

The German games industry 2019/20

Insights, facts
and reports



game

The German Games
Industry Association

Anno 1800, the latest instalment of the renowned strategy series, is being developed in close connection with the loyal Anno community.



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Dear Readers,

Germany is one of the most important markets for computer and video games worldwide. No European country generates higher sales with games and the associated hardware. Germany's benefits as a business location include its geographical position in the heart of Europe and its excellent infrastructure, as well as its membership in the EU and the uninhibited exchange it therefore enjoys with over half a billion people on the continent. Germany is distinguished by a very lively games industry. A wide range of companies here are strong players on the world market.

Some of these come from the browser and mobile games segment, including InnoGames, Travian Games and Wooga. In the area of PC and console games as well, German studios such as Crytek (*Hunt: Showdown*), Rockfish Games (*Everspace 2*), Deck13 (*The Surge 2*), Mimimi Productions (*Shadow Tactics*) and Yager (*The Cycle*) have achieved international success. Moreover, Germany's Ubisoft studio Blue Byte (*Anno 1800*) opened a new branch in Berlin 2018, whose team will be working on one of the French parent company's major brands. In addition, internationally successful developers such as Epic Games and id Software operate their own studio branches in Germany. Many young developers, too, are currently founding small, creative teams that are attracting attention with special titles. We expect the founding and settlement of further game developers in the coming years: 50 million euros were made available for games funding for 2019 and the subsequent years.

Some 520 companies in Germany are active in the development and marketing of games, providing jobs for over 11,000 people. Universities in many large German cities also train new talent for all major areas of the games industry. Germany also plays a special role in the esports segment: some of the world's largest tournaments, the ESL One tournaments, take place here. And the ESL itself, one of the most important organisers of esports tournaments and leagues in the world, is headquartered in Germany.

Last but not least, Germany is the home of gamescom. The biggest annual event for computer and video games in the world and the most important business platform for games in Europe, it brings together more than 370,000 people in Cologne, where as yet unreleased games can be tried out and business contacts cultivated.

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

Enjoy reading this brochure!

Sincerely, Felix Falk

Managing Director of game –
the German Games Industry
Association



Investing in the German games market

Germany is a business hotspot for foreign investors. Currently, around 80,000 foreign companies are based in Germany, employing approx. 3.7 million people. In their FDI report, the economic development agency of the Federal Republic of Germany, Germany Trade & Invest (GTAI), stated a peak value of 1,910 FDI projects in 2017. This confirms the excellent results of recent years (2016: 1,944 projects, 2015: 1,912 projects). Since 2010, foreign direct investment stocks have increased by more than 20 per cent and reached a value of more than 466 billion euros in 2015. Foreign companies that invest in the German market stem primarily from the business and financial

services sector, followed by the software and information as well as communication technology industries.

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, providing 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

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



Ten good reasons for investing in Germany

1 Leading Economy

Germany is Europe's economic engine. Investors profit from the economic performance of the world's fourth largest economy. We also offer a large domestic market and easy access to growing markets in the enlarged European Union.

2 Global Player

Germany is the world's number three exporter, neck and neck with China and the US after six years at the top spot. And with EUR 469 billion FDI, we also proved to be an investment magnet and one of the top regions for foreign investors.

3 High productivity

One of the highest productivity rates in the world, German quality, and steadily decreasing unit labor costs are the decisive factors for our competitiveness. A series of social and market reforms have further contributed to Germany's continued economic growth to make it one of Europe's most cost-effective production locations.

4 Excellent Workforce

Our world class education system ensures the highest standards. 81 percent of the German population have been trained to university entrance level or possess a recognized vocational qualification – above the OECD average of 67 percent. An investor friendly social-market economy promotes stable labor relations.

5 Innovative Power

Germany is Europe's № 1 location for research. German R&D is backed by billions of euros in annual federal funds, helping to make Germany the world's leader in innovation. It's this commitment which also makes us Europe's leading patent applicant and the leading global force in high-tech solutions.

6 First Class Infrastructure

Located at the heart of Europe, Germany is Europe's number one logistics market. A sophisticated energy and communications infrastructure and first-class transportation networks ensure on-time delivery and short roads to success.

7 Inviting Incentives

Germany provides attractive incentives to all investors. A comprehensive range of programs support the broad spectrum of business activities at all stages of the investment process. Support

8 Competitive Tax Conditions

Germany has significantly reduced its corporate tax levels. A far-reaching reform of company taxation is helping companies invest, and secure new business. The Federal Government's raft of reforms to improve the general tax framework and keep indirect labor costs down are opening doors of opportunity to ever more investors.

9 Secure Investment Framework

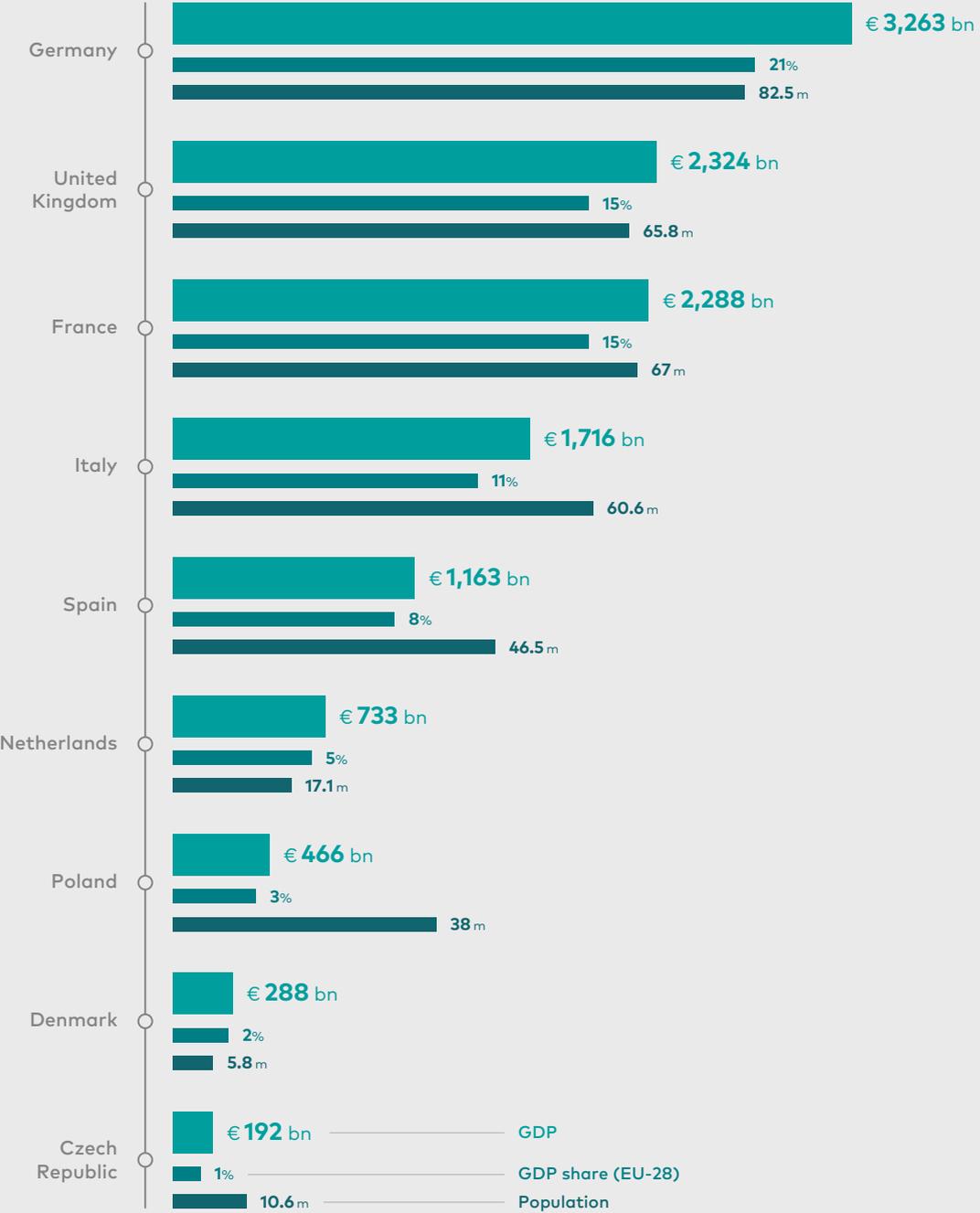
Highly developed economic and political frameworks provide the necessary security for your business investment. Our judiciary and civil service institutions are professionally regulated to ensure consistently excellent service. Contractual agreements are secure and intellectual property is strictly protected.

10 Quality of Life

Germany is a modern, tolerant, and cosmopolitan society with an excellent standard of living. Superior health and education provision, endless opportunities for sports and recreation in our beautiful landscape, and a vibrant cultural scene are just some of the reasons why more than seven million foreigners have made their homes in Germany.

Sources: Germany Trade & Invest (www.gtai.de), www.businesslocationcenter.de, Eurostat, Federal Statistical Office of Germany

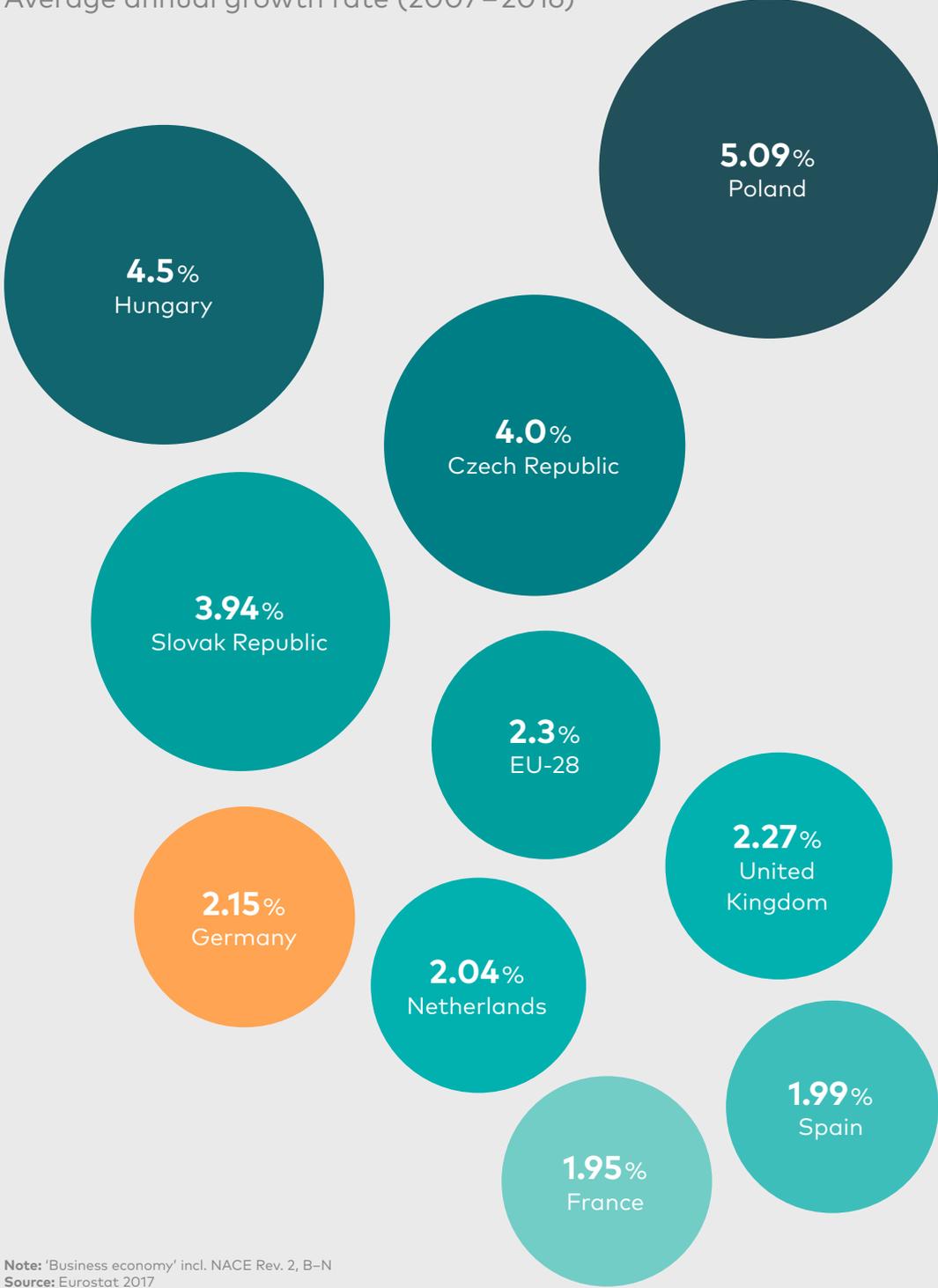
Gross domestic product and population: Germany compared to the rest of Europe



Note: Reference year 2017
Sources: Eurostat, Federal Statistical Office of Germany, U.S. Census Bureau, National Bureau of Statistics of China, Statistics Bureau of Japan 2018

Development of wage costs in the business economy

Average annual growth rate (2007–2016)



Note: 'Business economy' incl. NACE Rev. 2, B–N
Source: Eurostat 2017

German Bundestag approves games funding for coming years

Following the introduction of games funding in 2019, the Finance Committee of the German Bundestag has decided that the federal budget for 2020 and the subsequent years will also include funding in the amount of 50 million euros to promote computer game development in Germany.



Starting 2019, 250 million euros have been allocated to the federal budget for the upcoming years to promote computer game development in Germany.

For many years, game – the German Games Industry Association has been advocating the introduction of games funding at a national level, as the framework conditions for the development of computer and video games in Germany are not yet on a par with those of many of its European neighbours. Although funding programmes have been in place in individual German states for a number of years, these are not comparable with the support that game developers receive in other European countries.

In numerous discussions, game succeeded in convincing politicians across party lines of the need for better conditions for game development in Germany. This prompted the CDU, CSU and SPD to agree in their programme of government to the introduction of games funding to more strongly support computer and video game production. In late 2018, the time had finally arrived: 50 million euros for the introduction of a games funding programme was included in the federal budget for 2019. At the end of 2019, the Finance Committee of the German Bundestag decided to continue the funding in subsequent years.



'We've been making the case for introducing a games funding programme for many years now. Germany is the world's fifth-largest market for computer and video games. In the development of our own game titles, we haven't yet caught up with countries like the USA, Canada or Japan, although Germany does have the potential to do this. In numerous discussions, we were able to convince politicians across party lines that we have to tap this potential more effectively. Chancellor Angela Merkel's visit to gamescom was helpful to us in this regard, as were our parliamentary evenings, our political arena with the secretaries general at the gamescom congress and our funding concept.'

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

The ring-fencing of funding for games is a clear signal for Germany as a games location and provides important planning security for game developers. The funding is intended to reduce Germany's major competitive disadvantages in computer game development. Other countries such as France, the United Kingdom and Canada have been funding their local games industries for many years.

The games funding in Germany is to be awarded automatically and, as in the United Kingdom or France, is subject to the respective title passing a cultural test. It is a non-repayable subsidy and the funding rate should be between 25 and 50 per cent depending on the size of the project.

The Federal Ministry of Transport and Digital Infrastructure is working on the implementation of the funding programme for larger games projects. It is scheduled to start in 2020 and has to be notified by the European Commission.

Associations, networks and funding

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

Industry associations

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

Regional representations of game

The regional associations represent the games industry on a local level. By working more closely with already existing regional associations and also by founding new ones, game – the German Games Industry Association supports the regional games industry. The goal of these regional associations is to represent the interests of the games industry with direct contact partners and clear positions on a regional political level. The reason behind this is the rise of the political interest in the games industry also on a national level. Right now (as of late January 2019), these are the regional associations in Germany: game Rheinland-Palatinate, game Baden-Württemberg, game Northern Germany (regional representative of the games industry in Lower Saxony, Bremen and Mecklenburg-West Pomerania), game Hamburg, game Schleswig-Holstein and game



With a yearly budget of more than 3 million Euro, North Rhine-Westphalia is the German state that spends the most money on games funding.

