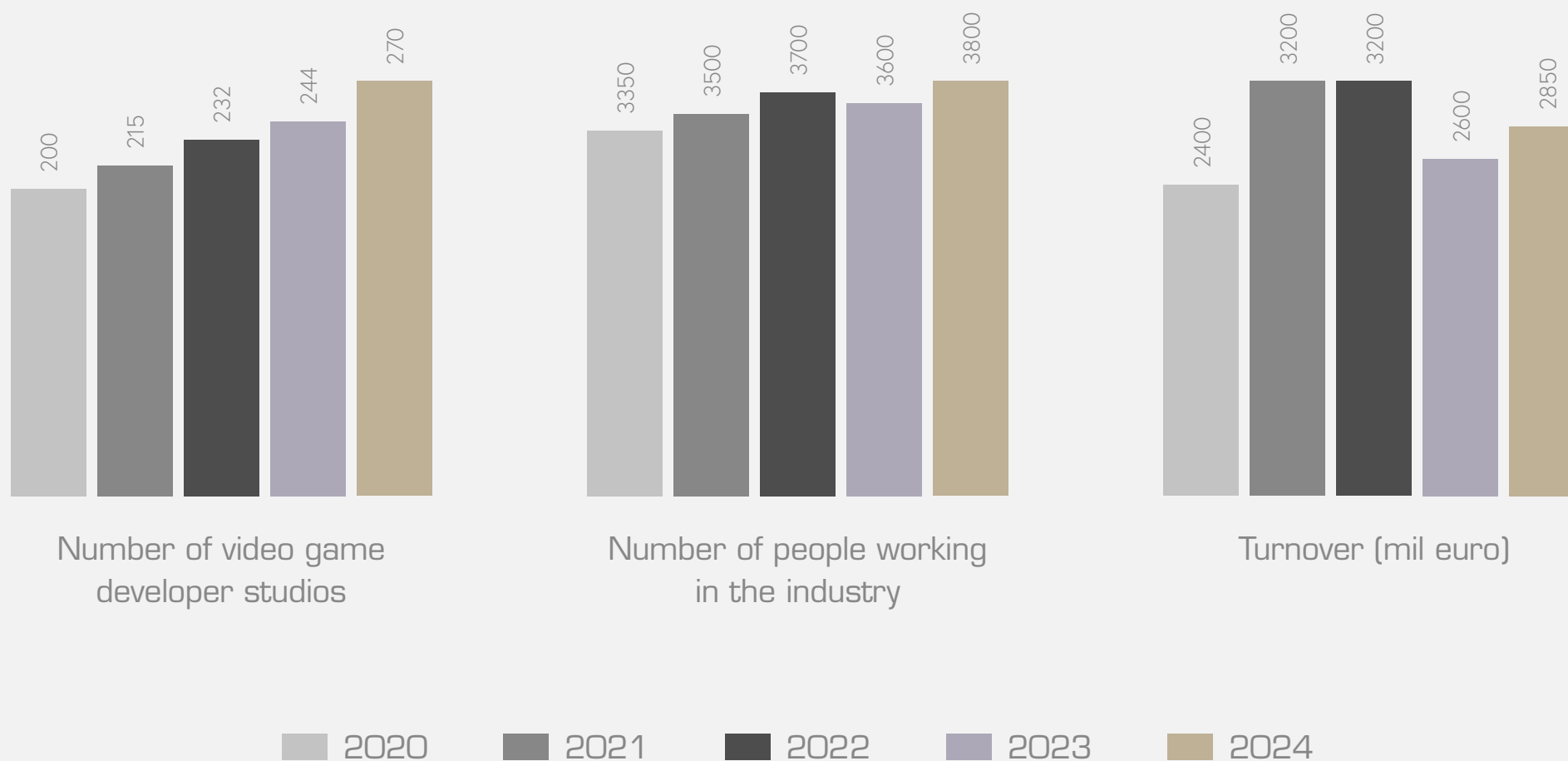


Estonia



Finland

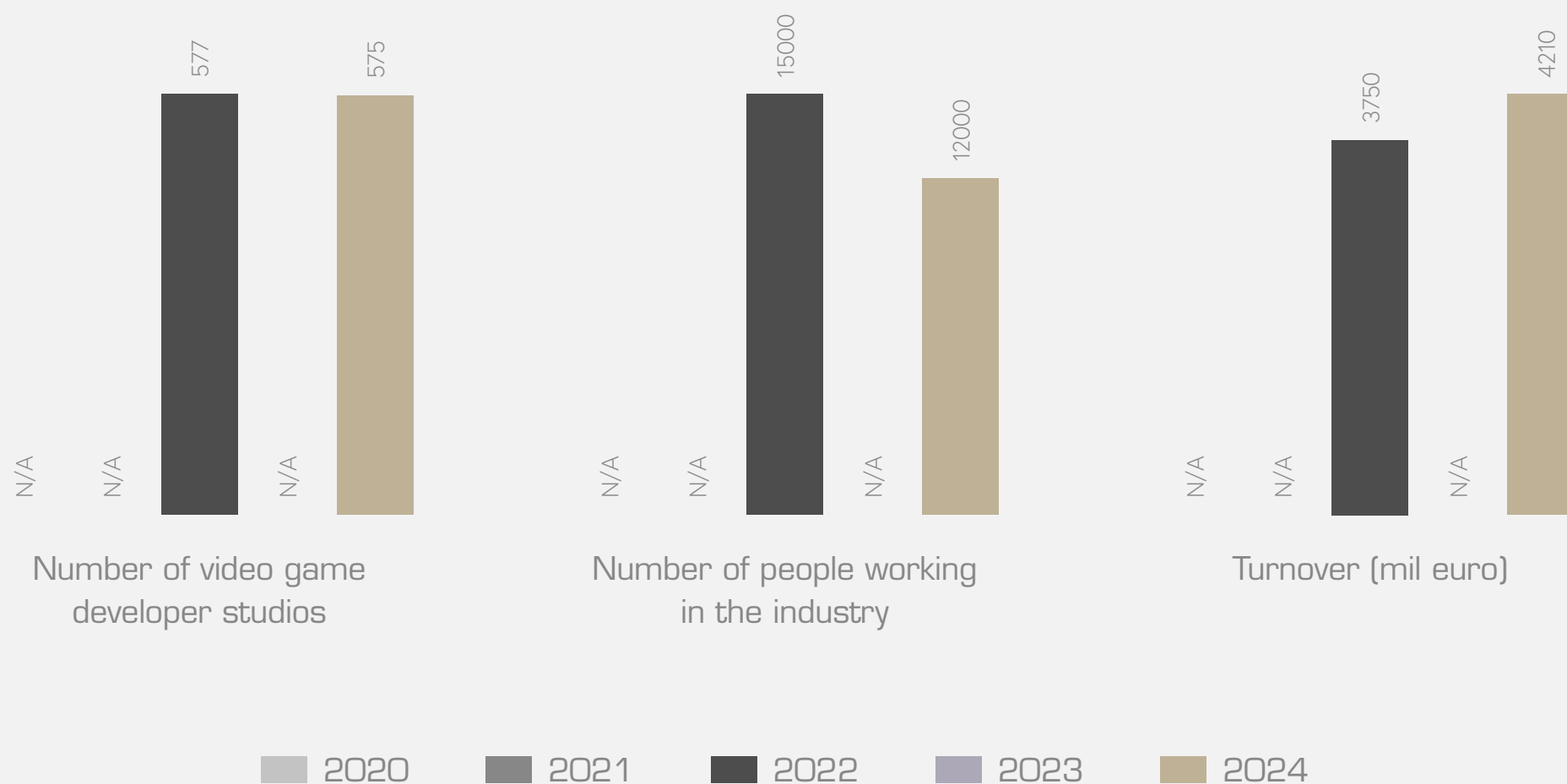
Neogames Finland



Find more information in the full report [📄](#)

France

Le Syndicat National du Jeu Vidéo

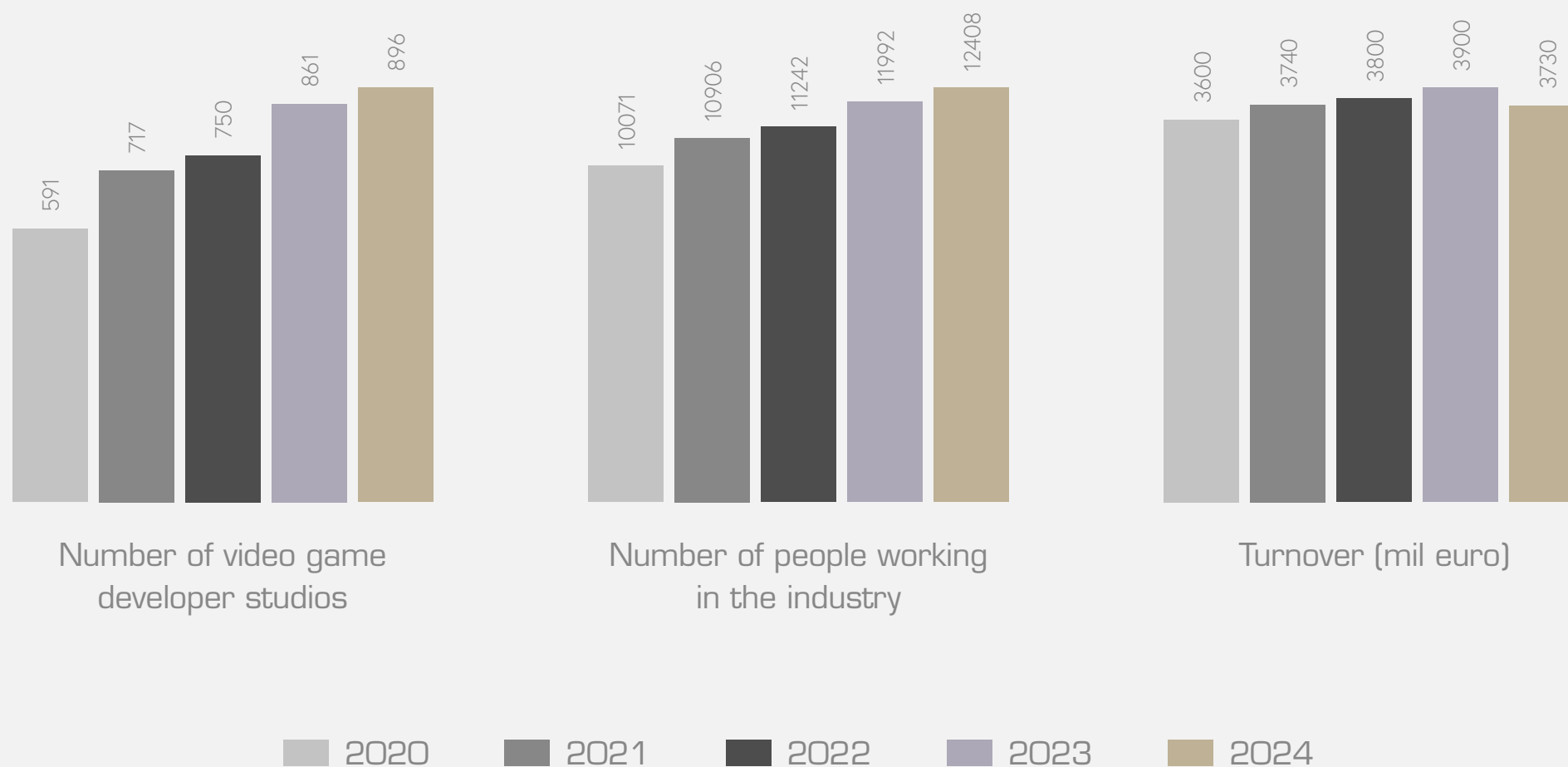


Find more information in the full report [📄](#)

