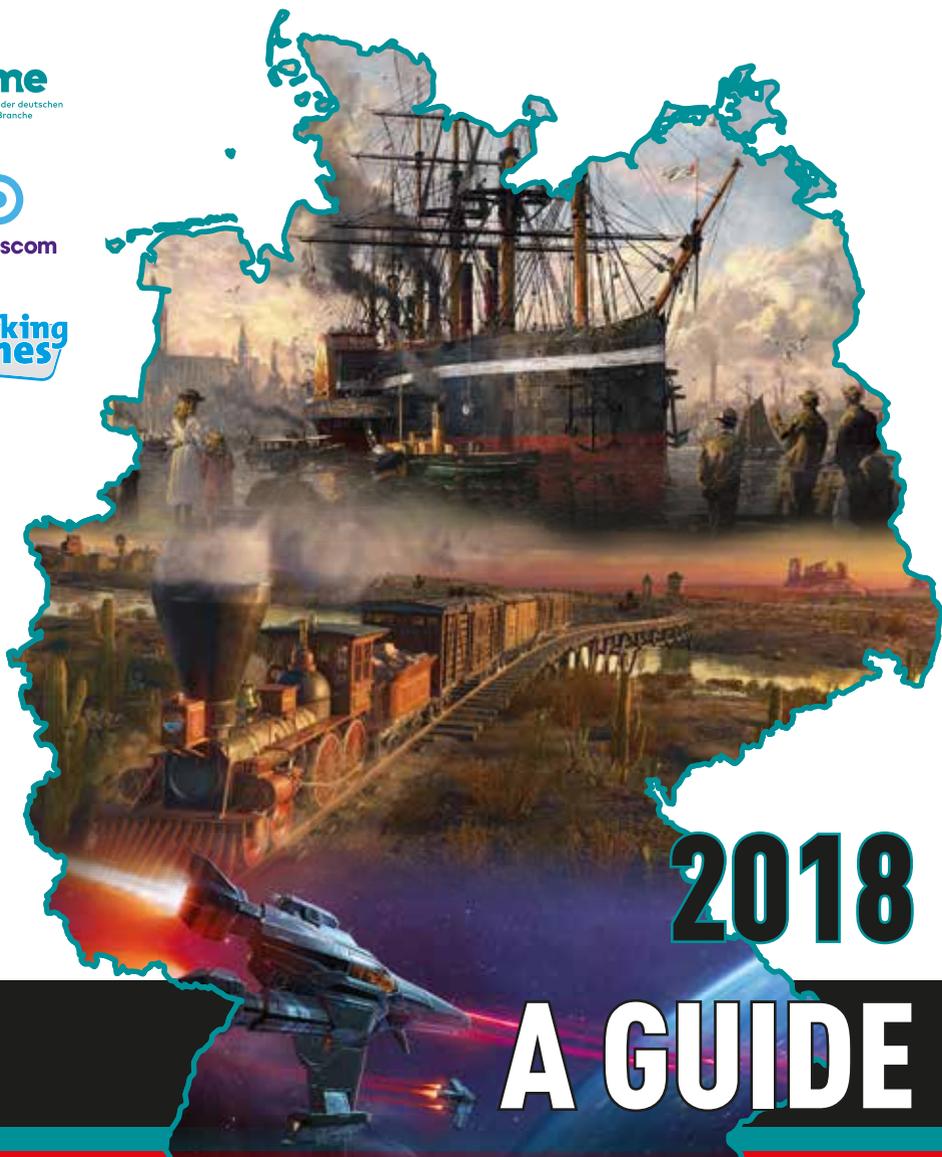


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2018

A GUIDE

TO THE GERMAN

GAMES INDUSTRY

PREFACE BROCHURE ON GERMANY AS A BUSINESS AND INVESTMENT LOCATION

Dear Readers,

Germany is one of the most important markets for computer and video games worldwide. No European country generates higher sales with games and the associated hardware. Germany's benefits as a business location include its geographical position in the heart of Europe and its excellent infrastructure, as well as its membership in the EU and the uninhibited exchange it therefore enjoys with over a half-billion people on the continent.

Germany is distinguished by a very lively games industry. A wide range of companies here are strong players on the world market. Some of these come from the browser and mobile games segment, including, for example, InnoGames, Travian Games and Wooga. In the area of PC and console games as well, German studios such as Deck 13 ('The Surge'), Mimi Productions ('Shadow Tactics') and Yager Entertainment ('Dreadnought') have recently achieved international success. Moreover, Germany's Ubisoft studio Blue Byte ('Anno 1800') is opening a new branch in Berlin this year, whose team will be working on one of the French parent company's major brands. Crytek from Frankfurt am Main offers one of the technologically most advanced game engines in the world, CryENGINE, which is used in virtual reality games like 'Robinson: The Journey' and such elaborate productions as 'Prey' and 'Hunt: Showdown'. In addition, internationally successful developers such as Epic Games and id Software operate their own studio branches in Germany. Many young developers, too, are currently founding small, creative teams that are attracting attention with special titles at, among other venues, the A MAZE. festival for independent video games, held annually as part of the Games Week Berlin. Some 520 companies in Germany are active in the development and marketing of games, providing jobs for over 11,000 people. Universities in many large German cities also train new talent for



all major areas of the games industry. Germany also plays a special role in the e-sports segment: some of the world's largest tournaments, the ESL One tournaments, take place here. And the ESL itself, one of the most important organisers of e-sports tournaments and leagues in the world, is headquartered in Germany.

Last but not least, Germany is the home of gamescom, which last year was opened by Federal Chancellor Angela Merkel. The biggest annual event for computer and video games in the world and the most important business platform for games in Europe, it brings together more than 350,000 people in Cologne, where as-yet-unreleased games can be tried out and business contacts cultivated.

I can provide but a brief overview of Germany's diverse games industry here. This publication, however, offers a much more extensive impression of Germany as a games location. I would be pleased if it helps to win you over, or to strengthen your future commitment as a friend and partner of, and an active participant in the German games industry.

Enjoy reading this brochure!

Sincerely,

Felix Falk

Managing Director of game
(the German Games Industry Association)

Robinson: The Journey, the new VR game from Crytek (creators of graphics engine **CryENGINE**), is a dream come true for fans of dinosaurs: a whole world teeming with those beasts to explore. Truly an adventure like no other.

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TEN GOOD REASONS FOR INVESTING IN GERMAN BUSINESSES

Germany is a business hot spot for foreign investors. Currently, around 70,000 foreign companies are based in Germany, employing approx. three million people. In 2015/2016, the FDI amounted to over 464 billion euros. In their FDI report, the economic development agency of the Federal Republic of Germany, Germany Trade & Invest (GTAI), stated a peak value of 1,944 new FDI projects, representing an increase of 2% compared to the previous year. The related prospect of at least 30,000 new jobs is also a record high.

1. STRONG AND STABLE MARKET ECONOMY

With 500 million consumers, united Europe represents the largest market worldwide, with Germany being the largest national economy and thus the driving force in the European market. Being the biggest market within the EU, Germany's economy is not only very well developed, but also highly diversified.

- Representing 16% of the entire population within the European Union, Germany generates 21% of the EU's total gross domestic product.
- The large German domestic market as well as the easy access to the growth markets in the member states of the European Union make Germany a profitable and extremely attractive location for investors.
- With 82 million inhabitants (2017), Germany represents the largest state in the EU.

- Germany's economic strength is ranked 4th in the world.

- With the European Central Bank located in Frankfurt a. M., Germany is a powerful financial center.

2. CENTRAL LOCATION AND OUTSTANDING INFRASTRUCTURE

The central location in the very heart of Europe makes Germany an attractive location for the gaming industry. Conveniently located airports in Berlin, Dusseldorf, Frankfurt/Main, Hamburg and Munich allow for short travel times to all European destinations on the one hand, and provide a connection to every important city worldwide on the other. In the country itself, all important hot spots of the existing gaming industry in the cities of Berlin, Frankfurt/Main, Hamburg, Munich as well as the Baden-Württemberg region and the Rhine-Ruhr area (Dusseldorf, Cologne etc.) are quickly accessible – thanks to the well-developed rail network.

- With France, Austria, Switzerland, Poland, Belgium, the Czech Republic, Denmark, Luxembourg and the Netherlands, Germany has a total of nine neighboring countries – more than any other European nation.

- The supply in Germany is characterized by an efficient communication and energy network.

3. HIGH PRODUCTIVITY

The international competitiveness of the German economy is characterized by outstanding quality and a high performance level – despite decreasing unit wage costs. Hence, Germany boasts an excellent price-performance ratio within Europe.

4. GLOBALITY

Germany as a business and investment location benefits greatly from its traditionally close economic relations with Central and Eastern Europe, especially with the markets in Poland, the Czech Republic and Hungary. This long-standing East-West integration ensures a correspondingly good economic expertise and lets Germany play a leading role as a platform for the growing domestic markets in the European region.

5. OUTSTANDING PROFESSIONALS

"Made in Germany" is considered a seal of quality for exceptionally high product and service quality throughout the world. Germany has a broad range

Gross domestic product and population: Germany compared with the rest of Europe

	GDP (in Bn EUR)	GDP-Share (EU-28)	Population (in M)
Germany	3.134	21%	82
France	2.229	15%	67
United Kingdom	2.367	18%	65
Italy	1.672	11%	61
Spain	1.114	7%	46
Netherlands	703	5%	17
Poland	424	3%	38
Denmark	277	2%	6
Czech Republic	174	1%	11

Note: Currencies converted with the European Central Bank's reference exchange rates for 2016
Sources: Eurostat 2017 Federal Statistical Office Germany 2017, US Census Bureau 2017

of excellently trained and highly qualified professionals, setting international standards. The basis for this is Germany's excellent education system; 82% of the German population have completed some sort of vocational training or have a university degree, which is well above the OECD average.



Thanks to its high density of banking institutions and being an important stock exchange location, Frankfurt/Main ranks on top of Germany's finance industry, making Frankfurt one of the most important international financial centers in the world.

6. INNOVATION AND RESEARCH

Germany is regarded as the top research location in Europe, enjoying an excellent reputation worldwide for its innovative and dynamic research and development landscape. Germany's federal government supports annual research and development projects with billions of financial funds and hence claims a pioneering role in the high-tech industry. According to results of a survey carried out by the American Chamber of Commerce in Germany (AmCham), 75% of the companies rate the research and development environment in Germany as "Very good" or "Good".

7. ATTRACTIVE FUNDING OPPORTUNITIES

The large number of funding programs in Germany are of great interest for foreign investors. The programs offered cover each phase of a company settlement. Besides direct grants, there is also free training of skilled workers or research funds. Local business development corporations actively support investors on matters regarding financing, recruitment and location search. In the gaming industry, in particular, investors can benefit from corresponding funding opportunities. For more details, please refer to page 34.

8. COMPETITIVE TAX RATES

Tax reforms in Germany resulted in a decrease of incidental wage costs and a reduction of corporate taxes. Compared to the USA, Canada, Japan, Italy and France, Germany has a decisive lead in this respect, which makes it more attractive for investors. The tax revenues by the state ensure that its various tasks within the community, e.g. in the areas of education, healthcare, infrastructure and social security are fulfilled.

9. SECURE ENVIRONMENT FOR INVESTMENT

As a modern, democratic constitutional state with a stable and peaceful policy, Germany provides its companies with the required security. Intellectual property is highly valued and strictly protected. Also, contractual agreements are deemed legally binding in Germany. Decisive location factors such as long-term security and

ABOUT GERMANY TRADE & INVEST

Germany Trade & Invest (GTAI) is a foreign trade agency of the Federal Republic of Germany. It's a central hub to support German and foreign companies. Thus, one of the tasks of GTAI is to inform and accompany foreign investors, from their market entry all the way to their settlement in Germany. For this, GTAI offers a broad spectrum of services, such as market entry, market and industry analyses, funding and financing information as well as comprehensive legal information regarding taxes, employment law, etc. GTAI also offers corresponding consulting services. Besides, GTAI pursues active investor acquisition at leading trade fairs and conferences in selected German key regions in order to promote the international investment interest in Germany as an attractive business and investment location. Interested parties can find helpful information and contact opportunities on GTAI's website at: www.gtai.de/GTAI/Navigation/EN/welcome.html

predictability are important aspects for economic commitment and projects.

Development of wage costs in the business economy* (2007-2016) Average annual growth rate

France	1,95%
Spain	1,99%
Netherlands	2,04%
Germany	2,15%
United Kingdom	2,27%
EU-28	2,30%
Slovak Republic	3,94%
Czech Republic	4,0%
Hungary	4,5%
Poland	5,09%

*"Business economy" incl. NACE Rev. 2, B-N
Source: Eurostat 2017

10. HIGH QUALITY OF LIFE

Germany is characterized by a high quality of life in a safe, open-minded and modern country. Its landscape and culture, the comprehensive healthcare provision as well as the leisure and sports opportunities are just a few of the reasons why seven million people have made Germany their adopted home. The basis for the excellent quality of life in Germany is the country's social security system. The social security of every individual is one of the priorities of the domestic agenda. A nationwide social security legislation regulates the personal financial provision in the event of illness, for retirement and the need for care. It also includes payments of child and housing allowances. ■

• Sources: Germany Trade & Invest, gtai.de, businesslocationcenter.de.



"Hunt: Showdown" is a competitive multiplayer bounty hunting game by German developer Crytek that mixes PvP with PvE elements in a handcrafted sandbox environment. The game's release is scheduled for 2018.



