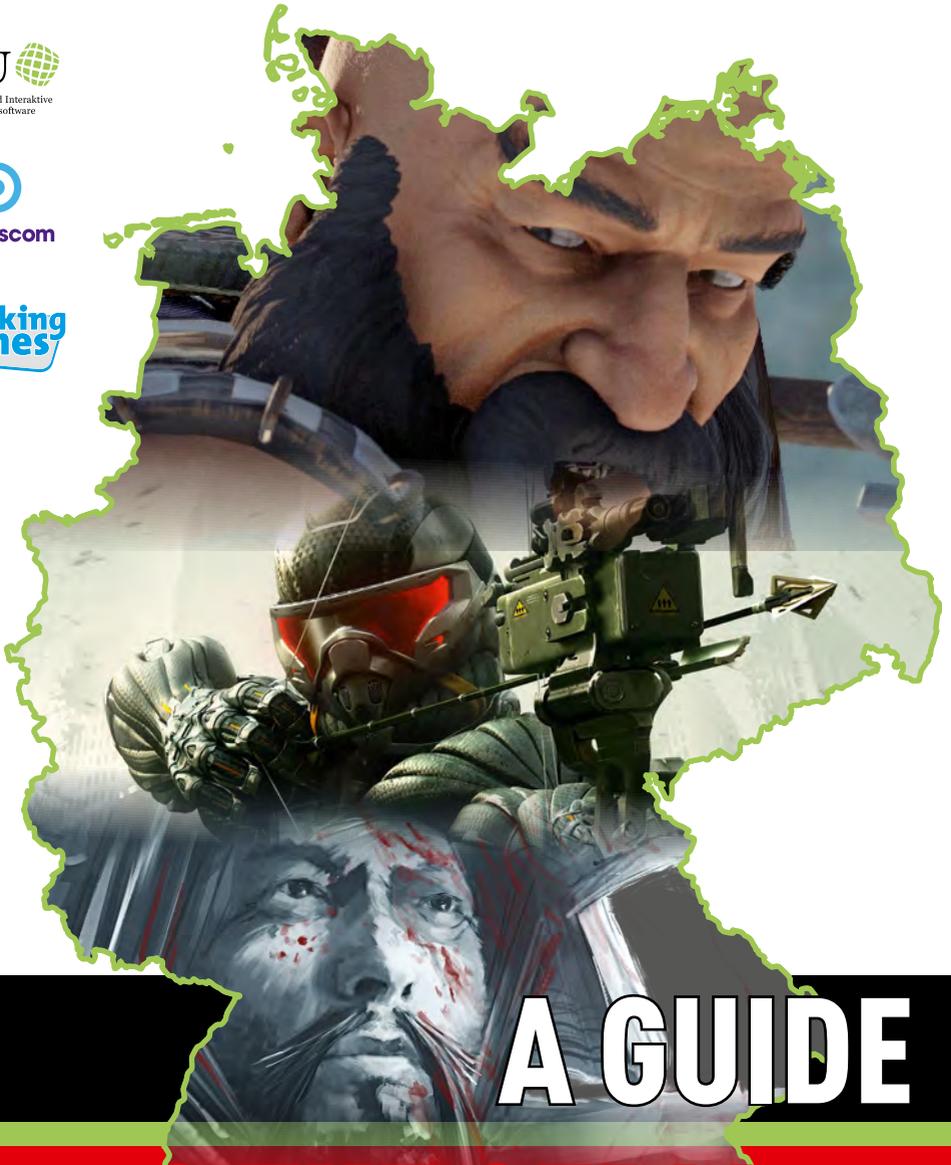


BIU 
Bundeverband Interaktive
Unterhaltungssoftware


gamescom

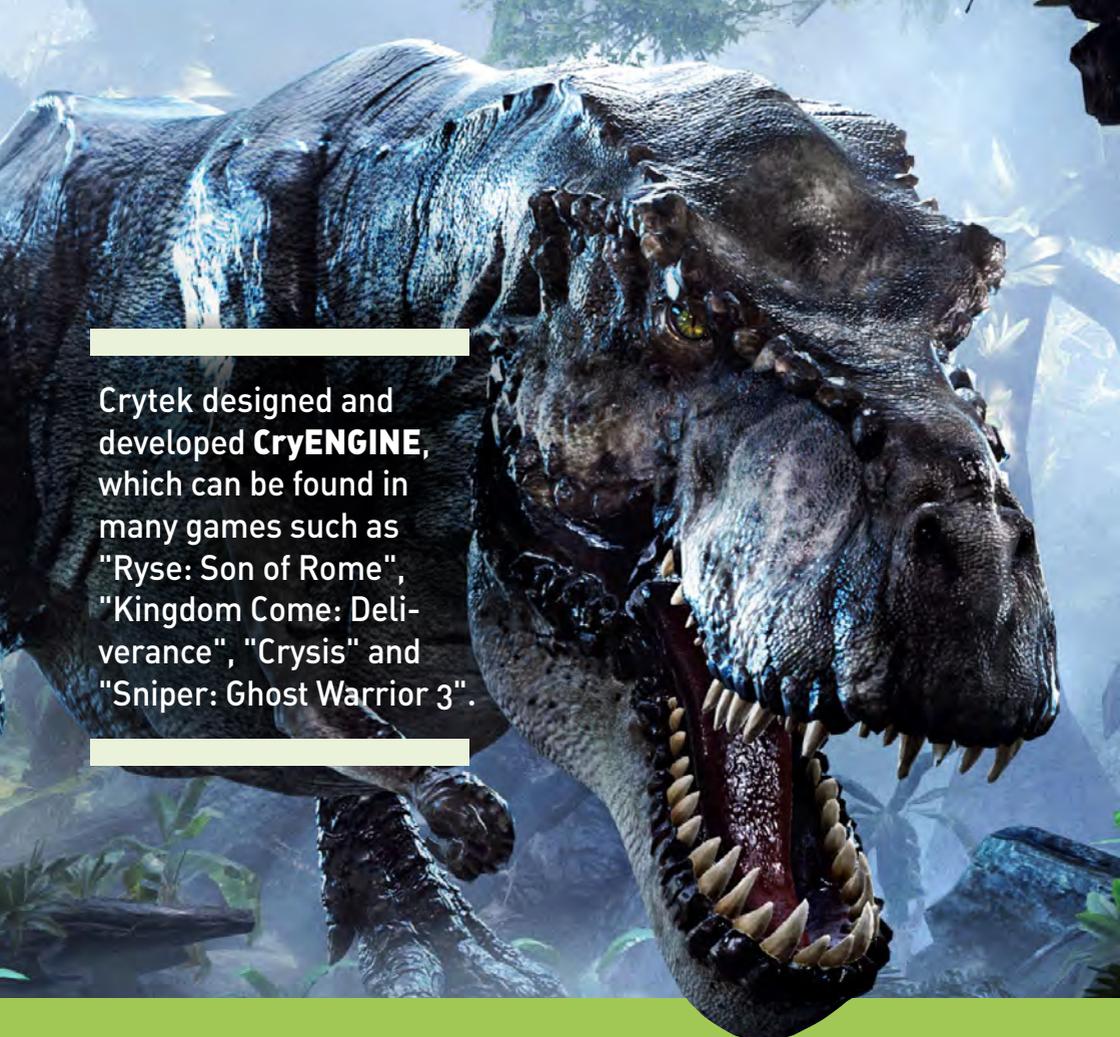
making
games



A GUIDE

TO THE GERMAN

GAMES INDUSTRY



Crytek designed and developed **CryENGINE**, which can be found in many games such as "Ryse: Son of Rome", "Kingdom Come: Deliverance", "Crysis" and "Sniper: Ghost Warrior 3".

INDEX

- 4 Germany: A gateway to Europe
- 8 German games market and its players
- 12 Gaming studios and companies in Germany
- 18 Strengths, chances and the future of the German games industry
- 20 Gaming trends in Germany
- 24 gamescom: celebrate the games
- 28 Germany's developer landscape
- 32 Job market situation and education opportunities in Germany's games industry
- 34 Associations, networks and funding in Germany
- 36 Top gaming media in Germany
- 39 Generation YouTube in Germany
- 40 Company register of the games industry in Germany

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: In Europe, this is where the biggest revenues are generated with games and the respective hardware. Germany's location in the heart of Europe and its excellent infrastructure are just as big advantages as the EU membership and the resulting borderless exchange with over half a billion people living on the continent.

To the same extent, Germany is characterized by a very active computer and video game industry. There are German companies who successfully compete in the world market. They are mainly specializing in browser and mobile games, such as InnoGames, Goodgame Studios and Wooga. But in other areas, too, games companies from Germany are among the world's most successful ones: Crytek from Frankfurt am Main have developed CryENGINE, one of the technologically most advanced game engines worldwide, which was recently used in widely acclaimed Virtual Reality games like "The Climb" or "Robinson: The Journey". A lot of young developers, too, are currently founding small, but highly creative teams who attract a lot of attention with special titles, like at the AMAZE Festival for Independent Video Games which is held annually during the International Games Week Berlin. Successful international developers like Epic Games, id Software or Foundry 42/Roberts Space Industries, who are developing "Star Citizen", have also opened studios in Germany. Altogether, around 510 companies in Germany are specializing in the development and marketing of games, creating jobs for approx. 13,000 people. And in many German cities, colleges and universities offer educational programs for new talents in all important areas of the games industry.



Germany also plays a decisive role in the field of eSports: Some of the biggest international competitions are held in Germany, like the ESL One tournaments. The ESL itself is based in Germany, too, as one of the world's major organizers of eSports tournaments and leagues. Riot Games, the developer of "League of Legends", has a studio in Berlin just for live-streaming major eSports matches.

Last but not least, Germany is the home of gamescom, the world's biggest event for computer and video games. Every year in August, the international games industry is focused on Cologne when more than 350,000 people visit gamescom to try out games that haven't been released yet or to do business on the most important business platform for games in Europe.