Note: France reviewed their methodology in 2022

Germany

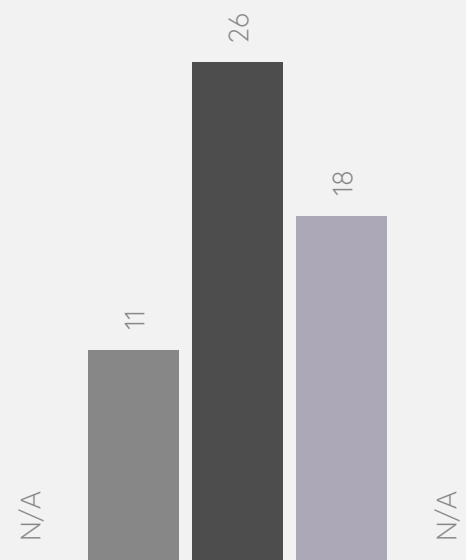
game - Verband der deutschen Games-Branche e.V



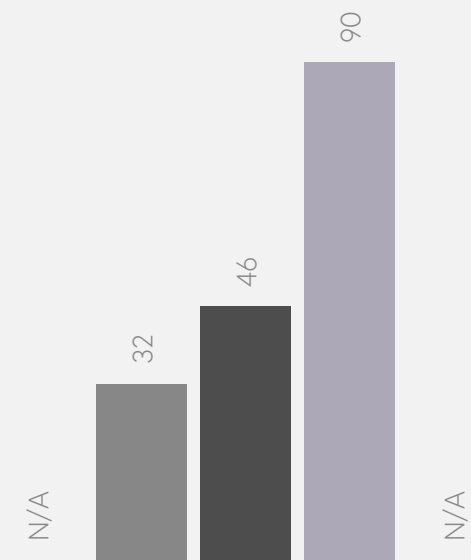
Find more information in the full report [📄](#)