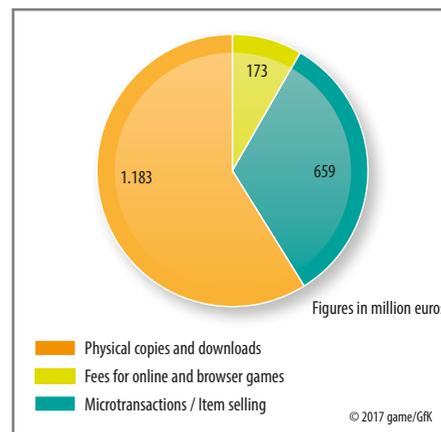
GERMAN MARKET FOR DIGITAL GAMES: FACTS AND NUMBERS

The German games industry recorded sales of computer and video games totaling 43.9 million units in 2016 - a decrease of 3 percent on the previous year. The turnover of computer and video games software in 2016 in Germany totaled 2.13 billion euros. These revenues are distributed across four core business fields:

- **Boxed games and downloads:** sale of games for PC and consoles as well as mobile games
- **Online and browser games:** expenditures for subscriptions and premium accounts
- **Downloadable content:** expenditures for additional items / item selling
- **Online networks (e.g. PlayStation Plus, Xbox Live Gold):** expenditures for subscriptions

MARKET VOLUME

Revenues from computer and video games software totaled 2.01 billion euros on the German market in 2016. With a share of 1.183 billion euros, the classic sale of physical or downloaded games (games for mobile consoles, smartphones & tablets included) still accounts for the lion's share of revenues. Newer business models such as fees for subscriptions and premium accounts (online and browser games) or expenditures on game expansions and additional items (downloadable content) make up about 44 percent of total revenues.

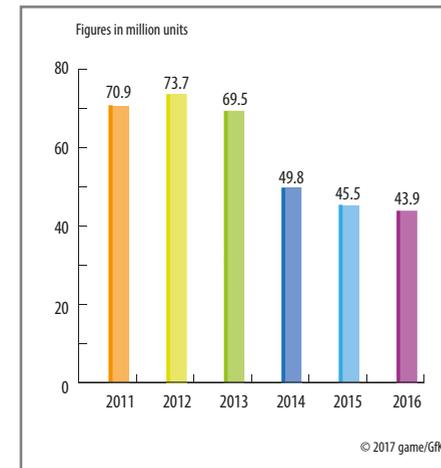


SALE OF DATA MEDIA AND DOWNLOADS

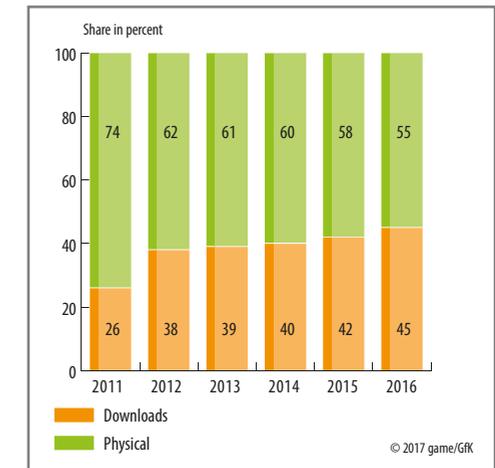
The selling of computer and video games – physical or by download – represents the classic business model of the games industry. The consumer acquires a software license that entitles him to use

a certain game indefinitely. In 2016, 43.9 million games for PC, consoles and mobile devices such as mobile phones, handhelds or smartphones were sold in Germany.

Games Sold



Games sold as Downloads



Germany has become a preferred location for innovative start-ups; offering a winning combination of moderate costs, excellent infrastructure and a large talent pool.

More than four out of ten games sold in Germany are purchased by download.

Sales trend by platforms (physical and downloads)



ONLINE AND BROWSER-GAMES AND GAME-APPS – A GLOBAL GAMING HUB

Thanks to German companies such as Gameforge, InnoGames and Goodgame Studios, Germany has become a global hub for online and browser game production.

15.9 million Germans played online and browser games in 2016, making them an integral part of the German games market. This number decreased significantly from 2014 to 2016, while the revenues from online and browser-game fees increased from 139 million euros in 2014 to a total figure of 173 million euros in 2016. Browser games refer to internet games that are played directly, using the web browser, or in a social network. Online games are played mainly or exclusively on the internet and require a previous program installation on the computer. Not included is the turnover from the sales of virtual items.

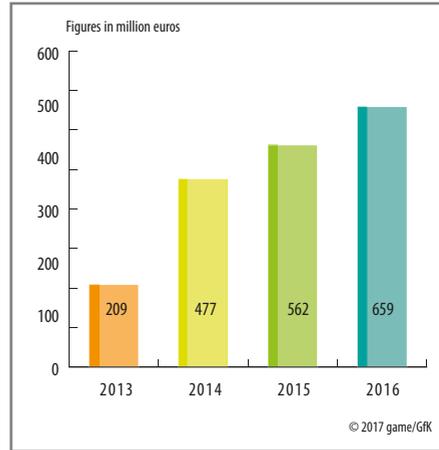
Game apps are one of the greatest drivers of growth in the computer and video games industry, as well as in the entire mobile ecosystem consisting of smartphones, tablets, app stores and mobile internet.

ITEM SELLING

Virtual items include new characters, levels and virtual weapons for online and browser games as well as additional playing levels for games which were acquired by data media or download. Against the background of the increasing dynamics of digital business models, the statistical methods used in the co-operation between game and GfK (society for consumer research) to measure turnover of virtual items have been adjusted. Turnover for virtual items amounted to a total of 659 million euros in 2016.

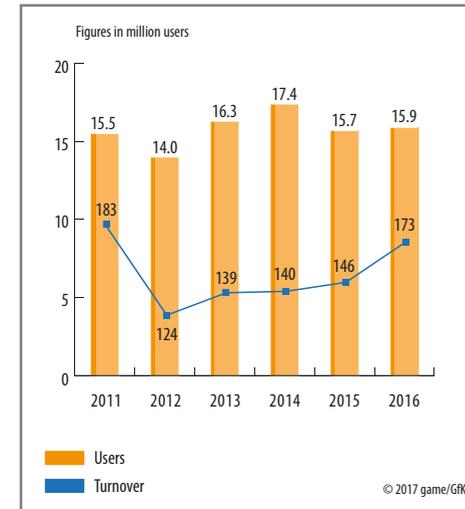
TURNOVER ON ITEM SELLING

Compared to 2015, the turnover from item selling increased by 17 percent to 659 million euros in 2016. The number includes both game add-ons, for example additional levels or so-called map packs and virtual items, which are used in online and browser games as well as in-app purchases for mobile games.

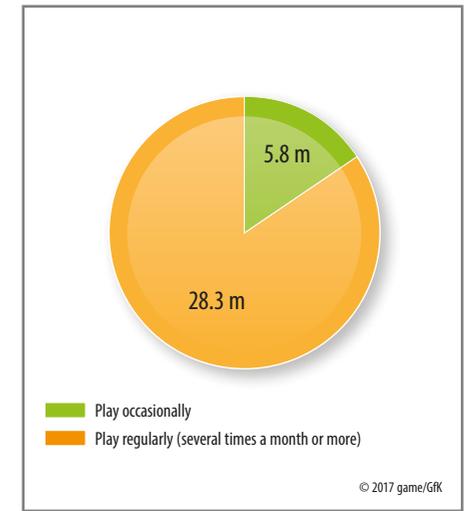


INCREASE IN TURNOVER AND USERS OF ONLINE AND BROWSER GAMES

While the turnover from subscriptions and premium accounts rose by 19 percent to 173 million euros in 2016, the number of users increased to 15.9 million. Turnover from sales and virtual items is not included in these statistics.



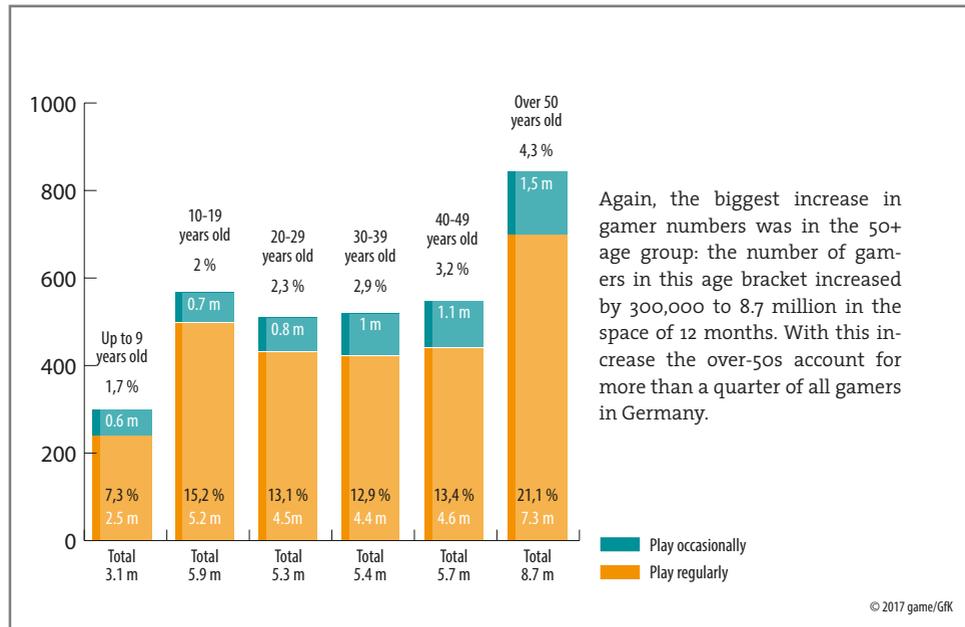
34,1 m Germans play games



Nearly every second German is a gamer: 34.1 million people in Germany play computer and video games. That's 41 per cent of the total population. Almost half of them (47 per cent or 16 million) are women.

The average age of German gamers is 35.5 years. In all, more than 34 million people play digital games, a quarter of which is over 50 years old.

German gamers by age group



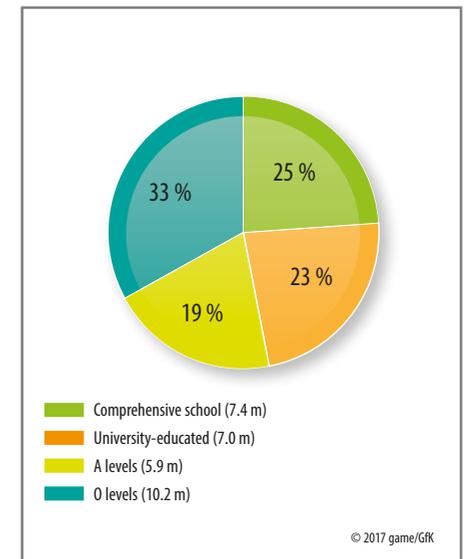
Again, the biggest increase in gamer numbers was in the 50+ age group: the number of gamers in this age bracket increased by 300,000 to 8.7 million in the space of 12 months. With this increase the over-50s account for more than a quarter of all gamers in Germany.

Buyers of virtual goods and average expenditure: In 2016, the number of gamers who bought virtual items for games rose to 3.9 million. Meanwhile, the average annual expenditure per person decreased by 2% to 88.6 euros.

GAMING PLATFORM PROSPECTS

Today, people play on all kinds of devices. The classic computer, be it desktop PC or laptop, is the most popular gaming platform in Germany. Whether browser games, eSports titles or virtual reality games: The PC is a very versatile gaming platform. Smartphones attract more and more gamers in Germany but are still only ranked second with a total of 17.3 million gamers. Another 11.5 million users play on tablets, and almost 42% of these smartphone and tablet gamers even play on a daily basis. The number of stationary gaming consoles also increased slightly compared to the previous year, accumulating to 15.8 million devices. In total, almost one in three people in Germany play on a stationary and/or mobile gaming console.

Education level



GAMING STUDIOS AND COMPANIES IN GERMANY

L O N E L Y M O U N T A I N S DOWNHILL



MEGAGON INDUSTRIES . "LONELY MOUNTAINS DOWNHILL"



BLUE BYTE . "ANNO 1800"

The German games industry features a large number of developers, publishers and service providers (see company register on page 38). On the following pages, we will present some of the studios and technology developers.



BLUE BYTE

LOCATION: Dusseldorf, Mainz, Berlin

FOUNDING YEAR: 1988

NUMBER OF EMPLOYEES: over 300

The development studio Blue Byte was already founded in 1988, making a name for itself with games like "Battle Isle" and, above all, "The Settlers". In 2001, Ubisoft took over the studio, and from then on the Dusseldorf-team mainly worked on further "Settler" games until Ubisoft acquired the Mainz-based developer Related Designs in 2014, turning it into the second Blue Byte studio. Since then, the "Anno" series has been part of the portfolio, with "Anno 1800" being scheduled for end of 2018. The team has also worked also on PC implementations of Ubisoft blockbusters like "For Honor".

pioneers to deliver AAA quality for the new medium VR, with recent titles like "The Climb" and "Robinson: The Journey". The studio is also working on the multi-player shooter "Hunt: Showdown"

CRYTEK

LOCATION:

Frankfurt/Main, Kiev

FOUNDING YEAR: 1999

NUMBER OF EMPLOYEES: over 500



Crytek made a mark on the international market early in the new millennium with visual masterpieces like "Far Cry" and later the "Crysis" series, and at the same time developed CryENGINE, a competitive game engine which today is used by Amazon for their Lumberyard engine or until recently by Cloud Imperium Games for "Star Citizen". Crytek is now one of the few

BLACK FOREST GAMES



LOCATION: Offenburg

FOUNDING YEAR: Offenburg

NUMBER OF EMPLOYEES: over 60

Black Forest Games was formed in 2012, recruiting most people out of the former Spellbound Entertainment team. Before becoming a part THQ Nordic in August 2017, Black Forest Games relied mostly on self-published titles and was on track to become a top-notch independent studio. Their greatest achievement was "Giana Sisters: Twisted Dreams", which was funded through a Kickstarter campaign. "Twisted Dreams" was the spiritual successor to the C64 classic "The Great Giana Sisters".