Saarland. The corresponding contact partners can be found at www.game.de/games-branche-in-deutschland/regionale-strukturen. North Rhine-Westphalia, Bavaria and Hesse already have their own regional associations which do important work and with whom game will continue to work closely together. These associations are as follows: games.nrw in North Rhine-Westphalia (www.games.nrw), Games Bavaria Munich e.V. in Bavaria (www.gbm.online) and gamearea-FRM e.V. in Hesse (www.gamearea-frm.de).

Funding organisations

In Germany, there are various, mostly regional funding organisations which support game developers financially. The conditions for being granted such a financial boost by the state vary depending on the funding organisation 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 game – the German Games Industry Association, there are also regional networks which connect development studios and companies in their region, get them in touch with experts or provide them with guidance and resources. They are a good first point of contact 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.



178 companies were a member of game when the industry association was founded in 2018. In October 2019 they welcomed their 300th member.



Find more information on associations on page 64.

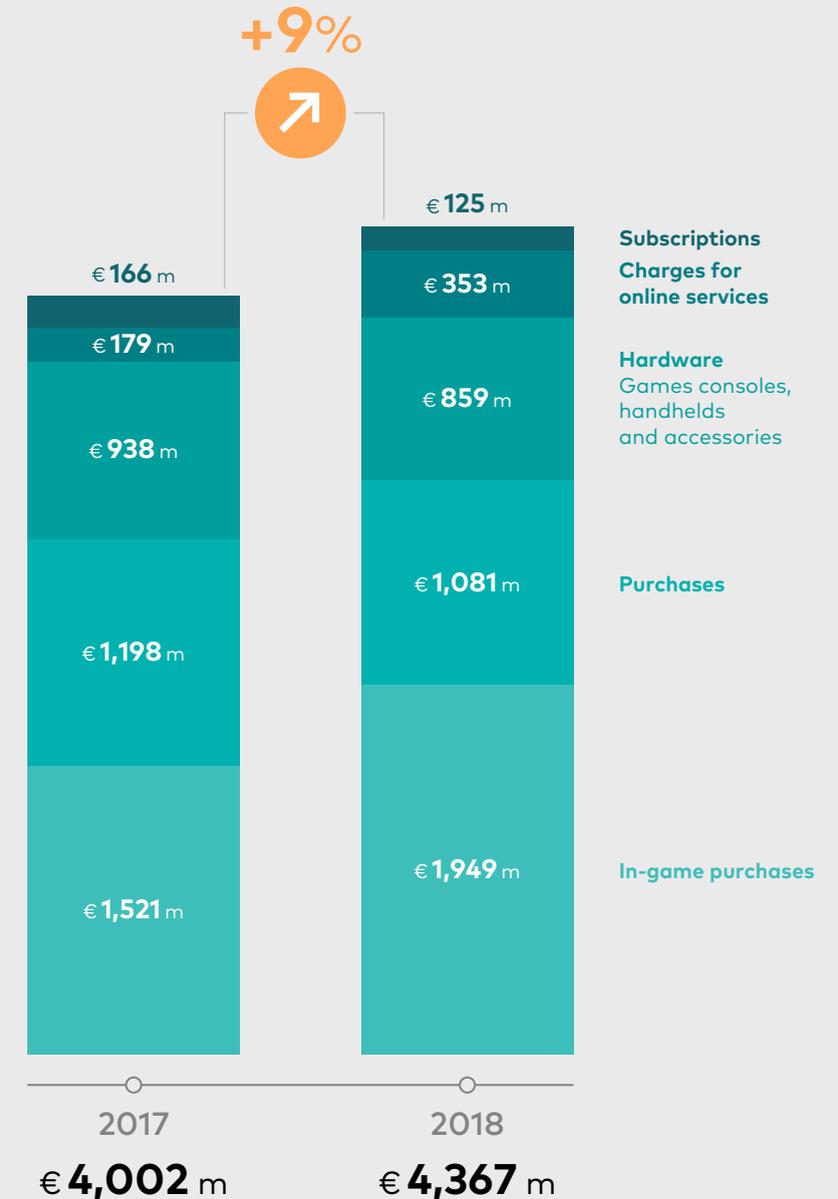
German market for digital games: facts and figures

The German games market continued its success story in 2018. In total, around 4.4 billion euros were generated with computer and video games as well as with games hardware, which is a new record! This equates to a 9 per cent growth of the games market in Germany within one year. And in all probability, this value will soon be topped again: the games market in Germany continued to grow throughout the first half of 2019. Compared to the first six months of 2018, revenues from games and games hardware rose by 11 per cent from 2.5 to 2.8 billion euros.

Market volume

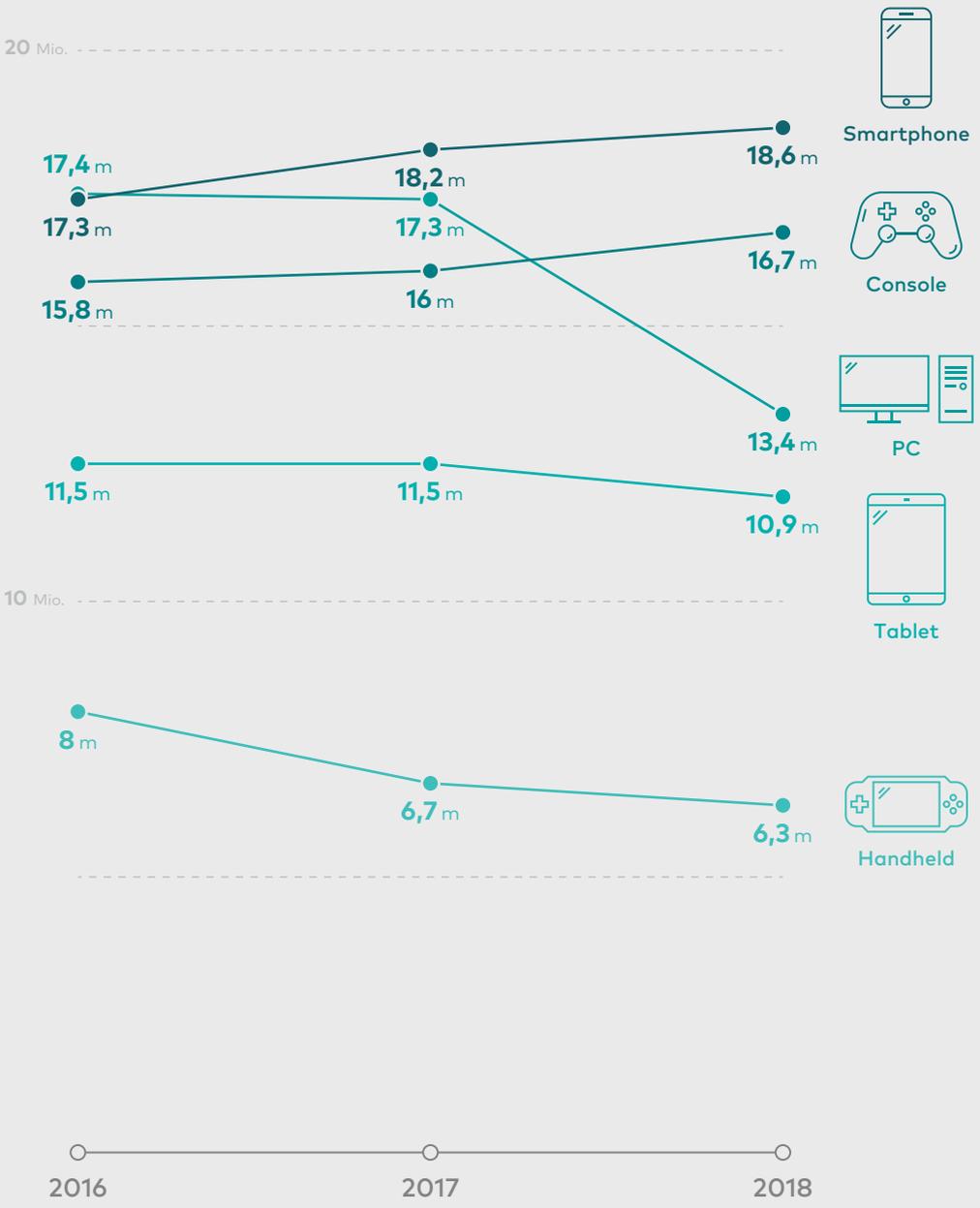
Sales of computer and video games and game hardware have already increased significantly in previous years. With this high dynamic, the games market once again underlines its special position among the cultural and media markets. In a European comparison, Germany generates the most significant turnover with computer and video games, while the German market continues to rank fifth worldwide. The individual segments of the games market in Germany developed very differently in 2018. Revenues from games hardware fell by 8 per cent to 859 million euros. This includes game consoles as well as other accessories such as gamepads. The decline follows a strong growth of 26 per cent from the previous year. At that time, new game consoles such as the Nintendo Switch and revised models such as Sony's PlayStation 4 Pro or Microsoft's Xbox One X were the main growth drivers. There were no comparable impulses in 2018. PlayStation 4 and Xbox One were released at the end of 2013, so many gamers and the games industry are already looking increasingly to the upcoming next-generation consoles, which are expected in 2020. As a result, the decline in sales of gaming hardware corresponds to the trend frequently observed towards the end of a console cycle.

The German market for computer and video games keeps growing



Source: calculations based on the GfK Consumer Panel (2017/2018; n = 25,000), GfK Entertainment, GfK POS Measurement and App Annie. © game 2019

Smartphones are Germany's most popular gaming platform



Source: calculations based on the GfK Consumer Panels (2017/2018/2019; n=25,000). © game 2019

Subscription revenues for individual games like World of Warcraft (Activision Blizzard) or Final Fantasy XIV (Square Enix) were also lower. This submarket fell by 25 per cent to 125 million euros. By contrast, the market for gaming software grew particularly strongly: sales amounted to 3.5 billion euros, 14 per cent more than in 2017. The purchase of computer and video games on storage media or as downloads is no longer the largest submarket. Sales in this segment fell to around 1.1 billion euros – a drop of 10 per cent compared with the previous year. This indicates a transition in the games market: the purchase of an individual game loses some importance, while the long-term use and thus, the corresponding supply of additional content becomes more relevant.

The strongest growth drivers in the games market are in-game and in-app purchases. Sales in this submarket grew by 28 per cent to 1.9 billion euros. Within just a few years, in-game purchases have developed from an additional business model to the largest market segment. Only one market segment has grown even faster than in-game and in-app purchases: fee-based online services. In Germany, 179 million euros were spent in 2017 on services such as PlayStation Plus, Xbox Live Gold, and Nintendo Switch Online. By 2018, the amount had already reached 353 million euros, representing a growth rate of 97 per cent.

Downloads continue to play an increasingly important role

The proportion of download purchases in 2018 fell by one percentage point from 42 to 41 per cent for the first time compared to the previous year. At the same time, the share of sales generated by games purchased via download fell by one percentage point to 28 per cent. Although the share of downloads in revenues and turnover is declining, the importance of digital distribution in the games market continues to grow. Even if gamers in Germany still frequently buy games on Blu-ray Discs or Game Cards in comparison to other countries, more and more German gamers also purchase their games and new content as downloads. But there are significant differences between the platforms: PC gamers use download portals such as Origin, Steam, and Uplay particularly frequently. So in 2018, 82 per cent of PC games sold in Germany were purchased as downloads. For PlayStation, Switch, and Xbox, on the other hand, only around a quarter of all games (23 per cent) were purchased as downloads.



In-game and in-app purchases are the strongest growth drivers in the games market.

Gaming platform prospects

34.3 million people in Germany play games; that's almost half of all Germans. Of that number, 47 per cent are women and 53 per cent men. The average age of gamers in Germany increased to over 36 in 2018. These people play on all kinds of devices. The classic computer, be it desktop PC or laptop, used to be the most popular gaming platform in Germany. Whether browser games, esports

titles or virtual reality games: the PC is a very versatile gaming platform. However, in 2017 the PC, while still going strong with 17.3 million players, was ousted from the top spot for the first time ever. The smartphone with 18.2 million players is now the most popular gaming platform in Germany. That is approximately 900,000 (+5 per cent) more than in the previous year. Thanks to these additional players, 16 million people in Germany now use games consoles like the PlayStation 4 from Sony, Switch from Nintendo and Xbox One from Microsoft – approximately 200,000 (+1 per cent) more than in the previous year. The number of tablet gamers, on the other hand, has not changed: 11.5 million people in Germany use tablets for gaming.

Strong interest in cloud gaming and subscription services

Although subscription services that give players access to a large games library for a few euros per month are relatively new, around every third German (32 per cent) is familiar with offerings of this kind. Of this group, approximately every fifth person (19 per cent) has tried out a subscription service. This equates to more than 4.2 million people throughout Germany. There is also great interest in cloud gaming, where the actual computing in the game takes place in the cloud. This enables even gamers without high-performance hardware at home to play blockbuster titles with elaborate graphics. Already, every fourth German (26 per cent) has heard of cloud gaming and knows what it means. One in three of this group – nearly 6 million people – has at least tried it out. Another 33 per cent have not yet tried cloud gaming but can imagine doing so.

The German games industry: a creative driver of innovation

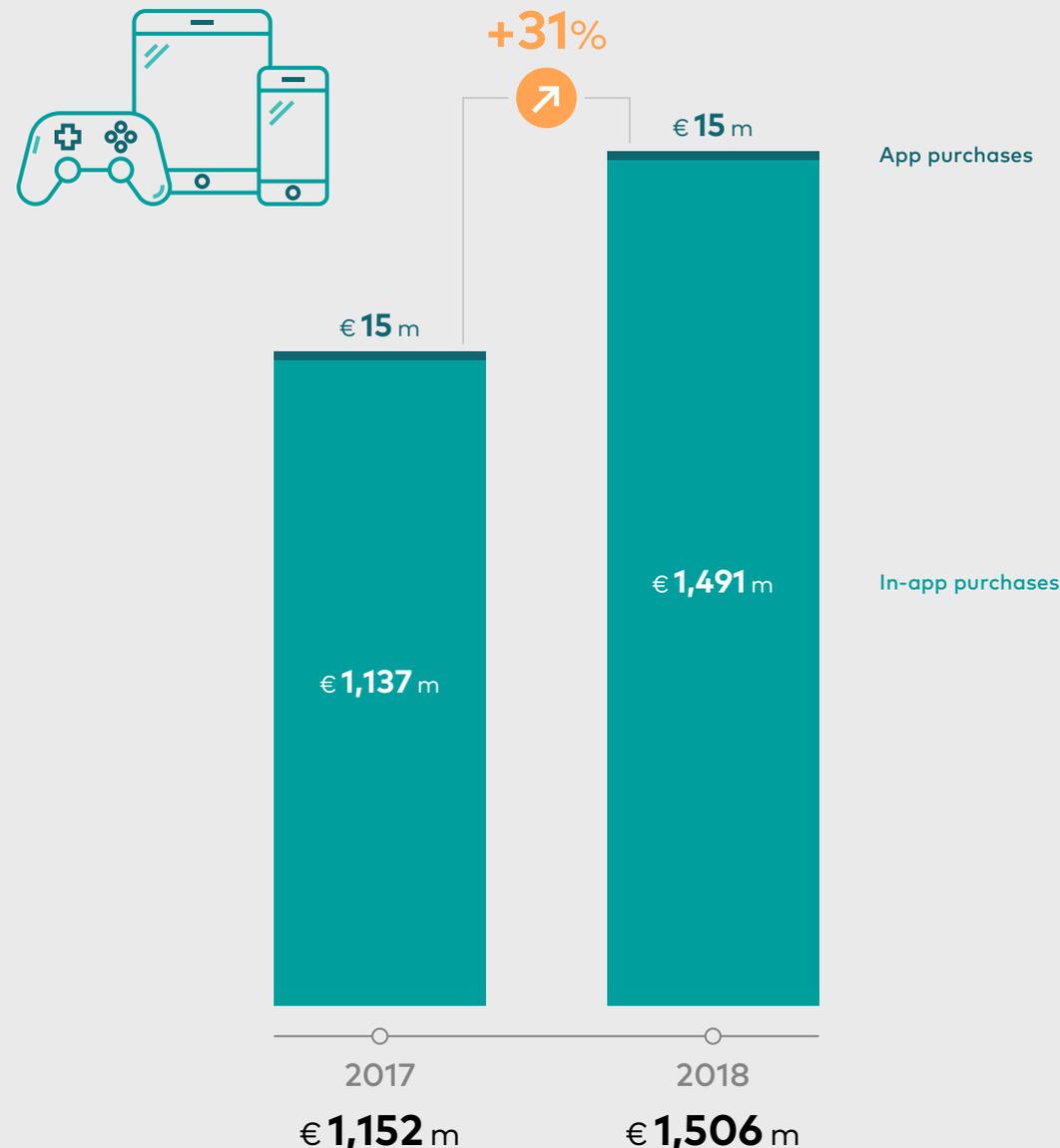
Games are no longer only an entertainment medium and cultural asset, but also an important driver of innovation for other industrial sectors and a key medium of digitalisation. Millions of Germans now see it this way as well: more than every second

German (54 per cent) agrees with the statement that new technologies of the games industry are also important for other sectors. Two thirds of Germans (66 per cent) say that the games industry is especially creative. This can also be seen in the high attractiveness of the games industry as a job market of the future. Games companies are viewed as an attractive employer by more than every second German (53 per cent), and by 66 per cent of 16- to 24-year-olds.