Greece

Game Developers Association Greece



Number of video game developer studios

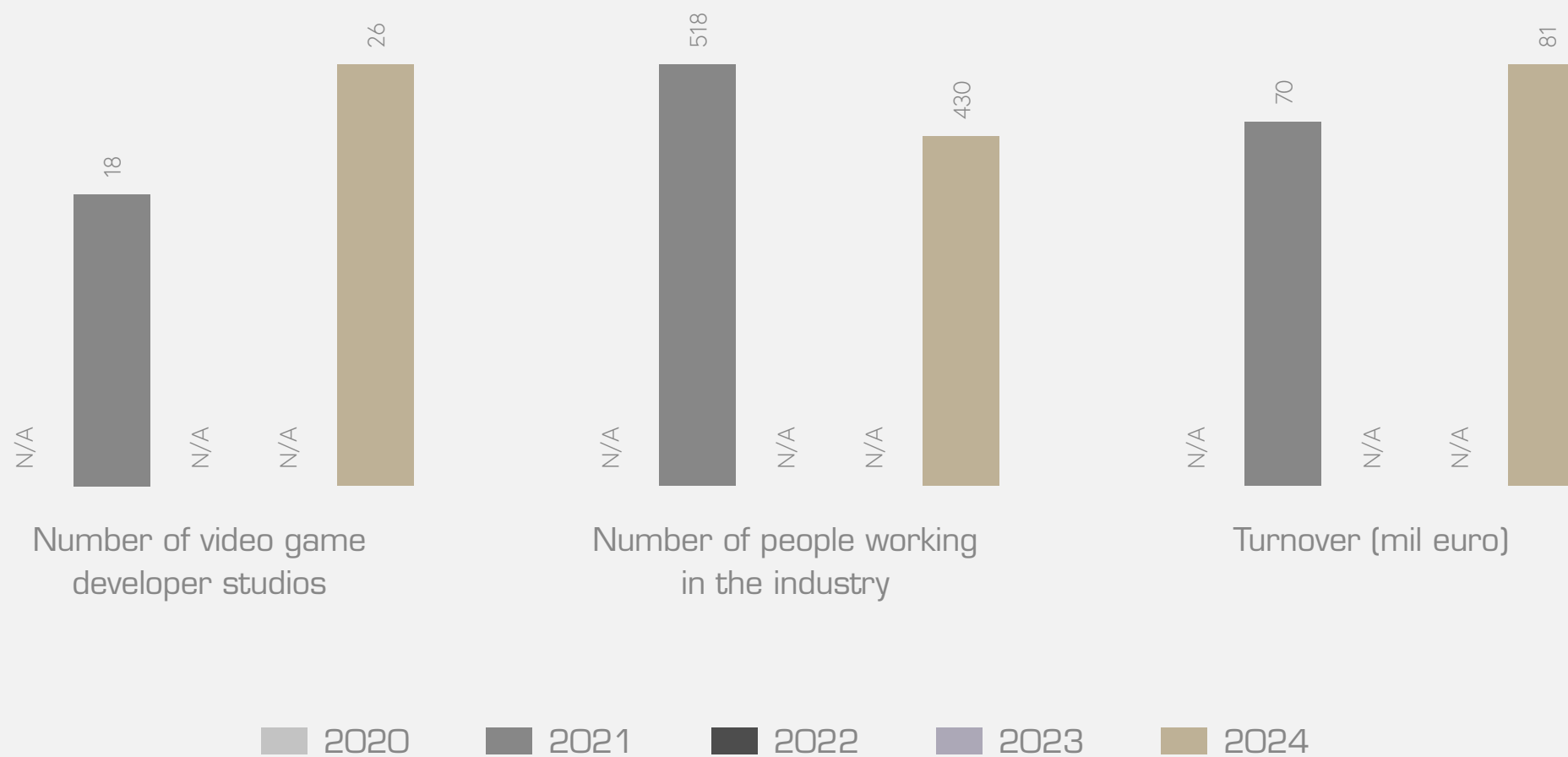


Number of people working in the industry

2020 2021 2022 2023 2024

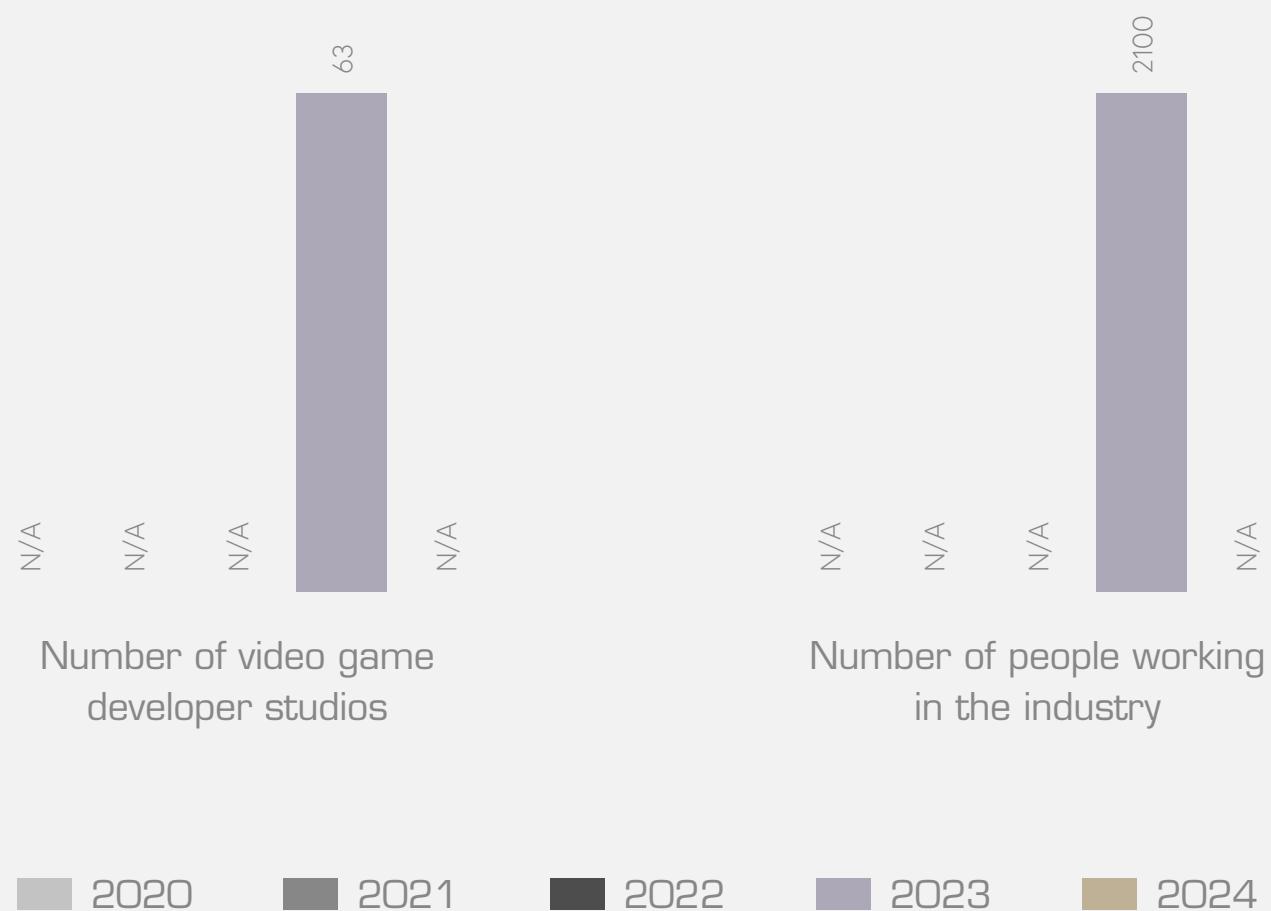
Iceland

Icelandic Game Industry



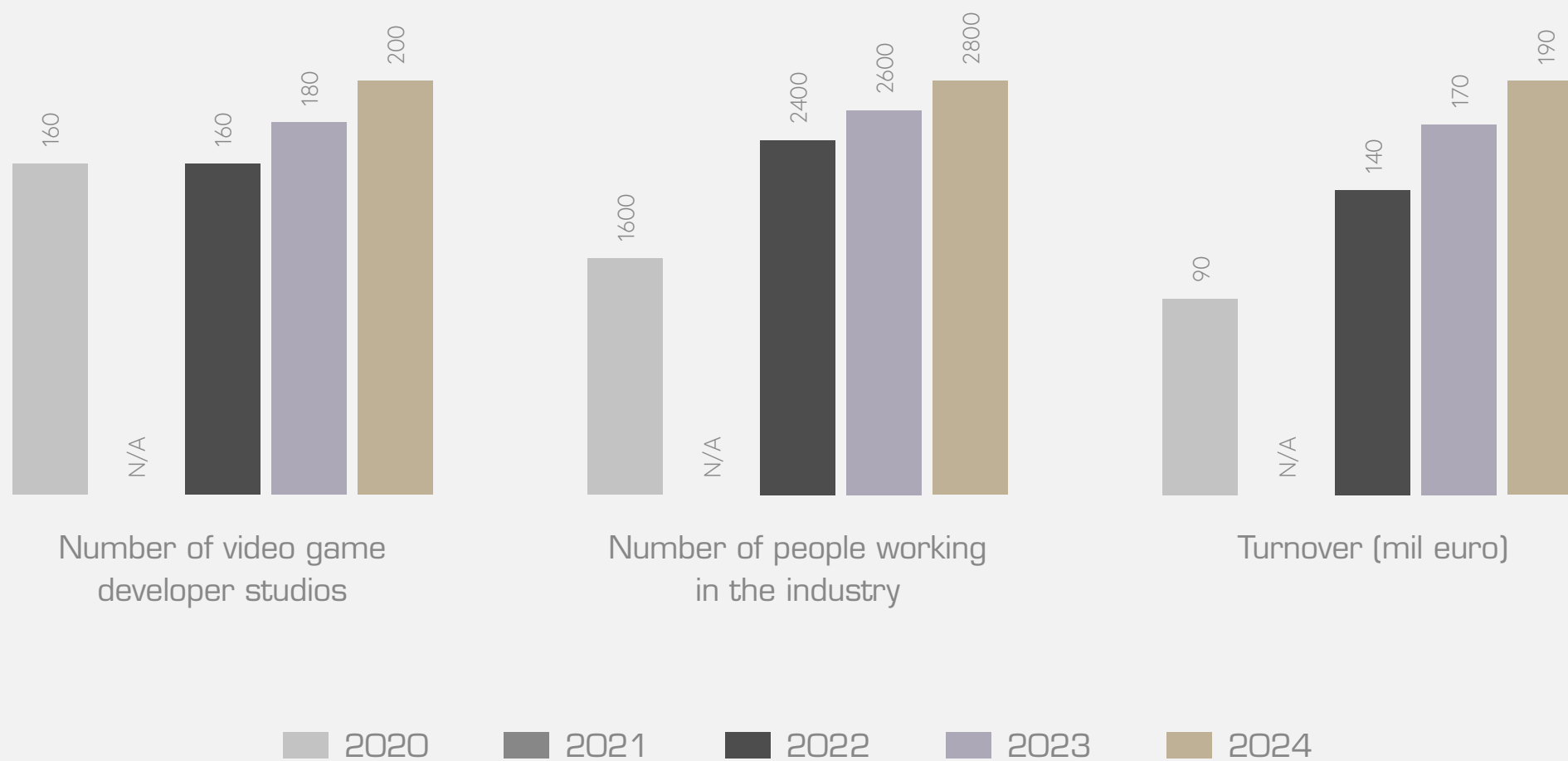
Ireland

IMIRT - Irish Game Makers Association



Italy

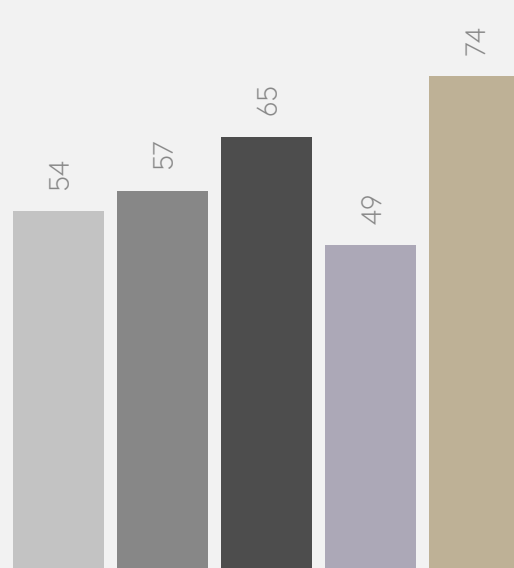
IIDEA - Italian Interactive & Digital Entertainment Association



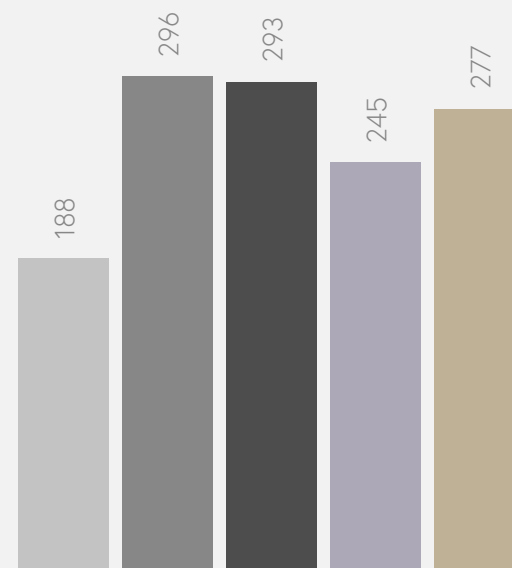
Note: 2023 numbers estimated

Latvia

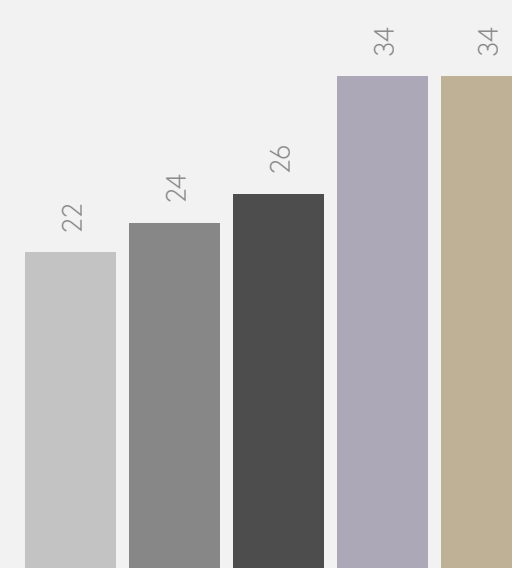
Latvian Game Developers Association



Number of video game developer studios



Number of people working in the industry

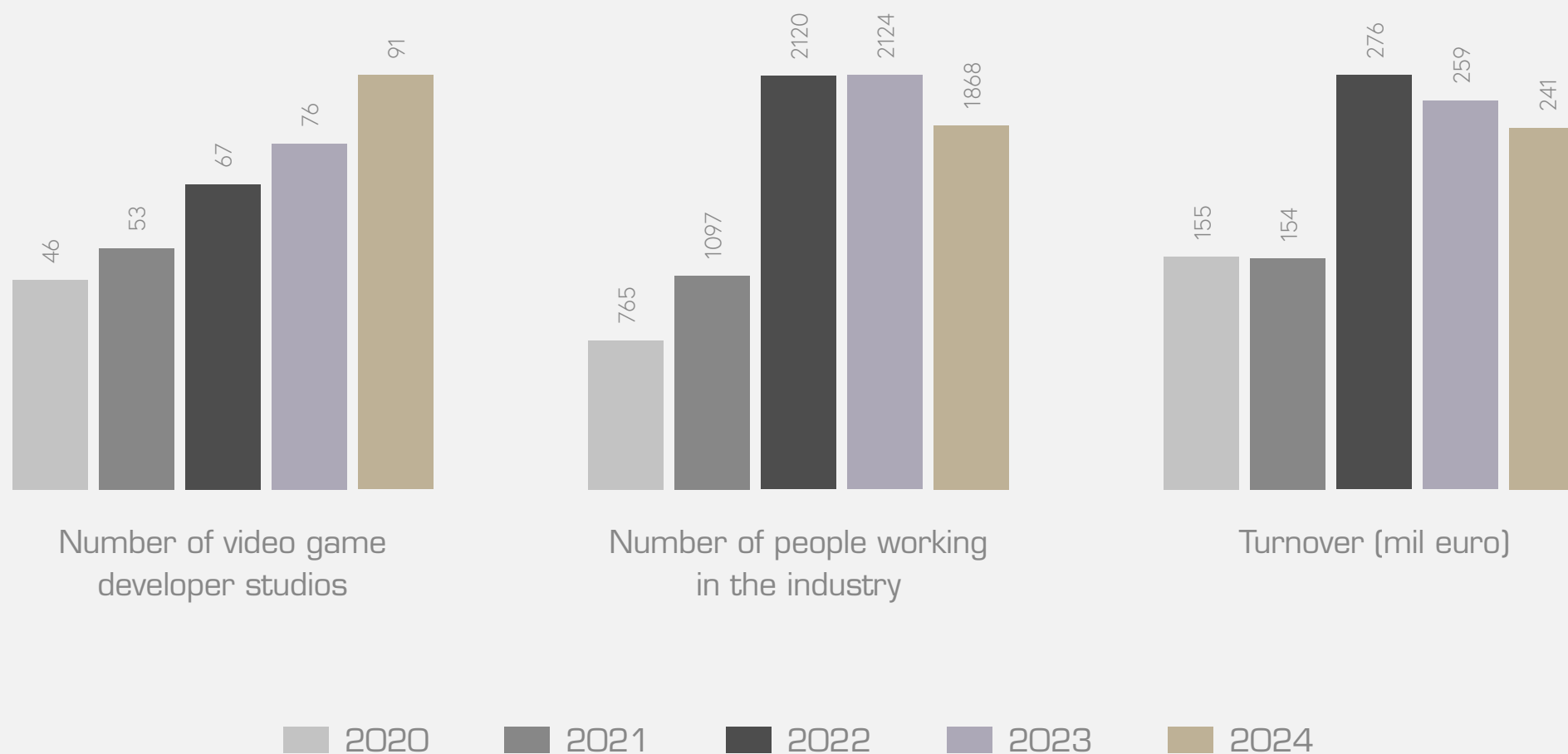


Turnover (mil euro)

2020 2021 2022 2023 2024

Lithuania

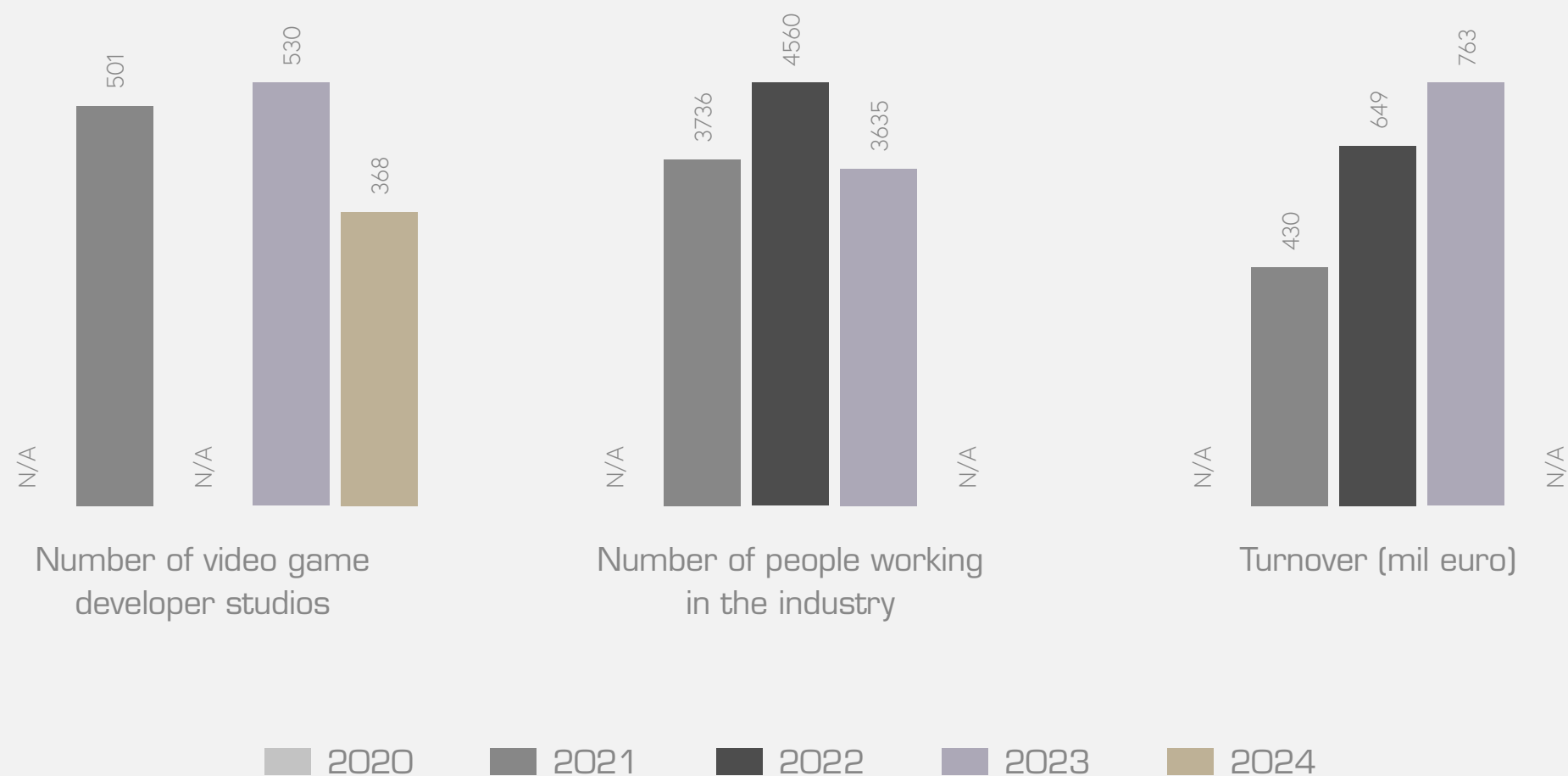
Lithuanian Game Developers Association



Find more information in the full report [📄](#)