I can only provide a brief overview of the diverse games industry in Germany here. However, in this publication, you have the opportunity to gain a lot more impressions about Germany as a business location for games.

Enjoy reading this brochure!

Sincerely,

Felix Falk

Managing Director of BIU
(the German Games Industry Association)

A handwritten signature in black ink that reads "Felix Falk". The signature is written in a cursive, slightly stylized font and is positioned to the right of the printed name and title.



TEN GOOD REASONS FOR INVESTING IN GERMAN BUSINESSES

Germany is a business hot spot for foreign investors. Currently, around 60,000 foreign companies are based in Germany, employing approx. three million people. In 2014, the FDI amounted to over 461 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 1,912 new FDI projects, representing an increase of 60% 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 (2016), 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	3.026	21%	82
France	2.181	15%	67
United Kingdom	2.576	18%	65
Italy	1.636	11%	61
Spain	1.081	7%	46
Netherlands	677	5%	17
Sweden	444	3%	10
Poland	428	3%	38
Czech Republic	167	1%	11
Hungary	109	1%	10

Note: Reference year 2015.
Sources: Eurostat (2016)/ World Bank (2016)

of excellently trained and highly qualified professionals, setting international standards. The basis for this is Germany's excellent education system; 81% of the German population have completed some sort of vocational training or have a high-school diploma, 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), 86% 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 predictability are important aspects for economic commitment and projects.

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

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. ■

Development of wage costs in the business economy* (2006-2015)

Average annual growth rate

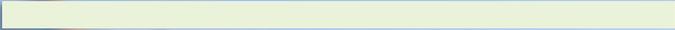
Germany	2,0%
France	2,2%
Netherlands	2,2%
Spain	2,3%
EU-28	2,5%
United Kingdom	2,6%
Slovak Republic	2,6%
Czech Republic	4,4%
Hungary	4,9%
Poland	5,3%

*"Business economy" incl. NACE Rev. 2, B-N
Source: Eurostat 2015

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



A total of four studios are now working on the vast space game projects "Star Citizen" and "Squadron 42". The latest studio **Foundry 42** is one of them and set up office in Germany's Frankfurt/Main in 2015.





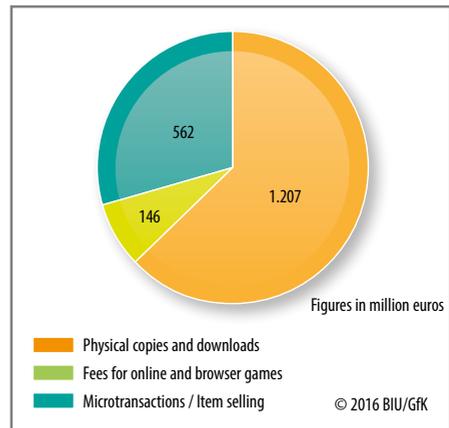
GERMAN MARKET FOR DIGITAL GAMES: FACTS AND NUMBERS

For many years, computer and video games have been the most dynamic cultural and media-based market in Germany, and growth in this market continued unabated in 2015. The continuous innovation and exceptional creativity in the games industry generates an endless stream of new products, platforms and market models. The turnover of computer and video games software in 2015 in Germany totaled 1.91 billion euros. These revenues are distributed over three 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

MARKET VOLUME

Revenues from computer and video games software totaled 1.91 billion euros on the German market in 2015. With a share of 1.207 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 37 percent of total revenues.

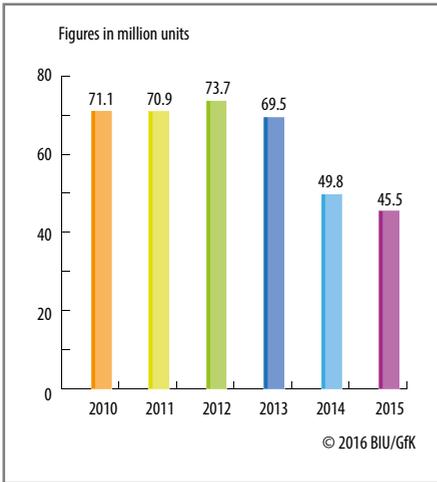


SALE OF DATA MEDIA AND DOWNLOADS

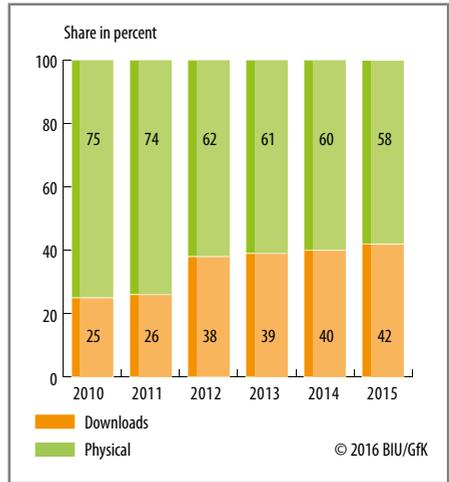
The selling of computer and video games – physical or by download – represents the classic business model of the games industry. The consumer acquires a software license that entitles him to use a certain

game. In 2015, 45.5 million games for PC, consoles and mobile devices such as mobile telephones, handhelds or smartphones were sold in Germany. This represents a turnover of 1.207 billion euros.

Games Sold



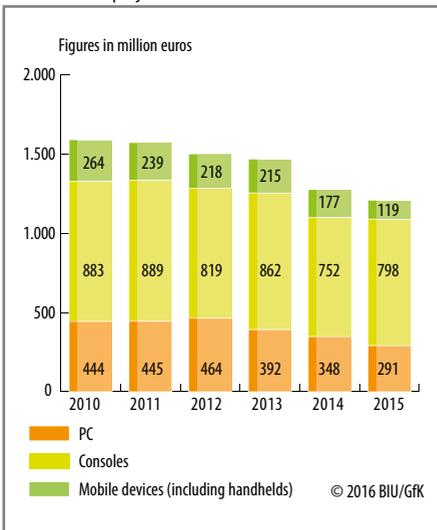
Games sold as Downloads



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 one third of all games 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.

17.4 million Germans played online and browser games in 2014, making them an integral part of the German games market. This number rose from 16.3 million in 2013, while the revenues from online and browser-game fees increased from 139 million euros in 2013 to a total figure of 140 million euros in 2014. 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.

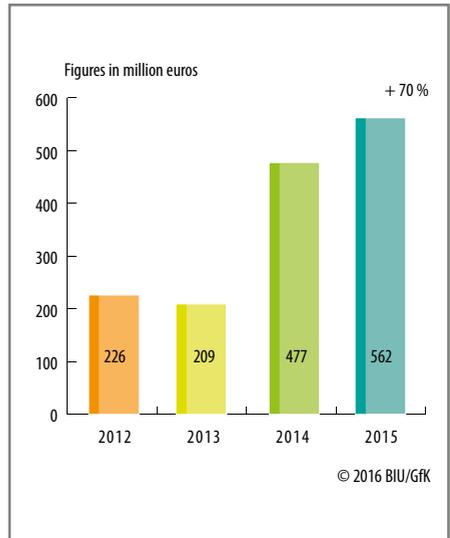
Game apps are one of the greatest drivers of growth in the computer and video games industry, as well as in the entire mobile ecosystem consisting of smartphones, tablets, app stores and mobile internet.

ITEM SELLING

Virtual items include new characters 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 BIU (German Games Industry Association) and GfK (Society for Consumer Research) to measure turnover of virtual items have been adjusted. Turnover for virtual items amounted to a total of 562 million euros in 2015.

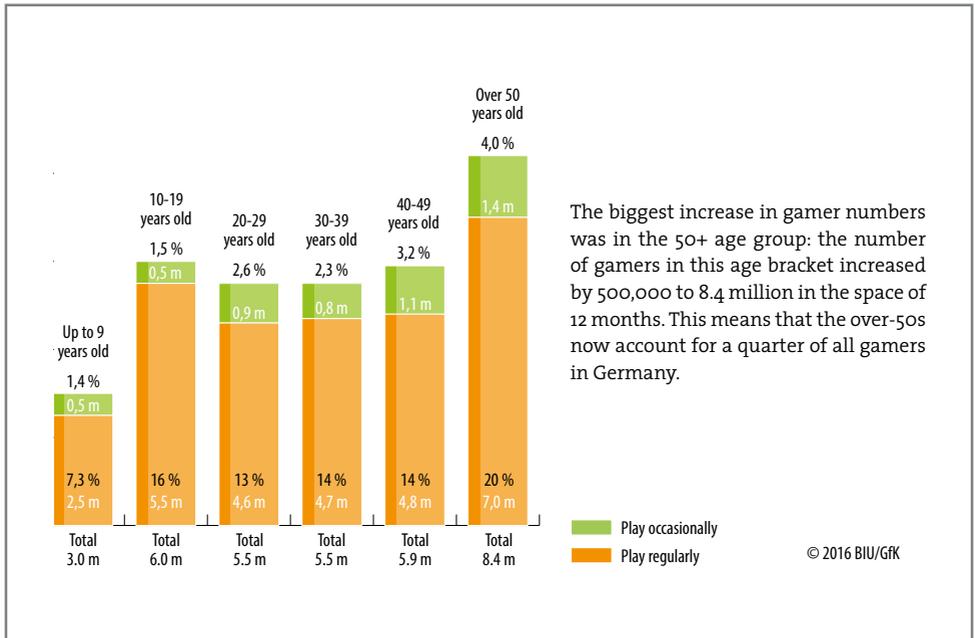
TURNOVER ON ITEM SELLING

Compared to 2014, the turnover made from item selling increased by 18% to 562 million euros in 2015. 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.



The average age of German gamers is 35 years.