BLACK FOREST GAMES . "FADE TO SILENCE"

DAEDALIC ENTERTAINMENT

LOCATION: Hamburg,

Dusseldorf

FOUNDING YEAR: 2007

NUMBER OF EMPLOYEES: over 80



Daedalic Entertainment is known for their adventure games, since the company is acting as both developer and publisher. The "Whispered World" games, the "Deponia" series or the implementation of the Ken Follett novel "The Pillars of the Earth" are just a few examples of the successful and highly anticipated adventure games. Daedalic is also a publisher of titles like "Divinity: Original Sin", "Valhalla Hills" or "Bounty Train". In 2016, Daedalic released two games that received a lot of international acclaim: "The Long Journey Home" and "Shadow Tactics: Blades of the Shogun".



DECK 13: "THE SURGE 2"



DECK13

LOCATION: Frankfurt/Main, Hamburg

FOUNDING YEAR: 2001

NUMBER OF EMPLOYEES: over 60

With more than 20 completed projects since their founding, Deck13 is one of the most successful developers in Germany, recently making a name for itself with the role-playing game "Lords of the Fallen". Fans like to call the game the German equivalent to "Dark Souls". In 2016, the team released the quasi-sequel "The Surge". Deck13 is headquartered in Frankfurt/Main, but also has a small office in Hamburg. Also, since 2014, Deck13 supports indie studios as a publisher under their label Deck13 Games, with the team overseeing areas like production, localization, QA, marketing and PR. More than 10 games have already been published by Deck13 in this setup.

DEEPSILVER FISHLABS

LOCATION: Hamburg

FOUNDING YEAR: 2004

NUMBER OF EMPLOYEES: over 80



DeepSilver Fishlabs have been part of the Koch Media Group since December 2013, standing out in particular for their "Galaxy on Fire" games. The Hamburg-based company is specialized in mobile games, working not only on their own brands, but



DEEPSILVER FISHLABS: "GALAXY ON FIRE 3"

also developing apps for international customers like Volkswagen, Barclaycard and The Coca-Cola Company. Since DeepSilver Fishlabs also manage all of Koch Media's mobile activities, the team acts as a publisher for high-quality indie projects for iOS and Android as well, and has generated more than 120 million cross-platform installations so far.

EXIT GAMES



LOCATION: Hamburg

FOUNDING YEAR: 2003

NUMBER OF EMPLOYEES: over 20



Exit Games is the maker of Photon Engine which is designed to facilitate the implementation of multiplayer features. The SDK is available for major game engines like Unity and Unreal Engine, but also Cocos2d, Marmalade or Scirra/Construct 2. Various cloud services, match-making APIs and cross-platform multiplayer are just a few of the services offered. More than 255,000 developers worldwide use Photon for their projects, from Bandai Namco, Codemasters, DeepSilver Fishlabs up to Gamevil.



GAMEFORGE

LOCATION: Karlsruhe

FOUNDING YEAR: 2003

NUMBER OF EMPLOYEES: over 300



In 2002, Alexander Rösner's browser game "OG-ame" laid the foundation for one of the world's most successful companies in the area of free2play online games. Just one year later, he founded Gameforge with his business partner Klaas Kersting. In 2006, Gameforge brought the then most successful MMO in Europe, "Metin2", to Germany. The success of the game resulted both in the growth of player numbers and of the company itself. Over 450 million registered players immerse themselves daily in the fascinating worlds of more than 20 games, offered by Gameforge in over 75 countries.

INNOGAMES

LOCATION: Hamburg, Dusseldorf | **FOUNDING YEAR:** 2007 | **NUMBER OF EMPLOYEES:** 400



The foundation of InnoGames was laid in 2003 when brothers Eike and Hendrik Klindworth developed the browser game "Tribal Wars" together with Michael Zillmer. The hobby project grew so rapidly, that the developers made it their main profession in 2005, and in 2007 they eventually founded InnoGames. "Tribal Wars" is still going strong, with almost 60 million registered players. Today, the company that's specialized on free2play browser and mobile games reaches over 200 million players worldwide, employs around 400 people and operates seven games. On top, the team

GAMIGO

LOCATION: Hamburg,

Berlin, Münster, Darmstadt,

Chicago, Seoul

FOUNDING YEAR: 2000

NUMBER OF EMPLOYEES: 300



Originally founded as an online magazine for PC games, Gamigo today offers free2play online and mobile games, with around 100 million registered users. The portfolio includes titles like "Echo of Soul", "Last Chaos" or "Dragon's Prophet", and altogether the company's product range consists of more than 20 multiplayer titles and over 500 casual games. In 2016, Gamigo acquired Berlin-based publisher Aeria Games, also specialized on online games. On top of its publishing activities, Gamigo also offers a comprehensive IT infrastructure which can be used by both developers and publishers to host their games.



GAMIGO: "IRONSIGHT"

from Hamburg took over developer Funatics in 2016, who are now working for InnoGames as their Dusseldorf office.



INNOGAMES: "DIE STÄMME"

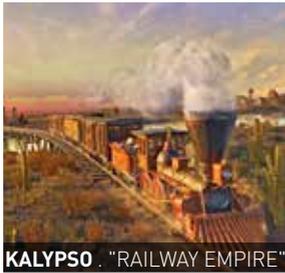
KALYPSO

LOCATION: Worms, Gütersloh, Munich

FOUNDING YEAR: 2006

NUMBER OF EMPLOYEES: over 100 

Kalypso Media, founded in 2006, is one of the few German publishers. Apart from projects by external developers, such as "Vikings: Wolves of Midgard" which was released in 2017, Kalypso also runs two studios of their own: Gaming Minds in Gütersloh and Realmforge Studios in Munich. Plus, they have a mobile department in Hamburg as well as offices in the UK and the US. Kalypso Media is mainly known for the "Tropico" series, whose IP rights they acquired by now, but also for the "Dungeon Keeper" reboot, "Dungeons". The focus of Kalypso Media is on strategy games for PC and consoles.

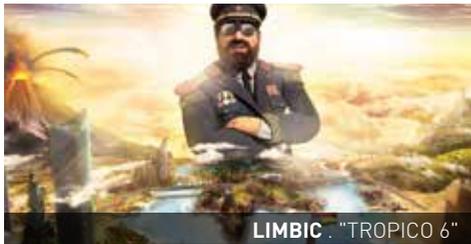


LIMBIC ENTERTAINMENT

LOCATION: Langen

FOUNDING YEAR: 2002

NUMBER OF EMPLOYEES: 50



Limbic Entertainment was founded in 2002 by three former employees of Sunflowers, a company where they worked on games like "Anno 1602", "Anno 1503" and "TechnoMage". Limbic Entertainment first specialized in educational games like "Mein Pferdehof", a client-based horse farm simulation which sold more than 800,000 units for PC and GameBoy Advance. Later, Limbic was working on the strategy series "Might & Magic" for Ubisoft. They are currently working on the 6th installment of the renowned "Tropico" strategy series for publisher Kalypso.

TEAMSPEAK

LOCATION: Krün

FOUNDING YEAR: 1999

NUMBER OF EMPLOYEES: unknown



Everyone who competes in fierce multiplayer battles these days is probably familiar with TeamSpeak, the useful communication tool which lets users chat to each other online. The idea for it started back in 1999 in Germany when a group of friends realized that no existing software solutions were suitable for that purpose. Two years later, the first version of TeamSpeak was released, and today, both game developers and business service providers use the communication software for their products.

MIMIMI PRODUCTIONS

LOCATION: Munich

FOUNDING YEAR: 2011

NUMBER OF EMPLOYEES: 20



Mimimi Productions is a small, young development studio from Munich, which has been highly successful since as early as 2011. Their first title, the mobile game "DaWindci", won the Apple Design Award in 2012, while their next game, "The Last Tinker", won a total of 15 awards. In late 2016, the team published the strategy hit "Shadow Tactics" for PC; a console version will follow in 2017. The team has also completed a number of successful contract jobs, like the interactive children's book "The Trip to Panama".



TRAVIAN GAMES

LOCATION: Munich | **FOUNDING YEAR:** 2005 | **NUMBER OF EMPLOYEES:** over 150



The company is specialized on free2play browser games whose focus is on builder and strategy game elements. Some of the most successful and popular titles by Travian Games are "Travian" and "GoalUnited". Travian Games is cooperating with ArtCraft to publish "Crowfall" and Portalium to publish Richard Garriott's latest game Shroud of the Avatar: Forsaken Virtues. Both games are client-based mmorpgs for pc.



TIVOLA

LOCATION: Hamburg

FOUNDING YEAR: 1995

NUMBER OF EMPLOYEES: over 10



Tivola is a German publisher of apps and games with a focus on kids. The portfolio reaches from educational programs for school, preschool and kindergarten to animal simulations up to games which are all about having fun. Over the years, Tivola has worked on many popular brands, such as "TKKG", "Snoopy", "Käpt'n Blaubär", "Vicky the Viking" or "Maya The Bee" and achieved market leadership with programs like "Lernerfolg Grundschule", an educational software for primary school kids. Besides educational games for mobile and PC, the company has also entered the VR market.

YAGER

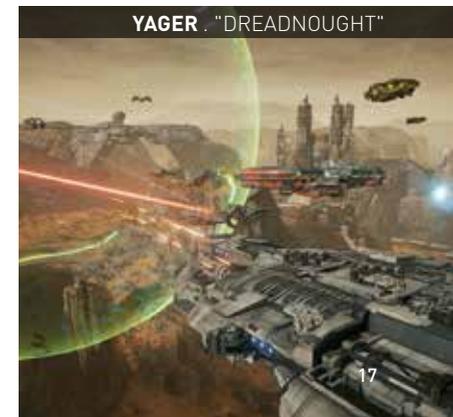
LOCATION: Berlin

FOUNDING YEAR: 1999

NUMBER OF EMPLOYEES: over 120



The team of Yager published its first game of the same name in 2003, but is probably known to most gamers for their anti-war shooter "Spec Ops: The Line" from 2012, which the Berlin-based studio developed for 2K and which received widespread critical acclaim. In the meantime, Yager worked on "Dead Island 2" and is now focusing on the free2play title "Dreadnought" which is still in open beta and scheduled to be released in 2018. The company's focus is on AAA games for PC and consoles.



WOOGA

LOCATION: Berlin

FOUNDING YEAR: 2009

NUMBER OF EMPLOYEES: 250



Wooga is specializing in free2play mobile games and has published a number of mega-hits since 2009, like "Jelly Splash" (over 50 million players), the "Bubble Island" series (over 90 million players) or "Diamond Dash" (over 200 million players).

Within seven years, the company grew to 250 employees from over 40 nations and by now has also worked with high-profile licenses like "Futurama". Wooga serves both iOS and Android devices as well as Smartwatches.



THAT'S WHAT THEY SAID: GERMAN DEVS AND INDUSTRY EXPERTS ABOUT GERMANY'S GAMING INDUSTRY

We wanted to know what Germany's game developers and industry experts think of Germany as a business and investment location; what the strengths and benefits are in their opinion, why international gaming investors should make business there, and what they wish for regarding the future of the German games industry. On this page, you will find a selection of answers they gave us.



**JAN THEYSEN,
CREATIVE DIRECTOR,
KING ART**

"The German developer community is comparably small, but has an excellent network. The exchange between the developers, the helpfulness and feelings of solidarity are very strong. People help each other out in fast and unbureaucratic ways."



KING ART. "IRON HARVEST 1920+"



**JAN KLOSE,
MANAGING DIRECTOR,
DECK 13**

"There's certainly a breath of fresh air in the German games industry, with more new studios evolving and more titles becoming internationally successful. The shift to digital distribution seems to enable a lot of creative developers to find their niche and develop awesome games, while at the same time international publishers are becoming more and more aware of good quality coming from Germany. We need to keep this trend alive and I still haven't lost hope that our government will eventually wake up and give our industry the attention it deserves and the care to help it expand and live up to its true potential."



"TRANSOCEAN 2: RIVALS"



**BENEDIKT GRINDEL,
STUDIO MANAGER,
BLUE BYTE**

"We are celebrating our 30th anniversary this year, and we have big plans. Germany's developer scene is on the upswing and offers a large pool of highly qualified talent for all areas of game development. We have opened a new studio in Berlin early this year. The studio will be working on the Far Cry brand, and the applications we receive are amazing: top profiles from all around the world. We are also looking for new talent in Düsseldorf and Mainz, where we work on some of the biggest Ubisoft brands. Germany continues to benefit from the indie scene and a growing number of game-centric university programs. We see huge creative potential now and in the future. People who join us from abroad are often surprised by the warm welcome and friendliness they experience here. And we see that Germany is very popular for expatriates because of its overall stability. Luckily, our politicians have realized that games development has huge potential, and that we are a creative and high-tech business with an excellent workforce of digital natives. We expect that this will soon be reflected in an improving infrastructure for our industry, so that we can grow even faster."



BLUE BYTE. "ANNO 1800"



**JOHANNES ROTH,
FOUNDER & MANAGING
DIRECTOR, MIMIMI PRODUCTIONS**

"It's a sad fact that Germany has been repeatedly outpaced in the past. However, the latest merger of the industry associations BIU and GAME into one powerful federal association demonstrates that our industry is standing together and is well set up to overcome even the biggest obstacles. The prospects of federal funding, which would also make foreign investments more attractive, are better than ever. All of this combined with a large number of developers who are on the same level as international studios in areas like stability, quality and efficiency – be it for AAA blockbusters or artsy indies – there has never been a better time to cooperate."



MIMIMI PRODUCTIONS "SHADOW TACTICS"



**HENDRIK KLINDWORTH,
CHIEF EXECUTIVE OFFICER,
INNOGAMES**

"Being located in the heart of Europe, Germany offers good access to all European markets. The different regions host multiple game studios which are successful on diverse platforms and vary in size, style and strategic approach. Many German developers and publishers have decades of experience in the market and will continue to be successful in the future as they focus on sustainable growth."