Netherlands

The Dutch Games Association



Find more information in the full report [📄](#)

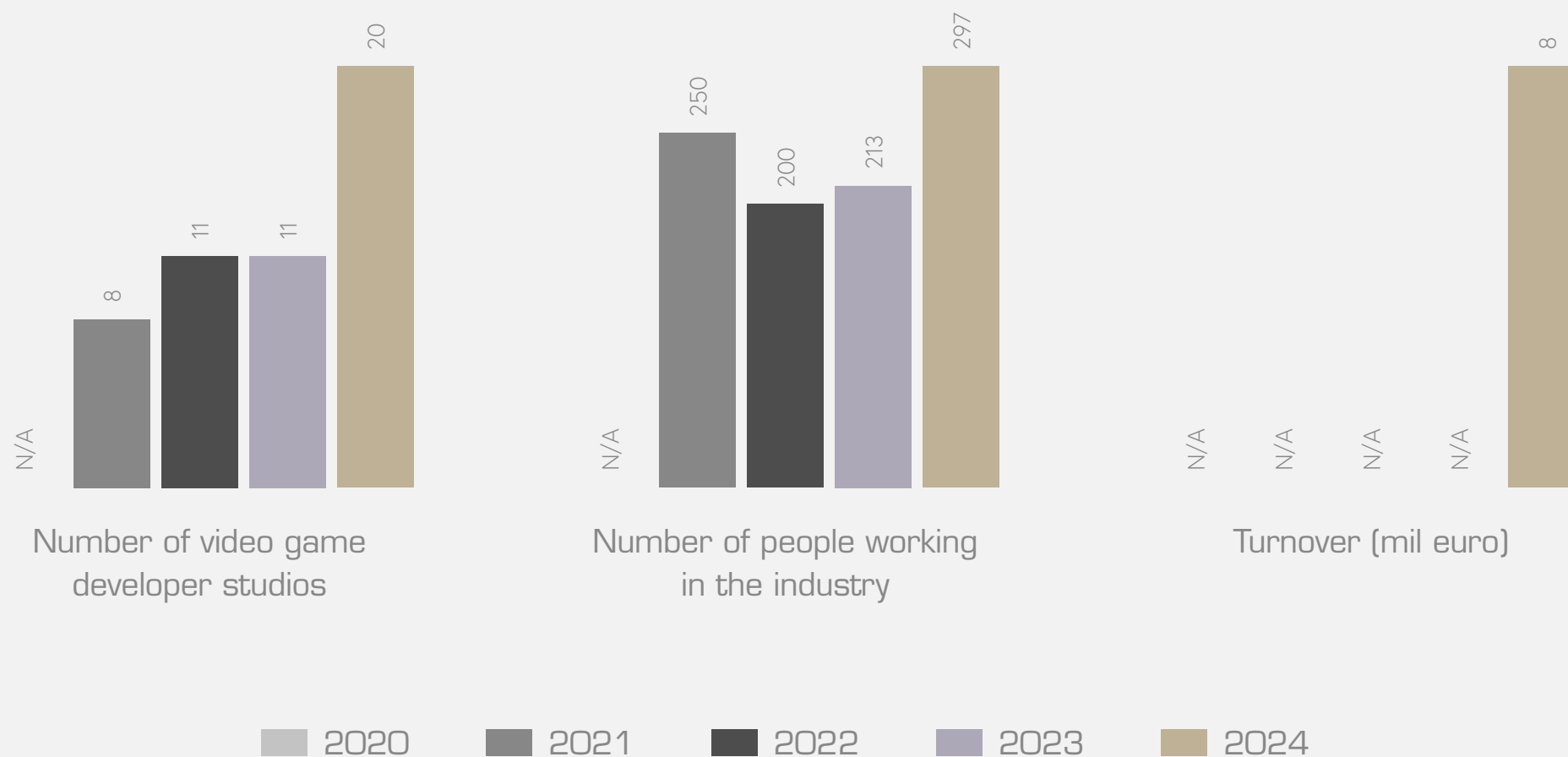
Note: Methodology for turnover reporting has changed in 2023.

North Macedonia

Macedonian Games Industry Association



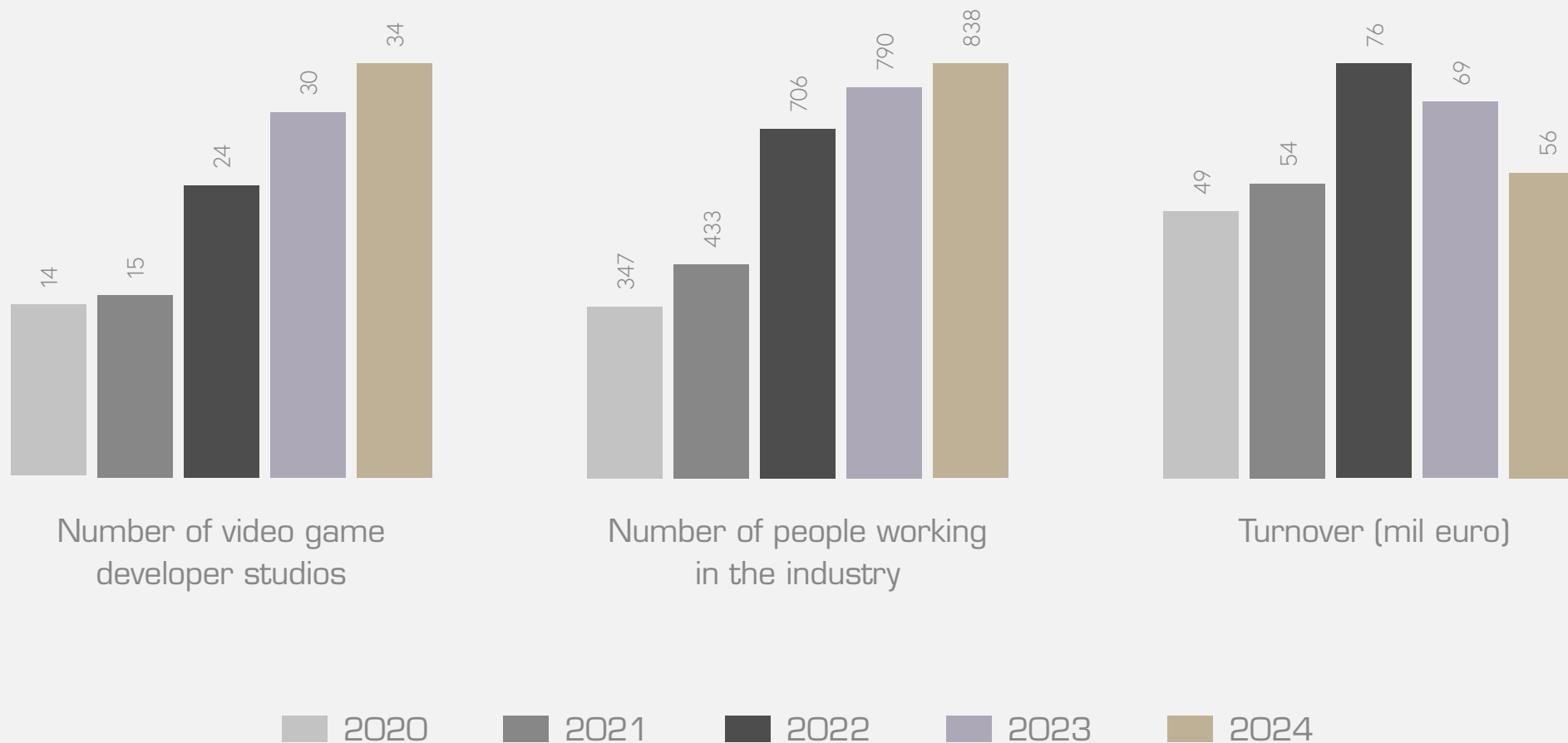
Macedonian
Games Industry
Association



Norway

Virke Norwegian Producers Association

VIRKE
NORWEGIAN PRODUCERS ASSOCIATION



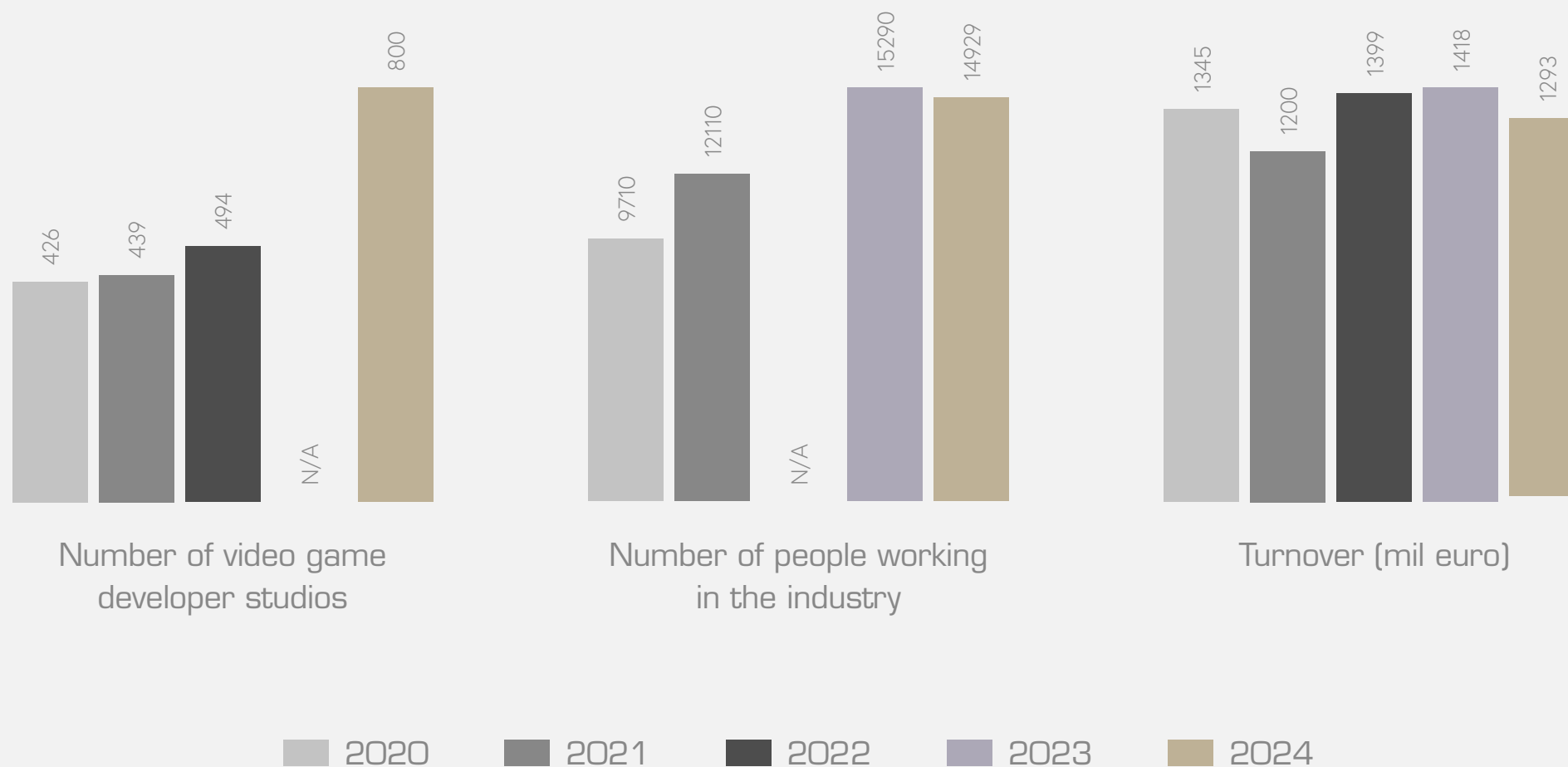
Find more information in the full report [📄](#)