Two thirds of Germans consider the games industry especially creative.

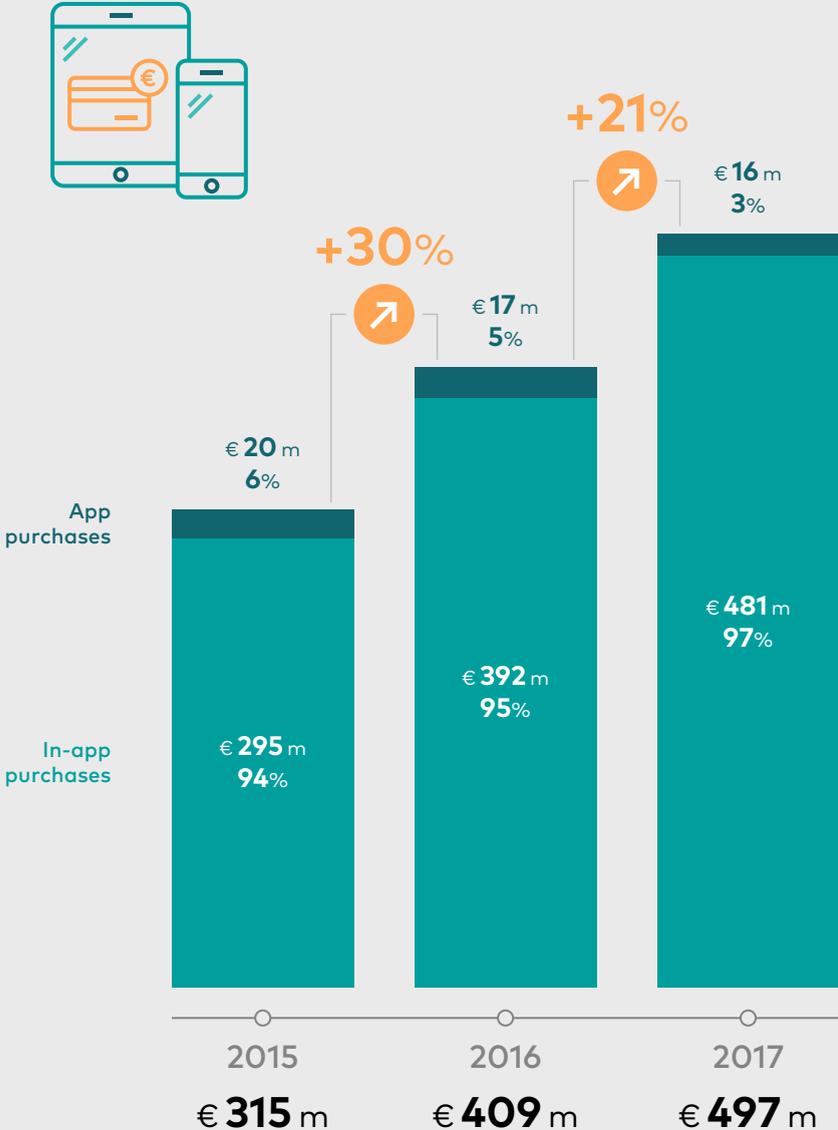
Market for game apps grows by 31 per cent in 2018



Source: App Annie. © game 2018

Game apps are still one of the biggest growth drivers

App purchases and in-app purchases (virtual goods and additional content)

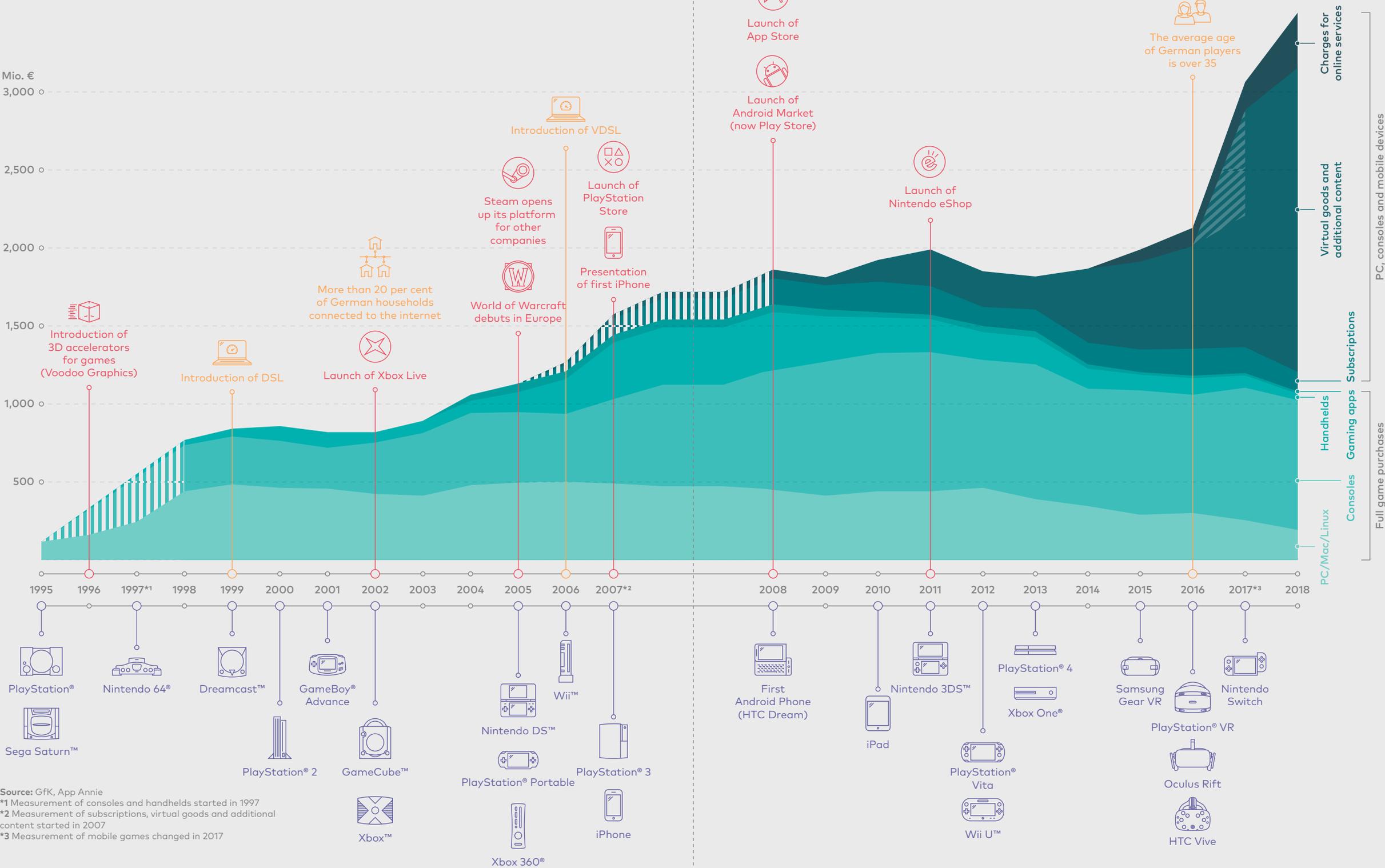


Source: GfK. © game 2018

Angry Birds Evolution was developed by Munich based developer Chimera Entertainment, who are part of remote control productions, Europe's biggest developer family.



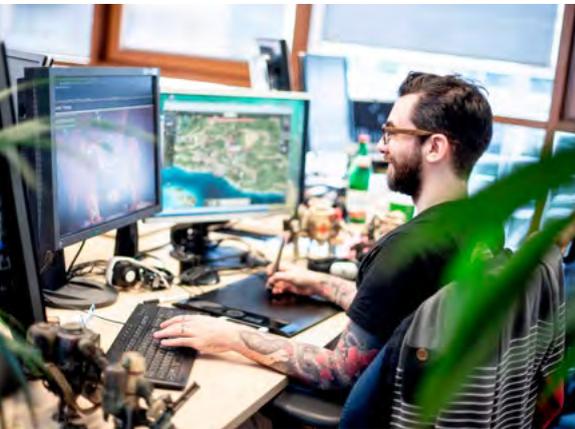
Development of the German games market since 1995



Source: GfK, App Annie
 *1 Measurement of consoles and handhelds started in 1997
 *2 Measurement of subscriptions, virtual goods and additional content started in 2007
 *3 Measurement of mobile games changed in 2017

Germany's developer landscape

The German games industry is typically focused on the big cities, with Hamburg and Berlin having become the hotspots in the last few years. Other economic centres for the games industry are Munich, the Frankfurt am Main region and the catchment area of Cologne and Düsseldorf, where most developers and publishers are based.



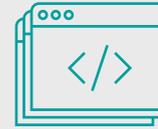
Hamburg and Berlin in detail

Today, Hamburg is home to some of the biggest gaming companies in Germany, like InnoGames (around 420 employees), Goodgame Studios (around 270 employees) or Bigpoint (around 260 employees). All three of them are specialising in free-to-play 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 emphasised by respective educational offerings at various colleges, a large number of indie studios and traditional gaming companies like Daedalic Entertainment or DeepSilver Fishlabs.

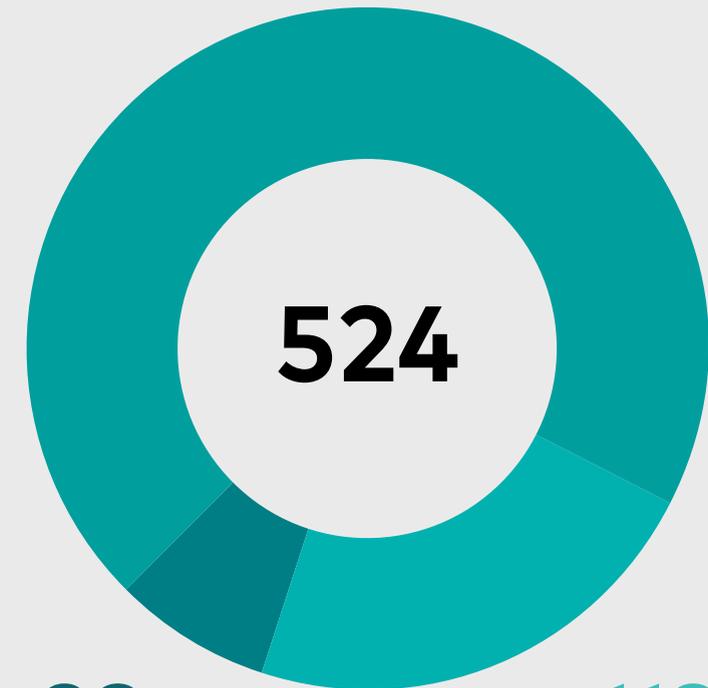
Berlin, too, has gained importance over the last few years, and has become the location of choice for big players like Wooga (around 200 employees), GameDuell (around 150 employees) or Yager (around 100 employees). Besides that, Berlin has a vibrant and prosperous indie scene, and also a number of colleges and international companies like Tencent, Gamevil, King, Epic Games or Wargaming Mobile, who have set up office in the German capital. International conferences, too, are held in Berlin on a regular basis, most notably the QUO VADIS developer conference, which is now the creative hub of Games Week Berlin.

524 companies in Germany develop and distribute games



368

companies
develop exclusively



38

companies
publish exclusively

118

companies both
publish and develop



Source: gamesmap.de, industry observations, projections. © game 2019

Employees in the German games industry in 2019

11,014

Core market
People employed by developers and publishers



16,840

Extended market
People employed by service providers, retailers, educational establishments, the media and the public sector in connection with the games industry



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, ESL Gaming and Ubisoft (in Düsseldorf). In the catchment area of Frankfurt am 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 Deck13 or Keen Games. In addition, the headquarters of Nintendo of Europe with over 800 employees is also located in Frankfurt am Main.

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

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

Studios far off the metropolitan centres

But lesser known regions far off the metropolitan areas are home to successful gaming companies as well. Mobile gaming pioneers HandyGames, e.g., have their offices in Giebelstadt near Würzburg. Publisher Kalypso Media, known for the *Tropico* series, has its headquarters in Worms, while the free-to-play experts of Flaregames reside in Karlsruhe, where Gameforge is located, too. All companies and their locations are detailed in the company register of this brochure.



Find more information in our company register on page 66.



gamesmap.de

gamesmap.de represents the online directory of the German games industry by game – the German Games Industry Association. On an interactive map, gamesmap.de contains more than 1,500 entries, including more than 500 game developers and publishers, 850 media, technical and commercial service providers and around 180 educational institutions offering degree courses related to games.

www.gamesmap.de

Source: projection based on industry observations; May 2019 (www.gamesmap.de). © game 2019

Job market situation and education opportunities

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.



Learn more about working in Germany

General information on taxes, housing, visa, etc.: www.make-it-in-germany.com

Compare costs of living: www.expatistan.com/cost-of-living

Overview of the games industry in Germany with more than 1,250 entries for developers, publishers, educational institutions and service providers: www.gamesmap.de

But these days, Germany is also an important market for the gaming industry, not only because it has the highest sales potential compared to the rest of Europe. Also, with regard to production, Germany has become an important location according to the latest figures. In 2018, there were approx. 524 companies specialising in computer and video game development and publishing. In detail, there are 368 development studios, 38 companies focused on publishing, and 118 companies acting as both developer and publisher.¹

Number of employees in Germany

These companies employ a total of 11,014 people who work directly in game development and games distribution. When looking at the industry as a whole, including specialised retail salespeople, journalists, scientists or employees of authorities and institutions linked to the gaming industry, the number even amounts to 27,854 employees.

Hamburg and Berlin in particular are regarded as the hotspots 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, Gamigo, Travian Games and Wooga, just to name a few, which were founded in Germany and have each grown to over 200 employees by now.

¹ Source: projection by game based on the industry database gamesmap.de. Effective date: July 2018



Find more information on education opportunities on page 60.

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 Düsseldorf-based Ubisoft studio Blue Byte. Also, in addition to private training facilities, colleges and universities have been offering a number of games study programmes for a few years now. The potential for innovative content and technologies originating from the gaming industry is also recognised by other industries. Whether young talent tends to be oriented towards computer science, game design, art, 3D animation or lately even virtual reality, there are more than 50 public colleges and universities (see following list) covering all aspects of game development in various study programmes specialising in games. Plus, there are some private colleges offering educational programmes for junior developers, too.

These private colleges charge tuition fees or offer scholarship programmes 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.

Gaming studios and companies



Airborn Studios *Ori and the Blind Forest*



Astragon *Farming Simulator 19*



Black Forest Games *Destroy all Humans!*

The German games industry features a large number of developers, publishers and service providers. On the following pages, we will present some of the German game companies.