TRENDS FOR THE GERMAN GAMES MARKET

Germany is one of the most important markets for computer and video games in Europe. In 2016, it generated a revenue of 2.13 billion euros, with the PC being the dominating platform (based on the installed hardware), followed by smartphones and consoles. But another two areas will become more and more important in the years to come: eSports and Virtual Reality.

JUST PLAY TOGETHER

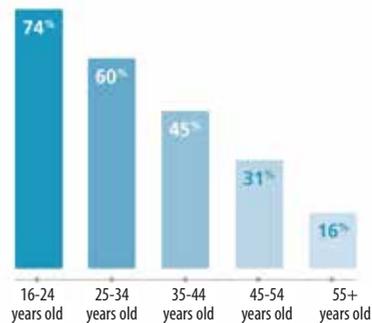
With the motto "Just Play Together", gamescom 2017 put one of the most vital features of games in the spotlight: Even the very first digital games like "Pong" could be played together with friends on just

one device. And yet, playing together has never been easier and more versatile than it is today – which was the focus at gamescom 2017, also due to a particularly high number of novelties: Friends play together in a room and experience stories together, for example,

Four in ten gamers in Germany play together with others



Share of German gamers who play multiplayer games at least occasionally

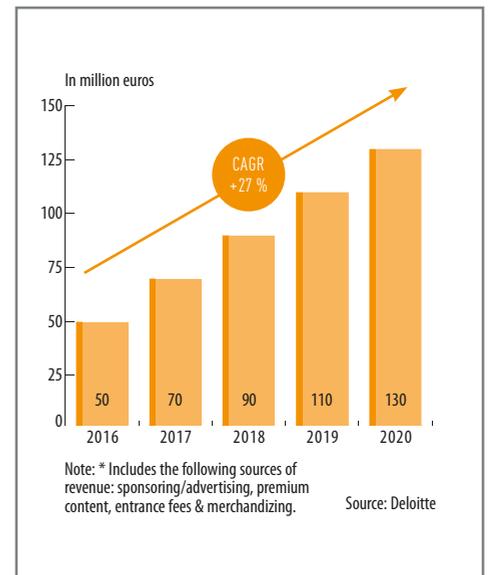


in "Star Wars Battlefront II" (Electronic Arts), "Mario + Rabbids Kingdom Battle" (Ubisoft) and "Super Mario Odyssey" (Nintendo). With Sony's "PlayLink", friends and family can gather in front of the TV and share a quick and easy gaming experience via smartphone and tablet on the gaming console. With their new gaming console Switch, Nintendo provides an opportunity to play together even on one device which can be taken anywhere at any time. Sharing gaming experiences online also moved more into the spotlight. Gamers can, for example, jump right into a friend's story and continue to play it together such as in "Far Cry 5" (Ubisoft). For online events with special missions, friends arrange joint gaming sessions to play games like "Destiny 2" (Activision). Even the audience of a live-stream can be involved interactively in the gaming experience, e.g. on the video platform Mixer (Microsoft). Never before have there been so many ways to play with friends and family.

PROFESSIONALIZATION OF ESPORTS

The development of eSports is rather unusual: No other sports has ever grown from niche sport into a mass phenomenon in such a short amount of time. Millions of people in Germany follow digital sports, be it live at a stadium or online via live-stream. The rapidly growing popularity also entails the increasing professionalization of eSports, which also gains more and more impact on the economy and politics. An increasing number of companies like Audi and Vodafone become involved in digital sports in order to reach the young, internet-savvy target group which can no longer be addressed through traditional advertising only. eSports also played a significant role during the German parliamentary election cam-

Germany: eSports business revenue*



According to an analysis by Deloitte, eSports is expected to generate a revenue of 130 million euros by the year 2020.

paign: All major parties announced that they would increase funding for digital sports in the upcoming legislative period. The announcement by the Olympic Council of Asia (OCA) to make eSports a medal event at the 2022 Asian Games in Hangzhou is another indicator for the increasing professionalization of eSports and its worldwide recognition as a sport.



eSports in Germany today can measure up to traditional sports

INNOVATIONS FOR INFINITE GAMING EXPERIENCES

The games industry has always been a pioneer in using innovative technologies to improve the gaming experience. Many technological innovations aim to create even more realistic, massive, virtually boundless game worlds. gamescom 2017 delivered proof for this kind of innovation power: More than any other media industry, the games industry already provides content in the so-called 4K resolution as well as the use of HDR technology (High Dynamic Range). With Sony's PlayStation 4 Pro and Microsoft's Xbox One X, new models of the current console generation were introduced, which support the latest standards for the considerably higher resolution and impressive contrast the latest TV generation has to offer. This new technology is not only used by new games such as "Assassin's Creed Origins" (Ubisoft), "Forza Motorsport 7" (Microsoft) and "Middle-earth: Shadow of War" (Warner Bros.). Some games that have previously been released contain free updates, too, in order to present improved image quality on the latest gaming consoles.

Virtual Reality is another example for the games industry's strong will to overcome technical hurdles over and over again in order to be able to present even more intense gaming experiences: Upon release of the current headset generation and price

reductions in the second half of 2017, the user base recorded a noticeable increase. Right now, Virtual Reality is becoming an entirely new platform – not only for computer and video games, but also for various economic sectors. If you want to experience what the computer platform of the future feels like, you can't avoid video games. A series of upcoming games show off the level of creativity the latest formats and ideas for Virtual Reality are being tried out with as, for example, "The Inpatient" for PlayStation VR, "Transference" (Ubisoft) or the VR version of "The Elder Scrolls V: Skyrim" (Bethesda).

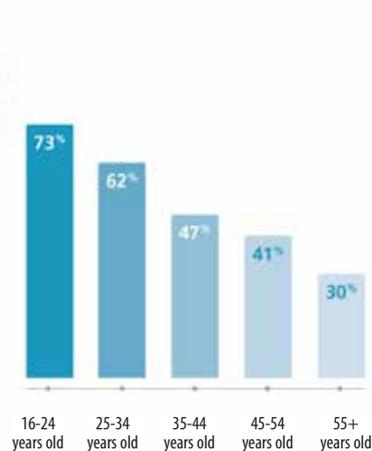


The interest in VR headsets is on the rise

Share of German internet users who have heard of special VR headsets

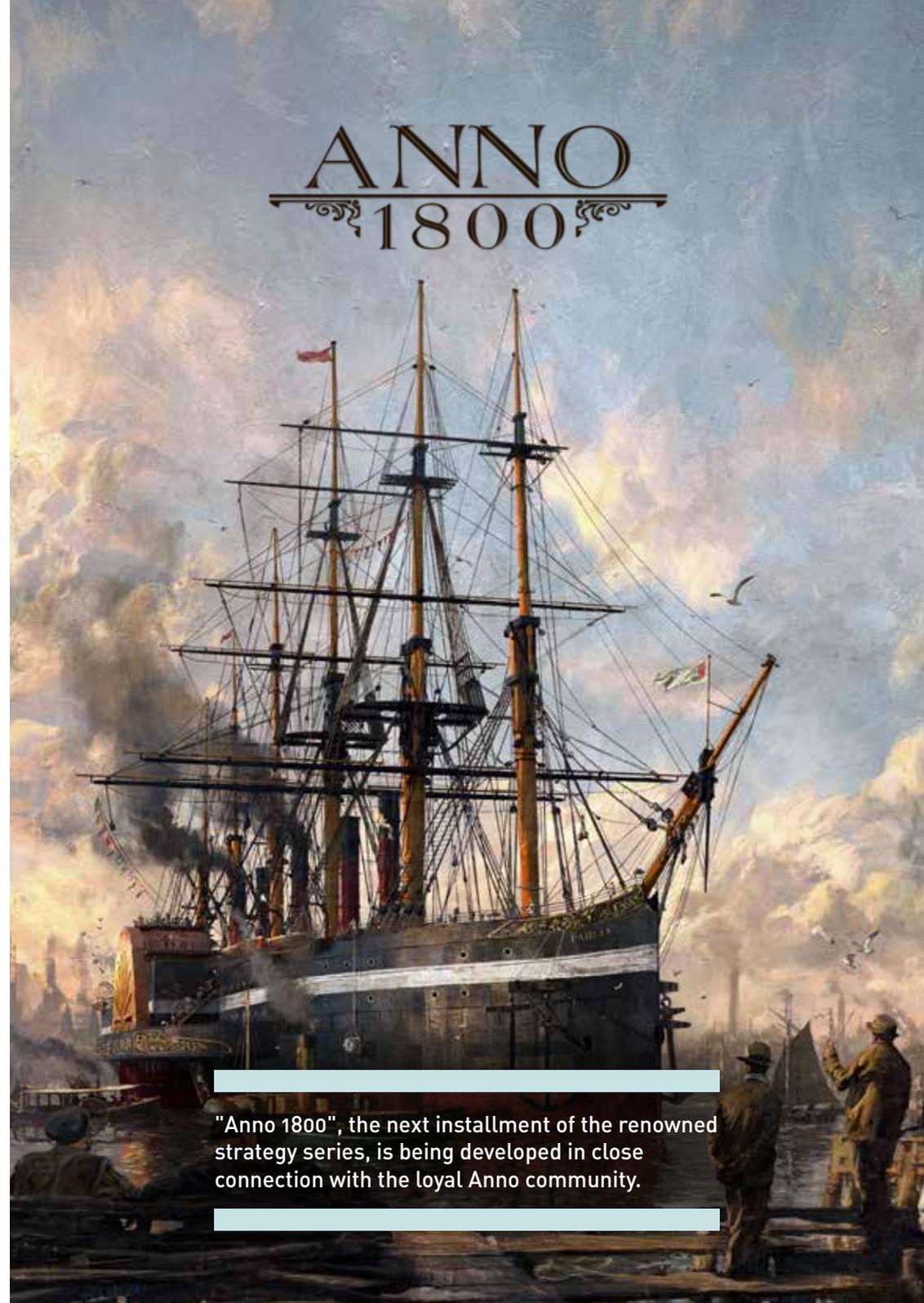


Share of German internet users who already use VR headsets for digital games or can imagine using VR headsets for digital games in the future



© 2017 game/YouGov

ANNO 1800



"Anno 1800", the next installment of the renowned strategy series, is being developed in close connection with the loyal Anno community.



GAMESCOM: CELEBRATE THE GAMES

Major innovations from Germany, Europe and the rest of the world are showcased at gamescom, the highlight of the interactive entertainment industry's annual calendar.

gamescom is both a trade fair and a public event, making it a unique entertainment experience for all visitors. It is hosted by the city of Cologne, where it has taken place in August of every year since 2009. Koelnmesse GmbH – one of the largest and most modern expo centres worldwide, with 284.000 square metres of floor space - is the service provider responsible for organising and running the event. In 2017, over 350,000 people from 106 countries attended the event, visiting booths run by 919 exhibitors from 54 countries – more than ever before.

GAMESCOM: THE CONCEPT

The success of gamescom is due in large part to the idea behind it. The event brings together representatives of every link in the industry's value chain, from developers and publishers to retailers and consumers, and creates forums for discussion at every level. The entertainment area is aimed at games fans from the general public. It comprises four modern exhibition halls with a total of about 200.000 square metres of floor space and both an indoor and an outdoor area. Here, gamescom attendees can try out the latest gaming software and hardware. The business area is an exclusive space

for exhibitors, trade professionals and the media. The exceptional infrastructure in this area makes it an ideal forum for successfully conducting business and holding in-depth discussions. The business area is a top meeting spot for the 30,700 trade professionals who attend the event.

The gamescom congress is one of the most important conferences for digital games in Germany. More than 114 speakers discuss the latest trends in several key areas of the games industry. This conference has been officially accredited as a training programme for teachers and other education professionals; upon request, participants will be given a certificate to that effect at the check-in desk. The conference is organised by Koelnmesse GmbH and supported by North Rhine-Westphalia's Minister for Federal Affairs, Europe and the Media, the new German Games Industry Association game – and the City of Cologne.

In addition to these main pillars, gamescom offers a multifaceted programme of other events. The gamescom city festival features concerts and entertainment in Cologne's city centre, which always takes on a festive atmosphere for the entire duration of the event.



„We are thrilled. gamescom 2017 set new standards and achieved an all-time visitor high, showing more than ever its exceptional global importance as a 360-degree event experience and leading communication platform for current and upcoming topics in the computer and video games industry.“

(Gerald Böse, CEO of Koelnmesse GmbH)

gamescom impressions



GAMESCOM AWARD

The gamescom award is presented every year to honour the best games at the event. All companies exhibiting at gamescom can submit their games for

consideration. Games are eligible if they were not published in Germany before gamescom and are available in the entertainment area for attendees to view and play. ■

Protection of minors and media literacy

At gamescom, the games industry also acknowledges its responsibility to help protect minors. The provisions of German youth protection laws are consistently observed throughout the exhibition area, and comprehensive measures are in place to protect young attendees from harmful content, including age verification at exhibitors' booths.



gamescom offers a great variety of having fun in all aspects of gaming, showing how videogames can connect people and bring them together.