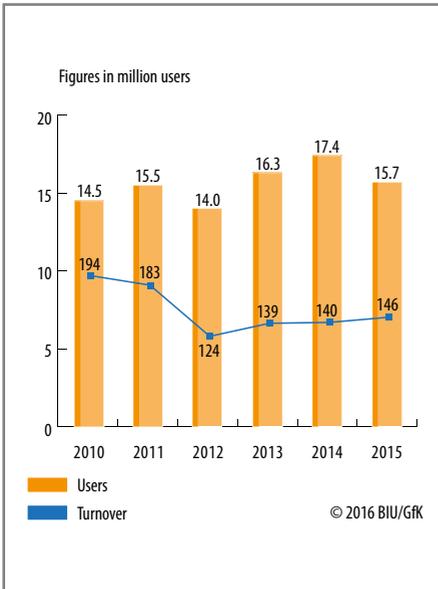
German gamers by age group



The biggest increase in gamer numbers was in the 50+ age group: the number of gamers in this age bracket increased by 500,000 to 8.4 million in the space of 12 months. This means that the over-50s now account for a quarter of all gamers in Germany.

INCREASE IN TURNOVER AND USERS OF ONLINE AND BROWSER GAMES

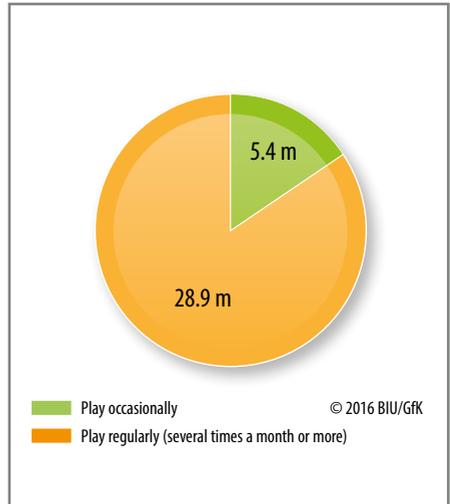
After the market for online and browser games saw a rise for two consecutive years in 2013 and 2014, it saw a decrease in the number of users in 2015. While the turnover from subscriptions and premium accounts rose by 4 percent to 146 million euros in 2015, the number of users decreased to 15.7 million. Turnover from sales and virtual items is not included in these statistics.



GAMING PLATFORM PROSPECTS

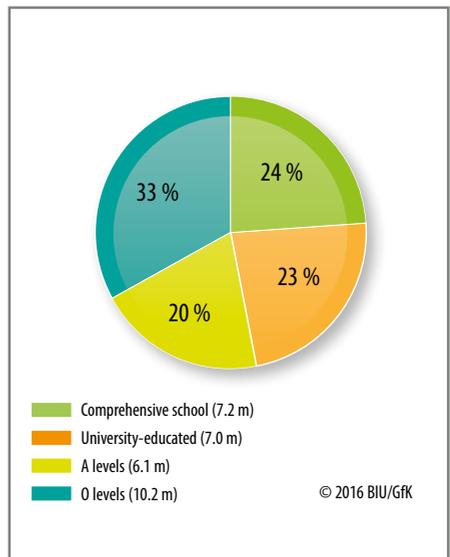
The PC remains the top-ranked gaming platform with 18.4 million active gamers in Germany. It continues to be highly attractive for a large number of different target groups, partly because of the various virtual reality headsets, eSports and browser games it supports, and because of genres like strategy games, which rely heavily on mouse and keyboard controls. During recent years the newer platforms like smartphone and tablet have been growing steadily, traditional platform usage like PC, handheld and console is stagnating. In the last two years, the number of gamers playing on smartphone increased by 14 percent, and the number of tablet gamers noted an increase of approx. 44 percent over the same period.

34,3 m Germans play games



Nearly every second German is a gamer: 34.3 million people in Germany play computer and video games. That's 46 per cent of the total population. Almost half of them (47 per cent or 16.2 million) are women.

Education level



GAMING STUDIOS AND COMPANIES IN GERMANY



CRYTEK . "CRYSIS"



BLUE BYTE . "FOR HONOR"

The German games industry features a large number of developers, publishers and service providers (see company register on page 40). On the following pages, we will present some of the studios and technology developers.



Blue
Byte

BLUE BYTE

LOCATION: Dusseldorf, Mainz

FOUNDING YEAR: 1988

NUMBER OF EMPLOYEES: 305

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, and today the team is increasingly working on PC implementations of Ubisoft blockbusters, currently, e.g., "For Honor".

CRYTEK

LOCATION:

Frankfurt/Main, Kiew

FOUNDING YEAR: 1999

NUMBER OF EMPLOYEES: 550



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 pioneers to deliver AAA quality for the new medium VR, with recent titles like "The Climb" (Oculus Rift) and "Robinson: The Journey" (PSVR).

DAEDALIC ENTERTAINMENT

LOCATION: Hamburg,

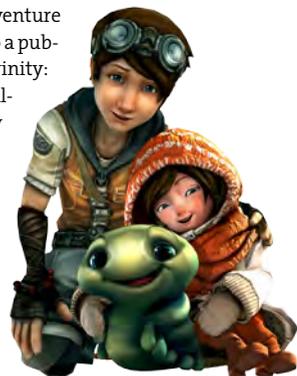
Dusseldorf

FOUNDING YEAR: 2007

NUMBER OF EMPLOYEES: 120



Daedalic Entertainment is known for their adventure games, since the company is acting as both developer and publisher. "Edna & Harvey: The Breakout", 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 2014, the Hamburg-based company opened an office in Dusseldorf where they are currently working on the rogue-like "The Long Journey Home".





DECK 13



DECK13

LOCATION: Frankfurt/Main, Hamburg

FOUNDING YEAR: 2001

NUMBER OF EMPLOYEES: 70

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". At the moment, the team is working on 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.



DECK 13. "LORDS OF THE FALLEN"

DEEPSILVER FISHLABS

LOCATION: Hamburg

FOUNDING YEAR: 2004

NUMBER OF EMPLOYEES: 90



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"

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



EXIT GAMES

LOCATION: Hamburg

FOUNDING YEAR: 2003

NUMBER OF EMPLOYEES: 25



Exit Games is the maker of Photon Engine which is designed to facilitate the implementation of multiplayer features. The SDK is available for all major game engines like Unity and Unreal Engine, but also Cocos2d, Marmalade, PlayFab or Cirra/Contract 2. Various cloud services, matchmaking APIs and cross-platform multiplayer are just a few of the services offered. More than 192,000 developers worldwide use Photon for their projects, from Bandai Namco, Codemasters, DeepSilver Fishlabs up to Gamevil.



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.

GAMEFORGE

LOCATION: Karlsruhe

FOUNDING YEAR: 2003

NUMBER OF EMPLOYEES: 350



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.



GOODGAME STUDIOS

LOCATION: Hamburg | **FOUNDING YEAR:** 2009 | **NUMBER OF EMPLOYEES:** 350



The company is specialized on free2play browser and mobile games whose focus is on builder and strategy game elements. Some of the most successful and popular titles by Goodgame Studios are "Goodgame Empire", "Empire: Four Kingdoms", "Legends of Honor" or "Goodgame Big Farm". Globally, the free2play experts reach over 300 million players in over 200 countries.



INNOGAMES

LOCATION: Hamburg, Dusseldorf

FOUNDING YEAR: 2007

NUMBERS OF EMPLOYEES: 410

InnoGames

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. Today, the company that's specialized on free-2play browser and mobile games reaches over 150 million players worldwide, employs around 410 people and operates six games. On top, the team from Hamburg took over developer Funatics in 2016, who are now working for InnoGames as their Dusseldorf office.



KALYPSO

LOCATION: Worms, Gütersloh, Munich

FOUNDING YEAR: 2006

NUMBER OF EMPLOYEES: 80



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 is going to be 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: 70



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 with action elements which sold more than 800,000 units for PC and GameBoy Advance. Later, the team founded the first cross-platform and first PlayStation 2 development team in Germany. Lately, Limbic was working on the strategy series "Might & Magic" for Ubisoft.

MIMIMI PRODUCTIONS

LOCATION: Munich

FOUNDING YEAR: 2011

NUMBER OF EMPLOYEES: 19



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".



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.

TIVOLA

LOCATION: Hamburg
FOUNDING YEAR: 1995
NUMBER OF EMPLOYEES: 11



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.

WOOGA

LOCATION: Berlin
FOUNDING YEAR: 2009
NUMBER OF EMPLOYEES: 250



Wooga is specializing in free-2play 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.



YAGER

LOCATION: Berlin
FOUNDING YEAR: 1999
NUMBER OF EMPLOYEES: 130



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 the sequel of "Dead Island" and is now focusing on the free2play title "Dreadnought" which is scheduled to be released in 2017. The company's focus is on AAA games for PC and consoles.



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."



"THE DWARVES"

"Developers in Germany are still hungry. They have learned to make the most out of small budgets and also want to prove their efficiency in larger projects."



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

"I am always astounded by the creative and effective indie scene, and the adaptability of the German developers who were one of the trendsetters for new business models like free2play. Just recently, one of my colleagues in our headquarters told me that our "Rainbow Six" team in Germany is receiving a lot of praise from the lead team in Montréal – after just a few months of working together – that's just wonderful!"

"We have an excellent workforce with in-depth know-how in key areas; Germany attracts experts from around the world, and the growing games-specific education will produce a lot of great talent in the years to come."



"RAINBOW SIX: SIEGE"



**ADRIAN GOERSCH,
CO-FOUNDER AND MANAGING
DIRECTOR OF
BLACK FOREST GAMES**

"Things aren't looking too shabby for the German-speaking games industry: Rockfish, King Art and Mimimi all made it to the top of the Steam charts. Yager, Piranha Bytes, Deck13 and us, too, are working on larger projects with international potential. THQ Nordic is making an extremely positive development, Flaregames is established as a successful mobile publisher, and Headup Games always has a good sense for business. "The Long Journey Home" (Daedalic), "Dropzone" (Gameforge) and "Drone Swarm" (stillalive studios) are really great projects which I'm expecting to also be commercially successful. The indie scene just made a mark with Jo-Mei's "Sea of Solitude" by getting EA to sign the project. These are just a few examples which inspire great hope."

