Challenges

Only the constant change is permanent in games industry

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COO, EGDF
EGDF unites

EGDF represents European game developers on a European level. It helps to build up policies that support the growth of the European game developer studios and foster the development of the entire digital ecosystem in Europe.

17 trade associations: EGDF unites national trade associations for game developers from 17 European countries: Austria, Belgium, Czechia, Denmark, Finland, France, Germany, Malta, Netherlands, Norway, Poland, Romania, Spain, Slovakia, Sweden, Turkey and the United Kingdoms.

2000+ game dev studios: Together with its member associations EGDF represents more than 2 000 of more than 4 000 game developer studios in Europe. Most of them are SMEs.

25 000+ people these 2 000 game studios employ more than 25 000 people. All in all, game developers employ more than 55 000 people in Europe. The European computer and video games industry, including distributors and students, encompasses more than 100 000 individuals.
Austria  
Belgium  
Czechia  
Denmark  
Finland  
France  
Germany  
Malta  
Netherlands  
Norway  
Spain  
Poland  
Romania  
Slovakia  
Sweden  
Turkey  
United Kingdoms  

EGDF members: www.egdf.eu
Distribution platforms

1970
1980
1990
2000
2010
2020

PC
CONSOLE
MOBILE
ONLINE
CHAT
VR
CLOUD
Business models
<table>
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<tr>
<th>Platform</th>
<th>Business model</th>
<th>Developing</th>
<th>Marketing</th>
<th>Distribution</th>
<th>Solutions</th>
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</thead>
<tbody>
<tr>
<td><strong>PC</strong></td>
<td>Retail, <strong>Pay per download</strong>, Subscription</td>
<td>Increasing development costs, introducing <strong>games as a service</strong> model</td>
<td>Increasingly <strong>publisher driven marketing</strong>, in addition viral and influencer marketing</td>
<td><strong>Market saturation</strong>, discoverability</td>
<td><strong>Grants for game development</strong>, trade missions</td>
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<tr>
<td><strong>Console</strong></td>
<td>Retail, Pay per download, Subscription</td>
<td><strong>Platforms as gatekeepers</strong> (dev kits), high development costs,</td>
<td>Usually <strong>publisher driven</strong></td>
<td></td>
<td><strong>Grants for game development</strong>, support for <strong>trade missions</strong></td>
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<tr>
<td><strong>Mobile</strong></td>
<td>Pay per download, Freemium, <strong>Free2Download</strong> Subscription</td>
<td><strong>Access to top talent</strong>, access to sufficient funding to create free enough free content</td>
<td><strong>Marketing budgets</strong> are sky rocketing, <strong>viral</strong> and influencer marketing</td>
<td><strong>Market saturation</strong>, discoverability</td>
<td><strong>Grants for game development and marketing</strong>, training, trade missions</td>
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</table>
## Challenges

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<tr>
<td>Online/ browser</td>
<td>Subscription, Freemium, Free2Download</td>
<td></td>
<td>Stagnated market</td>
<td>Discoverability</td>
<td>Moving to other platforms</td>
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<tr>
<td>Virtual Reality (VR)</td>
<td>Retail Pay per download</td>
<td>Access to talent, lack of genre conventions, quality of software, artistic content and hardware</td>
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<tr>
<td>Chat</td>
<td>Freemium</td>
<td>Access to talent</td>
<td></td>
<td>Access to Asian platforms</td>
<td>Trade missions</td>
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<tr>
<td>Cloud</td>
<td>Subscription, Freemium</td>
<td>Access to analytics data, poor network infrastructure (5G)</td>
<td>Access to analytics data</td>
<td>Platforms as gate keepers</td>
<td>Trade missions, platform regulation</td>
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Creative Europe Funding

- **Grants: SMEs**
  - Clear eligibility criteria
  - More focus on innovative creative content pushing the artistic boundaries
  - Needs to become more risks taking, as new story driven cloud gaming platforms are emerging

- **Training: Events and associations**
  - Game developer friendly call texts
  - Focus on skills needed for access to funding (e.g. pitching VC funding) and improving business development

- **Access to markets: Associations**
  - Game developer friendly call texts
  - Focus of trade missions is starting to move from Europe/USA to Asia
  - Lowering the minimum EU contribution to 20 000€
  - Increasing EC funding to 70% in Europe and 90% international as as travel and event costs are increasing
  - Common promotional activities for wider regional clusters, at least 4 MEDIA countries (e.g. Nordics or Central-Eastern Europe)

- **Loan guarantees / investment: Banks, VC funds**
  - Creative Europe loan guarantee is only available in few countries, new opportunities from EIB/EIF investment instruments
Thank you
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