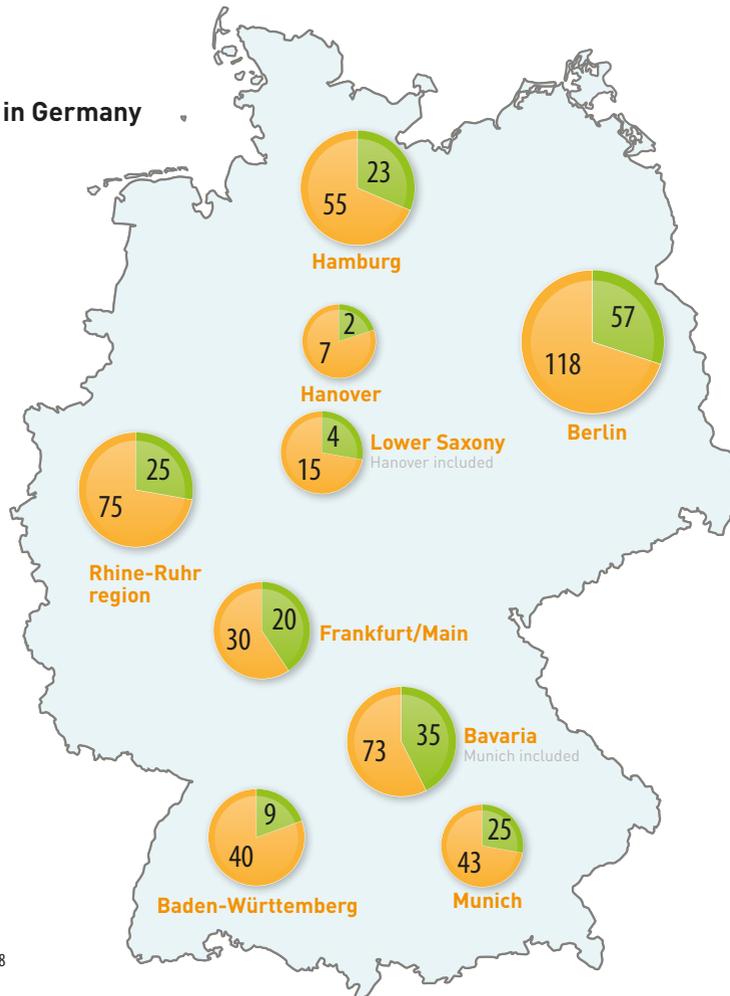


GERMANY'S DEVELOPER LANDSCAPE

The German games industry is typically focused on the big cities, with Hamburg and Berlin having become the hot spots in the last few years. Other economic centers for the games industry are Munich, the Frankfurt/Main region and the catchment area of Cologne and Düsseldorf where most developers and publishers are based (see map below).

Gaming Clusters in Germany

■ Game Publishers
■ Game Developers



Source: Germany Trade & Invest 2018

HAMBURG AND BERLIN IN DETAIL

Today, Hamburg is home to some of the biggest gaming companies in Germany, like, e.g., Goodgame Studios (around 350 employees), Bigpoint (around 500 employees) or InnoGames (around 410 employees). All three of them are specializing on free2play and browser and/or mobile games. But international companies have their offices here, too, such as Square Enix, Capcom or Warner Bros., which shows that Hamburg has become one of the most important locations for the industry in Germany. This is also emphasized by respective educational offerings at various colleges, a large number of indie studios and traditional gaming companies like Daedalic Entertainment or DeepSilver Fishlabs.

Berlin, too, has gained importance over the last few years, and has become the location of choice for big players like Wooga (around 250 employees), Gameduell (around 160 employees) or Yager (around 130 employees). Besides that, Berlin has a vibrant and prosperous indie scene, and also a number of colleges and international companies like Tencent, Gamevil, King, Epic Games or Wargaming, who have set up office in the German capital. International conferences, too, are held in Berlin on a regular basis, most notably the QUO VADIS developer conference which is now the creative hub of International Games Week Berlin.

ADDITIONAL CITIES IN BRIEF

Other important companies and events are distributed across the remaining conurbations: Greater Cologne, e.g., is hosting Europe's leading trade show for digital games, gamescom, every year in August, and is also home to companies like Electronic Arts, Turtle Entertainment (ESL: Electronic Sports League) and Ubisoft (in Dusseldorf).

In the catchment area of Frankfurt/Main, Bethesda and its in-house Studio id Software have set up office, and this is also where Chris Roberts is working on "Star Citizen" with Foundry 42. Also, Crytek, one of the most popular German gaming companies, has its headquarters in the financial metropolis, and there are also development studios like Deck 13 or Keen Games.

Munich, on the other hand, is home to big international players like Activision/Blizzard, Take 2 (Rockstar/2K) and Koch Media. Also, there's Travian Games, another free2play heavyweight from Germany with around 200 employees, and a number of smaller studios like the young, but very successful team of Mimimi Productions, or remote control productions whose studio Chimera Entertainment has worked on "Angry Birds Epic" for Rovio, among other things.

Plus, all cities mentioned here offer various networks for developers, promoting networking and exchange among one another, providing experts where needed, etc. Also, many funding organizations have their offices and contact partners there.

STUDIOS FAR OFF THE METROPOLITAN CENTERS

But lesser known regions far off the metropolitan areas are home to successful gaming companies as well. Mobile gaming pioneers HandyGames, e.g., have their offices in Giebelstadt near Würzburg. Publisher Kalypso Media, known for the "Tropico" series, has its headquarters in Worms, while the free2play experts of flaregames reside in Karlsruhe where Gameforge is located, too. The map on the left is therefore only a rough overview of the hot spots of the German games industry. All companies and their locations are detailed in the company register of this brochure, starting on page 38. ■



"The Surge" by German developer Deck 13 (co-creators of the award-winning action game Lords of the Fallen) has won a total of three categories at the German Developer Awards 2017: **Best Graphics**, **Best PC/Console Game** and **Best German Game**. "The Surge 2" was announced recently and is scheduled for release in 2019.

THE SURGE





JOB MARKET SITUATION AND EDUCATION OPPORTUNITIES IN GERMANY'S GAMING INDUSTRY

Germany – the land of poets and thinkers, fast but pricey luxury cars and high-quality products "Made in Germany". These are most certainly the first clichés that come to mind when thinking of Germany.

But these days, Germany is also an important market for the gaming industry, not only because it has the highest sales potential compared to the rest of Europe. Also, with regard to production, Germany has become an important location according to the latest figures. In 2017, there were approx. 521 companies specializing in computer and video game development and publishing. In detail, there are 337 development studios, 61 companies focused on publishing, and 123 companies acting as both developer and publisher (source: Projection by game based on the industry database "Industriekompass Games" – www.industriekompass-games.de. Effective date: April 19, 2017).

NUMBER OF EMPLOYEES IN GERMANY

These companies employ a total of 11,140 people who work directly in games development. When looking at the industry as a whole, including journalists, scientists or specialized retail salespeople linked to the gaming industry, the number even amounts to 28,460 employees.

Hamburg and Berlin in particular are regarded as the hot spots of the German developer scene since the biggest companies are located there. Plus, there are companies like Goodgame Studios, Bigpoint, InnoGames, Crytek, Gameforge, Blue Byte, Gami-go, Travian Games and Wooga, just to name a few, which were founded in Germany and have each grown to over 200 employees by now.

INCREASING NUMBER OF EDUCATION OPPORTUNITIES

This increasing demand of employees and trained staff needs to be met in one way or the other. Hence, there are numerous studios and companies offering in-house-training, like, for example, the Dusseldorf-based Ubisoft studio Blue Byte. Also, in addition to private training facilities, colleges and universities have been offering a number of games study programs for a few years now. The potential for innovative content and technologies of the gaming industry is also recognized as high-tech qualifications by other industries. Whether young talents tend to be oriented towards Computer Science, Game Design, Art, 3D Animation or lately even Virtual Reality, there are around 15 public colleges and universities (see list on the right) covering all aspects of game development in various study programs specializing on games. Plus, there are some private colleges offering educational programs for junior developers, too.

These private colleges charge tuition fees or offer scholarship programs to their students. Public universities, on the other hand, can be attended free of charge. All interested students should pay attention to what kind of degree they can obtain and what types of cooperation there are with companies in order to have the best chances possible to gain a foothold in the industry ■

LIST OF EDUCATION OPPORTUNITIES IN GERMANY

PUBLIC COLLEGES			
College	City	Website	Degree Programs Offered
Anhalt University of Applied Sciences	Köthen	www.hs-anhalt.de	• Applied Computer Science - Digital Media and Games Development (B.A.)
Augsburg University of Applied Sciences	Augsburg	www.hs-augsburg.de	• Interactive Media (B.A.) - Interactive Media Systems (M.A.)
Burg Giebichenstein University of Art and Design Halle	Halle	www.burg-halle.de	• Design of Playing and Learning (M.A.)
h_da Darmstadt University of Applied Sciences	Darmstadt	www.h-da.de	• Animation & Game (B.A.)
Hamburg University of Applied Sciences	Hamburg	www.haw-hamburg.de	• Time-Dependent Media / Sound - Vision - Games (M.A.)
Harz University of Applied Sciences	Wernigerode	www.hs-harz.de	• Media and Games Conception (M.A.)
Hochschule der Medien	Stuttgart	www.hdm-stuttgart.de	• Audiovisual Media - focus on Interactive Systems/Games (M.A.)
HTW Berlin University of Applied Sciences	Berlin	www.htw-berlin.de	• Game Design (B.A.)
Kempten University of Applied Sciences	Kempten	www.hochschule-kempten.de	• Computer Science - Game Engineering (B.Sc.)
Mittweida University of Applied Sciences	Mittweida	www.hs-mittweida.de	• Media Informatics and Interactive Entertainment (B.A.)
Technical University of Munich	Munich	www.tum.de	• Computer Science - Games Engineering (B.A.)
TH Köln, Cologne Game Lab	Cologne	www.colognegamelab.de	• Digital Games (B.A.) • Game Development and Research (M.A.) • from 2018: Digital Games (M.A.)
Trier University of Applied Sciences	Trier	www.hochschule-trier.de	• Digital Media and Games (B.Sc.) • Intermedia Design (B.A.) • Computer Science (focus on Game Technology) (M.A.) • Design (focus on Intermedia Design) (M.A.)
University of Bayreuth	Bayreuth	www.uni-bayreuth.de	• Computer Game Studies (M.A. & M.Sc.)
University of Paderborn	Paderborn	www.uni-paderborn.de	• Media studies (B.A. & M.A.)
University of Würzburg	Würzburg	www.uni-wuerzburg.de	• Games Engineering (B.Sc.)
PRIVATE COLLEGES			
Educational Institutions	City	Website	Degree Programs Offered
bib International College	Bergisch Gladbach, Hanover, Paderborn	www.bib.de	• Media Informatics - Game Development (B.Sc.) • Game Design - Art & Animation (B.A.)
BTK - University of Art & Design	Berlin	www.btk-ft.de	• Game Design (B.A.)
design akademie berlin - SRH University for Communication and Design	Berlin	www.design-akademie-berlin.de	• Communication Design (B.A.) • Illustration (B.A.) • Web Development (B.A.) - Film • Motion Design (B.A.) • Marketing Communication (B.A. & M.A.) • Institute for Ludology
Designhochschule (University of Design)	Leipzig, Schwerin	www.designschule.de	• Game Design (B.Sc.)
Games Academy	Berlin, Frankfurt/Main	www.games-academy.de	• GA Certificate - Approved Game Programmer • GA Certificate - State-Approved Game Designer • GA Certificate - Approved Game Producer • GA Certificate - Approved Digital Artist
Macromedia University of Applied Sciences	Berlin, Cologne, Freiburg, Hamburg, Munich, Stuttgart	www.macromedia.de	• Game Design (B.Sc.) (Stuttgart only) • Game Design and Development (Macromedia Certificate, B.Sc. Hons) • Media and Communication Design (B.A.)
mAHS, media Academy - University Stuttgart	Stuttgart	www.media-hs.de	• Game Design (B.A.) • Animation Design (B.A.)
MD.H University of Media Design	Berlin, Düsseldorf, Munich	www.mediadesign.de	• Game Design (B.Sc.)
S4G - School for Games	Berlin	www.school4games.net	• Game Development • Game Graphics • Game Engineering • Game Production • Game Programming
SAE Institute	Berlin, Bochum, Cologne, Frankfurt/Main, Hamburg, Hanover, Leipzig, Munich, Stuttgart	www.sae.edu	• Game Art Animation (B.A. / B.Sc.) • Games Programming (B.Sc.) • Professional Media Creation (M.A.)
School of Games	Cologne	www.medienberufe.de	• Game Artist PLUS Media Designer Digital and Print (IHK - Chamber of Industry and Commerce) • Game Programmer PLUS IT Specialist Application Development (IHK - Chamber of Industry and Commerce) • Game Business PLUS Marketing Communication Managers (IHK - Chamber of Industry and Commerce)
SRH University Heidelberg	Heidelberg	www.hochschule-heidelberg.de	• Game Development (B.Sc.) • VR & AR (B.Sc.)
University of Applied Sciences Europe (UE)	Berlin, Hamburg	www.ue-germany.com	• Game Design (B.A.)



ASSOCIATIONS, NETWORKS AND FUNDING IN GERMANY

On the following two pages, we will introduce the industry associations, business development bodies, networks and institutions which fund game projects financially.

INDUSTRY ASSOCIATIONS

Since the beginning of 2018, a joint association represents the German games industry's interests vis-à-vis government, society and the media. The members of the two previous associations, BIU and GAME, joined forces, merging under the new name 'game – the German Games Industry Association'. The new association represents developers, publishers and other actors – such as e-sports event organizers, institutions of higher education and service providers – and thus the German games industry in all its diversity. game is a shareholder of the Entertainment Software Self-Regulation Body (USK) and the Stiftung Digitale Spielkultur, and hosts the German Computer Games Awards. Through the merger, game also becomes the sponsor of gamescom, the world's largest event for computer and video games. For further information on game – the German Games Industry Association, please visit www.game.de/en

FUNDING ORGANIZATIONS

In Germany, there are various, mostly regional funding organizations which support game developers financially. The conditions for being granted such a financial boost by the state vary depending on the funding organization and are detailed on the respective websites.