Airborn Studios

LOCATION Berlin FOUNDED 2015

Airborn Studios is a Berlin-based company focused on the development and production of 2D and 3D art. Its founders have been working in the entertainment industry for over 15 years now and tap into a network of international artists. Airborn has contributed to projects such as Blizzard's *Overwatch*, Activision's *Spyro: The Reignited Trilogy*, Epic Games' *Fortnite* and Microsoft's *Halo* franchise as well as smaller productions and indie games. The team is responsible for the visual design of *Ori and the Blind Forest*, for which it has received a BAFTA award, a D.I.C.E. Award and a Game Developers Choice Award, among others.



Astragon

LOCATION Mönchengladbach FOUNDED 1998

Astragon's products meet the growing demand for high-quality simulation games. Successful game series from its portfolio such as *Farming Simulator*, *Bus Simulator* or *Euro Truck Simulator* already reach an enthusiastic audience of millions. Astragon's diverse product portfolio, however, also offers a wide variety of games for non-simulation players. Thrilling strategy games and entertaining casual games round off the range. Astragon games are available worldwide for a wide range of platforms including consoles, smartphones, tablets and PCs.



Black Forest Games

LOCATION Offenburg FOUNDED 2012

Black Forest Games is a game developer focused on PC and console games. It was founded in 2012 by five passionate industry veterans. The studio made a blazing entrance with the revival of *The Great Giana Sisters*. As the first German gaming Kickstarter project *Giana Sisters: Twisted Dreams* was quickly funded by the community and to this day remains one of the most successful German indie games. Since August 2017, Black Forest Games is part of THQ Nordic and their biggest internal development studio. They are currently working on remaking the 2005 cult classic *Destroy All Humans!* which is looking to dominate the World in 2020.



Find more information in our company register on page 66.



Crytek *Hunt: Showdown*

Crytek

LOCATION Frankfurt am Main, Kiev, Istanbul
FOUNDED 1999

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. Crytek is now one of the few pioneers to deliver AAA quality for the new medium VR, with recent titles like *The Climb* and *Robinson: The Journey*. The studio is also working on the multiplayer shooter *Hunt: Showdown*, which has been available as an early-access game on Steam.



Daedalic Entertainment *A Year of Rain*

Daedalic Entertainment

LOCATION Hamburg, Düsseldorf, Munich FOUNDED 2007

Daedalic is a developer and publisher covering all platforms. The studio offers high-quality games, ranging from Adventures to Strategy Games, Multiplayer titles and RPGs. Daedalic won 32 titles at the German Developer Awards (multiple times Studio of the Year) and has been awarded with 11 German Videogame Awards, which made Daedalic the record holder of the two most relevant awards of the German industry. Daedalic has published titles like *Shadow Tactics*, *Iratus*, *Unrained!*, *Felix the Reaper* and *Barotrauma*. In 2021 they will release *The Lord of the Rings – Gollum*, an action adventure on PC and all next gen platforms. Daedalic is known for games like *Deponia*, *Edna & Harvey*, *Blackguards* or recent releases like Ken Follett's *The Pillars of the Earth*, *The Long Journey Home* and *A Year of Rain*.



Deck13

LOCATION Frankfurt am Main FOUNDED 2001

With more than 20 completed projects since their founding, Deck13 is one of the most successful developers in Germany, making a name for itself with the role-playing game *Lords of the Fallen*. Fans like to call the game the German equivalent to *Dark Souls*. In 2019, the team released a sequel to their futuristic action game *The Surge*. Deck13 is headquartered in Frankfurt am Main. Also, since 2014, Deck13 has supported indie studios as a publisher under their label Deck13 Games, with the team overseeing areas like production, localisation, QA, marketing and PR. More than ten games have already been published by Deck13 in this setup.



Deck13 *The Surge 2*

Egosoft

LOCATION Würselen FOUNDED 1990

Egosoft, founded in 1990, is one of Germany's oldest independent game developers. Its team of industry veterans and dedicated game enthusiasts entered the international stage with the widely-acclaimed *X-Beyond the Frontier* space simulation game in 1999. Since then, EGOSOFT has been exclusively dedicated to set new standards in the space simulation genre. Their latest title, *X4: Foundations*, was released in November 2018 and marks the 20th anniversary of the game series.





FDG Entertainment
Monster Boy and the Cursed Kingdom



Flaregames
Nonstop Chuck Norris



Gameforge *Guardians of Ember*

Exit Games

LOCATION Hamburg **FOUNDED** 2003

Exit Games is the maker of the Photon engine, which is designed to facilitate the implementation of multiplayer features. The SDK is available for major game engines like Unity and Unreal Engine, but also Cocos2d, Marmalade or Scirra/Construct 2. Various cloud services, matchmaking APIs and cross-platform multiplayer are just a few of the services offered. More than 300,000 developers worldwide use Photon for their projects, including Bandai Namco, Codemasters, DeepSilver Fishlabs and Gamevil.



FDG Entertainment

LOCATION Munich **FOUNDED** 2002

FDG Entertainment was founded in 2002 to produce download games for Java-compatible mobile phones. The games have been offered on operator portals and were pre-installed on millions of Samsung colour phones worldwide. With the release of advanced smartphones like iPhone and Android devices, the company started to produce console-quality mobile games and quickly became a successful global player on the App Store and Google Play with over 100 million iOS and Android game downloads to date. FDG Entertainment teams up with the best indie developers around the world to deliver highly creative games. A big network of partners ensures best quality for each genre with greatly varying styles and gameplay mechanics. FDG Entertainment is privately funded and 100 per cent independent.



Flaregames

LOCATION Karlsruhe, Frankfurt am Main, Tampere
FOUNDED 2011

Flaregames is an award-winning mobile games publisher with a headquarter in Karlsruhe and development studios in Frankfurt am Main (Keen Flare) and Tampere (Kopla Games). Committed to working with world-class mobile game developers to create awesome free-to-play games for mobile devices, Flaregames is well known for *Zombie Gunship Survival*, *Nonstop Chuck Norris*, *Nonstop Knight* and the *Royal Revolt* series.



Gameforge

LOCATION Karlsruhe **FOUNDED** 2003

In 2002, Alexander Rösner's browser game *OGame* laid the foundation for one of the world's most successful companies in the area of free-to-play 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 in the growth both 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.





Headup Games *Trüberbrook*



Hologate VR platform



InnoGames *Forge of Empires*

Gamigo

LOCATION Hamburg, Berlin, Münster, Darmstadt, Cologne, Warsaw, Istanbul, Redwood City, Austin, Chicago, Seoul **FOUNDED** 2000

Originally founded as an online magazine for PC games, Gamigo today offers free-to-play 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 specialised in 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.



Headup Games

LOCATION Düren **FOUNDED** 2009

Headup is a hybrid games publishing and development company providing players worldwide with the best content in the independent gaming sector. Established in 2009, it is active on all major platforms such as consoles, mobile devices and PC, and was awarded as *Best Publisher* at the German Developers Awards in 2012, 2013 and 2017. With over 80 million customers served on mobile and further several million players on the PC and consoles, Headup is always looking to raise awareness and commercial success for developers thinking outside the box.



Hologate

LOCATION Munich, Los Angeles **FOUNDED** 2017

Hologate is a VR platform that enables a wide variety of games in the virtual world. The special thing about it is that these games offer the ultimate community experience for four players on an area of 25 square metres. The efficiency-trimmed dimensions of the construction allow a problem-free installation in almost every leisure location worldwide, such as cinemas, entertainment centres or shopping centres. Hologate is the world market leader for location-based VR.



InnoGames

LOCATION Hamburg **FOUNDED** 2007

InnoGames is Germany's leading developer and publisher of mobile and online games. The company based in Hamburg is best known for *Forge of Empires*, *Elvenar* and *Tribal Wars*. InnoGames' first mobile title *Warlords of Aeternum* is a fantasy turn-based strategy game. InnoGames' complete portfolio encompasses seven live games and several mobile titles in production. Born as a hobby, InnoGames today has a team of 400 employees from more than 30 nations who share the passion of creating unique games that players across the globe enjoy for years.





Jo-Mei *Sea of Solitude*



Kalypso *Railway Empire*



King Art *Iron Harvest*

InstaLOD

LOCATION Stuttgart FOUNDED 2016

InstaLOD provides everything needed for the production and automatic optimisation of 3D content. Whether taking massive CAD assemblies into a VR application or optimising AAA game scenes, InstaLOD assists you in saving costs when creating new assets or getting data ready for any business case. Each individual software feature has been carefully engineered to deliver best-in-class results at outstanding performance levels.



Jo-Mei

LOCATION Berlin FOUNDED 2009

Jo-Mei Games is an independent development studio for videogames based in Berlin. The company was founded in November 2009 and began with game development projects for clients like Ubisoft, BMW, Volkswagen, Gazprom and German Telekom. Their first video game production was an online multiplayer dungeon crawler in cooperation with browser games publisher Upjers. In July 2014 Jo-Mei got a funding package from Medienboard Berlin-Brandenburg for a prototype of a game called *Sea of Solitude*, which was published in 2019 by Electronic Arts. Currently, the studio is working on a new game called *Sands of Sorrow*.



Kalypso Media

LOCATION Worms, Gütersloh, Munich, Bracknell, Leicester FOUNDED 2006

Kalypso Media, founded in 2006, is one of the few German publishers. Apart from projects by external developers, such as *Vikings – Wolves of Midgard*, which was released in 2017, Kalypso also runs two studios of their own: Gaming Minds Studios in Gütersloh (*Railway Empire*) 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, but also for the *Dungeon Keeper* reboot, *Dungeons*. Recently Kalypso acquired the IP rights of the *Commandos* series. The focus of the company is on strategy games for PC and consoles.



King Art

LOCATION Bremen FOUNDED 2000

Founded in 2000, King Art is a veteran independent game studio from Bremen, Germany. Around 60 developers in three production teams create games for all major platforms. King Art has developed several award-winning adventure, role-playing, and turn-based strategy games as well as very successful free-to-play browser and mobile games. Their latest title, the real-time strategy game *Iron Harvest*, is one of the biggest projects currently in development in Germany. King Art usually co-publishes their own games and is known for working closely with the community. Four of their games are partially crowd funded.





Koch Media *Metro Exodus*

Koch Media

LOCATION Munich, Hamburg, Champaign, Nottingham **FOUNDED** 1994

Koch Media is a leading, global producer, distributor and marketer of digital entertainment products and accessories. The company's own publishing activities, marketing and distribution extend throughout Europe, North America and Australia under the Deep Silver label. The Koch Media group has more than 25 years of experience and has risen to become the number one publishing partner in Europe. The Koch Group also owns the development studios Deep Silver Dambuster Studios in Nottingham, UK; Deep Silver Fishlabs in Hamburg, Germany, Deep Silver Volition based in Champaign, IL, USA, Warhorse Studios based in Prague, Czech Republic and Milestone srl based in Milan, Italy.

KOCH MEDIA



Kolibri Games *Idle Miner Tycoon*

Kolibri Games

LOCATION Berlin **FOUNDED** 2016

Kolibri Games was founded in February 2016 in Karlsruhe under the name Fluffy Fairy Games. In the same year their first game was released: *Idle Miner Tycoon*. Three months after moving to Berlin, the next game, *Idle Factory Tycoon*, was already in the starting blocks. In August 2018, the dedicated team managed to crack the 50 million downloads mark for both games combined. The goal of Kolibri Games is to become the world's most player-centric game company.

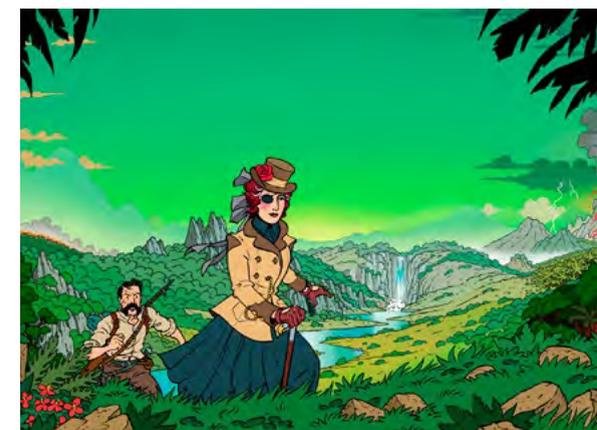


Limbic Entertainment *Tropico 6*

Limbic Entertainment Maschinen-Mensch

LOCATION Langen **FOUNDED** 2002

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 specialised in educational games like *Mein Pferdehof*, a client-based horse farm simulation which sold more than 800,000 units for PC and Game Boy Advance. Later, Limbic worked on the strategy series *Might & Magic* for Ubisoft. They are currently working on the 6th instalment of the renowned *Tropico* strategy series for publisher Kalypso, which is scheduled to be released end of March 2019.



Maschinen-Mensch *Curious Expedition 2*

LOCATION Berlin **FOUNDED** 2014

Maschinen-Mensch is an independent game studio founded by two AAA developers who left the mainstream industry to experiment with new forms of generative storytelling and create innovative games. Their debut title *Curious Expedition* (a roguelike expedition simulation set in the late 19th century) was first released in May 2015 on Steam Early Access and reached version 1.0 in September 2016, after 30 feature updates. It has sold more than 200.000 copies to date. The team, which has grown to 12 people, is currently working on *Curious Expedition 2* (to be released in 2020 on PC and consoles) and *Codecks*, a project management tool for game developers.





Mimimi Productions *Desperados III*

Mimimi Productions

LOCATION Munich FOUNDED 2011

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: City of Colors*, won a total of 15 awards. In late 2016, their strategy hit *Shadow Tactics: Blades of the Shogun* was published by Daedalic Entertainment and won a lot of national and international awards. The team has also completed a number of successful contract jobs, like the interactive children's book *Janosch: The Trip to Panama*. Currently Mimimi is working on *Desperados III* for THQ Nordic.



Rockfish Games

LOCATION Hamburg FOUNDED 2013

Rockfish Games is an independent games studio based in Hamburg, Germany which specializes in high-quality 3D action video games made in Unreal Engine 4 for PC and console. It was founded by mobile games veterans Michael Schade and Christian Lohr, who had spearheaded 3D mobile gaming for almost as founders and managers of Fishlabs Entertainment, best known for the space shooter series *Galaxy on Fire*. Their new 20-person studio is currently working on *Everspace 2*, an open-world space shooter RPG and sequel to the studio's debut title which became a surprise hit on PC and console with over one million copies sold.



Rockfish Games *Everspace 2*

TeamSpeak

LOCATION Krün, San Diego, Derby FOUNDED 1999

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 realised 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 FOUNDED 1995

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.

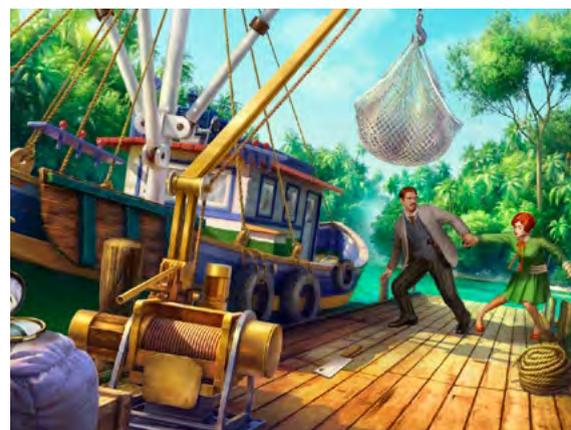




Travian Games *4Sight*



Ubisoft Blue Byte *Anno 1800*



Wooga *June's Journey*



Yager *The Cycle*

Travian Games

LOCATION Munich, Cologne, Hamburg
FOUNDED 2005

The company is specialised in free-to-play browser games whose focus is on builder and strategy game elements. Some of the most successful and popular titles by Travian Games are *Travian: Legends* and *Goalunited Legends*. The company is currently working with Estonia-based developer Shadow Masters on *4Sight*, a futuristic PVP-focused RTS game.



Ubisoft Blue Byte

LOCATION Düsseldorf, Mainz, Berlin **FOUNDED** 1988

With more than 30 years of experience, Ubisoft Blue Byte is one of the pioneers of the German games industry. At three sites in Düsseldorf, Mainz and Berlin the teams develop high-class gaming experiences. Ubisoft Düsseldorf and Ubisoft Mainz are leading the development of *Anno 1800* and *The Settlers* as well as the VR escape room *Beyond Medusa's Gate*. As co-developer the teams are supporting titles such as *Tom Clancy's Rainbow Six Siege* and *Beyond Good and Evil 2*. Ubisoft Berlin is focussing on co-development, including the *Far Cry* series. All three studios combined form the German Ubisoft studio network.