"On the subject of eSports in Germany: In 2016, a lot of players from outside the industry jumped onto the eSports bandwagon, like the soccer clubs Schalke 04 or Paris St. Germain. For the first time ever, there were more eSports spectators than at the classic sports heavyweights. Lots is going to happen, primarily at the base, in 2017. Local eSports clubs are going to be established and start becoming a part of our society. In no time, parents will not only be driving their kids to soccer training or ballet classes, but to training in eSports clubs, and the bedrooms of German teens will be decorated with posters of eSports stars."



**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."

"Germany has various multi-cultural cities like Hamburg or Berlin, whose game studios attract high-profile talents from all over the world. Additionally, thanks to a variety of IT or game related schools or traineeships, local experts from Germany offer a high level of education for the specific needs inside the international games industry."



"FORGE OF EMPIRES"



TRENDS FOR THE GERMAN GAMES MARKET

Germany is one of the most important markets for computer and video games in Europe. In 2015, it generated a revenue of 1.91 billion euros, with the PC being the dominating platform, followed by smartphones and consoles. But another two areas will become more and more important in the years to come: eSports and Virtual Reality.

ESPORTS IS BECOMING INCREASINGLY IMPORTANT

"League of Legends", "Dota 2", "Counter-Strike" – games which attract millions of users these days who compete in thrilling matches. But also the number of mere spectators at eSports tournaments is constantly on the rise, and so is the price money. One of the oldest leagues in this area, the Electronic Sports League (ESL) has its roots in Germany: It was founded in 2000 by Turtle Entertainment in Cologne. Today, the league includes around six million active gamers, organized in approx. 500,000 clans.

Tens of thousands of spectators make their way to the stadiums and arenas for events hosted by the ESL, like recently the ESL One in Frankfurt ("Dota 2") (audience: 30,000) and the ESL One in Cologne ("Counter-Strike: Go") (audience: 22,000) in order to cheer on their idols during the competitions. A dedicated study by the economic enterprise Deloitte showed that the German eSports market has risen by approx. 30 percent within the last three years and has generated a revenue of around 50 million euros. They even forecast a revenue of 130 million euros by 2020.

As a result, the general public is also becoming more and more aware of the eSports phenomenon.



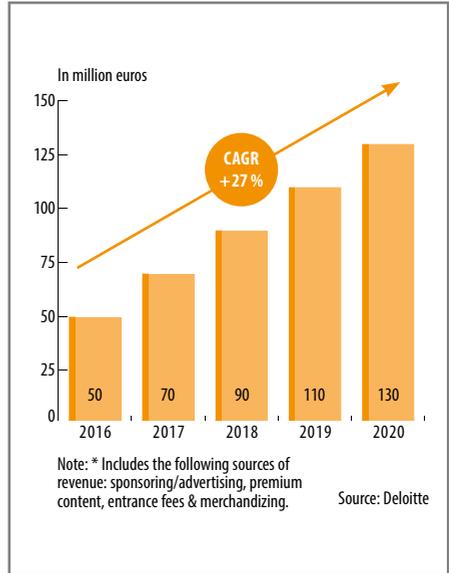
Map of the 22 registered eSports clubs in Germany.
Source: Making Games 06/2016. Map by Robert Fankhänel.

Tournaments, for example, are already broadcast on the Pay TV channel Sky and from 2016 even on the free-to-air channel Sport1. Traditional sports teams like the German Bundesliga clubs FC Schalke 04 and VfL Wolfsburg have also recognized the potential of eSports, above all its enormous marketing potential; they have their own teams today who compete in "League of Legends" (FC Schalke 04) and "FIFA" (VfL Wolfsburg).

A representative study by YouGov in 2016 revealed that almost one in six internet users in Germany has already watched an eSports match in their lives, which amounts to as much as 11 million people, with the rate for 16- to 24-year-olds being the highest with 38%, followed by the 25- to 34-year-olds who still account for 30% of the internet users. Also, 12 percent of all study participants watch such events and broadcasts at least once a week and 19 percent even several times a month.

Another indicator for the increasing importance of eSports in Germany is Riot Games opening an office in Berlin to hold the European Championships (EU LCS) there. In 2014, Riot Games decided in favor of the German capital since there is a large, active scene of "League of Legends" players and fans, and also with Berlin being in the heart of Europe, the developer from California is hoping to attract other European eSports fans to visit the tournaments, too.

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.



eSports in Germany today can measure up to traditional sports events and easily fills entire stadiums.

VIRTUAL REALITY AS A GROWTH MARKET

As mentioned above, the PC is traditionally the dominating gaming platform in Germany, hence there's a correspondingly high interest in Virtual Reality (VR). The previously mentioned study by YouGov also examined what internet users in Germany think of the VR devices that are available of lately. The result: Almost one in two internet users in Germany (46 percent) has heard of VR devices, and one in three users (32 percent) intends to use such headsets for gaming in the future. This represents over 21 million people in Germany. Already about one in five internet users (21 percent) in Germany considers it possible to buy a Virtual Reality headset.



Crytek, one of the pioneers of the German developer scene, is already active in the field of VR right now. They have already delivered AAA quality for this new medium with their games "The Climb" for Oculus Rift and "Robinson: The Journey" for PlayStation VR. Exozet from Berlin usually implements client projects for German public TV channels ARD and ZDF or for Telekom and offers consulting services in areas like marketing, app and game development. But the Berlin-based agency has recognized the potential of VR (and AR) as well and built a team of experts around Thomas Bedenk, which assists them with regard to devices and areas of application.

Young developer talents are also more and more trained towards this new technology. Colleges like SRH University Heidelberg and Kunsthochschule Halle (University of Art and Design Halle) (see page 33) offer study programs specifically focused on VR, and at other colleges, too, Virtual Reality is becoming part of the educational program, as shown by the VR game Wake Up which was created by a student group of Mediadesign Hochschule Berlin.

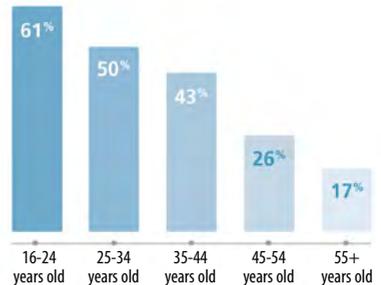
Other important locations for research and development in the field of VR and AR are the University of Hamburg (Prof. Steinicke) and the University of Würzburg (Prof. Dr. Latoschik). ■

Great interest in Virtual Reality headsets

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



Share of German internet users who intend to use VR headsets for digital games



A futuristic cityscape with a large moon in the sky and a rocket launching. The city features tall, modern buildings and a waterfront with a boat. The title 'ANNO 2205' is prominently displayed in the center.

ANNO

2205

The latest part of the successful German city-building strategy series was awarded **Best German Game 2016**.



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 2016, over 345,000 people from 97 countries attended the event, visiting booths run by 877 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 80,000 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 more than 30,000 trade professionals who attend the event.

The gamescom congress is one of the most important conferences for digital games in Germany. More than 90 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 BIU – the German Games Industry Association – 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.



„gamescom is the most important business platform for the European computer and video game industry. Last year's show grew by 9% and once again attracted more international exhibitors, which impressively confirms its leading position in the market.“

(Gerald Böse, CEO of Koelnmesse GmbH)



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 impressions



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

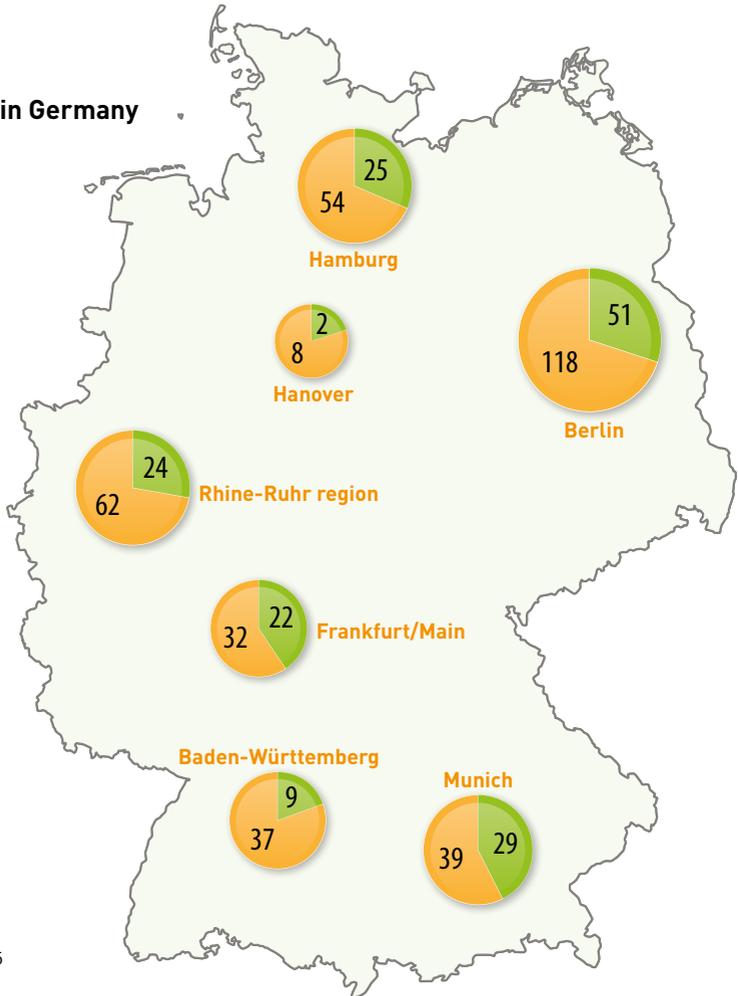


GERMANY'S DEVELOPER LANDSCAPE

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 2016

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 490 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 Quo Vadis and Casual Connect.

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 approx. 250 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.