Poland

Indie Games Poland



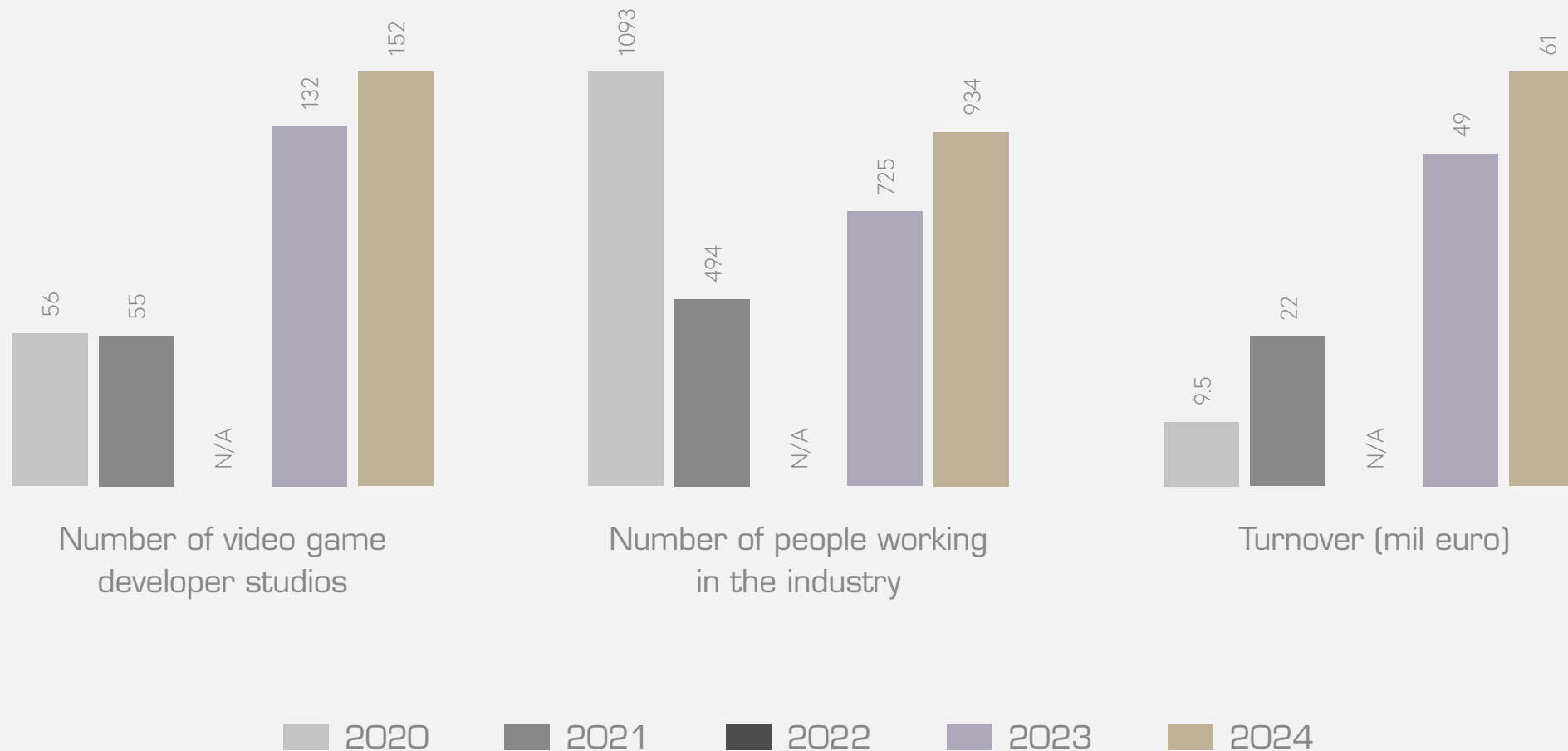
**INDIE GAMES
POLAND
FOUNDATION**



Find more information in the full report [📄](#)

Portugal

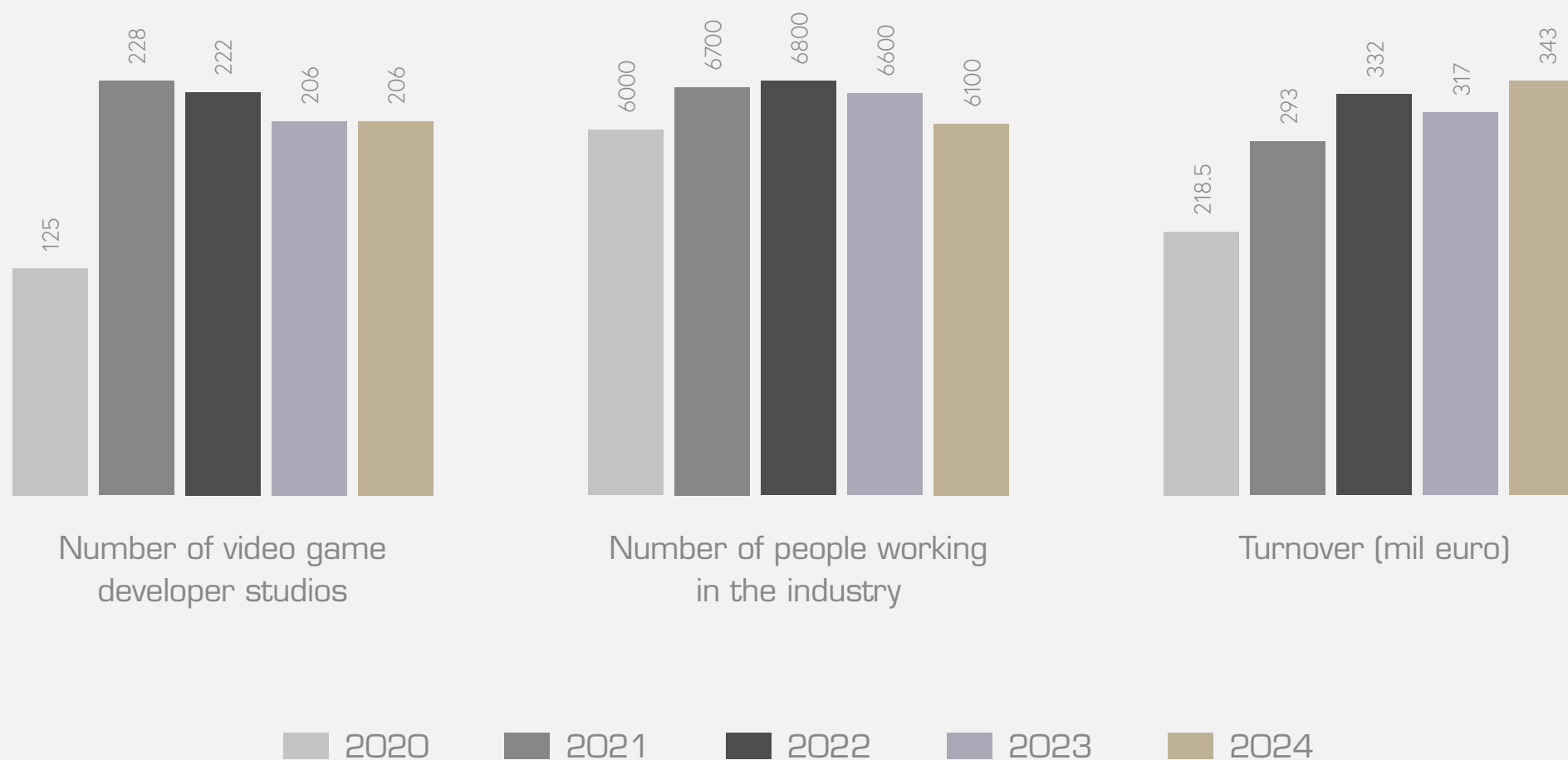
Associação Produtores de Videojogos Portugueses



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

Romania

Romanian Game Developers Association

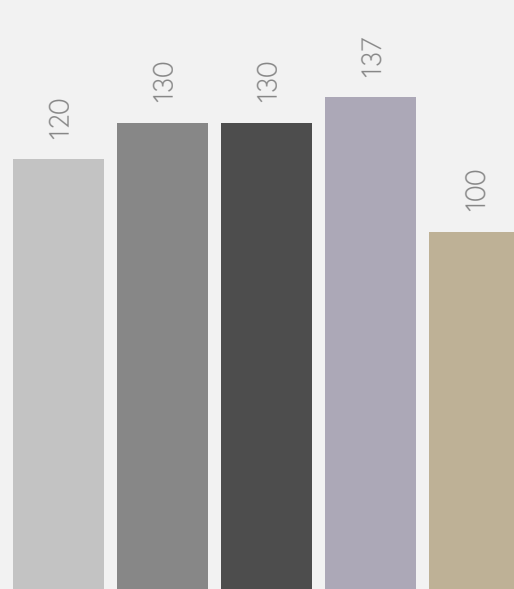


Find more information in the full report [📄](#)

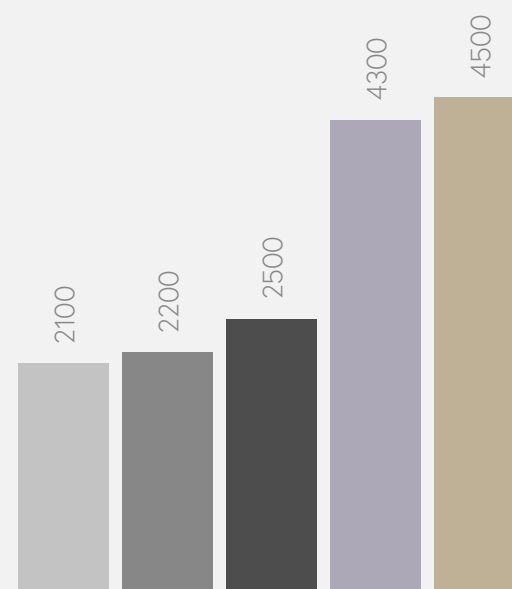
Note: The methodology used to collect the data has changed compared to previous years