Generally, all those developers and projects are supported which are produced in the region to a certain extent, don't glorify violence and have a certain cultural value. The level of funding also depends on various factors, e.g. whether a prototype or the actual development of a game is to be funded. The type of funding, too, may vary and is sometimes granted as a loan which is to be reimbursed in case the product turns out to be a success.

BUSINESS DEVELOPMENT

Germany is divided into 16 federal states, all of which provide business development bodies run by the respective state governments. They support national, but also international companies in finding the perfect location in the respective state. They provide them with information about the market and business environment, offer advice regarding legal or tax issues, assist them in choosing a location or regarding funding and financing plans, and they are generally able to provide access to a large network of experts in their state.

NETWORKS

In addition to the new association game, there are also regional networks which connect development studios and companies in their region, get them in

touch with experts or provide them with guidance and resources. They are a good first contact to get in touch with the local scene. Some also offer co-working spaces, i.e. office spaces which can be rented or used at a reasonable price to provide smaller teams

with a workplace, especially during the early stages of a newly founded studio. Also, there are regular meetings, workshops and such within the networks where members, but also interested parties can share their experience and learn from one another. ■

ASSOCIATIONS, NETWORKS & FUNDING ORGANIZATIONS

INDUSTRY ASSOCIATIONS

Company Name	City	Website
game - the German Games Industry Association	Berlin	www.game.de/en

FUNDING ORGANIZATIONS

Company Name	City	Website
Bavarian Film and Television Funding (FFF)	Munich	www.fff-bayern.de
Film- und Medienstiftung NRW GmbH	Düsseldorf	www.filmstiftung.de
gamecity:Hamburg	Hamburg	www.gamecity-hamburg.de
Medienboard Berlin-Brandenburg GmbH	Potsdam-Babelsberg	www.medienboard.de
MFG Medien- und Filmgesellschaft Baden-Württemberg mbH	Stuttgart	www.mfg.de
Mitteldeutsche Medienförderung GmbH	Leipzig	www.mdm-online.de
nordmedia - Film- und Mediengesellschaft Niedersachsen/Bremen mbH	Hanover	www.nordmedia.de

BUSINESS DEVELOPMENT

Company Name	City	Website
Baden-Württemberg International - Gesellschaft für internationale wirtschaftliche und wissenschaftliche Zusammenarbeit mbH	Stuttgart	www.bw-i.de
Berlin Partner	Berlin	www.berlin-partner.de
Berlin Partner for Business and Technology	Berlin	www.businesslocationcenter.de
Creative Hub Frankfurt	Frankfurt/Main	www.frankfurt-business.net
engage-nrw	Mühlheim	www.engage-nrw.de
GTAI - Germany Trade & Invest	Berlin, Bonn	www.gtai.de
Hessen Trade & Invest GmbH	Wiesbaden	www.invest-in-hessen.de
HWF Hamburg Business Development Corporation	Hamburg	www.hamburg-economy.de
IMG Investment and Marketing Corporation Sachsen-Anhalt	Magdeburg	www.investieren-in-sachsen-anhalt.de
Invest in Bavaria	Munich	www.invest-in-bavaria.com
Invest in Mecklenburg-Vorpommern GmbH	Schwerin	www.invest-in-mv.de
Investment and Economic Development Bank of Rheinland-Pfalz (ISB)	Mainz	www.isb.rlp.de
Landesentwicklungsgesellschaft Thüringen mbH (LEG Thüringen)	Erfurt	www.invest-in-thuringia.de
NRW.INVEST GmbH	Düsseldorf	www.nrwinvest.com
Select Niedersachsen	Hanover	www.nds.de
SHS Strukturholding Saar GmbH	Saarbrücken	www.strukturholding.de
WFB Wirtschaftsförderung Bremen GmbH (Bremen Invest)	Bremen	www.wfb-bremen.de
Wirtschaftsförderung Sachsen GmbH (WFS)	Dresden	www.standort-sachsen.de
Wirtschaftsförderung und Technologietransfer Schleswig-Holstein GmbH	Kiel	www.wtsh.de
ZAB Brandenburg Economic Development Board	Potsdam	www.zab-brandenburg.de

NETWORKS

Company Name	City	Website
gamearea-FRM e.V.	Frankfurt/Main	www.gamearea-frm.de
Games Bavaria Munich e.V.	Munich	www.gbm.online
Games/Bavaria	Munich	www.games-bavaria.com
GameUp! Software-/Gamesforum Rheinland-Pfalz	Trier	www.game-up.de
K ⁹ Kultur- und Kreativwirtschaftsbüro Karlsruhe	Karlsruhe	www.k3-karlsruhe.de
media:net berlinbrandenburg e.V.	Berlin	www.medianet-bb.de
Mediencluster NRW GmbH	Düsseldorf	www.medien.nrw.de
Medienetzwerk Bayern	Munich	www.medienetzwerk-bayern.de
Netzwerk Kreativwirtschaft Baden-Württemberg	Stuttgart	www.kreativnetzwerk.mfg.de
nextMedia.Hamburg/gamecity:Hamburg	Hamburg	www.nextmedia-hamburg.de
WERK1.Bayern GmbH	Munich	www.werk1.com

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Erik "Gronkh" Range (here with two of his fans at gamescom 2016) is regarded as one of the founders of the German Let's Play scene.

GENERATION YOUTUBE – GERMANY'S LET'S PLAY SCENE

As early as in 2006, the first German creators of web videos laid the foundation for a growing scene in Germany, which focuses on comedy, lifestyle, beauty and video gaming. What started out as a hobby scene has now turned into an actual industry with a star culture.

The "Let's Play" trend has long established itself as an independent entertainment format in the German "Generation YouTube" and is used by around 16 million people these days. Both the video platform YouTube as well as Twitch as a live-streaming provider are fixed components of today's digital entertainment program for gamers.

The operators of successful Let's Play channels in Germany earn their living with their gaming videos. For example, they use the opportunity to generate advertising revenue and sell merchandizing articles. Another source of income are fee-based channel subscriptions of the Let's Players. The following results of a data collection carried out by the market research

company YouGov shows just how successful the scene is in Germany:

- A large number of people are willing to stream their own gaming experience: roughly one in five gamers in Germany (19 percent), which is equivalent to 8,5 million people, can imagine filming their play sessions in the future and making the videos publicly accessible.
- 1.6 million Germans declared that they make completely voluntary donations to their favorite Let's Players. This corresponds to 10 percent of the total of 16 million Let's Play users in Germany.
- 3 million Germans (18.75 percent of the German Let's Play audience) consider it possible to support Let's Players financially through donations. ■



"Within the space of a few years, Let's Plays have developed into an interactive media format in their own right for millions of Germans. The footage of computer and video games invites viewers to explore digital worlds together, listen to stories and engage with other members of the group."

(Felix Falk, Managing Director of game – the German Games Industry Association)



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COMPANY REGISTER OF THE GAMES INDUSTRY IN GERMANY

From 2nd Wave to Z-Software: the names and websites of publishers, developers, service providers, educational institutions and associations of the German games industry.

Company	City	Website
DEVELOPMENT		
3d-io	Wiesbaden	www.3d-io.com
5d lab	Freiburg	www.5dlab.com
Adrastea	Nürnberg	www.adrastea.com
Aesir Interactive	München	www.aesir-interactive.com
Ahooii Entertainment	Köln	www.ahooii.com
Animation Arts Creative	Naumburg (Saale)	www.animationarts.de
AntMe!	Grafrath	www.antme.net
Bad Monkee	Hamburg	www.badmonkee.de
B-Alive	Ummendorf	www.b-alive.de
Beardshaker Games	Hamburg	www.beardshaker.com
BIGITEC	Bonn	www.bigitec.com
BIGPOINT	Hamburg	www.bigpoint.com
b-interaktive	Schwerte	www.binteraktive.com
Bit Barons c/o Wailua Games	Starnberg	www.bitbarons.com
Black Forest Games	Offenburg	www.bfgames.biz
Black Pants Studio	Berlin	www.blackpants.de
Blue Byte	Düsseldorf	www.bluebyte.com
Blue Byte Mainz	Mainz	www.bluebyte.com
Bongfish	Graz	www.bongfish.com
Bootsmann Games	Berlin	www.bootsmann-games.de
Brainseed Factory	Bonn	www.brainseed-factory.com
Bright Future	Köln	www.brightfuture.de
Brightside Games	Berlin	www.brightside-games.com
Broken Rules Interactive Media	Wien	www.brokenrul.es
Bronx Studios Entertainment	Düsseldorf	www.bronxstudios.com
BSS web consulting	Essen	www.bss-consulting.de
Bumblebee	Wiehl Merkausen	www.bumblebee-games.com
Buntware Games	Freiburg	www.buntware.com
ByteRockers	Berlin	www.byterockers.de
Bytro Labs	Hamburg	www.bytro.com
Caipirinha Games	Altenholz	www.caipirinhagames.de
Chasing Carrots	Stuttgart	www.chasing-carrots.com
Chimera Entertainment	München	www.chimera-entertainment.com
CipSoft	Regensburg	www.cipsoft.com
Cliffhanger Productions	Wien	www.cliffhanger-productions.com
ClockStone Studio	Innsbruck	www.clockstone.com
Cooe	Kaiserslautern	www.clubcooe.com
Crafty Studios	Pötsching	www.craftystudios.com
Crazy Bunch	Hamburg	www.crazybunch.biz
createale	Ludwigsburg	www.createale.de
CreaTeam Software	Flensburg	www.createam.de
Crenetic	Mülheim an der Ruhr	www.crenetic-publishing.de
Crytek	Frankfurt am Main	www.crytek.com
Cyber Arena Entertainment Group	München	www.c-arena.com
Daedalic Entertainment	Hamburg	www.daedalic.de
Decane	Quickborn	www.decane.net

Company	City	Website
Deck13 Interactive	Frankfurt am Main	www.deck13.de
Deep Silver Fishlabs	Hamburg	www.dsfishlabs.com
Destrax Entertainment	Bielefeld	www.destrax.de
Digitalmindsoft	Ulm	www.digitalmindsoft.eu
Doublesmith	St. Pölten	www.doublesmith.com
Dutyfarm	Berlin	www.dutyfarm.com
East Forge Entertainment	Leipzig	www.eastforge.com
eelusion	Berlin	www.eelusion.com
Egosoft	Würselen	www.egosoft.com
Elements of Art	Mönchengladbach	www.eoa.de
Enter-Brain-Ment	Berlin	www.enter-brain-ment.com
Envision Entertainment	Ingelheim	www.envision-entertainment.de
eos interactive	Berlin	www.eosinteractive.de
exDream	Hannover	www.exdream.com
exozet	Berlin	www.exozet.com
Experimental Game	Berlin	www.gamebook.io
extra toxic	Frankfurt am Main	www.extratoxic.com
eyefactive	Wedel	www.eyefactive.com
Fairytale Distillery	München	www.fairytale-distillery.com
FAKT Software	Leipzig	www.fakt-software.de
Fankhi	Tutzing	www.fankhi.de
Far Away Illustration & Design	Gelnhausen	www.faraway-illustration.com
FDG Entertainment	München	www.fdg-entertainment.com
flaregames	Karlsruhe	www.flaregames.com
Fluffy Fairy Games	Karlsruhe	www.fluffyfairygames.com
Flying Sheep Studios	Köln	www.flying-sheep.com
Fried Bytes	Saarbrücken	www.friedbytes.de
Funatics Software	Schermbek	www.funatics.de
funworld - S&T	Lenzing	www.funworld.com
GameArt Studio	Berlin	www.GameArtStudio.de
GameDuell	Berlin	www.gameduell.de
Gameforge	Karlsruhe	www.gameforge.com
Gaming Minds Studios	Gütersloh	www.gamingmindsstudios.com
Gbanga	Zürich	www.gbanga.com
Gentle Troll Entertainment	Würzburg	www.gentletroll.com
Gentlymad Studios	Wiesbaden	www.gentlymad.org
German Railroads	Wedel	www.german-railroads.de
GIANTS Software	Zürich-Schlieren	www.giants-software.com
Goal Games	Celle	www.goal-games.de
Goodgame Studios	Hamburg	www.goodgamestudios.com
Greentube Internet Entertainment Solutions	Wien	www.greentube.com
Grimbart Tales	Kaiserslautern	www.grimbart-tales.com
Hammer Labs	Tönisvorst	www.hammer-labs.com
HandyGames	Giebelstadt	www.handy-games.com
Happy Tuesday	Berlin	www.happy-tuesday.com
id Software	Frankfurt	www.idsoftware.de
iLogos Europe	Hamburg	www.ilogos.biz
Independent Arts Software	Hamm	www.independent-arts-software.de
InnoGames	Hamburg	www.innogames.de
Instance Four	Bochum	www.instancefour.com
Island Games	Hannover	www.islandgames.de
it Matters Games	Berlin	www.itmattersgames.com
Jo-Mei	Berlin	www.jo-mei.com
Kaasa health	Düsseldorf	www.kaasahealth.com
keen games	Frankfurt am Main	www.keengames.com
King Art	Bremen	www.kingart-games.de
KORION Simulation	Ludwigsburg	www.korion.de
kr3m. media	Karlsruhe	www.kr3m.com
Kritzelkratz 3000	Würzburg	www.kritzelkratz.de
kunst-stoff	Berlin	www.kunst-stoff.de
Lemonbomb Entertainment	Düsseldorf	www.lemonbomb.de
Limbic Entertainment	Langen	www.limbic-entertainment.de