THERE ARE ALSO 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 quaint 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 40. ■



"Shadow Tactics: Blades of the Shogun", the quasi sequel to the legendary "Commandos" series by Mimimi Productions from Munich won a total of three categories at the German Developer Awards 2016: **Best Game Design, Best PC/Console Game and Best German Game.**







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, with approx. 510 companies specializing in computer and video game development and publishing. In detail, there are 319 development studios, 69 companies focused on publishing, and 122 companies acting as both developer and publisher (source: Projection by BIU based on the industry database "Industriekompass Games" – www.industriekompass-games.de. (Effective date: April 1, 2016).

NUMBER OF EMPLOYEES CONTINUES TO GROW

These companies employ a total of 12,839 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 31,293 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	<ul style="list-style-type: none"> Applied Computer Science - Digital Media and Games Development (B.A.)
Augsburg University of Applied Sciences	Augsburg	www.hs-augsburg.de	<ul style="list-style-type: none"> Interactive Media (B.A.) Interactive Media Systems (M.A.)
Burg Giebichenstein University of Art and Design Halle	Halle	www.burg-halle.de	<ul style="list-style-type: none"> Design of Playing and Learning (M.A.)
h_da Darmstadt University of Applied Sciences	Darmstadt	www.h-da.de	<ul style="list-style-type: none"> Animation & Game (B.A.)
Hamburg University of Applied Sciences	Hamburg	www.haw-hamburg.de	<ul style="list-style-type: none"> Time-Dependent Media / Sound - Vision - Games (M.A.)
Harz University of Applied Sciences	Wernigerode	www.hs-harz.de	<ul style="list-style-type: none"> Media and Games Conception (M.A.)
Hochschule der Medien	Stuttgart	www.hdm-stuttgart.de	<ul style="list-style-type: none"> Audiovisual Media - focus on Interactive Systems/Games (M.A.)
HTW Berlin University of Applied Sciences	Berlin	www.htw-berlin.de	<ul style="list-style-type: none"> Game Design (B.A.)
Kempen University of Applied Sciences	Kempen	www.hochschule-kempen.de	<ul style="list-style-type: none"> Computer Science - Game Engineering (B.Sc.)
Mittweida University of Applied Sciences	Mittweida	www.hs-mittweida.de	<ul style="list-style-type: none"> Media Informatics and Interactive Entertainment (B.A.)
Technical University of Munich	Munich	www.tum.de	<ul style="list-style-type: none"> Computer Science - Games Engineering (B.A.)
TH Köln, Cologne Game Lab	Cologne	www.colognegamelab.de	<ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> Computer Game Studies (M.A. & M.Sc.)
University of Würzburg	Würzburg	www.uni-wuerzburg.de	<ul style="list-style-type: none"> Games Engineering (B.Sc.)

PRIVATE COLLEGES

Educational Institutions	City	Website	Degree Programs Offered
bib International College	Bergisch Gladbach, Hanover, Paderborn	www.bib.de	<ul style="list-style-type: none"> Media Informatics - Game Development (B.Sc.) Game Design - Art & Animation (B.A.)
BTK - University of Art & Design	Berlin	www.btk-fh.de	<ul style="list-style-type: none"> Game Design (B.A.)
Designhochschule (University of Design)	Leipzig, Schwerin	www.designschule.de	<ul style="list-style-type: none"> Game Design (B.Sc.)
Games Academy	Berlin, Frankfurt/Main	www.games-academy.de	<ul style="list-style-type: none"> 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	Munich, Stuttgart	www.macromedia.de	<ul style="list-style-type: none"> Game Design (B.Sc.) (Stuttgart only) Game Design and Development (Macromedia Certificate, B.Sc. Hons)
MD.H University of Media Design	Berlin, Düsseldorf, Munich	www.mediadesign.de	<ul style="list-style-type: none"> Game Design (B.Sc.)
S4G - School for Games	Berlin	www.school4games.net	<ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> Game Art Animation (B.A. / B.Sc.) Games Programming (B.Sc.) Professional Media Creation (M.A.)
School of Games	Cologne	www.medienberufe.de	<ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> Game Development (B.Sc.)



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

In Germany, there are two industry associations: the BIU – Bundesverband Interaktive Unterhaltungssoftware (German Games Industry Association), BIU in short, and the GAME – Bundesverband der deutschen Games-Branche (German Games Industry Association), GAME in short. Both are external representatives of the video games industry, promoting the interests of the games industry in politics.

The members of BIU represent 85% of the market volume. Representing companies like Crytek, Gameforge, Yager, Wooga, Innogames and many others, the BIU pools over 50% of the German games industry jobs. Additionally, the BIU is the host of gamescom and runs the nationwide network BIU.Dev and BIU.Net which unite all members of the games industry to promote Germany as a place of business. GAME also provides a common ground for a number of game companies and service providers, such as Daedalic, Deck13 and many others. Both associations offer their members various services, from discounted conditions for trade shows and conferences to expert networks, legal advice, training, etc. Additional information about the services, member fees etc. can be found on the respective websites of the two associations.

FUNDING ORGANIZATIONS

In Germany, there are various, mostly regional funding organizations which support game developers finan-

cially. 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 two big industry associations BIU and GAME, there are also regional networks which connect development studios and companies in their region, get them in touch with experts or pro-

vide 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
BIU - German Games Industry Association	Berlin	www.biu-online.de
GAME - German Games Industry Association	Berlin	www.game-bundesverband.de

FUNDING ORGANIZATIONS

Company Name	City	Website
Bavarian Film and Television Funding (FFF)	Munich	www.fff-bayern.de
Film- und Medienstiftung NRW GmbH	Dusseldorf	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	Dusseldorf	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.stadort-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.gameup-rlp.de
K³ Kultur- und Kreativwirtschaftsbüro Karlsruhe	Karlsruhe	www.k3-karlsruhe.de
media:net berlinbrandenburg e.V.	Berlin	www.medianet-bb.de
Mediencluster NRW GmbH	Dusseldorf	www.medien.nrw.de
Mediennetzwerk Bayern	Munich	www.mediennetzwerk-bayern.de
Netzwerk Kreativwirtschaft Baden-Württemberg	Stuttgart	kreativnetzwerk.mfg.de
nextMedia.Hamburg;gamecity:Hamburg	Hamburg	www.nextmedia-hamburg.de
WERK1.Bayern GmbH	Munich	www.werk1.com



Fürth | Berlin | München | Hamburg | Köln

computec MEDIA

PASSION FOR ELECTRONIC ENTERTAINMENT

With a publishing portfolio of 15 print and digital magazines (PC Games, play⁴, N-ZONE, XBG Games, SFT, Raspberry Pi Geek e.g.), 15 online portals (gamesworld.de, 4Players e.g.), apps (Games TV 24 e.g.), event business (Quo Vadis, Deutscher Entwicklerpreis), B2B activities (golem.de, Making Games, gamesbusiness.de, Linux-Magazin), gameserver business (4Netplayers), online IT training, corporate publishing, eCommerce & licensing COMPUTEC MEDIA is the leading media company in the gaming segment. Based in Fürth COMPUTEC MEDIA has millions of readers of its magazines, digital media and online portals, concentrating on the electronic entertainment world. COMPUTEC MEDIA offers its readers and users expert information on digital lifestyle, PC and video games, hardware, IT, CE, software, movies/DVD. COMPUTEC MEDIA is a subsidiary of Marquard Media International AG, Baar/Switzerland. [www.computec.de]



WEBSITES



APPS BOOKAZINES GAMING-SERVER



EVENTS IT-ACADEMY



MAGAZINES PRINT/DIGITAL | WEBSITES



Hamburg-based InnoGames is one of the world's leading developers and publishers of online games. Their titles such as "Forge of Empires", "Tribal Wars", "Tribal Wars 2", "Elvenar" and "Grepolis" are available in more than 30 languages and are all free to play without restrictions or time limits.

making games

YOUR KEY TO THE GERMAN GAMES INDUSTRY



SUBSCRIBE
TO OUR
NEWSLETTER
NOW!

MAKING GAMES MAGAZINE: 10,000 READERS
CENTRAL EUROPE'S MOST RELEVANT
MAGAZIN FOR GAME DEVELOPERS

MAKINGGAMES.BIZ: 12,000 UNIQUE VISITORS
GERMANY'S BIGGEST WEBSITE ABOUT
GAME DEVELOPMENT

MAKING GAMES MAIL: EMAIL DATABASE
WITH MORE THAN 10,000 B2B-CONTACTS

MAKING GAMES TALENTS: GERMANY'S MOST
SUCCESSFUL RECRUITING EVENT FOR THE
GAMES INDUSTRY

FACEBOOK.COM/MAKINGGAMES: 18,000 FANS
EUROPE'S LARGEST GAME
DEVELOPER COMMUNITY ON FACEBOOK

MAKING GAMES PROFESSIONALS: LEAD DATABASE
WITH MORE THAN 700 FULLY QUALIFIED GAMES
PROFESSIONALS

KEY PLAYERS: THE WORLD'S BIGGEST GAMES
INDUSTRY COMPENDIUM WITH MORE THAN 60
COMPANY PORTRAITS



WWW.MAKINGGAMES.BIZ

A product of
compuTEC
MEDIA



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 almost 15 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 sub-

scriptions 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:

- 1.15 million Germans declared that they make completely voluntary donations to their favorite Let's Players. This corresponds to 8 percent of the total of 15 million Let's Play users in Germany.
- 3.6 million Germans (25 percent of the German Let's Play audience) consider it possible to support Let's Players financially through donations. ■



„Let's Plays are well established today as a new entertainment format. Millions of Germans enthusiastically watch their favorite Let's Players on YouTube, Twitch and co., and rightfully so.“

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

COMPANY REGISTER OF THE GAMES INDUSTRY IN GERMANY

Here you will find the names and websites of publishers, developers, service providers, educational institutions and associations of the German games industry – from 3d-io to Z-Software.