Serbia

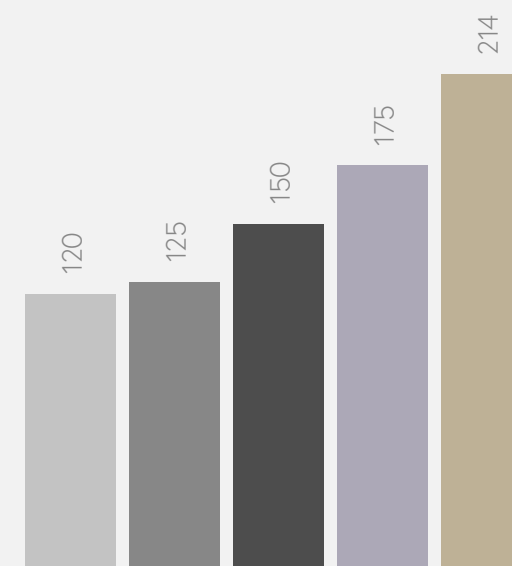
Serbian Games Association



Number of video game developer studios



Number of people working in the industry



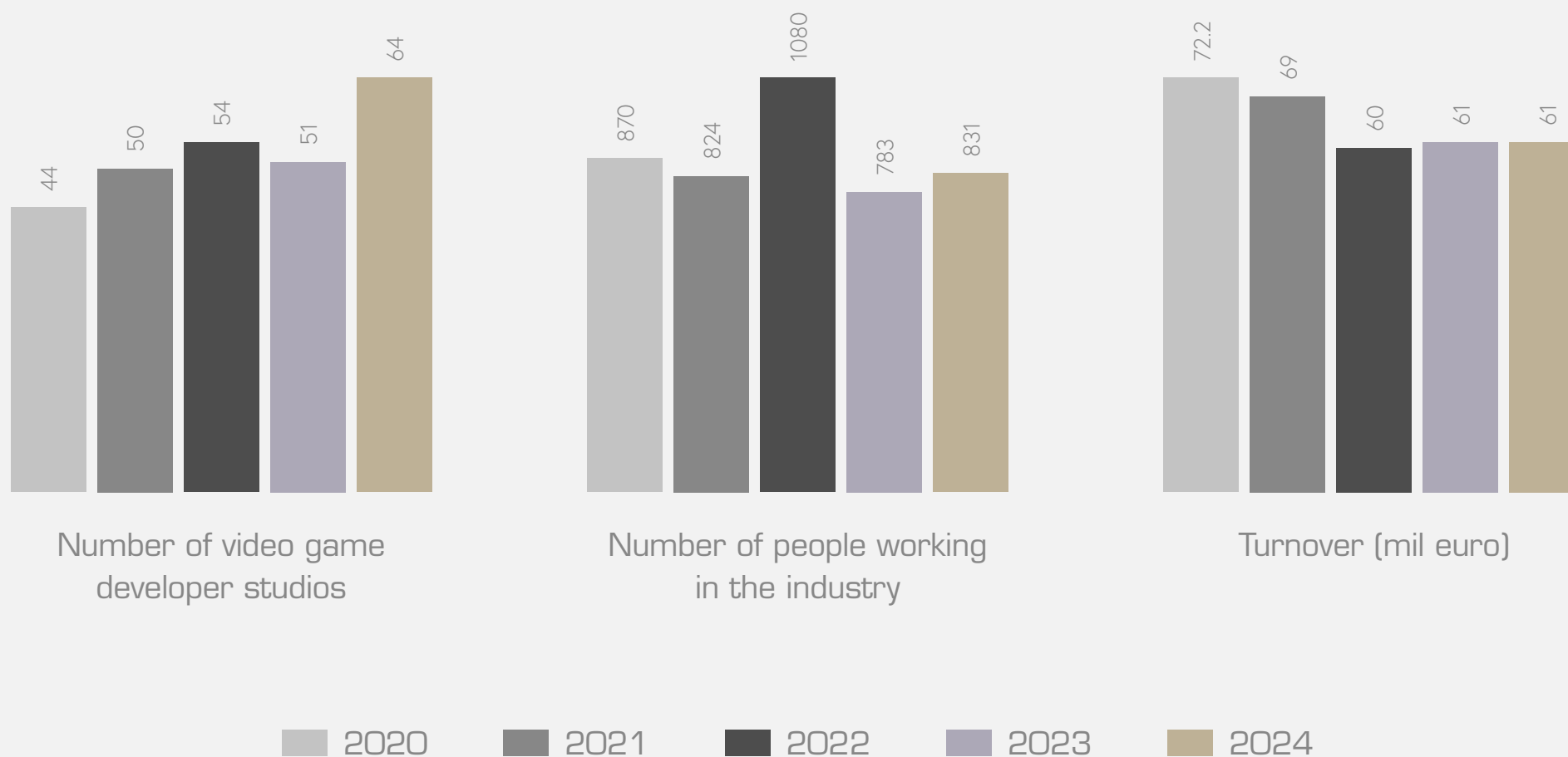
Turnover (mil euro)

2020 2021 2022 2023 2024

Find more information in the full report [📄](#)

Slovakia

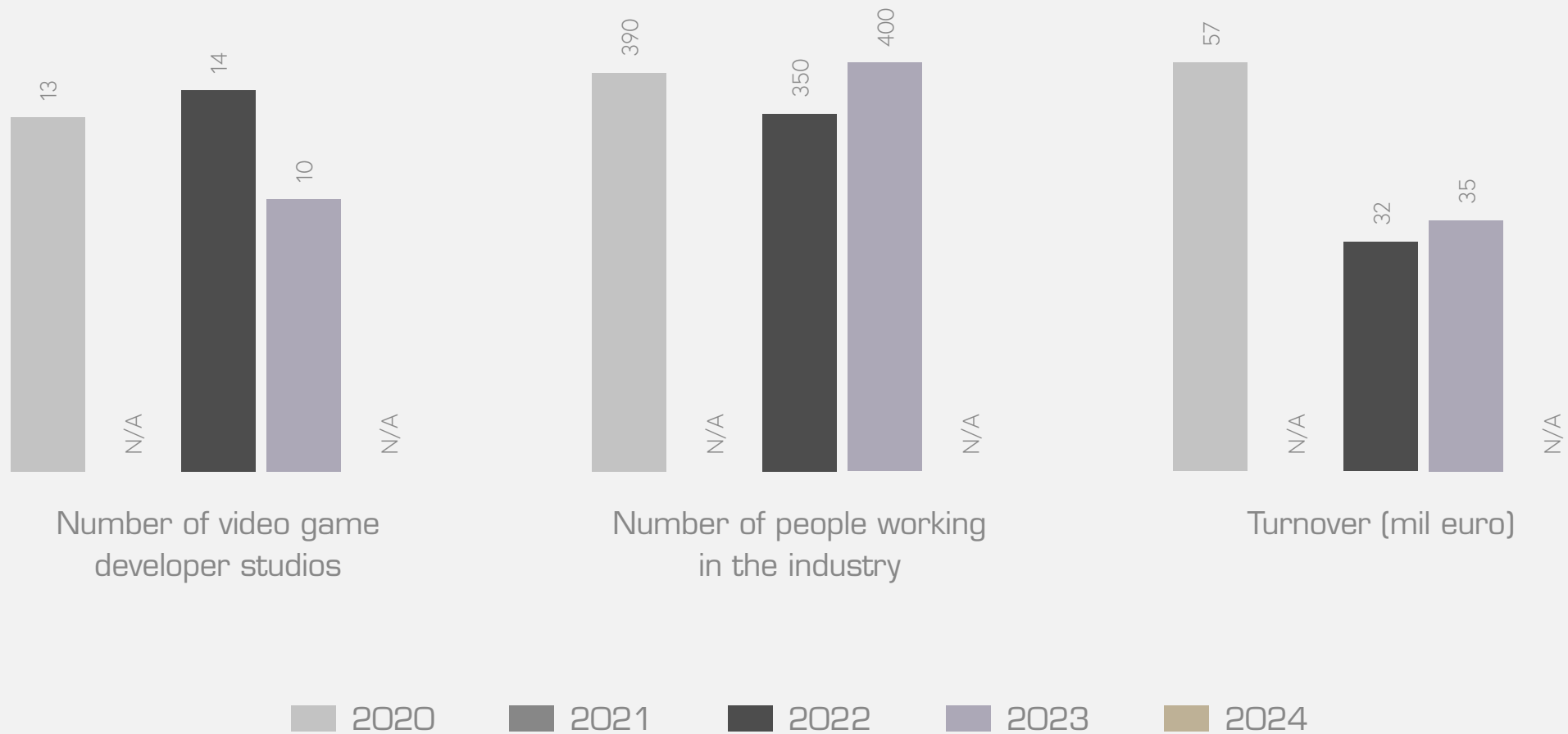
Slovak Game Developers Association



Find more information in the full report [📄](#)

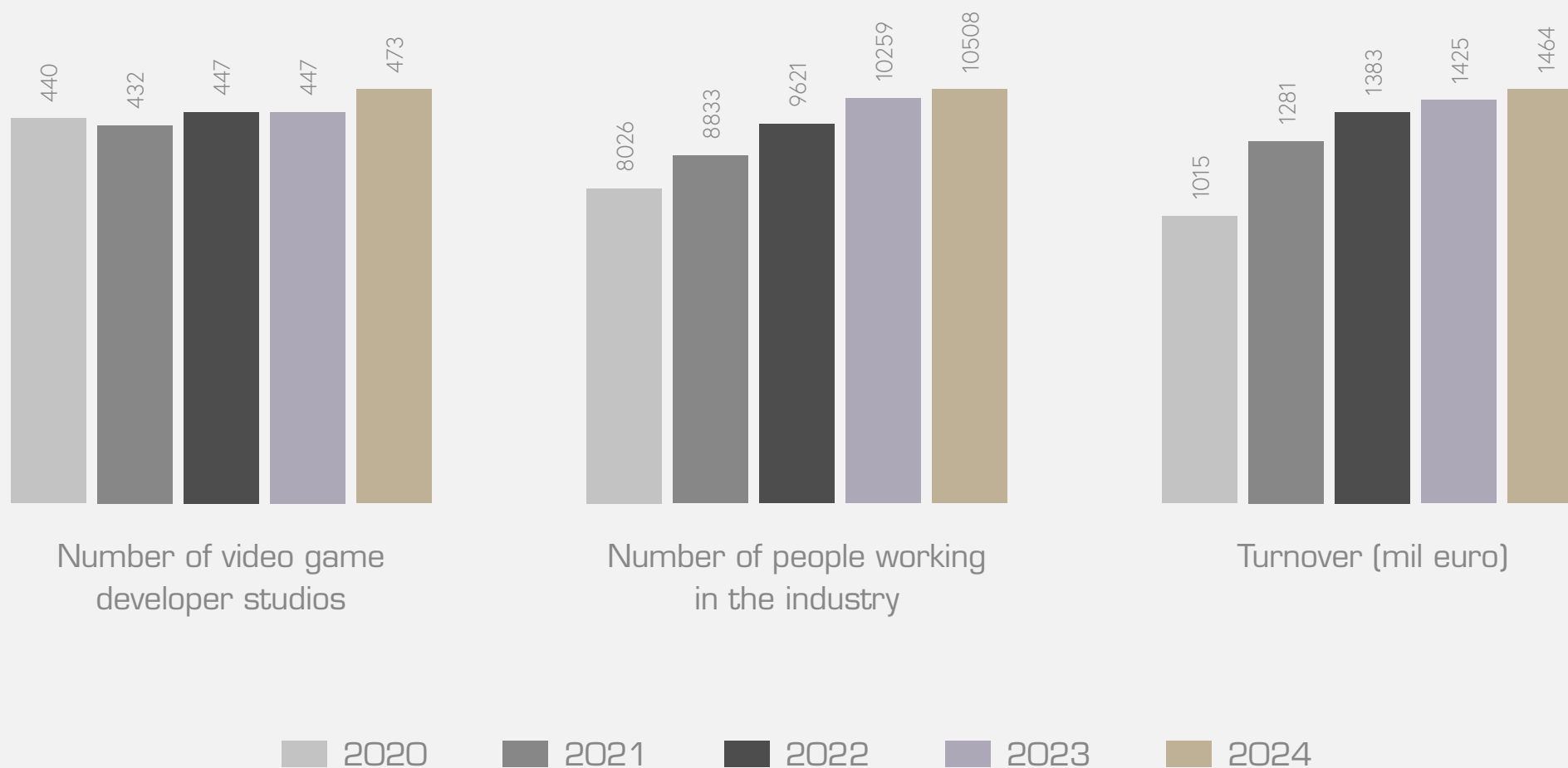
Slovenia

Slovenia Games Association



Spain

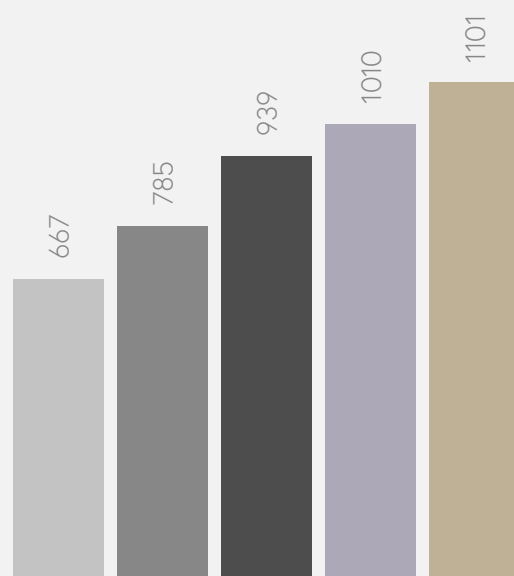
Spanish Desarrollo español de videojuegos