Company	City	Website
Linkops	Münster	www.linkops.com
Looterkings	Köln	www.looterking.de
Lost The Game Studios	Hamburg	www.lostthegame.de
Mad About Pandas	Berlin	www.madaboutpandas.de
MADE	Stuttgart	www.made-apps.com
MaDe Games GbR Neetix - Reichl	Nettetal	www.madegames.com
Maschinen-Mensch	Berlin	www.maschinen-mensch.com
McPeppergames	Münnerstadt	www.mcpeppergames.com
Media Seasons	Leipzig	www.mediasaisons.com
MegaDev	München	www.megadev.info
Megagon Industries	Berlin	www.megagonindustries.com
Mex IT	Dortmund	www.mex-solutions.com
Mimimi Productions	München	www.mimimi.games
mobivention	Köln	www.mobivention.com
Monokel	Cologne	www.monokel.de
Moonbyte Games	Neustadt/Weinstraße	www.moonbytegames.com
Mooneye Studios	Hamburg	www.mooneyestudios.com
NeoBird	Nürnberg	www.neobird.de
Neopoly	Bochum	www.neopoly.de
netmin games	Mainz	www.netmin.de
northworks	Hamburg	www.northworks.de
Nurogames	Köln	www.nurogames.com
OFM - OnlineFussballManager	Köln	www.onlinefussballmanager.de
Osmotic Studios	Hamburg	www.osmotic-studios.de
Outline Development	Siegen	www.outline-development.de
Pappuga	Nürnberg	www.pappuga.com
Phantom 8 Studio	Berlin	www.phantom8.studio
Phobetor	Nürnberg	www.phobetor.de
Piranha Bytes	Essen	www.pluto13.de
pixeltamer.net	Berlin	www.pixeltamer.net
Playata	Nürnberg	www.playata.com
playzo	Darmstadt	www.playzo.biz
Plazz	Erfurt	www.plazz.ag
Ploonymoon Studios	Kissing	www.ploonymoon.com
Pop Rocket Labs	Hamburg	www.poprocket.com
Procontis	Dieburg	www.procontis.de
Promotion Software - Studio Berlin	Berlin	www.promotion-software.de
Promotion Software - Studio Tübingen	Tübingen	www.promotion-software.de
Quantumfrog	Oldenburg	www.quantumfrog.de
Rat King Entertainment	Halle	www.ratking.de
Ravensburger Digital	München	www.ravensburger.us
Reality Solutions	Stuttgart	www.realitysolutions.de
Reality Twist	München	www.reality-twist.com
Realmforge Studios	München	www.realmforgestudios.com
REDOX Game Labs	Salzburg	www.redox-labs.com
remote control productions	München	www.r-control.de
RetroBrain	Hamburg	www.memore.de
Riot Games	Berlin	www.riotgames.com
RockAByte	Köln	www.rockabyte.com
ROCKFISH Games	Hamburg	www.rockfishgames.com
Rubin-Games Studios	Bochum	www.rubin-games.de
Sandbox Interactive	Berlin	www.sandbox-interactive.com
Scorpius Forge	Ulm	www.scorpius-forge.de
Secret Item Games	Lünen	www.secret-item-games.com
Serious Games Solutions	Berlin	www.serious-games-solutions.de
Sharkbomb Studios	Karlsruhe	www.sharkbombs.com
SilentFuture	Wuppertal	www.silentfuture.de
Silver Seed Games	Magdeburg	www.silverseedgames.com
Six Foot Europe	Berlin	www.6ft.com
Snapjaw Games	Pulheim	www.snapjawgames.com
SOLID WHITE design digital media	Stuttgart	www.solidwhite.de
Solimedia Productions	Erfurt	www.facebook.com/solimedia.de/

Company	City	Website
Sparrow Games	Berlin	www.sparrowgames.de
Springwald Software	Bochum	www.springwald.de
Sproing Interactive Media	Wien	www.sproing.com
stillalive studios	Innsbruck	www.stillalive-studios.com
Stratosphere Games	Berlin	www.stratosphere-games.com
Studio Fizbin	Ludwigsburg	www.studio-fizbin.de
Sunlight Games	Köln	www.sunlight-games.com
symbiCrowd	Stolberg	www.symbicrowd.de
Team Vienna Games	Leonding	www.teamvienna.at
TG Nord	Hannover	www.tg-nord.com
the Good Evil	Köln	www.thegodevil.com
Thera Bytes	München	www.therabytes.de
Thoughtfish	Berlin	www.thoughtfish.de
THREAKS	Hamburg	www.threaks.com
Tiny Roar	Hamburg	www.tinyroar.de
Travian Games	München	www.traviangames.com
Ubisoft/Blue Byte	Düsseldorf	www.bluebyte.com
unikat media	Schwerin	www.unikatmedia.de
upjers	Bamberg	www.upjers.com
V-Play	Wien	www.v-play.net
Wolpertinger Games	München	www.wolpertingergames.com
wooga	Berlin	www.wooga.com
Xendex	Wien	www.xendex.com
XYRALITY	Hamburg	www.xyrality.com
YAGER Development	Berlin	www.yager.de
YEPS!	Köln	www.yeps.de
zeitland media & games	Ludwigsburg	www.zeitland.com
Z-Software	Dortmund	www.z-software.net

PUBLISHING/DISTRIBUTION

505 Games	Burglengenfeld	www.505games.com
Activision Blizzard Deutschland	Ismaning	www.activision.com
ad2games	Berlin	www.ad2games.com
Aeria Games Europe	Berlin	www.aeriagames.com
Aerosoft	Büren	www.aerosoft.de
ak tronic Software & Services	Saerbeck	www.aktronic.de
Application Systems Heidelberg	Heidelberg	www.application-systems.de
AppLift	Berlin	www.applift.com
ASSEMBLE Entertainment	Wiesbaden	www.assemble-entertainment.com
astragon Software	Mönchengladbach	www.astragon.de
Bandai Namco Entertainment Germany	Frankfurt am Main	www.bandainamcoent.eu
bhv Publishing	Bad Münstereifel	www.bhv.de
Bigpoint	Hamburg	www.bigpoint.net
bitComposer Interactive	Eschborn	www.bit-composer.com
Capcom Entertainment Germany	Hamburg	www.capcom-europe.com
CAPCY Europe	Berlin	www.capcy.de
Covus Crobo	Berlin	www.crobo.com
Crimson Cow	Hamburg	www.crimsoncow.de
Crytek	Frankfurt am Main	www.crytek.com
Daedalic Entertainment	Hamburg	www.daedalic.de
Deck13 Interactive	Frankfurt am Main	www.deck13.de
dreamfab	Regensburg	www.dreamfab.com
Electronic Arts	Köln	www.ea.com
European Games Group	München	www.gamesgroup.eu
EuroVideo Medien	Grünwald	www.eurovideo.de
flashpoint	Hamburg	www.flashpoint.de
G2A.COM Limited	Causeway Bay, Hong Kong	www.g2a.com
GameDuell	Berlin	www.gameduell.de
Gameforge	Karlsruhe	www.gameforge.de
Gameloft	Berlin	www.gameloft.de
GamesInFlames	München	www.gamesinflames.com
GameTwist	Wien	www.funstage.com

Company	City	Website
gamigo	Hamburg	www.gamigo.com
Halycon Media	Reinfeld	www.halycon.de
Headup Games	Düren	www.headupgames.com
HitFox Group	Berlin	www.hitfoxgroup.com
IME - Interactive Media & Entertainment	Hamburg	www.ime.de
InnoGames	Hamburg	www.innogames.de
Kalypso Media Group	Worms	www.kalypsomedia.com
King	Berlin	www.king.com
Koch Media	Planegg/München	www.kochmedia.de
Konami	Frankfurt am Main	www.konami.com
McGame.com	Halle (Saale)	www.mcgame.com
mediaTest digital	Hannover	www.mediatest-digital.com
Microsoft	München	www.microsoft.com
mixtvision Digital	München	www.mixtvision.de
morphicon media	München	www.mamorgames.com
NBG	Burglengenfeld	www.nbg-online.de
Nintendo of Europe	Frankfurt am Main	www.nintendo.de
Playa Games	Hamburg	www.playa-games.com
Ravensburger Digital	München	www.ravensburger-digital.com
Reality Twist	München	www.reality-twist.com
Rumble Media	Karlsruhe	www.rumblemedia.de
S.A.D.	Neu-Ulm	www.s-a-d.de
Serious Brothers	Braunschweig	www.imagineearth.info
SERU	Nortorf	www.seru.de
Simplaex	Berlin	www.simplaex.com
Smilegate Games	Berlin	www.smilegate-global.com
SOFTGAMES - Mobile Entertainment Services	Berlin	www.softgames.de
Sony Computer Entertainment	Neu-Isenburg	www.scee.net
Square Enix	Hamburg	www.eu.square-enix.com
Take-Two Interactive	München	www.take2.de
Tencent Games	Berlin	www.tencent.com
THQ Nordic	Wien	www.thqnordic.com/de
Tivola Publishing	Hamburg	www.tivola-mobile.com/de
TopWare Interactive	Karlsruhe	www.topware.com/de
Travian Games	München	www.traviangames.com
Ubisoft	Düsseldorf	www.ubisoft.de
United Soft Media Verlag	München	www.usm.de
upjers	Bamberg	www.upjers.com
Valve	Hamburg	www.valvesoftware.com
Wargaming	Berlin	www.wargaming.com
Warner Bros. Entertainment	Hamburg	www.warnerbros.de
YEPS!	Köln	www.yeps.de
ZeniMax Germany	Frankfurt am Main	www.zenimax.com

EDUCATION

Acagamics e.V.	Magdeburg	www.acagamics.de
BTK - Hochschule für Gestaltung	Berlin	www.btk-fh.de
Cologne Game Lab / TH Köln	Köln	www.colognegamelab.de
Designschule Leipzig	Leipzig	www.designschule.de
Designschule Schwerin	Schwerin	www.designschule.de
Europa Campus Frankfurt/Main	Frankfurt am Main	www.ec-europa-campus.com
Europa Campus Karlsruhe	Karlsruhe	www.ec-europa-campus.com
Europa Campus Mannheim	Mannheim	www.ec-europa-campus.com
FH OÖ Studienbetriebs	Wels	www.fh-ooe.at
FH Salzburg	Puch/Salzburg	www.fh-salzburg.ac.at
FH Technikum Wien	Wien	www.technikum-wien.at
Games Academy Berlin	Berlin	www.games-academy.de
Games Academy Frankfurt	Frankfurt	www.games-academy.de
Gesellschaft für Personalentwicklung und Bildung	Berlin	www.gpb.de
Hochschule Darmstadt - Fachbereich Media	Darmstadt	www.h-da.de
Hochschule der Medien	Stuttgart	www.hdm-stuttgart.de
Hochschule Harz - Standort Halberstadt	Halberstadt	www.hs-harz.de

Company	City	Website
Hochschule Harz - Standort Wernigerode	Wernigerode	www.hs-harz.de
Hochschule Mittweida (FH)	Mittweida	www.hs-mittweida.de
Hochschule Trier	Trier	www.hochschule-trier.de
HTW Berlin	Berlin	www.htw-berlin.de
Macromedia Akademie Berlin	Berlin	www.macromedia.de
Macromedia Akademie Hamburg	Hamburg	www.macromedia.de
Macromedia Akademie Köln	Köln	www.macromedia.de
Macromedia Akademie München	München	www.macromedia.de
Macromedia Akademie Stuttgart	Stuttgart	www.macromedia.de
mAHS, media Akademie - Hochschule Stuttgart	Stuttgart	www.media-hs.de
Mediadesign Hochschule Berlin	Berlin	www.mediadesign.de
Mediadesign Hochschule Düsseldorf	Düsseldorf	www.mediadesign.de
Mediadesign Hochschule München	München	www.mediadesign.de
S4G School for Games	Berlin	www.school4games.net
SAE Institute Berlin	Berlin	www.sae.edu
SAE Institute Bochum	Bochum	www.sae.edu
SAE Institute Frankfurt	Frankfurt am Main	www.sae.edu
SAE Institute Hamburg	Hamburg	www.sae.edu
SAE Institute Köln	Köln	www.sae.edu
SAE Institute Leipzig	Leipzig	www.sae.edu
SAE Institute München	München	www.sae.edu
SAE Institute Stuttgart	Stuttgart	www.sae.edu
SRH Hochschule für Kommunikation und Design	Berlin	www.design-akademie-berlin.de
SRH Hochschule Heidelberg	Heidelberg	www.hochschule-heidelberg.de
Technische Hochschule Brandenburg	Brandenburg an der Havel	www.th-brandenburg.de
Universität Paderborn - Prof. Dr. Jörg Müller-Lietzkow	Paderborn	www.kw.uni-paderborn.de
University of Applied Sciences Europe	Berlin	www.ue-germany.com
Zürcher Hochschule der Künste	Zürich	www.zhdk.ch

BUSINESS SERVICE

2nd Wave (Marketing)	Berlin	www.2ndwave.rocks
4-REAL INTERMEDIA (Localization)	Offenbach	www.4-real.com
A MAZE. (Events)	Berlin	www.amaze-berlin.de
ad hoc gaming (Consulting)	Gera	www.adhoc-gaming.de
adjust (Marketing)	Berlin	www.adjust.com
adspre Media (Marketing)	Berlin	www.adspremedia.com
Anakan (Localization)	Berlin	www.anakan.de
Anderie Management (Consulting)	Liederbach	www.anderie-management.com
Aruba Events (Events)	Köln	www.aruba-events.de
arvato Bertelsmann (IT Services)	Gütersloh	www.bertelsmann.de
Baker & McKenzie Partnerschaft von Rechtsanwälten, Wirtschaftsprüfern und Steuerberatern (Legal Services)	München	www.bakermckenzie.com
beepkultur (Audio Design)	Brühl	www.beepkultur.de
Beiten Burkhardt Rechtsanwaltsgesellschaft (Legal Services)	München	www.beiten-burkhardt.com
BOEHMERT & BOEHMERT Anwaltspartnerschaft (Legal Services)	Berlin	www.boehmert.de
Booster Space (Events)	Berlin	www.booster-space.com
Brehm & v. Moers (Legal Services)	Berlin	www.bvm-law.de
Buschbaum Media & PR (Marketing)	Duisburg	www.buschbaum-media.com
Computec Media (Media Company)	Fürth	www.computeec.de
Conflutainment (Consulting)	Berlin	www.conflutainment.com
CULTURETRANSLATE (Localization)	Eschborn	www.culturetranslate.com
DACS Laboratories (IT Services)	Erkrath	www.dacs-labs.com
DELASOCIAL Berlin (Marketing)	Berlin	www.delasocial.com
DELASOCIAL Hamburg (Marketing)	Hamburg	www.delasocial.com
Die Hobrechts (Game Development)	Berlin	www.diehobrechts.de
Digital River (IT Services)	Köln	www.digitalriver.com
eco - Verband der Internetwirtschaft e.V. (Industry Association)	Köln	www.eco.de
Effective Media (Localization)	Bochum	www.effective-media.de
Frankfurter Buchmesse (Book Fair)	Frankfurt am Main	www.book-fair.de
Freaks 4U Gaming (Marketing)	Berlin	www.freaks4u.de
Friedmann Kommunikation (Public Relations/IT Services)	Köln	www.friedmann-kommunikation.de
Game Farm (Consulting)	Berlin	www.game-farm.de