Company	City	Website
DEVELOPMENT		
3d-io	Wiesbaden	www.3d-io.com
5d lab	Freiburg	www.5dlab.com
Adrastea	Nuremberg	www.adrastea.com
Aesir Interactive	Munich	www.aesir-interactive.com
Animation Arts Creative	Halle (Saale)	www.animationarts.de
AntMe!	Grafath	www.antme.net
Bad Monkee	Hamburg	www.badmonkee.de
B-Alive	Ummendorf	www.b-alive.de
Beardshaker Games	Hamburg	www.beardshaker.com
Bearhands – Bothe Griengig UG	Berlin	www.bearhands.berlin
BIGITEC	Bonn	www.bigitec.com
BIGPOINT	Hamburg	www.bigpoint.net
b-interaktiv	Schwerte	www.binteraktive.com
Birds and Trees UG	Hamburg	www.birds-and-trees.de
Bit Barons c/o Wailua Games	Munich	www.bitbarons.com
Black Forest Games	Offenburg	www.bfgames.biz
Black Pants Studio GmbH	Berlin	www.blackpants.de
Blazing Badger	Frankfurt/Main	www.blazingbadger.com
Blue Byte	Dusseldorf	www.bluebyte.com
Blue Byte Mainz	Mainz	www.bluebyte.com
Booster Space	Berlin	www.booster-space.com/
Brainseed Factory	Bonn	www.brainseed-factory.com
Bright Future	Cologne	www.brightfuture.de
Brightside Games	Berlin	www.brightside-games.com
Bronx Studios Entertainment	Frankfurt/Main	www.bronxstudios.com
BSS web consulting	Essen	www.bss-consulting.de
Buntware Games	Freiburg	www.buntware.com
Bumblebee.	Wiehl Merkausen	www.bumblebee-games.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	Munich	www.chimera-entertainment.com
CipSoft	Regensburg	www.cipssoft.com
Cloud Imperium Games / Foundry 42	Frankfurt/Main	www.cloudimperiumgames.com
Cooee	Kaiserslautern	de.clubcooee.com
Crazy Bunch	Hamburg	www.crazybunch.biz
createale	Ludwigsburg	www.createale.de
Creasteam Software	Flensburg	www.creasteam.de
Crenetic	Mülheim an der Ruhr	www.crenetic.de
Crytek	Frankfurt/Main	www.crytek.de
Cyber Arena Entertainment Group	Munich	www.c-arena.com
Dachshund Games	Berlin	www.dachshund-games.com
Daedalic Entertainment	Hamburg	www.daedalic.de
Decane	Quickborn	www.decane.net
Deck13 Interactive	Frankfurt/Main	www.deck13.com
Deep Silver Fishlabs	Hamburg	www.dsfishlabs.com
Destrax Entertainment	Bielefeld	www.destrax.de
DigitalMindsoft	Ulm	www.digitalmindsoft.eu
dreiNET	Berlin	www.dreinet.org
Dutyfarm	Berlin	www.dutyfarm.com
East Forge Entertainment	Leipzig	www.eastforge.com

Company	City	Website
eelusion	Münster	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	Bretten	www.eosinteractive.de
Epic Games	Berlin	www.epicgames.com
exDream	Hanover	www.exdream.com
exozet	Berlin	www.exozet.com
extra toxic	Frankfurt/Main	www.extratotoxic.com
eyefactive	Wedel	www.eyefactive.com
FAKT Software	Leipzig	www.fakt-software.de
Fairytale Distillery UG	Munich	www.fairydist.com
Far Away Illustration & Design	Gelnhausen	www.faraway-illustration.com
FDG Entertainment	Munich	www.fdg-entertainment.com
flaregames	Karlsruhe	www.flaregames.com
Frame6	Dusseldorf	www.frame6.de
Fried Bytes	Saarbrücken	www.friedbytes.de
GameArt Studio	Berlin	www.gameartstudio.de
GameDuell	Berlin	www.gameduell.de
Gameforge	Karlsruhe	www.gameforge.de
GameLoft	Berlin	www.gameloft.com
Gaming Minds Studios	Gütersloh	www.gamingmindsstudios.com
Gentle Troll Entertainment	Würzburg	www.gentletroll.com
German Railroads	Wedel	www.german-railroads.de
Goal Games	Celle	www.goal-games.de
Goodgame Studios	Hamburg	www.goodgamestudios.com
Hammer Labs	Tönisvorst	www.hammer-labs.com
Handy Games	Giebelstadt	www.handy-games.com
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	Hanover	www.islandgames.de
it Matters Games	Berlin	www.itmattersgames.com
Jo-Mei	Berlin	www.jo-mei.com
keen games	Frankfurt/Main	www.keengames.com
King Art	Bremen	www.kingart-games.de
KORION Simulation	Ludwigsburg	www.korion.de
kr3m. media	Karlsruhe	www.kr3m.com
Kritzelkratzen 3000	Würzburg	www.kritzelkratzen.de
kunst-stoff	Berlin	www.kunst-stoff.de
Lemonbomb Entertainment	Dusseldorf	www.lemonbomb.de
Limbic Entertainment	Langen	www.limbic-entertainment.de
Looterkings GmbH	Cologne	www.looterkings.de
LostTheGame Productions	Hamburg	www.lostthegame.de
LudInc	Berlin	www.ludinc.de
MADE	Stuttgart	www.made-apps.com
MaDe Games GbR Neetix - Reichl	Nettetal	www.madegames.com
McPeppergames	Münnerstadt	www.mcpeppergames.com
Media Seasons	Leipzig	www.mediasasons.com
Mex IT	Dortmund	www.mex-solutions.com
Mimimi Productions	Munich	www.mimimi-productions.de
Mobile Learning Labs	Berlin	www.ml-labs.com
mobivention	Cologne	www.mobivention.com
Monokel - Koschmieder, Maier, Roitman, Wagner GbR	Cologne	www.monokel.de
Moonbyte Games	Neustadt/WeinstraÙe	www.moonbytegames.com
Mooneye Studios	Hamburg	www.mooneyestudios.com
NeoBird	Nuremberg	www.neobird.de
Neopoly GmbH	Bochum	www.neopoly.de
netmin games	Mainz	www.netmin.de
northworks	Hamburg	www.northworks.de
Nukklear	Hannover	www.nukklear.com
Nurogames GmbH	Cologne	www.nurogames.com
OFM - OnlineFussballManager	Cologne	www.onlinefussballmanager.de
Osmotic Studios	Hamburg	www.osmotic-studios.de
Outline Development	Siegen	www.outline-development.de
Pappuga	Nuremberg	www.pappuga.com

Company register

Company	City	Website
Phobator	Nuremberg	www.phobator.de
Piranha Bytes	Essen	www.piranha-bytes.com
pixeltamer.net	Berlin	www.pixeltamer.net
Pixon	Hamburg	www.pixon.de
Playata	Nuremberg	www.playata.com
Playnik	Münster	www.playnik.de
playzo	Darmstadt	www.playzo.biz
Plazz AG	Erfurt	www.plazz.ag
Ploonymoon Studios	Kissing	www.ploonymoon.com
Pop Rocket Studios GmbH	Hamburg	www.poprocket.com
Procontis	Dieburg	www.procontis.de
Promotion Software - Studio Tübingen	Tübingen	www.promotion-software.de
Promotion Software - Studio Potsdam	Potsdam	www.promotion-software.de
Quantumfrog	Oldenburg	www.quantumfrog.de
Rat King Entertainment	Halle	www.ratking.de
Ravensburger Digital	Munich	www.ravensburger-digital.com
Reality Solutions	Stuttgart	www.realitysolutions.de
Reality Twist	Munich	www.reality-twist.com
Realforge Studios	Munich	www.realforigestudios.com
remote control productions	Munich	www.r-control.de
RetroBrain	Hamburg	www.retrobrain.de
Riot Games	Berlin	www.riotgames.com
RockAByte	Cologne	www.rockabyte.com
Rockfish Games	Hamburg	www.rockfishgames.com
Sandbox Interactive	Berlin	www.sandbox-interactive.com
Scorpius Forge	Ulm	www.scorpius-forge.de
Secret Item Games UG	Lünen	www.secret-item-games.com
Serious Games Solutions	Potsdam	www.serious-games-solutions.com
Sharkbomb Studios	Karlsruhe	www.sharkbombs.de
SilentFuture	Wuppertal	www.silentfuture.de
Simlity	Jena	www.simlity.com
Snajjaw Games	Pulheim	www.snajjawgames.com
SOLID WHITE design digital media	Stuttgart	www.solidwhite.de
Solimedia Productions	Erfurt	www.solimedia.de
Sparrow Games	Berlin	www.sparrowgames.de
Springwald Software	Bochum	www.springwald.de
Stratosphere Games	Berlin	www.stratosphere-games.com
Studio Fizbin	Ludwigsburg	www.studio-fizbin.de
Sunlight Games	Cologne	www.sunlight-games.com
symlCrowd	Stolberg	www.symlcrowd.de
TG Nord	Hanover	www.tg-nord.com
the Good Evil	Cologne	www.thegodevil.com
Thera Bytes UG	Munich	www.therabytes.de
Thoughtfish GmbH	Berlin	www.thoughtfish.de
Threaks	Hamburg	www.threaks.com
Travian Games	Munich	www.traviangames.com
unikat media	Schwerin	www.unikatmedia.de
upjers	Bamberg	www.upjers.com
Vibrant Core	Bonn	www.vibrantcore.com
Wargaming.net	Berlin	www.wargaming.net
Wolpertinger Games	Munich	www.wolpertingergames.com
wooga	Berlin	www.wooga.com
XinBlue	Vallendar	www.xinblue.de
XYRALITY	Hamburg	www.xyrality.com
YAGER Development	Berlin	www.yager.de
YEPSI GmbH	Cologne	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 Germany	Ismaning	www.activision.de
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