Wooga

LOCATION Berlin **FOUNDED** 2009

Wooga is specialised in free-to-play mobile games and has published a number of megahits 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 200 employees from all around the world and by now has also worked with high-profile licences like *Futurama*. Wooga serves both iOS and Android devices as well as smartwatches.



Yager

LOCATION Berlin **FOUNDED** 1999

The team of Yager published its first game of the same name in 2003, but is probably known to most gamers for their anti-war shooter *Spec Ops: The Line* from 2012, which the Berlin-based studio developed for 2K and which received widespread critical acclaim. In the meantime, Yager worked on *Dead Island 2* and the free-to-play title *Dreadnought*. The latter was released in October 2018. Right now the company's focus is on the match-based first-person shooter *The Cycle*, which is currently running in closed alpha status.



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.



Linda Kruse
Founder and CEO
The Good Evil

The location of Germany in the heart of Europe and infrastructure are optimal for development. Both for people, that come to work in Germany and to meet with other countries for co-development. Together with a strong federal game association and a developer exchange network, we are stronger than ever before. What's more, the German government recently introduced the new game funding budget. 50 million euros have been allocated to the federal budget to support both indie studios and AAA game development, starting in autumn of 2019.



Johannes Roth
Founder and CEO
Mimimi Productions

2019 could be the start signal for an internationally competitive German games industry – with funding corresponding to proposals of game – the German Games Industry Association. We must now prepare ourselves for this and strike at the right time with the right projects and the necessary investments. Our fingers are crossed!



Benedikt Grindel
Managing Director
Ubisoft Blue Byte

In the German Ubisoft studios in Düsseldorf, Mainz and Berlin we are constantly looking for talent from all around the globe to work on some of the biggest brands in the gaming industry, including our lead titles *Anno 1800* and *The Settlers*, as well as co-development projects such as *Rainbow Six Siege*, *Beyond Good & Evil 2* and *Far Cry*. With more than 400 developers and more than 30 years of experience, Ubisoft Blue Byte is the largest group of development studios in Germany. The German games industry has huge creative potential now and in the future. People who join us enjoy the stability and great social benefits in Germany as well as the warm welcome and friendliness they experience in our communities. With the upcoming national games fund, the German games industry will also finally be able to catch up on an international level in terms of government support. Studios of all sizes will benefit from this programme, and new jobs will be created for the many students in the growing game development curriculum of our universities. The time has never been better to join the German games industry. In our Ubisoft studios in Düsseldorf, Mainz and Berlin, you get the chance to work on AAA products and join the large Ubisoft network of more than 15,000 game development experts.



Julia Pfiffer
CEO
Astragon Entertainment

Germany is a country of gamers: whether you play together in front of the TV or on the go on your smartphone – you can play anywhere and anytime. As an established publisher and distributor who has accompanied the ups and downs of the German games industry for 18 years now, we at Astragon Entertainment very much welcome the current course set by the federal budget for the explicit funding of the games industry and the concrete plan to establish Germany as an attractive location for game developers. We are delighted that both new and existing teams will be given the opportunity to inspire us with innovative and forward-looking projects.

Esports in Germany

Esports is one of the fastest growing industries in the world with more than 330 million fans world wide. In Germany, more than 65 per cent of the population know what esports is or have at least heard of it. In general, Germany plays an important role in the esports world with big companies like tournament organiser ESL being based and significant leagues like Riot Games' LEC being played there.



The incredible rise of esports

Esports is quickly becoming a social mass phenomenon in Germany: about two in three Germans (65 per cent) has heard of digital sports. This amounts to roughly 45 million people. A year ago, it was only around one in two Germans (55 per cent). The biggest growth has been recorded among Germans who have heard of

esports and know what it is: within one year, the share in people who are familiar with esports has risen from 29 to 37 per cent. This represents an additional 6 million people. These impressive numbers were announced by game – the German Games Industry Association at the end of November 2018, based on the data of a representative survey by opinion research institute YouGov. According to the survey, the Olympic Games, too, could win over young audiences if digital sports was a part of the programme. At least that's what more than 28 million people in Germany think, especially among the 16- to 24-year-olds: 63 per cent believe that digital sports can help raise interest in the Olympic Games among younger audiences.

Facts about esports in Germany



Every two in three Germans have heard of esports



The positive trend continues in terms of popularity and turnover: by 2020, esports will be a global, multibillion market



Esports could help TV win back a once lost target group



More than 220 sports clubs in Germany have their own esports section



13 Million Germans have already watched at least one esports match



Germany is the most important esports market in Europe



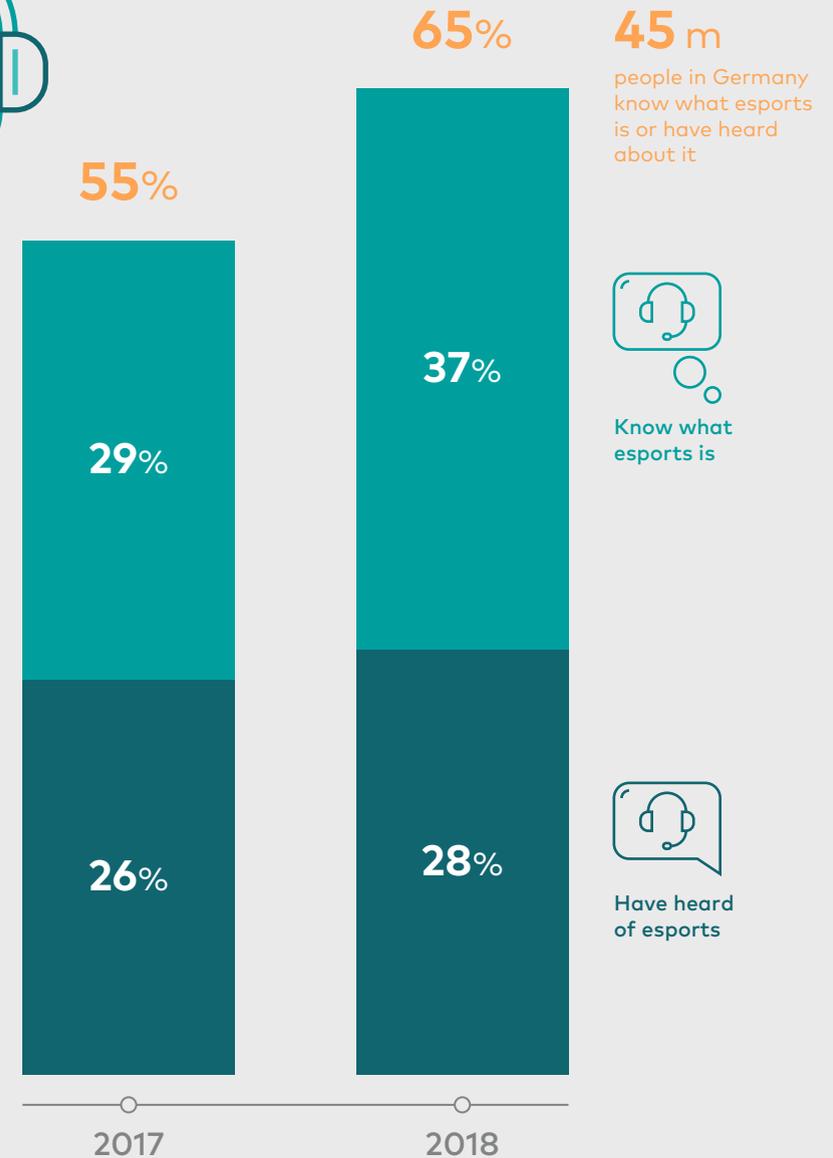
Esports is quickly becoming a social mass phenomenon in Germany.

'Esports is quickly becoming a social mass phenomenon in Germany, too – one that is well known way beyond the key target group', says Felix Falk, Managing Director of game. 'Digital sports offers great opportunities for Germany, even beyond professional esports teams and international tournaments. Already now, millions of esports amateurs practice and compete online on a daily basis. This shows once more why it's so important that

the German federal government recognises the public benefit of esports clubs. This acceptance will help esports to also find its place in important areas like club work.'

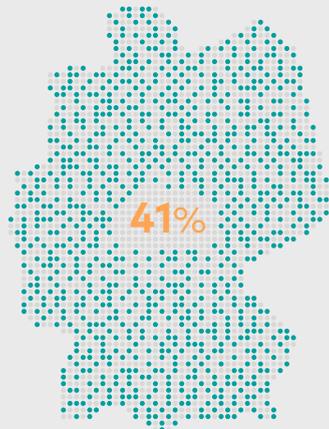
Another study on the German esports market by Deloitte and game – the German Games Industry Association also clearly shows that it is by far no longer a niche market. The success of esports is reflected not only in its popularity, but also in terms of turnover. No later than 2020, esports will be a global billion euro market with an estimated turnover of nearly 1.3 billion euros. 'For the German market we are expecting a turnover of roughly 130 million euros, which equals a 10 per cent share of the global market,' predicts Stefan Ludwig, Head of the Sports Business Group at Deloitte. Sponsoring and advertising will be the most important sources of revenue.

Awareness of esports is growing strongly



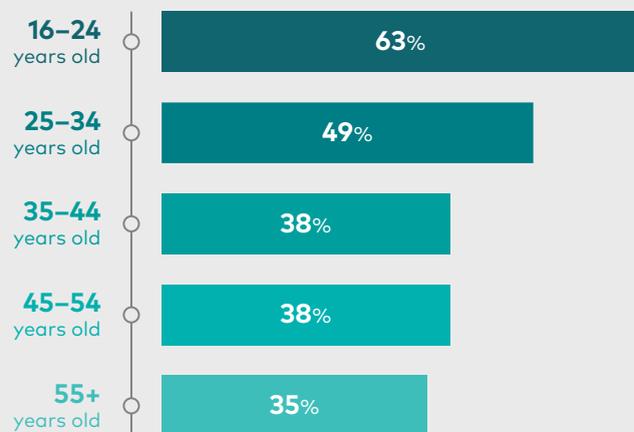
Source: representative YouGov survey (16+; n = 2.000). © game 2018

Four in ten Germans believe that esports can help the Olympic Games attract more young viewers



28.6 million

Germans believe that the Olympic Games can attract more young viewers through esports



Share of people who believe that esports can help the Olympic Games attract more young viewers

Source: representative YouGov survey (16+; n = 2.000). © game 2018



A respectable 28 per cent of consumers surveyed would like to watch esports events on TV in the future. This interest expressed in the survey shows that esports has the potential to win a significant number of viewers on linear TV—especially among a younger audience whose focus is more and more on on-demand and online formats. 'All parties involved could benefit from a stronger media presence of esports,' explains Klaus Böhm, Head of Media & Entertainment at Deloitte. 'Esports is gaining more reach and thus new audiences and sponsors. With esports, TV broadcasters can address a target group which has lately been hard to attract through traditional formats. The streaming platforms, too, gain new users when there are more viewers with esports expertise.' This can be achieved by differentiating between platforms and target groups.

Last but not least, the positive development is fuelled by the current gaming trends. In addition to ever-popular hits like *Dota 2*, *League of Legends* or *FIFA*, it's especially *Fortnite* which is currently captivating millions of esports fans across the globe. The colourful third-person shooter was released in September 2017 by Epic Games, and the hype is not only limited to the digital world: during the World Cup, several players, like France's Antoine Griezmann, celebrated their goals and victories with *Fortnite* references, like dances, in front of billions of viewers.

Just like in traditional sports, the more professional esports becomes, the more it will also develop its own system of clubs and associations. In addition to *eSport-Bund Deutschland* (ESBD) founded by teams and athletes, game is the other important association to be named, representing the interests of developers, publishers as well as esports promoters, educational institutions and service providers. Plus, it's the sponsor of gamescom, the world's biggest event for computer and video games. Both institutions are currently pursuing one particular goal: the recognition of esports as a sports and thus the acceptance of the public benefit of esports clubs and an Olympic perspective. 'Germany has a chance to play a pioneering role in esports,' says a convinced Gregory Wintgens, Senior Manager Marketing & Esports at game. 'The arrangement in the coalition agreement made by the major political parties CDU, CSU and SPD to recognise esports as an independent type of sports with its own laws for clubs and voluntary associations is a necessary step to be taken in this respect.'

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 and thus celebrated its eleventh anniversary in 2019. Koelnmesse is the organiser of the event with the German industry association game being the co-organizer. In 2019, over 373,000 people from more than 100 countries attended the event, visiting booths run by 1,153 exhibitors – ten percent more than last year.

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 the consumers. It comprises four modern exhibition halls with a total of about 218,000 square metres of floor space and both an indoor and an outdoor area. Here, gamescom attendees can try out the latest games and hardware. A new addition in 2019 is the event arena, where gamescom attendees can dive into the esports scene and experience great shows and game presentations. 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 31,300 trade professionals who attend the event. The gamescom congress is Think Tank for Digitization far beyond the games industry. More than 100 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. The conference is organised by Koelnmesse and supported by North Rhine-Westphalia's Minister for Federal Affairs, Europe and Media, game – the German Games Industry Association – and the City of Cologne. Another main pillar is the gamescom city festival which features concerts and entertainment in Cologne's city centre and always takes on a festive atmosphere for the entire duration of the event. In the fanshop arena, which extends over an entire hall, video game fans will find endless merchandise. The gamescom cosplay village offers events, fun and entertainment especially for all cosplayers.



'gamescom once again impressively continued its success story this year: on site and online. With 'gamescom: Opening Night Live', we have taken a decisive step in the direction of becoming an international platform for new products. At the same time, the show was also the starting point for our new gamescom now digital offering, with which we offered the digital community additional access to gamescom.'

Gerald Böse, CEO of Koelnmesse

New in 2019 – gamescom: Opening Night Live

gamescom: Opening Night Live is the new opening event of gamescom and is produced by Geoff Keighley, host and producer of the "The Game Awards". The event took place in the above-mentioned event arena, which accommodated more than 1,500 guests. Over 500.000 concurrent viewers tuned in to the show and during gamescom, the Opening Night Live was viewed over 50 million times. The show was also available on the new digital platform "gamescom now" which developed into a massive success with more than 100 million video hits during the fair itself. The star of "gamescom: Opening Night Live" was developer legend Hideo Kojima. In the course of the event, the jury prizes of this year's gamescom awards were also awarded.

devcom: one of the most important European developers conferences

The game developer conference devcom took place for the first time in August 2017 in Cologne. From this year on, game – the German Games Industry Association has reassigned the organization of the conference. In its third year, devcom again was a great success with lots of exciting talks, summits, workshops, and masterclasses. The top-class speaker line up 2019 included numerous legends of the industry, such as Noah Falstein and David Fox (both worked on the Indiana Jones adventures for Lucasarts) or the Japanese game design legend Ryuichi Nishizawa, developer of Wonder Boy and Monster World.

gamescom asia - on to new shores

gamescom will make its Asian debut in Singapore from October 15 to 18 in 2020. With gamescom asia, gamescom is expanding into one of the fastest-growing games markets in the world. It

will be the premier platform for Asian game developers to explore partnerships globally, and a hub for international publishers who are looking for the next big thing in games. The event with more than 30,000 expected visitors will feature a two-day industry gaming conference and a three-day trade and public exhibition, including eSports events, a showcase of emerging technologies in video games, gaming workshops, meet-and-greet sessions, cosplay theatrics and much more.

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. Furthermore, gamescom offers a family & friends area especially for the youngest visitors.



German Chancellor Angela Merkel opening gamescom 2017: 'Games are of paramount importance as cultural assets, drivers of innovation and economic factors.'



Opening Night Live had its debut at gamescom 2019 with famous video game creator Hideo Kojima (mi.) and host Geoff Keighley (ri.).