Company	City	Website
Games Foundation (Consulting)	Kiel	www.gamesfoundation.com
Games Markt (Media Company)	München	www.gamesmarkt.de
Games Quality (IT Services)	Erkner	www.games-quality.com
gamescom (Events)	Köln	www.gamescom.de
Gamify Now! (Consulting)	München	www.gamify-now.de
GAMINSIDE (IT Services)	Allhartsberg	www.gaminside.com
Ganz & Stock (Consulting)	Büdingen	www.ganz-stock.de
Gärtner PR (Public Relations)	Grafring bei München	www.gaertner-pr.de
GlobaLoc (Localization)	Berlin	www.globaloc.de
GRAEF Rechtsanwälte Berlin/Hamburg (Legal Services)	Berlin	www.graef.eu
HoneyTracks (Game Analytics)	München	www.honeytracks.com
IEM Consulting (Business Development)	Roedermark	www.iem-consulting.com
IHDE & Partner (Legal Services)	Berlin	www.ihde.de
INPROMO (Marketing)	Hamburg	www.inpromo.de
iVentureGroup (Business Development)	Hamburg	www.iventuregroup.com
Joindots (Business Development)	Krefeld	www.joindots.de
Koelmesse (Events)	Köln	www.koelmesse.de
LaterPay (IT Services)	München	www.laterpay.net
loots / fishwoodco (Marketing)	Berlin	www.loots.com
M.I.T. - Media Info Transfer (IT Services)	Hamburg	www.mediainfotransfer.de
Making Games (Media Company)	Fürth	www.makinggames.biz
Marchsreiter Communications (Public Relations)	München	www.marchsreiter.com
maxupport GmbH (IT Services)	Gütersloh	www.maxupport.com
Mediakraft Networks (Marketing)	Köln	www.mediakraft.de
Medienachse (Business Development)	München	www.medienachse.de
Messe Husum & Congress (Events)	Husum	www.messehusum.de
MOTHERSHIP - free2play Agency (IT Services)	Köln	www.mothership.de
MOTION AREA (IT Services)	Wiesbaden	www.motionarea.de
MSM Communications (Public Relations/IT Services)	Hamburg	www.msm.digital
Nimrod Rechtsanwälte (Legal Services)	Berlin	www.nimrod-rechtsanwaelte.de
Osborne Clarke (Legal Services)	Köln	www.osborneclarke.com
Partnertrans (Localization)	Voerde	www.partnertrans.com
paysafecard.com Deutschland (IT Services)	Düsseldorf	www.paysafecard.com
Phénix Noir Productions / Patrick Nevian (Sound Design)	Oberhausen	www.phenix-noir.de
Pixel Vienna / IG Computergrafik (Events)	Wien	www.pixelvienna.com
planetlan (IT Services/Events)	Bochum	www.planetlan.de
Poppe Rechtsanwälte (Legal Services)	Pinneberg	www.kanzlei-poppe.de
Quinke Networks (Public Relations/Marketing)	Hamburg	www.quinke.com
Ratgeberspiel (Media Company/Events)	Magdeburg	www.ratgeberspiel.de
Rechtsanwalt Marian Härtel (Legal Services)	Berlin	www.rahaertel.com
remote control productions (Producing)	München	www.r-control.de
Rocket Beans Entertainment (Media Company)	Hamburg	www.rocketbeans.de
ROESSLER PR (Marketing, Public Relations)	Frankfurt am Main	www.roesslerpr.de
S&H Entertainment Localization (Localization)	Hong Kong	www.shentloc.com
Schulte Riesenkampf (Legal Services)	Frankfurt am Main	www.schulte-lawyers.de
Selected Minds (Consulting)	Groß-Gerau	www.selected-minds.de
Serious Games Conference (Events)	Hannover	www.nordmedia.de
Sputnic Consulting (Consulting)	München	www.sputnic.consulting
STOMT (IT Services)	Potsdam	www.stomt.com
Susan Tackenberg Media & Communications Consultant (Consulting)	Frankfurt am Main	www.stmedia-consultant.com
swordfish PR (Marketing/Public Relations)	München	www.swordfish-pr.de
Taylor Wessing Deutschland (Legal Services)	Düsseldorf	www.taylorwessing.com
TCl Rechtsanwälte Partnerschaft Schmidt (Legal Services)	Mainz	www.tclaw.de
TigerTeam Productions (Consulting)	Hagenbach	www.tigerteam-productions.com
ToLL Relations (Public Relations)	Frankfurt am Main	www.toll-r.com
Trusted Events (Events)	Unterschleißheim	www.trusted-events.de
Turtle Entertainment (Marketing)	Köln	www.turtle-entertainment.com
Two Pi Team (IT Services)	Hilden	www.two-pi-team.de
Visibility Communications (Public Relations)	Berlin	www.visi.bi
wazal (Consulting)	Berlin	www.wazagames.com
Webedia Gaming (Media Company)	München	www.webedia-group.de
Yantami (IT Services)	Berlin	www.yantami.de

Company	City	Website
FREELANCER BUSINESS SERVICE		
Ahmet Isciturk (Editorial Services)	Nürnberg	www.texteatme.com
Anja Weiligmann (Translation Services)	Telgte	www.spielworte.de
Anne-Petra Lellwitz (Market Research)	Dreieich	www.apl-mafo.de
bedenk.de/sign - Thomas Bedenk (Consulting/Design)	Berlin	bedenk.de/sign
Christiane Gehrke (Consulting)	Berlin	www.tom-putzki-consulting.com
Elisabetta Corapi (Translation Services)	Karlsruhe	www.corapi-translations.com
Falko Löffler (Editorial Services)	Ilbeshausen	www.falkoloeffler.de
Kerstin Fricke (Translations)	Berlin	www.kf-uebersetzungen.de
Marc Huppke (Project Management)	Gross-Gerau	www.make-projects.com
Marc Oberhäuser (Consulting)	Düren	www.freelancer-games.com
Prof. Dr. Malte Behrmann (Legal Services)	Berlin	www.malte-behrmann.de
Stefan Köhler (Editorial Services)	Salzgitter	-
TECHNICAL SERVICE		
Akamai Technologies (IT Services)	Garching	www.akamai.com
Augenpulver (Graphic Design)	Wiesbaden	www.augenpulver-design.de
Augmented Minds, Ambrus & Lonau (IT Services)	München	www.augmented-minds.com
B.TON Medien (Sound Design)	Starnberg	www.bton.de
BiteTheBytes (Tools/Middleware)	Fulda	www.bitethebytes.net
Creature Factory (Graphic Design)	Bremen	www.creature-factory.com
Crytek (Game Engines)	Frankfurt am Main	www.crytek.com
DICO Deutschland (Localization/IT Services)	Köln	www.dico4u.com
Doublesmith (Graphic Design)	St. Pölten	www.doublesmith.com
Dutyfarm (IT Service)	Berlin	www.dutyfarm.com
eurosimtec (IT Service)	Düsseldorf	www.eurosimtec.de
Exit Games (Tools/Middleware)	Hamburg	www.exitgames.com
Games Quality (Software QA)	Erkner	www.games-quality.com
Glare Productions (IT Services)	Herten	www.glare-productions.com
GreenMamba-Studios (Graphic Design)	Dülmen	www.greenmamba-studios.de
Hans HiScore (Sound Design)	Frankfurt	www.hanshiscore.com
Havok (Game Engines)	Eningen	www.havok.com
Intulo (Graphic Design)	Hildesheim	www.intulo.de
Keuthen (IT Services)	Mainz	www.keuthen.net
Konsole Labs (IT Services)	Berlin	www.konsole-labs.com
Lingooa (Localization)	Plankstadt	www.lingooa.com
Living Liquid Software (IT Services)	Innsbruck	www.livingliquid.com
Master Solution AG (IT Services)	Plauen	www.mastersolution.ag
metricminds (Graphic Design)	Frankfurt am Main	www.metricminds.com
MobileBits (Game Engines)	Hannover	www.mobilebits.de
morro images (Graphic Design)	Potsdam	www.morroimages.com
Neviso (Tools/Middleware)	Bochum	www.neviso.com
Nitrado (IT Services)	Karlsruhe	www.nitrado.net
NVIDIA (Hardware)	Würselen	www.nvidia.de
Periscope Studio (Sound Design)	Hamburg	www.periscopestudio.de
Phenomatics (IT Services)	Leonding	www.phenomatics.com
Master Solution AG (IT Services)	Plauen	www.mastersolution.ag
Polygonfabrik (Graphic Design)	Bremen	www.polygonfabrik.de
Priori Data (IT Services)	Berlin	www.prioridata.com
Project-C (IT Services)	Nienhagen	www.project-c.eu
Rabcat Computer Graphics (Graphic Design)	Wien	www.rabcat.com
Razer (Hardware)	Hamburg	www.razerzone.com
Sennheiser Communications A/S (Hardware)	Wedemark	www.sennheiser.de
Spinor (Game Engines)	München	www.spinor.com
TeamSpeak Systems (Tools/Middleware)	Krün	www.teamspeak.com
The Light Works (Graphic Design)	Köln	www.thelightworks.com
ToBringAlive (Graphic Design)	Münster	www.tobringalive.com
TÖN & SPOT (Sound Design)	Berlin	www.ton-und-spot.de
toneworx (IT Services)	Hamburg	www.toneworx.com
Toygardens Media (Graphic Design)	Hannover	www.toygardens.com
Twitch Interactive Germany (IT Services)	München	www.twitch.tv

Company	City	Website
ToBringAlive	Münster	www.tobringalive.com
TON & SPOT audiodesign	Berlin	www.ton-und-spot.de
toneworx	Hamburg	www.toneworx.com
Toygardens Media	Hannover	www.toygardens.com
Twitch Interactive Germany	München	www.twitch.tv
Virgin Lands	Würzburg	www.virgin-lands.com
Virtual Reality e.V. Berlin Brandenburg	Potsdam	www.virtualrealitybb.org
Z-Ground Illustration	Mainz	www.z-ground.com

FREELANCER TECHNICAL SERVICE

Alexander N. Ostermann	Berlin	www.nico-ostermann.com
Andreas Adler	Hannover	www.adler-audiopictures.de
Arne Lanzelot Meier	Ritterhude	www.meierdesigns.de
Calined	Hagen	www.calined.itcho.io
Daniel Pharos	Haag	www.knightsofsoundtrack.com
Johan Weigel	Berlin	www.sonic-gallery.com
Kai Rosenkranz	Herne	www.kairosenkranz.com
Max Schulz	Hamburg	www.xoco1.com
Olaf Bartsch	Berlin	www.olafbartsch.com
Sabrina Heuer	Hamburg	www.froschtatze.de
Sound42 / Lukas Hasitschka	Wien	www.sound42.com

PUBLIC SECTOR

eSport-Bund Deutschland e.V. (ESBD)	Frankfurt am Main	www.esportbund.de
Film- und Medienstiftung NRW	Düsseldorf	www.filmstiftung.de
FilmFernsehFonds Bayern	München	www.fff-bayern.de
game	Berlin	www.game.de
gamearea-FRM e.V.	Frankfurt am Main	www.gamearea-frm.de
gamecity:Hamburg	Hamburg	www.gamecity-hamburg.de
GAMeplaces	Frankfurt am Main	www.frankfurt-business.net
Games Factory Ruhr	Mülheim an der Ruhr	www.muelheim-business.de
games.net berlinbrandenburg	Berlin	www.medianet-bb.de
GameUp! Rheinland-Pfalz	Trier	www.game-up.de
Gaming-Aid e.V.	Berlin	www.gaming-aid.de
Hessen-IT	Wiesbaden	www.hessen-it.de
Holocafe	Düsseldorf	www.holocafe.de
httc e.V.	Darmstadt	www.httc.de
Leipzig eSports e.V.	Leipzig	www.leipzigsports.de
Mediatrust	Flensburg	www.mediatrust.de
medienboard berlin-brandenburg	Potsdam-Babelsberg	www.medienboard.de
MFG Medien- und Filmgesellschaft Baden-Württemberg	Stuttgart	www.mfg.de
Mitteldeutsche Medienförderung	Leipzig	www.mdm-online.de
nordmedia	Hannover	www.nordmedia.de
ÖVUS	Wien	www.ovus.at
Stiftung Digitale Spielkultur	Berlin	www.stiftung-digitale-spielkultur.de
USK	Berlin	www.usk.de
WERK1 München	München	www.werk1.com

The adventure game "The Pillars of the Earth", based on the book by best-selling author Ken Follett and published by Daedalic Entertainment, won the award for Best Sound at the German Developers Awards 2017.



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