Company	City	Website
astragon Software	Mönchengladbach	www.astragon.de
Bandai Namco Entertainment Germany	Frankfurt/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 GmbH	Hamburg	www.capcomeuro.de
Covus Crobo	Berlin	www.crobo.com
Crimson Cow	Hamburg	www.crimsoncow.de
Crytek	Frankfurt/Main	www.crytek.com
Daedalic Entertainment	Hamburg	www.daedalic.de
Deck13 Interactive	Frankfurt/Main	www.deck13.com
dreamfab	Regensburg	www.dreamfab.com
Electronic Arts	Cologne	www.ea.com
European Games Group	Munich	www.gamesgroup.eu
EuroVideo Medien	Grünwald	www.eurovideo.de
flashpoint	Hamburg	www.flashpoint.de
GameDuell	Berlin	www.gameduell.de
Gameforge	Karlsruhe	www.gameforge.de
GameLoft	Berlin	www.gameloft.com
GamesInFlames	Munich	www.gamesinflames.com
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 GmbH	Hamburg	www.ime-online.net
InnoGames	Hamburg	www.innogames.de
Kalypso Media Group	Worms	www.kalypsomedia.com
Koch Media	Planegg/Munich	www.kochmedia.de
Konami	Frankfurt/Main	www.konami.de
McGame.com	Halle (Saale)	www.mcgame.com
mediaTest digital	Hanover	www.mediatest-digital.com
Microsoft	Munich	www.microsoft.com
mixtvision Digital	Munich	www.mixtvision.de
morphicon media AG	Munich	www.morphicon.com
NBG	Burglengenfeld	www.nbg-online.de
Nintendo of Europe	Frankfurt/Main	www.nintendo.de
Playa Games	Hamburg	www.playa-games.com
Ravensburger Digital	Munich	www.ravensburger-digital.com
Reality Twist	Munich	www.reality-twist.com
Rumble Media	Karlsruhe	www.fettspielen.de
S.A.D.	Neu-Ulm	www.s-a-d.de
SERU	Nortorf	www.seru.de
Simplaex	Berlin	www.simplaex.com
Sony Computer Entertainment	Neu-Isenburg	www.scee.net
Square Enix	Hamburg	eu.square-enix.com
Take-Two Interactive	Munich	www.take2.de
Tencent	Berlin	www.tencent.com
Tivola Publishing	Hamburg	www.tivola.de
TopWare Interactive	Karlsruhe	www.topware.de
Travian Games	Munich	www.traviangames.com
Ubisoft	Dusseldorf	www.ubisoft.de
United Soft Media Verlag (Publishing)	Munich	www.usm.de
upjers	Bamberg	www.upjers.com
Wargaming.net	Berlin	www.wargaming.net
Warner Bros. Interactive Entertainment	Hamburg	www.warnerbros.com
YEPSI GmbH	Cologne	www.yeps.de
ZeniMax Germany	Frankfurt/Main	www.zenimax.com
PUBLIC SECTOR		
Bavarian Film and Television Funding (FFF)	Munich	www.fff-bayern.de
Berlin Partner	Berlin	www.berlin-partner.de
BIU - German Games Industry Association	Berlin	www.biu-online.de
BIU.Dev/BIU.Net	Berlin	www.biu-online.de
Engage NRW	Muelheim an der Ruhr	www.engage-nrw.de
Film- und Medienstiftung NRW	Dusseldorf	www.filmstiftung.de
(Film and Media Foundation North Rhine-Westphalia)		
GAME - German Games Industry Association	Berlin	www.game-bundesverband.de
Games Bavaria	Munich	www.games-bavaria.com

Company	City	Website
Games Bavaria Munich	Munich	www.gbm.online
gamearea-FRM e.V.	Frankfurt/Main	www.gamearea-frm.de
gamecity:Hamburg	Hamburg	www.gamecity-hamburg.de
Gameup Rheinland Pfalz	Kaiserslautern	www.game-up.de
GAMeplaces	Frankfurt/Main	www.frankfurt-business.net
games.net berlinbrandenburg	Berlin	www.medianet-bb.de
Games Factory Ruhr	Muelheim an der Ruhr	www.muelheim-business.de
Hessen-IT	Wiesbaden	www.hessen-it.de
Initiative Creative Gaming e.V.	Berlin	www.creative-gaming.eu
K3 Kultur und Kreativwirtschaft Karlsruhe	Karlsruhe	www.k3-karlsruhe.de
Leipzig eSports e.V.	Leipzig	www.leipzigesports.de
medienboard berlin-brandenburg	Potsdam-Babelsberg	www.medienboard.de
Media.net Berlinbrandenburg	Berlin	www.medianet-bb.de
Mediencluster NRW	Düsseldorf	www.medien.nrw.de
MFG Medien- und Filmgesellschaft Baden-Württemberg (Media and Film company Baden-Württemberg)	Stuttgart	www.mfg.de
Mitteldeutsche Medienförderung (Media Funding)	Leipzig	www.mdm-online.de
Netzwerk Kreativwirtschaft BW	Stuttgart	www.kreativnetzwerk.mfg.de
nordmedia	Hanover	www.nordmedia.de
Stiftung Digitale Spielekultur (Foundation For Digital Games Culture)	Berlin	www.stiftung-digitale-spielekultur.de
USK (Entertainment Software Self-Regulation Body)	Berlin	www.usk.de
WERKT1 Munich	Munich	www.werk1muenchen.de

EDUCATION

Acagamics e.V.	Magdeburg	www.acagamics.de
BTK - University of Art & Design	Berlin	www.btk-fh.de
Cologne Game Lab / TH Köln	Cologne	www.colognegamelab.de
Darmstadt University of Applied Science	Darmstadt	www.h-da.de/hochschule/fachbereiche/media
Designschule Leipzig (Leipzig School of Design)	Leipzig	www.designschule.de
Designschule Schwerin (Schwerin School of Design)	Schwerin	www.designschule.de
Europa Campus Frankfurt/Main	Frankfurt/Main	www.ec-europa-campus.com
Europa Campus Karlsruhe	Karlsruhe	www.ec-europa-campus.com
Europa Campus Mannheim	Mannheim	www.ec-europa-campus.com
Film Academy Baden-Württemberg	Ludwigsburg	www.filmakademie.de
gamelab.berlin	Berlin	www.gamelab.berlin
Games Academy Berlin	Berlin	www.games-academy.de
Games Academy Frankfurt	Frankfurt/Main	www.games-academy.de
Gesellschaft für Personalentwicklung und Bildung (Staff and Educational Development Association)	Berlin	www.gpb.de
Hamburg University of Applied Science	Hamburg	www.haw-hamburg.de
Harz University of Applied Science - Location Halberstadt	Halberstadt	www.hs-harz.de
Harz University of Applied Science - Location Wernigerode	Wernigerode	www.hs-harz.de
HTW Berlin (Game Changer)	Berlin	www.gamedesign.htw-berlin.de/forschung/
Institute for Ludologie	Berlin	www.ludologie.de
Macromedia Academy	Berlin, Hamburg, Cologne, Munich, Stuttgart	www.macromedia.de
mAHS, media Academy - University Stuttgart	Stuttgart	www.media-hs.de
Mediadesign University Berlin	Berlin	www.mediadesign.de
Mediadesign University Düsseldorf	Düsseldorf	www.mediadesign.de
Mediadesign University Munich	Munich	www.mediadesign.de
Mittweida University of Applied Science	Mittweida	www.hs-mittweida.de
S4G School for Games	Berlin	www.school4games.net
SAE Institute	Berlin, Bochum, Frankfurt/Main, Hamburg, Cologne, Leipzig, Munich, Stuttgart	www.sae.edu
SRH University for Kommunikation and Design	Berlin	www.design-akademie-berlin.de
SRH University Heidelberg	Heidelberg	www.hochschule-heidelberg.de
Stuttgart Media University	Stuttgart	www.hdm-stuttgart.de
Trier University of Applied Science	Trier	informatik.hochschule-trier.de
University Würzburg	Würzburg	www.uni-wuerzburg.de

BUSINESS SERVICE

1st Order (Virtual Items)	Frankfurt/Main	www.1storder.com
4-REAL INTERMEDIA (Localisation)	Offenbach	www.4-real.com
adjust (Marketing)	Berlin	www.adjust.com
adspreemedia (User Acquisition)	Berlin	www.adspreemedia.com
Ampira (Online-Marketing)	Duisburg	www.ampira.de
Anakan (Localisation)	Berlin	www.anakan.de
Aruba Events (Events)	Cologne	www.aruba-events.de