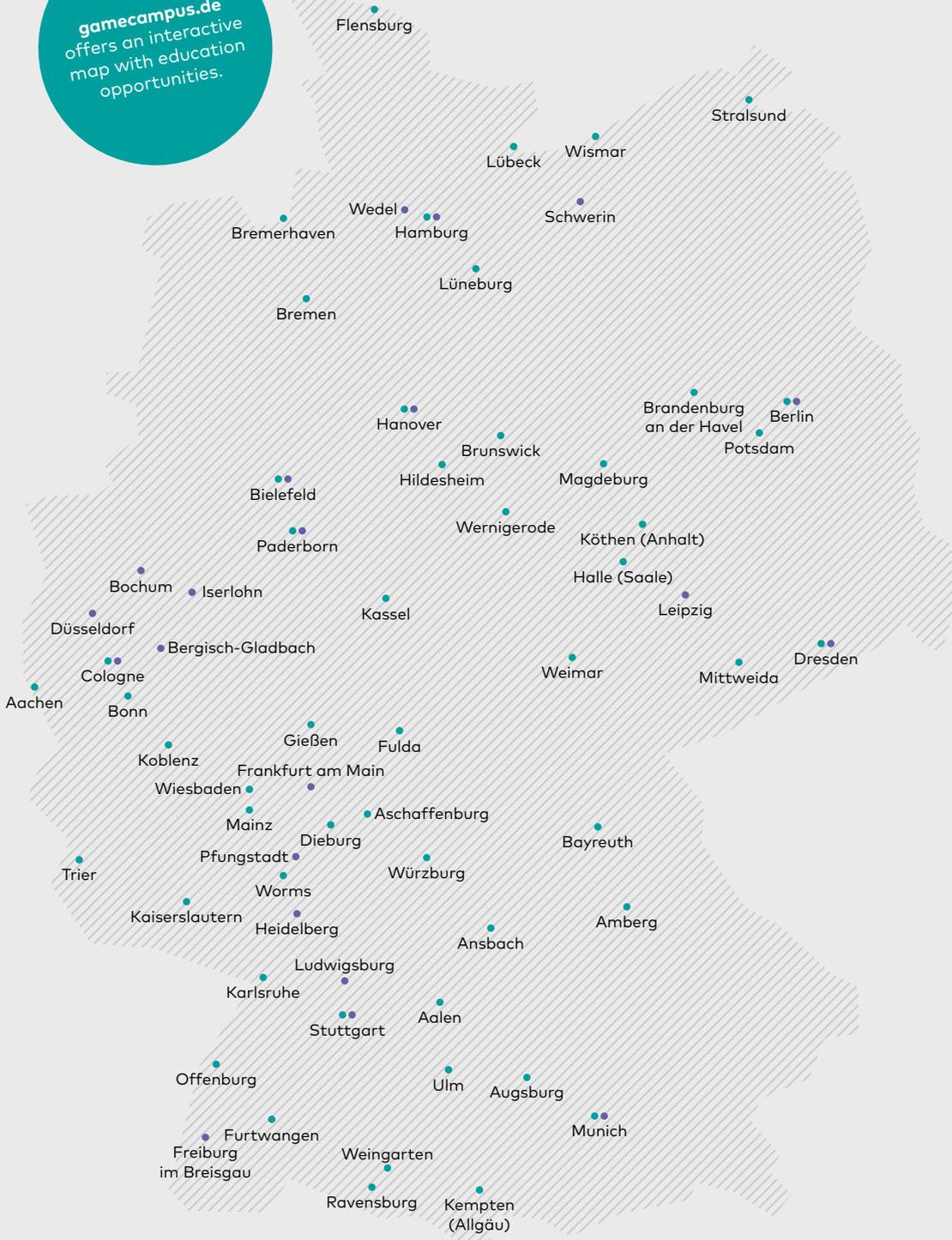


Education register

Public colleges and universities with game-related majors

Aalen University of Applied Sciences	Aalen	www.hs-aalen.de
Academy of Media Arts Cologne	Cologne	www.khm.de
Anhalt University of Applied Sciences	Köthen (Anhalt)	www.hs-anhalt.de
Ansbach University of Applied Sciences	Ansbach	www.hs-ansbach.de
Aschaffenburg University of Applied Sciences	Aschaffenburg	www.h-ab.de
Augsburg University of Applied Sciences	Augsburg	www.hs-augsburg.de
Bauhaus University Weimar	Weimar	www.uni-weimar.de
Berlin College of Further Education for Information Technology and Medical Equipment Technology	Berlin	www.oszimt.de
Berlin University of the Arts	Berlin	www.udk-berlin.de
Bielefeld University	Bielefeld	www.uni-bielefeld.de
Brandenburg University of Applied Sciences	Brandenburg an der Havel	www.th-brandenburg.de
Braunschweig University of Art	Brunswick	www.hbk-bs.de
Burg Giebichenstein University of Art and Design Halle	Halle (Saale)	www.burg-halle.de
Darmstadt University of Applied Sciences	Dieburg	www.h-da.de
DHBW Ravensburg	Friedrichshafen, Ravensburg	www.ravensburg.dhbw.de
Erich Pommer Institute	Potsdam	www.epi.media
FH Aachen University of Applied Sciences	Aachen	www.fh-aachen.de
Film University Babelsberg Konrad Wolf	Potsdam	www.filmuniversitaet.de
Flensburg University of Applied Sciences	Flensburg	www.hs-flensburg.de
Free University of Berlin	Berlin	www.fu-berlin.de
Fulda University of Applied Sciences	Fulda	www.hs-fulda.de
Furtwangen University	Furtwangen	www.hs-furtwangen.de
Hamburg University of Applied Sciences	Hamburg	www.haw-hamburg.de
Hannover University of Applied Sciences and Arts	Hannover	www.hs-hannover.de
Hannover University of Music, Drama and Media	Hannover	www.hmtm-hannover.de
Harz University of Applied Sciences	Wernigerode	www.hs-harz.de
HAWK University of Applied Sciences	Hildesheim	www.hawk.de

gamecampus.de offers an interactive map with education opportunities.



● Public colleges
● Private colleges

HFBK Hamburg	Hamburg	www.hfbk-hamburg.de
HTW Berlin University of Applied Sciences	Berlin	www.htw-berlin.de
HTW Dresden University of Applied Sciences	Dresden	www.htw-dresden.de
Humboldt University of Berlin	Berlin	www.hu-berlin.de
JMU University of Würzburg	Würzburg	www.uni-Würzburg.de
Kaiserslautern University of Applied Sciences	Kaiserslautern	www.hs-kl.de
Karlsruhe University of Arts and Design	Karlsruhe	www.hfg-karlsruhe.de
Kempten University of Applied Sciences	Kempten (Allgäu)	www.hochschule-kempten.de
Leuphana University Lüneburg	Lüneburg	www.leuphana.de
Mainz University of Applied Sciences	Mainz	www.hs-mainz.de
Mittweida University of Applied Sciences	Mittweida	www.hs-mittweida.de
Offenburg University	Offenburg	www.hs-offenburg.de
OTH Technical University of Applied Sciences	Amberg	www.oth-aw.de
Otto von Guericke University of Magdeburg	Magdeburg	www.ovgu.de
Paderborn University	Paderborn	www.uni-paderborn.de
Ravensburg-Weingarten University of Applied Sciences	Weingarten	www.hs-weingarten.de
RheinMain University of Applied Sciences	Wiesbaden	www.hs-rm.de
Stralsund University of Applied Sciences	Stralsund	www.hochschule-stralsund.de
Stuttgart Media University	Stuttgart	www.hdm-stuttgart.de
Technical University of Munich	Munich	www.tum.de
TH Koeln, Cologne Game Lab	Cologne	www.colognegamelab.de
TH Luebeck University of Applied Sciences	Lübeck	www.th-luebeck.de
TH Mittelhessen University of Applied Sciences	Gießen, Friedberg	www.thm.de
Trier University of Applied Sciences	Trier	www.hochschule-trier.de
Ulm University of Applied Sciences	Ulm	www.hs-ulm.de
University of Applied Sciences Bremerhaven	Bremerhaven	www.hs-bremerhaven.de
University of Applied Sciences Potsdam	Potsdam	www.fh-potsdam.de
University of Augsburg	Augsburg	www.informatik.uni-augsburg.de
University of Bayreuth	Bayreuth	www.uni-bayreuth.de
University of Bonn	Bonn	www.uni-bonn.de
University of Bremen	Bremen	www.uni-bremen.de
University of Kassel	Kassel	www.uni-kassel.de
University of Koblenz · Landau	Koblenz	www.uni-koblenz-landau.de
University of Performing Arts Ernst Busch	Berlin	www.hfs-berlin.de
Wismar University of Applied Sciences	Wismar	www.fiw.hs-wismar.de
Worms University of Applied Sciences	Worms	www.hs-worms.de

Private colleges with game-related majors

bib International College	Bergisch Gladbach, Bielefeld, Hanover, Paderborn	www.bib.de
BTK University of Applied Sciences Europe	Berlin, Hamburg	www.btk-fh.de
FH Dresden University of Applied Sciences	Dresden	www.fh-dresden.eu
FH Wedel University of Applied Sciences	Wedel	www.fh-wedel.de
Film Academy Baden-Wuerttemberg	Ludwigsburg	www.filmakademie.de
Games Academy	Berlin, Frankfurt am Main	www.games-academy.de
hdpk University of Applied Sciences	Berlin	www.hdpk.de
HMKW University of Applied Sciences	Berlin	www.hmkw.de
Macromedia University of Applied Sciences – Macromedia Academy – Macromedia School of Creative Arts	Berlin, Cologne, Freiburg im Breisgau, Hamburg, Munich, Stuttgart	www.macromedia.de
mAHS, media Academy – University Stuttgart	Stuttgart	www.media-hs.de
MD.H University of Media Design	Berlin, Düsseldorf, Munich	www.mediadesign.de
Mobile University of Technology (Wilhelm Buechner Hochschule)	Pfungstadt	www.wb-fernstudium.de
PIXL VISN Media Arts Academy	Cologne	www.pixlvisn.com
S4G School for Games	Berlin	www.school4games.net
SAE Institute	Berlin, Bochum, Cologne, Frankfurt am Main, Hamburg, Hanover, Leipzig, Munich, Stuttgart	www.sae.edu
School of Games	Cologne	www.schoolofgames.com
Society for Personnel Development and Education (GPB – Gesellschaft für Personalentwicklung und Bildung mbH)	Berlin	www.gpb.de
SRH University Heidelberg	Heidelberg	www.hochschule-heidelberg.de
SRH University of Communication and Design (design akademie berlin)	Berlin	www.design-akademie-berlin.de
University of Applied Art, Design and Media (Merz Akademie)	Stuttgart	www.merz-akademie.de
University of Applied Sciences Europe (UE)	Berlin, Hamburg, Iserlohn	www.ue-germany.com
University of Design (Designschule)	Leipzig, Schwerin	www.designschule.de
Vitruvius University	Leipzig	www.vitruvius-hochschule.de
WAVE Academy (WAVE AKADEMIE für Digitale Medien)	Berlin	www.wave-akademie.de

Association register

Industry associations

game – the German Games Industry Association	Berlin	www.game.de/en
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Regional funding organizations

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

Business development

Baden-Wuerttemberg 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 am Main	www.creativehubfrankfurt.de
engage-nrw	Mülheim an der Ruhr	www.engage-nrw.de
Frankfurt Economic Development	Frankfurt am Main	www.frankfurt-business.net
Gesellschaft zur Medienfoerderung Saarland – Saarland Medien mbH	Saarbrücken	www.saarland-medien.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 Thueringen mbH (LEG Thueringen)	Erfurt	www.invest-in-thuringia.de
NRW.INVEST GmbH	Düsseldorf	www.nrwinvest.com
Select Niedersachsen	Hanover	www.nds.de
SHS Strukturholding Saar GmbH	Saarbrücken	www.strukturholding.de
WFB Wirtschaftsfoerderung Bremen GmbH (Bremen Invest)	Bremen	www.wfb-bremen.de
Wirtschaftsfoerderung Sachsen GmbH (WFS)	Dresden	www.standort-sachsen.de
Wirtschaftsfoerderung und Technologietransfer Schleswig-Holstein GmbH	Kiel	www.wtsh.de
ZAB Brandenburg Economic Development Board	Potsdam	www.zab-brandenburg.de

Networks

Acagamics e.V.	Magdeburg	www.acagamics.de
bremen digitalmedia	Bremen	www.bremen-digitalmedia.de
Cologne Game Haus	Cologne	www.colognegamehaus.com
CyberForum e.V.	Karlsruhe	www.cyberforum.de
eSport-Bund Deutschland e.V. (ESBD)	Berlin	www.esportbund.de
gamearea-FRM e.V.	Frankfurt am Main	www.gamearea-frm.de
Games Bavaria Munich e.V.	Munich	www.gbm.online
games.nrw e.V.	Düsseldorf	www.games.nrw
Games/Bavaria	Munich	www.games-bavaria.com
GameUp! Software-/Gamesforum Rheinland-Pfalz	Trier	www.game-up.de
Gaming-Aid e.V.	Berlin	www.gaming-aid.de
Generator HdM Startup Center	Stuttgart	www.startupcenter-stuttgart.de
httc e.V.	Darmstadt	www.httc.de
IfGameSH (Initiative zur Foerderung der Spielebranche in Schleswig-Holstein)	Kiel	www.ifgamesh.de
Initiative Creative Gaming e. V.	Berlin	www.creative-gaming.eu
K³ Kultur- und Kreativwirtschaftsbuero Karlsruhe	Karlsruhe	www.k3-karlsruhe.de
media:net berlinbrandenburg e.V. (games.net)	Berlin	www.medianet-bb.de
Mediencluster NRW GmbH	Düsseldorf	www.medien.nrw.de
Mediengruenderzentrum NRW	Cologne	www.mediengruenderzentrum.de
Mediennetzwerk Bayern	Munich	www.mediennetzwerk-bayern.de
Netzwerk Kreativwirtschaft Baden-Württemberg	Stuttgart	https://kreativnetzwerk.mfg.de
nextMedia.Hamburg/gamecity:Hamburg	Hamburg	www.nextmedia-hamburg.de
TechBase Regensburg	Regensburg	www.techbase.de
Virtual Reality e.V. Berlin-Brandenburg	Potsdam-Babelsberg	www.virtualrealitybb.org
WERK1.Bayern GmbH	Munich	www.werk1.com

Company register

From A to Z: the names, locations and websites of publishers, developers, service providers, educational institutions and associations of the German games industry. Couldn't find the company you are looking for? Check out www.gamesmap.de for more information and an even bigger selection of companies.