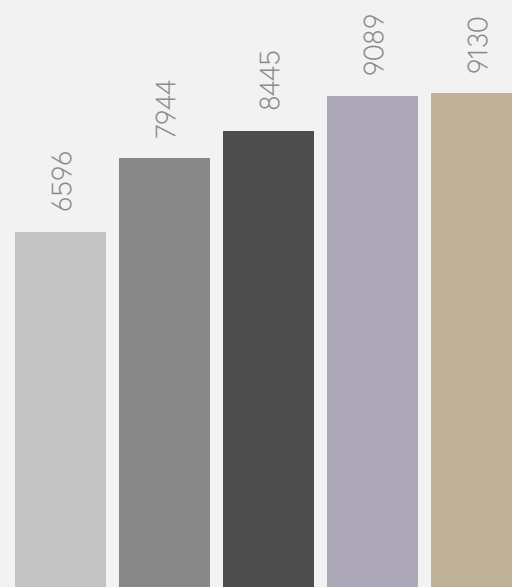
Find more information in the full report [📄](#)

Sweden

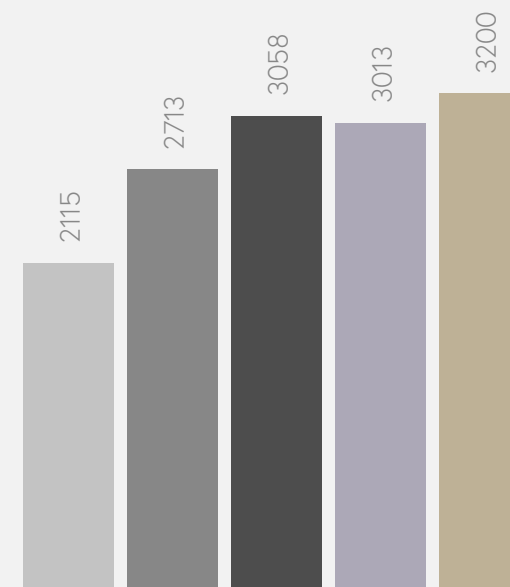
Dataspelsbranschen/ Swedish Games Industry



Number of video game developer studios



Number of people working in the industry



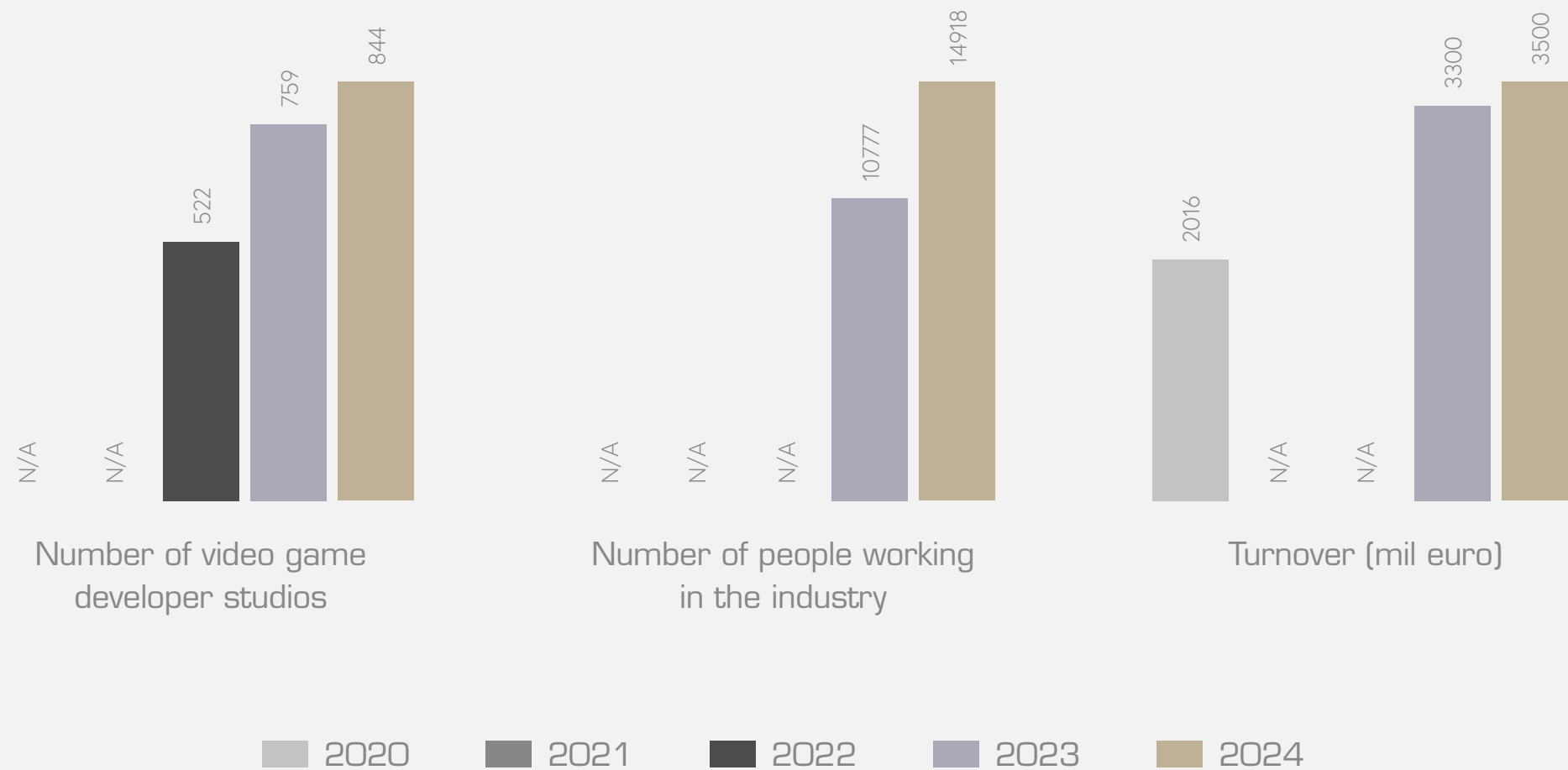
Turnover (mil euro)

2020 2021 2022 2023 2024

Find more information in the full report [📄](#)

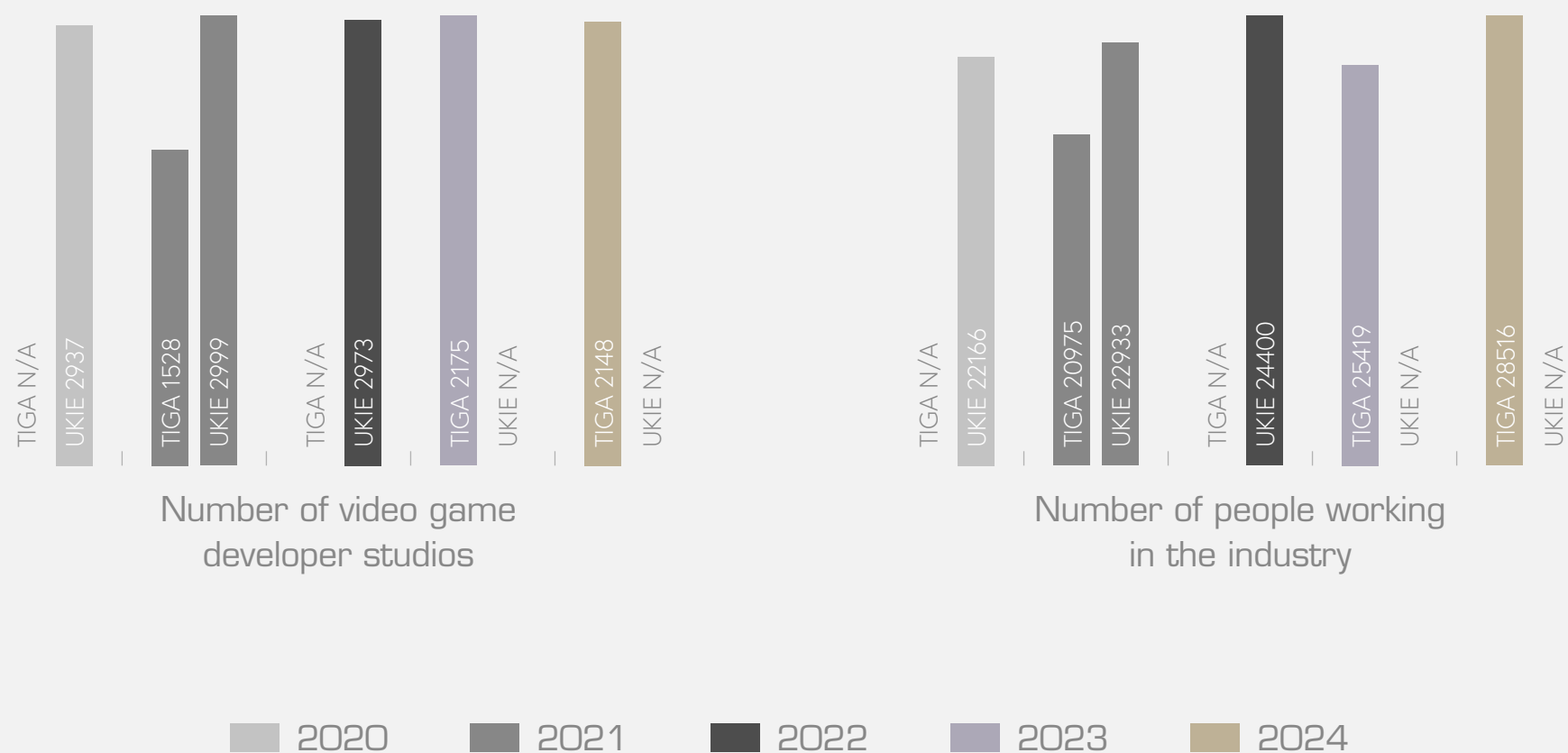
Turkiye

TOGED (Game Developers Association of Turkiye)



United Kingdom

TIGA and Ukie



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

APPENDIX

VIDEO GAMES INDUSTRY 2024 REPORTS BY COUNTRY

ANNEX I

Video games industry 2024 reports by country

AUSTRIA

Pioneers of Game
Development Austria



BELGIUM

BelgianGames
(FLEGA, WALGA and
games.brussels)



CROATIA

Croatian Game
Development Alliance



FINLAND



FRANCE

Syndicat National du
Jeu Vidéo



GERMANY

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



LITHUANIA



NETHERLANDS

Dutch Games
Association



NORWAY

Virke, The Federation of
Norwegian Enterprise



ROMANIA

Romanian Game
Developers Association



SERBIA

Serbian Games
Association



SLOVAKIA

Slovak Game
Developers Association



SPAIN

Desarrollo Español
de videojuegos



SWEDEN



EDUCATIONAL INSTITUTIONS PROVIDING STUDY PROGRAMMES IN GAME DEVELOPMENT IN EUROPE

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 Joanneum 
- 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