Company	City	Website
arvato Bertelsmann (IT and Distribution Service Provider)	Gütersloh	www.arvato.de
Beiten Burkhardt Rechtsanwalts-gesellschaft mbH (Legal Consulting)	Frankfurt/Main	www.bblaw.com
Brehm & v. Moers (Legal Consulting)	Berlin	www.bvm-law.de
Buschbaum Media & PR (PR and Marketing-Agency)	Düsseldorf	www.buschbaum-media.com
Clans.de (eSports Service)	Hamburg	www.clans.de
ComputeC Media GmbH (Publishing)	Fürth	www.computeC.de
Confutainment (Consulting)	Berlin	www.confutainment.com
CULTURETRANSLATE (Localisation)	Eschborn	www.culturetranslate.com
Curse (Online Marketing)	Berlin	www.curseinc.com
DACS Laboratories (IT Service Provider)	Erkrath	www.dacs-labs.com
DELASOCIAL Berlin (PR, Marketing & Social Media Agency)	Berlin, Hamburg	www.delasocial.com
Die Hobrechts (Game Design Consultants)	Berlin	www.diehobrechts.de
Digital River (eCommerce and Marketing Services)	Cologne	www.digitalriver.com
Effective Media GmbH (Localisation)	Bochum, Munich	www.effective-media.de
Frankfurter Buchmesse (Trade Fair)	Frankfurt/Main	www.book-fair.com
Freaks 4U Gaming (PR, Events, Consulting)	Berlin	www.freaks4u.de
Friedmann Kommunikation (PR Agency)	Cologne	www.fr-k.de
Gärtner PR (PR Agency)	Grafing/Munich	www.gaertner-pr.de
gamesbusiness.de (Online Medium)	Fürth	www.gamesbusiness.de
gamescom (Trade Fair)	Cologne	www.koelnmesse.de
Games Quality (QA Services)	Erkner	www.games-quality.com
Gamify Now! (Gamification Consulting)	Munich	www.gamify-now.de
Ganz & Stock (HR Consulting)	Büdingen	www.ganz-stock.de
GIANTS Software Entertainment GmbH (Marketing)	Erlangen	www.giants-software.com
GlobaLoc (Localisation)	Berlin	www.globaloc.de
GRAEF Rechtsanwälte Berlin (Legal Consulting)	Berlin	www.graef.eu
GRAEF Rechtsanwälte Hamburg (Legal Consulting)	Hamburg	www.graef.eu
HoneyTracks (Game Analytics)	Munich	www.honeytracks.com
IEM Consulting (Business Development, Financing)	Roedermark	www.iem-consulting.com
IHDE & Partner (Legal Consulting)	Berlin	www.ihde.de
INPROMO (PR, Marketing, Social Media & SEO Agency)	Hamburg	www.inpromo.de
iVentureGroup (Investment Partner)	Hamburg	www.iventuregroup.com
KSP Kanzlei - Dr. Seegers, Dr. Frankenheim (Legal Consulting)	Hamburg	www.ksp.de
LaterPay (Payment Service Provider)	Munich	www.laterpay.net
Making Games (Trade Publication)	Fürth	www.makinggames.biz
Marchsreiter Communications (PR Agency)	Munich	www.marchsreiter.com
Medienachse (Full Service, Business planning)	Munich	www.medienachse.de
M.I.T. - Media Info Transfer (Payment Service Provider)	Hamburg	www.mediainfotransfer.de
MOTHERSHIP - free2play Agency GmbH (Free2Play Agency)	Cologne	www.mothership1p.de
MOTION AREA (Localisation, Media Production)	Wiesbaden	www.motionarea.de
Osborne Clarke (Law Firm)	Cologne	www.osborneclarke.de
Partnertrans (Localisation)	Düsseldorf	www.partnertrans.com
paysafecard.com Deutschland (Payment Service Provider)	Düsseldorf	www.paysafecard.com
Phénix Noir Productions / Patrick Neviau (Music Production)	Oberhausen	www.phenix-noir.de
planetlan (Event and IT Service Provider)	Bochum	www.planetlan-gmbh.de
Poppe Rechtsanwälte (Legal Consulting)	Pinneberg	www.kanzlei-poppe.eu
Quinke Networks (PR, Marketing)	Hamburg	www.quinke.com
Rechtsanwalt Marian Härtel (Legal Consulting)	Berlin	www.rahaertel.com
remote control productions (Producing)	Munich	www.r-control.de
ROESSLER PR (Marketing, PR, Consulting)	Frankfurt/Main	www.roesslerpr.de
S&H Entertainment Localization (Localisation)	Germering	www.shentloc.com
Schulte Riesenkampff (Legal Consulting)	Frankfurt/Main	www.schulte-lawyers.de
Selected Minds (HR Consulting)	Groß-Gerau	www.selected-minds.de
Serious Games Conference (Trade Fair)	Hanover	www.nordmedia.de
swordfish PR (PR, Marketing)	Munich	www.swordfish-pr.de
TigerTeam Productions (Localisation, Producing, Game Design)	Hammersbach	www.tigerteam-productions.com
Trusted Events (Event and Trade Fair planning)	Unterschleißheim	www.trusted-events.de
Turtle Entertainment (eSports)	Cologne	www.turtle-entertainment.de
Visibility Communications (PR, Text)	Berlin	www.visi.bi
wazal (Gamification and Serious Games Consulting)	Berlin	www.wazagames.com
Webedia Gaming (Publishing)	Munich	www.webedia-group.de
Young Targets (HR Service Provider)	Berlin	www.young-targets.com

TECHNICAL SERVICE

Airborn Studios GmbH	Berlin	www.airborn-studios.com/
Akamai Technologies (IT Service Provider)	Garching	www.akamai.com
Augenpulver (Graphics)	Wiesbaden	www.augenpulver-design.de

Company	City	Website
Augmented Minds (Augmented Reality Consulting)	Munich	www.augmented-minds.com
BiteTheBytes (Middleware)	Fulda	www.bitethebytes.com
B.TON Medien (Audio, Music)	Starnberg	www.bton.de
Chromatrix (Mobile Gaming)	Bodelshausen	www.chromatrix.com
Codecult (3D Engine)	Bochum	www.codecult.com
Contentainer (Level Design)	Gründau	www.contentainer.de
Creature Factory (Graphics)	Bremen	www.creature-factory.com
Crytek (3D Engine)	Frankfurt/Main	www.crytek.com
DICO Deutschland (App Development, Graphics, Localisation)	Cologne	www.dico4u.com
Dutyfarm (Development and Consulting)	Berlin	www.dutyfarm.com
Dynamedion (Sound Design)	Mainz	www.dynamedion.com
Epic Games (3D Engine)	Berlin	www.epicgames.com
eurosimtec (3D Simulation)	Düsseldorf	www.eurosimtec.de
Exit Games (Network Engine)	Hamburg	www.exitgames.com
Experimental Game (Production Software)	Berlin	www.gamebook.io
Eye Rock Media (Design, Animation)	Oberhausen	www.eyerock.de
Games Quality (QA Service Provider)	Erkner	www.games-quality.com
Glare Productions (Graphics)	Herten	www.glare-productions.com
Goal Games (Online Games)	Celle	www.goal-games.de
GreenMamba-Studios (Animation)	Dülmen	www.greenmamba-studios.de
Hans HiScore (Audio)	Frankfurt/Main	www.hanshiscore.com
Havok (Physics and AI Engine)	Eningen	www.havok.com
Intulo (3D, Animation)	Hildesheim	www.intulo.de
Keuthen (Controlling Software)	Mainz	www.keuthen.net
Konsole Labs (Web Development)	Berlin	www.konsole-labs.com
Lingoona (Localisation Middleware)	Plankstadt	www.lingoona.com
metricminds (Graphics)	Frankfurt/Main	www.metricminds.com
MobileBits (Mobile Engine)	Hanover	www.mobilebits.de
morro images (Graphics)	Potsdam	www.morroiimages.com
Neviso (Tools & Middleware)	Bochum	www.neviso.com
Periscope Studio (Audio)	Hamburg	www.periscopestudio.de
Phenomatics (VR, simulations)	Leonding	www.phenomatics.com
PIXABLE STUDIOS (3D Animation)	Dresden	www.pixable.de
Polyce (Graphics)	Berlin	www.polyce.de
Polygonfabrik (Graphics)	Bremen	www.polygonfabrik.de
Project-C (HYDRA)	Nienhagen	www.project-c.eu
Quantumfrog (App, Web and Software Development)	Oldenburg	www.quantumfrog.de
Razer (Hardware)	Hamburg	www.razerzone.com
Sennheiser Electronic (Hardware)	Wedemark	www.sennheiser.com
Spinor (3D Engine)	Munich	www.spinor.com
The Light Works (Graphics)	Cologne	www.thelightworks.com
ToBringAlive (Animation, Design)	Münster	www.tobringalive.com
TON & SPOT audiodesign (Sound)	Berlin	www.ton-und-spot.de
Toneworx (Localisation & Voice Recordings)	Hamburg	www.toneworx.com
Toygardens Media (Graphics, Video)	Hanover	www.toygardens.com
Virgin Lands (Graphics, Cinematics)	Würzburg	www.virgin-lands.com
Z-Ground Illustration (Graphics)	Mainz	www.z-ground.com



The roguelike space shooter "Everspace" by Hamburg-based Indie developer **Rockfish Games** was nominated for Best Graphics, Best Game Design and Best Indie Game at the German Developer Awards 2016.

IMPRINT & CONTACTS



Bundesverband Interaktive
Unterhaltungssoftware

PUBLISHER

BIU – (German Games Industry Association)
Charlottenstraße 62, D-10117 Berlin
Phone.: +49 30 240 87 79 - 0
Fax: +49 30 240 87 79 - 11
www.biu-online.de

PROJECT IMPLEMENTATION

Computec Media GmbH
Dr.-Mack-Straße 83, D-90762 Fürth

EDITOR IN CHIEF

Dirk Gooding

PROJECT MANAGEMENT

Gregory Wintgens, Stefan Weiß

EDITORS

Felix Falk, Sebastian Weber,
Stefan Weiß, Thorsten Hamdorf

GUEST COMMENTS

Adrian Goersch, Benedikt Grindel,
Hendrik Klindworth, Jan Theysen

TRANSLATION

Bettina Wilding

LAYOUT

Albert Kraus, Hansgeorg Hafner, Judith
Mackowski, Lars Kromat, Simon Schmid

PRODUCTION

Uwe Hönig

PRINT

Mediengruppe Oberfranken
Druckereien GmbH & Co. KG
Gutenbergstrasse 1, D-96050 Bamberg
Phone: +49 951 188-601
Druckereien@mgo-druckereien.de

PHOTO CREDITS

pixabay: TreptowerAlex; alamyStock: Andriy Kravchenko; Koelnmesse:
Andreas Hagedorn, Hanne Engwald, Harald Fleissner, Helena Kristi-
ansson, Jürgen Dehniger, Majid Moussavi, Oliver Wachenfeld, Stephan
Fengler, Thomas Klerx; Dirk Mathesius; Thies Raetzke

- LEARN ABOUT THE GERMAN GAMES INDUSTRY: FACTS, NUMBERS AND TRENDS
- FIND OUT HOW TO INVEST IN THE GERMAN GAMES INDUSTRY
- HEAR FROM DEVELOPERS AND PUBLISHERS IN GERMANY
- UNDERSTAND THE GERMAN ASSOCIATIONS AND NETWORKS
- FIND YOUR PERFECT PARTNER IN THE COMPANY REGISTER