development

4sdk	Freiburg im Breisgau	www.4sdk.com
5D LAB	Freiburg im Breisgau	www.5dlab.com
Acid Mines Software	Rostock	www.acidmines.de
Adrastea	Nuremberg	www.adrastea.com
Aesir Interactive	Munich	www.aesir-interactive.com
Ahoiii Entertainment	Cologne	www.ahoiii.com
Airborn Studios	Dresden	www.airborn-studios.com
Altigi	Hamburg	www.goodgamestudios.com
Animation Arts Creative	Naumburg (Saale)	www.animationarts.de
AntMe!	Grafrath	www.antme.net
Awesome Prototype	Berlin	www.awesomeprototype.com
Backwoods Entertainment	Bochum	www.backwoods-entertainment.com
Bad Monkee	Hamburg	www.badmonkee.de
B-Alive	Ummendorf	www.b-alive.de
Barrell Roll Games	Hamburg	www.barrellrollgames.com
BeamNG	Bremen	www.beamng.com
Beardshaker Games	Hamburg	www.beardshaker.com
BIGITEC	Bonn	www.bigitec.com
BIGPOINT	Hamburg	www.bigpoint.com
b-interaktive	Schwerte	www.binteraktive.com
Binary Impact	Niederelbert	www.binaryimpact.de
bildundtonfabrik btF	Köln	www.btF.de
Bit Barons c/o Wailua Games	Starnberg	www.bitbarons.com
Black Forest Games	Offenburg	www.black-forest.games.com
Black Pants Studio	Berlin	www.blackpants.de

blackHound Studios	Frankfurt am Main	www.blackhoundstudios.com
Bootcamp Bros.	Alfter	www.bootcamp-bros.com
Bootsmann Games	Berlin	www.bootsmann-games.de
Boxelware	Erlangen	www.boxelware.de
Brainseed Factory	Bonn	www.brainseed-factory.com
Bright Future	Cologne	www.brightfuture.de
Brightside Games	Berlin	www.brightside-games.com
Broken Rules Interactive Media	Vienna	www.brokenrul.es
Bronx Studios Entertainment	Düsseldorf	www.bronxstudios.com
BSS web consulting	Essen	www.bss-consulting.de
Bumblebee	Wiehl Merkausen	www.bumblebee-games.com
Buntware Games	Freiburg im Breisgau	www.buntware.com
ByteRockers	Berlin	www.byterockers.de
Bytro Labs	Hamburg	www.bytro.com
Caipirinha Games	Altenholz	www.caipirinhagames.de
Caplab	Karlsruhe	www.bcon.zone
Chasing Carrots	Stuttgart	www.chasing-carrots.com
Chimera Entertainment	Munich	www.chimera-entertainment.de
CipSoft	Regensburg	www.cipsoft.com
ColdFire Games	Karlsruhe	www.coldfiregames.com
Cooee	Kaiserslautern	www.clubcooee.com
Crazy Bunch	Hamburg	www.crazybunch.biz
creatale	Ludwigsburg	www.creatale.de
CreaTeam Software	Flensburg	www.createam.de
Crenetic	Mülheim an der Ruhr	www.crenetic-publishing.de
Crunchy Leaf Games	Berlin	www.crunchyleafgames.com
Cubidoo Entertainment	Hürth	www.cubidoo.de
Crytek	Frankfurt am Main	www.crytek.com
Cyber Arena Entertainment Group	Munich	www.c-arena.com
Daedalic Entertainment	Hamburg	www.daedalic.de
Decane	Quickborn	www.decane.net
Deck13 Interactive	Frankfurt am Main	www.deck13.de
Deep Silver Fishlabs (Koch Media)	Hamburg	www.dsfishlabs.com
Destrax Entertainment	Bielefeld	www.destrax.de
digiTales	Saarbrücken	www.digitales.games
Digitalmindsoft	Ulm	www.digitalmindsoft.eu
Dutyfarm	Berlin	www.dutyfarm.com
East Forge Entertainment	Leipzig	www.eastforge.com

eelusion	Berlin	www.eelusion.com
Egosoft	Würselen	www.egosoft.com
Elements of Art	Mönchengladbach	www.eoa.de
encurio	Cologne	www.encurio.com
Enter-Brain-Ment	Berlin	www.enter-brain-ment.com
Envision Entertainment	Ingelheim am Rhein	www.envision-entertainment.de
eos interactive	Berlin	www.eosinteractive.de
Evil Grog Games	Karlsruhe	www.evilgrog.com
exDream	Hanover	www.exdream.com
EXIT Adventures	Berlin	www.exit-vr.de
Exozet Berlin	Berlin	www.exozet.com
Experimental Game	Berlin	www.gamebook.io
extra toxic	Frankfurt am Main	www.extratoxic.com
eyefactive	Wedel	www.eyefactive.com
Fairytale Distillery	Munich	www.fairytale-distillery.com
FAKT Software	Leipzig	www.fakt-software.de
Far Away Illustration & design	Gelnhausen	www.faraway-illustration.com
FDG Entertainment	Munich	www.fdg-entertainment.com
Fivefingergames	Arnstorf	www.fivefingergames.com
flaregames	Karlsruhe	www.flaregames.com
Flying Sheep Studios	Cologne	www.flying-sheep.com
Foundry 42 Limited	Frankfurt am Main	www.cloudimperiumgames.com
Fried Bytes	Saarbrücken	www.friedbytes.de
Funatics Software	Schermbeck	www.funatics.de
funworld – S&T	Lenzing	www.funworld.com
Fusion Play (IT Sonix custom development)	Leipzig	www.fusion-play.com
GameArt Studio	Berlin	www.GameArtStudio.de
GameDuell	Berlin	www.gameduell.de
Gameforge	Karlsruhe	www.gameforge.com
Gaming Minds Studios	Gütersloh	www.gamingmindsstudios.com
Gamma Minus	Paderborn	www.gammaminus.com
Garlic Games Media	Brunswick	www.garlicgamesmedia.com
Gentle Troll Entertainment	Würzburg	www.gentletroll.com
Gentlymad Studios	Wiesbaden	www.gentlymad.org
German Railroads	Wedel	www.german-railroads.de
Goal Games	Celle	www.goal-games.de
Golden Orb	Witten	www.golden-orb.de
Goodgame Studios	Hamburg	www.goodgamestudios.com

Goodwolf	Cologne	www.goodwolf-studio.com
Grimbart Tales	Kaiserslautern	www.grimbart-tales.com
Hammer Labs	Tönisvorst	www.hammer-labs.com
HandyGames	Giebelstadt	www.handy-games.com
Happy Tuesday	Berlin	www.happy-tuesday.com
Holocafe	Düsseldorf	www.holocafe.de
HOLOGATE	Munich	www.hologate.com
id Software	Frankfurt	www.idsoftware.com
IJsfontein Interactive Media	Mönchengladbach	www.ijsfontein.nl/de
iLogos Europe	Hamburg	www.ilogos.biz
Independent Arts Software	Hamm	www.independent-arts-software.de
InnoGames	Hamburg	www.innogames.de
Instance Four	Bochum	www.instancefour.com
Island Games	Hanover	www.islandgames.de
it Matters Games	Berlin	www.itmattersgames.com
JiW-Games	Meppen	www.jiw-games.net
Jo-Mei	Berlin	www.jo-mei.com
Kaasa health	Düsseldorf	www.kaasahealth.com
Keen games	Frankfurt am Main	www.keengames.com
Kids Interactive	Erfurt	www.kids-interactive.de
King Art	Bremen	www.kingart-games.de
Kitto	Leinfelden-Echterdingen	www.kitto.app
Kolibri Games	Berlin	www.kolibrigames.com
KORION Simulation	Ludwigsburg	www.korion.de
kr3m. media	Karlsruhe	www.kr3m.com
Kritzelkratz 3000	Würzburg	www.kritzelkratz.de
kunst-stoff	Berlin	www.kunst-stoff.de
LAB132	Ostfildern	www.lab132.com
Lemonbomb Entertainment	Düsseldorf	www.lemonbomb.de
Limbic Entertainment	Langen (Hessen)	www.limbic-entertainment.de
Linkops	Münster	www.linkops.com
Looterkings	Cologne	www.looterkings.de
Lost The Game Studios	Hamburg	www.lostthegame.de
Lyrebird Game	Berlin	www.lyrebird-studio.com
Mad About Pandas	Berlin	www.madaboutpandas.de
MADE	Stuttgart	www.made-apps.com
MaDe Games GbR Neetix – Reichl	Nettetal	www.madegames.com

Maschinen-Mensch	Berlin	www.maschinen-mensch.com
Massive Miniteam	Cologne	www.massiveminiteam.com
McPeppergames	Münnerstadt	www.mcpeppergames.com
Media Seasons	Leipzig	www.mediaseasons.com
MegaDev	Munich	www.megadev.info
Megagon Industries	Berlin	www.megagonindustries.com
Meister Cody	Düsseldorf	www.meistercody.com
Mex IT	Dortmund	www.mex-solutions.com
Mimimi Productions	Munich	www.mimimi.games
Mirko Studio	Sankt Augustin	www.kubifaktorium.com
mobivention	Cologne	www.mobivention.com
Monokel	Cologne	www.monokel.de
Moonbyte Games	Neustadt an der Weinstraße	www.moonbytegames.com
Mooneye Studios	Hamburg	www.mooneyestudios.com
Navel	Ludwigsburg	www.navel.cc
NeoBird	Nuremberg	www.neobird.de
Neopoly	Bochum	www.neopoly.de
netmin games	Mainz	www.netmin.de
northworks	Hamburg	www.northworks.de
NUKKLEAR	Hanover	www.nukklear.com
Nurogames	Cologne	www.nurogames.com
Off The Beaten Track	Kiel	www.beatentrack.games
OFM Studios	Cologne	www.onlinefussballmanager.de
OLDKID Studios	Rostock	www.old-kid-studios.com
OneManOnMars	Hamburg	www.onemanonmars.com
Osmotic Studios	Hamburg	www.osmotic-studios.de
Outline development	Siegen	www.outline-development.de
Paintbucket Games	Berlin	www.paintbucket.de
Pappuga	Nuremberg	www.pappuga.com
peachy360	Saarbrücken	www.peachy360.de
Phantom 8 Studio	Berlin	www.phantom8.studio
Phobetor	Nuremberg	www.phobetor.de
Pixel Maniacs	Nuremberg	www.pixel-maniacs.com
Pixelsplit	Frankfurt am Main	www.pixelsplit.games
pixeltamer.net	Berlin	www.pixeltamer.net
Playata	Nuremberg	www.playata.com
playzo	Darmstadt	www.playzo.biz

Plazz	Erfurt	www.plazz.ag
Ploonymoon Studios	Kissing	www.ploonymoon.com
Pluto 13 (Piranha Bytes)	Essen	www.pluto13.de
Pop Rocket Labs	Hamburg	www.poprocket.com
Procontis	Dieburg	www.procontis.de
Promotion Software – Studio Potsdam	Potsdam, Tübingen	www.promotion-software.de
Pumpnickel Studio Software	Münster	www.pumpnickel-studio.com
Quantumfrog	Oldenburg	www.quantumfrog.de
Radical Fish Games	Saarbrücken	www.radicalfishgames.com
Rat King Entertainment	Halle (Saale)	www.ratking.de
Ravensburger Digital	Munich	www.ravensburger.us
Reality Solutions	Stuttgart	www.realitysolutions.de
Reality Twist	Munich	www.reality-twist.com
Realmforge Studios	Munich	www.realmforgestudios.com
remote control productions	Munich	www.r-control.de
RetroBrain	Hamburg	www.memore.de
Riot Games services	Berlin	www.riotgames.com
RockAByte	Cologne	www.rockabyte.com
ROCKFISH Games	Hamburg	www.rockfishgames.com
rokaplay	Darmstadt	www.rokapublish.de
Rubin-Games Studios	Bochum	www.rubin-games.de
rupa.software	Weißensstadt	www.rupa.software
Sandbox Interactive	Berlin	www.sandbox-interactive.com
Scorpius Forge	Ulm	www.scorpius-forge.de
Seal Media/Seal Games	Kiel	www.seal.games
Secret Item Games	Lünen	www.secret-item-games.com
Serious Brothers	Brunswick	www.imagineearth.info
Serious Games Solutions	Berlin	www.serious-games-solutions.de
Sharkbomb Studios	Karlsruhe	www.sharkbombs.com
SideQuest Studios	Mainz	www.sidequest-studios.com
SilentFuture	Wuppertal	www.silentfuture.de
Silver Seed Games	Magdeburg	www.silverseedgames.com
Six Foot Europe	Berlin	www.6ft.com
Slow Bros.	Cologne	www.slow-bros.tumblr.com
Snapjaw Games	Pulheim	www.snapjawgames.com
SOFTGAMES Mobile Entertainment services	Berlin	www.softgames.de
SOLID WHITE design digital media	Stuttgart	www.solidwhite.de
Solimedia Productions	Erfurt	www.facebook.com/solimedia.de

Sparrow Games	Berlin	www.sparrowgames.de
Springwald Software	Bochum	www.springwald.de
Storyyeller Games	Kiel	www.storyyellergames.com
Stratosphere Games	Berlin	www.stratosphere-games.com
Studio Fizbin	Ludwigsburg	www.studio-fizbin.de
Sunlight Games	Cologne	www.sunlight-games.com
symbicrowd	Stolberg (Rhld.)	www.symbicrowd.de
TG Nord	Hanover	www.tg-nord.com
the Good Evil	Cologne	www.thegoodevil.com
Thera Bytes	Munich	www.therabytes.de
Thoughtfish	Berlin	www.thoughtfish.de
THREAKS	Hamburg	www.threaks.com
Tikaro	Berlin	www.tikaro.de
Tiny Crocodile Studios	Berlin	www.tinycrocodilestudios.de
Tiny Roar	Hamburg	www.tinyroar.de
Totally Not Aliens	Bamberg	www.totallynotaliens.com
toxtronyx interactive	Chemnitz	www.toxtronyx.com
Travian Games	Munich	www.traviangames.com
Trollgames	Füssen	www.trollgames.de
Ubisoft Blue Byte	Düsseldorf	www.bluebyte.com
Ubisoft/Blue Byte	Düsseldorf	www.bluebyte.com
unikat media	Schwerin	www.unikatmedia.de
upjers	Bamberg	www.upjers.de
waza!	Berlin	www.wazagames.com
Wolpertinger Games	Munich	www.wolpertingergames.com
Wooga	Berlin	www.wooga.com
Xendex	Vienna	www.xendex.com
XYRALITY	Hamburg	www.xyrality.com
YAGER development	Berlin	www.yager.de
YEPS!	Cologne	www.yeps.de
Zeitland media & games	Ludwigsburg	www.zeitland.com
Z-Software	Dortmund	www.z-software.net

Publishing and distribution

2tainment	Magdeburg	www.2tainment.com
505 Games	Burglengenfeld	www.505games.com
ACTIVISION Blizzard Deutschland	Ismaning	www.activision.com

ad2games	Berlin	www.ad2games.com
Aeria Games Europe	Berlin	www.aeriagames.com
Aerosoft	Büren	www.aerosoft.de
ak tronic Software & services	Saerbeck	www.aktronic.de
Application Systems Heidelberg	Heidelberg	www.application-systems.de
AppLift	Berlin	www.applift.com
ASSEMBLE Entertainment	Wiesbaden	www.assemble-entertainment.com
astragon Software	Mönchengladbach	www.astragon.de
Bandai Namco Entertainment Germany	Frankfurt am Main	www.bandainamcoent.de
bhv Publishing	Bad Münstereifel	www.bhv.de
Bigpoint	Hamburg	www.bigpoint.net
bitComposer Interactive	Eschborn	www.bit-composer.com
Capcom Entertainment Germany	Hamburg	www.capcom-germany.de
CAPCY Europe	Berlin	www.capcy.de
Covus Crobo	Berlin	www.crobo.com
Crimson Cow	Hamburg	www.crimsoncow.de
Crytek	Frankfurt am Main	www.crytek.com
Daedalic Entertainment	Hamburg	www.daedalic.com
DaRa Innovations	Ludwigswinkel	www.darainnovations.de
Deck13 Interactive	Frankfurt am Main	www.deck13.de
Deutsche Telekom	Bonn	magenta-gaming.telekom-dienste.de
dreamfab	Regensburg	www.dreamfab.com
Electronic Arts	Cologne	www.ea.com
European Games Group	Munich	www.gamesgroup.eu
EuroVideo Medien	Grünwald	www.eurovideo.de
Facebook	Hamburg	www.facebook.com
flashpoint	Hamburg	www.flashpoint.de
GameDuell	Berlin	www.gameduell.de
Gameforge	Karlsruhe	www.gameforge.com
Gameloft	Berlin	www.gameloft.de
Games In Flames	Munich	www.gamesinflames.com
gamigo	Hamburg	www.gamigo.com
Halycon Media	Reinfeld (Holstein)	www.halycon.de
Headup Games	Düren	www.headupgames.com
HitFox Group	Berlin	www.hitfoxgroup.com
IME – Interactive Media & Entertainment	Hamburg	www.ime.de