Bulgaria: 1 institution

- National Academy of Art Sofia

Croatia: 5 institutions

Formal Institutions

- Algebra University College 
- High School Sisak 
- High School Novska 
- University of Zagreb 

Non-formal institutions

- PISMO game development incubator 
- Machina Academy 

Czech Republic: 12 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

Estonia: 3 institutions

- Mainor
- Tallinn University
- Tartu University
- Creative Hill College
- VOŠG
- SPŠE Plzeň
- Scholastika
- Charles 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 Education and Training

- Ahlmannin koulun säätiö
- Careeria
- Business College Helsinki
- Helsinki Vocational College
- HEO
- Kainuun ammattiopisto
- Kauhajoen evankelinen opisto
- Kouvola seudun ammattiopisto
- Joutsenon opisto
- Laajasalon opisto
- Lybeckerin opisto
- Omnian ammattiopisto
- Oulun seudun ammattiopisto
- Pohjois-Karjalan koulutuskuntayhtymä
- Prakticum
- Sataedu
- Suupohjan koulutuskuntayhtymä
- Taitotalo
- Turun ammatti-instituutti

France: 130 institutions

Germany: 115 institutions

- Akademie Deutsche Pop Hamburg
- Bauhaus Universität Weimar
- Berufliche Schule für Medien und Kommunikation
- bib International College Bergisch Gladbach
- bib International College Paderborn
- bib International College Hannover
- btk Hochschule
- Burg Giebichenstein Kunsthochschule Halle
- design akademie berlin | SRH Hochschule für Kommunikation und Design
- Designakademie Rostock
- Designschule Leipzig
- Designschule Schwerin
- Duale Hochschule Baden-Württemberg Ravensburg
- Fachhochschule Aachen
- Fachhochschule Aalen
- Fachhochschule Potsdam
- Fachhochschule Wedel Gemeinnützige Schulgesellschaft mbH
- FH Dresden

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 für Medien Köln
- Kunsthochschule Kassel
- Leuphana Universität Lüneburg
- Macromedia Akademie
- BAF Bayerische Akademie für Fernsehen und Digitale Medien
- mAHS, media Akademie – Hochschule Stuttgart
- Mediadesign Hochschule Berlin
- Mediadesign Hochschule Düsseldorf
- Mediadesign Hochschule München
- Merz Akademie
- Ostbayrische Hochschule
- OSZ IMT
- PIXL VISN
- S4G School for Games GmbH

Germany

- SAE Institute Hamburg
- SAE Institute München
- 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: 2 institutions

- Reykjavík University
- Reykjavík Academy of Digital Entertainment

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)
- TheSign - Comics & Arts Academy
- Università degli Studi di Milano

Italy

- Università degli studi di Verona
- Università di Camerino
- Vigamus Academy

Latvia: 2 institutions

- RĪGAS MĀKSLAS UN MEDIJU TEHNIKUMS
- EKA University of Applied Sciences

Lithuania: 7 institutions

- Mykolas Romeris University 
- Kaunas University of Technology 
- VILNIUS TECH 
- Vytautas Magnus University 
- Vilnius Business College 
- SMK College of Applied Sciences 
- European Humanities University 

Netherlands: 30 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 
- Alpha-college 
- Windesheim 
- Eindhoven University of Technology 
- HAN University of Applied Sciences 
- Leiden University 
- NHL Stenden 
- Noorderpoort 

North Macedonia: 3 institutions

- Avenga Academy 
- Semos Education 
- M3DS Academy 

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: 45 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

Poland

- Academy of Fine Arts in Warsaw
- Vistula University in Warsaw
- University of Opole
- Tischner European University in Kraków
- Kielce University of Technology
- University of Technology in Koszalin
- Czestochowa University of Technology
- Silesian University of Technology in Gliwice
- Poznan University of Technology
- University of Silesia in Katowice
- Cracow University of Technology
- West Pomeranian University of Technology in Szczecin
- University of Applied Sciences in Nysa
- University of Zielona Gora
- WSB-NLU (Higher School of Business – National-Louis University) in Nowy Sacz
- Academy of Fine Arts in Katowice
- Academy of Art in Szczecin
- The Karol Godula Upper Silesian Academy of Entrepreneurship in Chorzow
- University of Silesia in Cieszyn
- Kozminski University in Warsaw
- University of Bialystok
- Kazimierz Wielki University in Bydgoszcz
- University of Humanities and Economics in Lodz
- The West Pomeranian Business School in Szczecin
- University of Economics in Katowice
- School of Computer Science and Skills in Lodz,
- The Eugeniusz Geppert Academy of Art and Design in Wroclaw
- Collegium Da Vinci in Poznan
- Warsaw Film School
- Katowice Institute of Information Technologies
- Jagiellonian University in Krakow
- WSB University in Gdansk
- The University of Economics and Human Sciences in Warsaw
- Polish-Japanese Academy of Information Technology in Warsaw
- Futuregames 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
- ULusófona De Humanidades E Tecnologia
- ULusófona Do Porto
- Universidade De Aveiro

Portugal

- 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 
- West University of Timisoara 
- The National University of Theatre Arts and Cinematography 
- The University of Urbanism and Architecture Ion Mincu 
- Universitatea Babeş-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
- Art Bully Training Center
- Crater Training Center

Slovakia: 10 institutions

- Academy of Performing Arts in Bratislava
- University of St. Cyril and Methodius in Trnava

- University of Žilina
- Comenius University in Bratislava
- Slovak University of Technology in Bratislava
- Academy of Fine Arts and Design Bratislava
- Vocational Art School Košice
- Vocational Art School Trenčín
- Bohumil Bača Private School of Applied Arts
- Skyro – Secondary Vocational School of Digital Technologies, Hemisféra

Spain: 64 institutions

- Escuela de Imagen y Sonido de Vigo EISV)
- European Business Factory (EBF)
- Universidade da Coruña
- UDIT (Universidad de Diseño, Innovación y Tecnología)
- DigiPen Institute of Technology Europe (Bilbao)
- Escuela Superior de Imagen y Sonido ACEIMAR
- Universidad Internacional de la Rioja (UNIR)
- Creanavarra- Pamplona
- CPA Salduie

Spain

- MasterD
- Universidad San Jorge (USJ)
- Unreal Training Hub
- Akiba School
- Centro de la Imagen y la Tecnología Multimedia (CITM - UPC)
- Escola de Noves Technologies Interactives (ENTI)
- Escola Pia Granollers
- Escuela de Arte y Superior de Diseño Deia
- Escuela IDesigner
- Fundación Obicex
- Level Up (Game Development Hub)
- Tecnocampus
- Universitat de Vic (UVic)
- Universitat Pompeu Fabra (UPF)
- UPC School
- CEV - Escuela Superior de Comunicación, Imagen y Sonido
- CICE
- e-Squad Academy
- Escuela CES - Escuela Superior de Imagen y Sonido
- Escuela Trazos
- ESNE
- Gametopia
- The Global eSports Academy
- U-tad
- Universidad Complutense de Madrid (UCM)
- Universidad de Alcalá
- Universidad Europea de Madrid
- Universidad Francisco de Vitoria
- Universidad Rey Juan Carlos
- Voxel School
- Escuela Superior de Arte y Tecnología (ESAT)
- Primer Frame
- UA School by Pixel 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
- Universitat Oberta de Catalunya (UOC)
- Universitat Politècnica de Catalunya (UPC)
- Universitat Politècnica de València (UPV)
- Lightbox Academy
- Animum Creativity Advanced School

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)

Sweden

- 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)

Turkiye: 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
- 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

UK

- Coventry University
- The University of Cumbria
- De Montfort University
- University of Derby
- Dudley College of Technology
- The University of East London
- Edge Hill University
- Edinburgh Napier University
- The University of Essex
- Falmouth University
- Farnborough College of Technology
- Futureworks
- Gateshead College
- Glasgow Caledonian University
- Glasgow School of Art.
- University of Gloucestershire
- Gloucestershire College
- Glyndwr University
- Goldsmiths, University of London
- University of Greenwich
- Heart of Worcestershire College
- Heriot-Watt University
- Hertford Regional College
- University of Hertfordshire
- University of Huddersfield
- Hugh Baird College
- University of Hull
- Hull College Group
- Institute of Contemporary Music Performance
- Keele University
- Kingston University
- University of Leeds
- Leeds Beckett University
- University of Lincoln
- The University of Liverpool
- Liverpool John Moores University
- Coleg Llandrillo
- The London College
- London Metropolitan University
- London South Bank University
- 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

UK

- 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 – 2024 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.** How many developers and publishers did you include in the data collection, and in what way? E.g. survey, interviews, information from registry (Open question)
- o.4** Please share if there is some specific information you could not gather during data collection? E.g. larger company information, type of companies not included, specific type of data not available. (Open question)

0.5 If you have published a report on **2024** 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.
- > Do not include **gambling, iGaming related companies**.

- 1.1. Number of active game developer studios and publishers in your country in 2024
- 1.1.1. What was the total number of active game developer studios and publishers located in your country in 2024? (Number) *Please make sure that you do not count twice companies which are both a game developer and third-party publisher.*
- 1.1.2-1.1.5 What is the number of micro/small/medium/large game developers' studios and publishers in your country? (Number)
- 1.1.6. What is the total number of active game developer studios in your country in 2024? Both studios doing self-publishing or using external publishers are taken into account (Number)
- 1.1.7 What was the number of active third-party publishers located in your country in 2024? (Number)
- 1.1.8. What was the number of active service provider companies located in your country in 2024? (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.
- 1.1.9. What type of service providers are you including?

2. Number of people working for game developer studios and publishers in your country, in 2024

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.*

- > **Talent hubs** – *the cities with the largest number of employees comparatively in the country.*

DO NOT INCLUDE

- > **Employees in subsidiaries in third countries:** *If a game developer studios / publisher established in your country owns studios in other countries, people working in those studios based in foreign countries should not be included in this number.*
- > **Subcontractors in third countries:** *If a studio has a subcontractor (a company) in a third country, this should not be included in the employing data.*

2.1 What was the number of people working for game developer studios and publishers in your country in 2024? (Number)

2.1.1. 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 2024/2025, 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)

2.1.2 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 2024

2.2.1. What percentage of the people, working for the local game developer studios and publishers, were females in 2024? (Percentage)

2.2.2. What percentage of the people, working for the local game developer studios and publishers, were male in 2024? (Percentage)

2.2.3. What percentage of the people, working for the local game developer studios and publishers, were other genders in 2024? (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 2024

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 2024? (Number in million euros)
- 3.1. Industry consolidation/ concentration in the hands of few biggest studios (subtitle) in 2024
 - 3.1.1. How much of that revenue was generated by the biggest (in terms of revenue) 10% of studios and publishers in 2024? (Percentage)

4. New games in 2024

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 2024? 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 2024? 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 2024
 - 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, , Other (specify platform)? (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 providing 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

6.2. 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

6.3. 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

ABOUT EUROPEAN GAMES DEVELOPER FEDERATION

Uniting the industry

The European Games Developer Federation e.f. (EGDF) unites 26 national trade associations representing game developer studios based in 23 European countries: Austria (PGDA), Belgium (FLEGA, WALGA), Croatia (CGDA), Czech Republic (GDACZ), Finland (Suomen pelinkehittäjät), France (SNJV), Germany (GAME, GBM), Ireland (IMIRT), Italy (IIDEA), Lithuania (LZKA), Netherlands (DGA), North Macedonia (MGI), Norway (Virke), Poland (PGA, IGP), Portugal (APVP), Romania (RGDA), Serbia (SGA), Slovakia (SGDA), Spain (DEV), Sweden (Spelplan-ASGD), Switzerland (SGDA), Turkiye (TOGED) and the United Kingdom (TIGA). For more information, visit <https://www.egdf.eu/>.

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