InnoGames	Hamburg	www.innogames.de
Intellivision Entertainment Europe	Nürnberg	www.intellivisionentertainment.com
Kalypso Media Group	Worms	www.kalypsomedia.com
King	Berlin	www.king.com
Koch Media	Planegg	www.kochmedia.de
Konami Digital Entertainment B.V.	Eschborn	www.konami.com
Lite Games	Hamburg	www.lite.games
McGame.com	Halle (Saale)	www.mcgame.com
mediaTest digital	Hanover	www.mediatest-digital.com
MEDION	Essen	www.medion.com
Metaboli SA	Paris	www.metaboli.de
Microsoft Deutschland	Munich	www.microsoft.com
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morphicon media	Munich	www.mamorgames.com
NBG	Burglengenfeld	www.nbg-online.de
Nintendo of Europe	Frankfurt am Main	www.nintendo.de
Playa Games	Hamburg	www.playa-games.com
Ravensburger Digital	Munich	www.ravensburger-digital.com
Reality Twist	Munich	www.reality-twist.com
rokapublish	Darmstadt	www.rokapublish.de
Rumble Media	Karlsruhe	www.rumblemedia.de
S.A.D.	Neu-Ulm	www.s-a-d.de
Serious Brothers	Brunswick	www.imagineearth.info
SERU	Nortorf	www.seru.de
Simplaex	Berlin	www.simplaex.com
Smilegate Games	Berlin	www.smilegate-global.com
Sony Interactive Entertainment	Neu-Isenburg	www.playstation.de
Square Enix	Hamburg	www.eu.square-enix.com
Take-Two Interactive	Munich	www.take2.de
Tencent Games	Berlin	www.tencent.com
Tivola Publishing	Hamburg	www.tivola-mobile.de
Travian Games	Munich	www.traviangames.com
Ubisoft	Düsseldorf	www.ubisoft.com
United Soft Media Verlag	Munich	www.usm.de
upjers	Bamberg	www.upjers.com
Valve	Hamburg	www.valvesoftware.com
Wargaming Europe	Berlin	www.wargaming.com

Warner Bros. Entertainment	Hamburg	www.warnerbros.de
YEPS!	Cologne	www.yeps.de
ZeniMax Germany	Frankfurt am Main	www.zenimax.com

Business services

2nd Wave (Marketing)	Berlin	www.2ndwave.rocks
4-Real Intermedia (Localisation)	Offenbach	www.4-real.de
A MAZE. (Events)	Berlin	www.amaze-berlin.de
Absolute Software GmbH (IT services)	Hamburg	www.absolute.de
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adspreemedia (Marketing)	Berlin	www.adspreemedia.com
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Beiten Burkhardt Rechtsanwältsogellschaft (Legal services)	Frankfurt am Main	www.beiten-burkhardt.com
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Drunken Rabbit Gaming Communication (Marketing)	Cologne	www.drunken-rabbit.com
eco – Verband der Internetwirtschaft e.V. (Industry association)	Cologne	www.eco.de
Effective Media (Localisation)	Bochum	www.effective-media.de
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Esports Business Solutions (Marketing)	Berlin	www.esportsobserver.com
Frankfurter Buchmesse (Book fair)	Frankfurt am Main	www.book-fair.de
Freaks 4U Gaming (Marketing)	Berlin	www.freaks4u.de
Friedmann Kommunikation (Public relations/IT services)	Cologne	www.friedmann-kommunikation.de
Gaertner PR (Public relations)	Grafring bei München	www.gaertner-pr.de
GALLAFILZ GmbH/The esports Company (Marketing)	Munich	www.esports.company
Game Art Brain (Consulting)	Berlin	www.gameartbrain.com
Game Farm (Consulting)	Berlin	www.game-farm.de
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Games Quality (IT services)	Erkner	www.games-quality.com
gamescom (Events)	Cologne	www.gamescom.de
GamesWirtschaft (Media company)	Zirndorf	www.gameswirtschaft.de
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Ganz & Stock (Consulting)	Büdingen	www.ganz-stock.de
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GRAEF Rechtsanwaelte Berlin/Hamburg (Legal services)	Berlin	www.graef.de
GZM Cosplay Management (Consulting)	Kürten	www.gzm-cm.de
HoneyTracks (Game analytics)	Munich	www.honeytracks.com
IEM Consulting (Business development)	Rödermark	www.iem-consulting.com
IHDE & Partner (Legal services)	Berlin	www.ihde.de

INPROMO (Marketing)	Hamburg	www.inpromo.de
International Games Magazine – IGM (Media company)	Oldenburg	www.igmonline.de
iVentureGroup (Business development)	Hamburg	www.iventuregroup.com
Joindots (Business development)	Krefeld	www.joindots.de
keySquare Communications (Public relations)	Berlin	www.visi.bi
Koelnmesse (Events)	Cologne	www.koelnmesse.de
LaterPay (IT services)	Munich	www.laterpay.net
loots/fishwoodco (Marketing)	Berlin	www.loots.com
M.I.T. – Media Info Transfer (IT services)	Hamburg	www.mediainfotransfer.de
Marchsreiter Communications (Public relations)	Munich	www.marchsreiter.com
Markt + Technik Verlag (Media company)	Burgthann	www.mut.de
maxupport GmbH (IT services)	Gütersloh	www.maxupport.com
Mediakraft Networks (Marketing)	Cologne	www.mediakraft.de
Medienachse (Business development)	Munich	www.medienachse.de
Messe Husum & Congress (Events)	Husum	www.messehusum.de
MOTHERSHIP – free-to-play Agency (IT services)	Cologne	www.mothersh1p.de
MOTION AREA (IT services)	Wiesbaden	www.motionarea.de
MSM Communications (Public relations/IT services)	Hamburg	www.msm.digital
Nesemann & Grambeck Steuerberatungsgesellschaft (Consulting)	Norderstedt	www.umsatz-steuer-beratung.de
Nimrod Rechtsanwaelte (Legal services)	Berlin	www.nimrod-rechtsanwaelte.de
OVH (IT services)	Köln	www.ovhcloud.de
Osborne Clarke Rechtsanwälte Steuerberater Partnerschaft (Legal services)	Cologne	www.osborneclarke.com
Partnertrans (Localisation)	Voerde	www.partnertrans.com
paysafecard.com Deutschland (IT services)	Düsseldorf	www.paysafecard.com
planetlan (IT services/events)	Bochum	www.planetlan.de
Poppe Rechtsanwaelte (Legal services)	Pinneberg	www.kanzlei-poppe.de
Quinke Networks (Marketing/public relations)	Hamburg	www.quinke.com
rain productions (Marketing)	Cologne	www.rain-productions.de
Ratgeberspiel (Media company/events)	Magdeburg	www.ratgeberspiel.de
Rechtsanwalt Marian Haertel (Legal services)	Berlin	www.rahaertel.com
remote control productions (Producing)	Munich	www.r-control.de
Rocket Beans Entertainment (Media company)	Hamburg	www.rocketbeans.de
ROESSLER PR (Marketing/public relations)	Frankfurt am Main	www.roesslerpr.de
Schulte Riesenkampff (Legal services)	Frankfurt am Main	www.schulte-lawyers.de
Selected Minds (Consulting)	Groß-Gerau	www.selected-minds.de
Serious Games Conference (Events)	Hanover	www.nordmedia.de

Sputnic Consulting (Consulting)	Munich	www.sputnic.consulting
STOMT (IT services)	Potsdam	www.stomt.com
Super Crowd Entertainment (Events)	Hamburg	www.indiearenabooth.de
Susan Tackenberg Media & Communications Consultant (Consulting)	Frankfurt am Main	www.stmedia-consultant.com
swordfish PR (Marketing/public relations)	Munich	www.swordfish-pr.de
Taylor Wessing Deutschland (Legal services)	Düsseldorf	www.taylorwessing.com
TCI Rechtsanwälte Partnerschaft Schmidt (Legal services)	Mainz	www.tcilaw.de
TigerTeam Productions (Consulting)	Hagenbach	www.tigerteam-productions.com
ToLL Relations (Public relations)	Frankfurt am Main	www.toll-r.com
Trusted Events (Events)	Unterschleißheim	www.trusted-events.de
Two Pi Team (IT services)	Hilden	www.two-pi-team.de
Vogel & Partner Rechtsanwälte (Legal services)	Karlsruhe	www.vogel-partner.eu
Webedia Gaming (Media company)	Berlin	www.webedia-group.de
well played bars (Events)	Cologne	www.meltdown.bar/cologne
Yantami (IT services)	Berlin	www.yantami.de

Technical services

3Dgrafix Animation Studio (Graphic design)	Cologne	www.3dgrafix.de
Akamai Technologies (IT services)	Garching bei München	www.akamai.com
articy Software/Neviso (Tools/middleware)	Bochum	www.nevigo.com
Augenpulver (Graphic design)	Wiesbaden	www.augenpulver-design.de
Augmented Minds, Ambrus & Lonau (IT services)	Munich	www.augmented-minds.com
B.TON Medien (Sound design)	Starnberg	www.bton.de
BiteTheBytes (Tools/middleware)	Fulda	www.bitethebytes.net
Creature Factory (Graphic design)	Bremen	www.creature-factory.com
Crytek (Game engines)	Frankfurt am Main	www.crytek.com
DICO Deutschland (Localisation/IT services)	Cologne	www.dico4u.com
Dutyfarm (IT Service)	Berlin	www.dutyfarm.com
Dynamedion (Sound design)	Mainz	www.dynamedion.com
encurio (IT services)	Cologne	www.encurio.com
eurosimtec (IT services)	Düsseldorf	www.eurosimtec.de
Exit Games (Tools/middleware)	Hamburg	www.exitgames.com
Games Quality (Software QA)	Erkner	www.games-quality.com
Glare Productions (IT services)	Herten	www.glare-productions.com
GreenMamba-Studios (Graphic design)	Dülmen	www.greenmamba-studios.de
Hans HiScore (Sound design)	Frankfurt	www.hanshiscore.com

Havok (Game engines)	Eningen unter Achalm	www.havok.com
Intulo (Graphic design)	Hildesheim	www.intulo.de
Keuthen (IT services)	Mainz	www.keuthen.net
Konsole Labs (IT services)	Berlin	www.konsole-labs.com
Lingoona (Localisation)	Plankstadt	www.lingoona.com
Master Solution AG (IT services)	Plauen	www.mastersolution.ag
metricminds (Graphic design)	Frankfurt am Main	www.metricminds.com
MobileBits (Game engines)	Hanover	www.mobilebits.de
morro images (Graphic design)	Potsdam	www.morroimages.com
Nitrado (IT services)	Karlsruhe	www.nitrado.net
NVIDIA (Hardware)	Würselen	www.nvidia.de
Only Sound (Sound design)	Berlin	www.onlysound.de
Pangolin Park (Sound Design)	Berlin	www.pangolinpark.com
Periscope Studio (Sound design)	Hamburg	www.periscopestudio.de
Phénix Noir Productions/ Patrick Nevian (Sound design)	Oberhausen	www.phenix-noir.de
Polygonfabrik (Graphic design)	Bremen	www.polygonfabrik.de
Priori Data (IT services)	Berlin	www.prioridata.com
Razer (Hardware)	Hamburg	www.razerzone.com
Sennheiser Communications A/S (Hardware)	Wedemark	www.sennheiser.de
Spinor (Game engines)	Munich	www.spinor.com
syndrone (Sound design)	Berlin	www.syndrone.de
TeamSpeak Systems (Tools/middleware)	Krün	www.teamspeak.com
The Light Works (Graphic design)	Cologne	www.thelightworks.com
ToBringAlive (Graphic design)	Münster	www.tobringalive.com
TON & SPOT (Sound design)	Berlin	www.ton-und-spot.de
toneworx (IT services)	Hamburg	www.toneworx.com
Toygardens Media (Graphic design)	Hanover	www.toygardens.com
Twitch Interactive Germany (IT services)	Munich	www.twitch.tv
Virgin Lands (Graphic design)	Würzburg	www.virgin-lands.com
Virtual Reality e.V. Berlin Brandenburg (IT services)	Potsdam	www.virtualrealitybb.org
zeuz (IT Services)	Munich	www.zeuz.io
Z-Ground Illustration (Graphic design)	Mainz	www.z-ground.com

Public Sector

Stiftung Digitale Spielekultur	Berlin	www.stiftung-digitale-spielekultur.de
USK	Berlin	www.usk.de

Freelancers – business services

Ahmet Iscituerk (Editorial services)	Nuremberg	www.texteatme.com
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Wolfgang Walk (Consulting)	Karlsruhe	www.grumpyoldmen.de

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Jan Haak (Sound design)	Herzogenrath	www.jan-haak.com
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Marie Havemann (Sound design)	Berlin	www.viciousonic.com
Max Schulz (Graphic design)	Hamburg	www.xoco1.com
Olaf Bartsch (Sound design)	Berlin	www.olafbartsch.com

Desperados III is a modern real-time tactics game, developed by Munich based developer Mimimi Productions and published by THQ Nordic.

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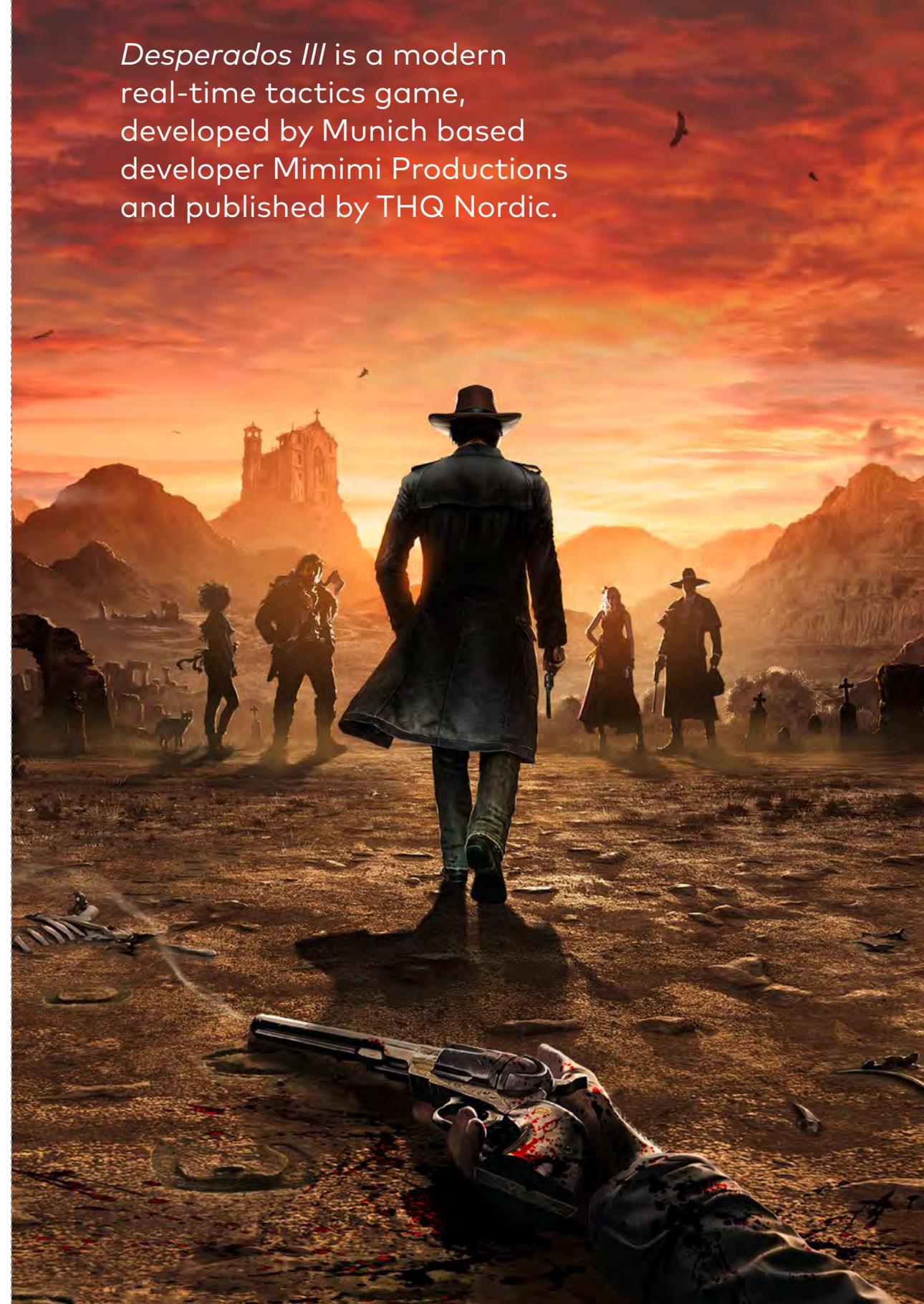
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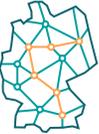
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