

23.3.2020
EGDF memos

National and joint responses on the COVID19 outbreak

At the moment, the biggest fear for European game developer studios is that they will go down, not tomorrow, but on the day after tomorrow. We will be losing some companies and they need our support. However, a crisis is always also an opportunity. EGDF focuses on sharing information, helping rebuilding routes to access funding and showing that there is a day after day after tomorrow.

1. The current situation in different countries

- **Belgium:**
 - **How FLEGA has supported the local industry community**
 - FLEGA has shared two blog posts about COVID19 and Belgian games industry
 - **Gamescom**
 - Belgian game developer associations are interested in going forward with Belgian booth in Gamescom.
 - **For more information, please visit:**
 - <https://www.flega.be/coronavirus-and-the-belgiangamesindustry/>
 - <https://www.flega.be/games-can-beat-covid-19-but-we-need-your-help/>
- **Denmark:**
 - **The impact of the outbreak on the Danish games industry**
 - The main concern of the Danish industry is the long term deal flow of the companies. Nobody knows when this situation is going to end and deals take months to set up.
 - **How PRO-F is supporting the local industry**
 - There is a number of initiatives from the government to support the local economy and PRO-F is following them closely.

- Pro-F is going to organise an online event on the 22nd April and is happy to share the best practices with other associations.
 - Pro-F agrees that it is clear that matchmaking support is needed from associations to help the deal flow between game developer studios and investors and publishers.
 - **For more information, please visit:**
 - <https://pro-f.dk/nyheder/hjaelpepakke-til-erhvervslivet-i-forbindelse-med-covid19>
 - <https://pro-f.dk/nyheder/anbefaling-i-forbindelse-med-coronavirus>
- **Finland:**
 - **The impact of the outbreak on the Finnish games industry**
 - Finland is in the same situation as other countries: all working remotely and events are cancelled.
 - 2008/2009 was the only point of time in the history of Finnish industry when the industry stagnated. Neogames predicts that we are likely to see something like this in 2021 or 2022 on the European level
 - Small studios are struggling, Neogames estimates that Finland is going to lose 10-15 of studios because of the crisis.
 - The bigger studios are in good shape, but they are struggling to keep games as service running when people are sick or otherwise hindered to work, thus a resource pool would be helpful.
 - **How Neogames is supporting the local industry**
 - Neogames is collecting information for game developers about government funding.
 - **Gamescom**
 - Normally Neogames has started the execution phase of PlayFinland booth in June.
 - **For more information, please visit:**
 - <http://www.neogames.fi/the-finnish-government-launches-a-5-billion-euro-emergency-support-package-for-finnish-companies-struggling-with-covid19-outbreak/>
- **France**
 - **The impact of the outbreak on the Finnish games industry**
 - The most urgent matter is that companies are not able to pitch their projects. Investment is frozen. Publishers are following old leads remotely. Bigger the publisher, more difficult it will be to work remotely. Small might be able to jump in. Of course, publishers are going to join online events, but nothing can replace face-to-face meetings.
 - **How SNJV is supporting the local industry**

- The government will hopefully pay some of the costs of keeping people home. There will be some production losses. There has been lots of promises for immediate action, but let's see what is going to happen.
 - SNJV is strongly cooperating with the administrations (CNC and DGE) and the government to keep the grants, tax credits and other funds well operating. E.g. the French Ministry of Culture has confirmed that the crisis won't delay the commission's decisions and the payments of the grants.
 - SNJV has also organized many communications and webinars with our members and the whole game dev ecosystem to help and guide the management team to make good decisions in this context.

- **Germany:**
 - **The impact of the outbreak on the German games industry**
 - Remote working is having an impact on productivity.
 - Everything on the investment and deal side is on hold.
 - **How GAME is supporting local industry**
 - GAME is collecting information on support measures from the German government and States.
 - The problem with loan funding is that it is only postponing the problem. Grants for small studios are also available, but nothing specific for the games industry.
 - There is a demand for matching investors and publishers with game developers in Germany.
 - **Gamescom**
 - Based on the current information, Gamescom will be organised.
 - **For more information, please visit:**
 - <https://www.game.de/covid19/>

- **Netherlands**
 - **How DGA is supporting the local industry**
 - DGA will be circulating a document this week with tips to work from home and links to helping funds from the government as well as other recommended best practices.
 - **Gamescom:**
 - DGA is worried about what will happen to Gamescom and would like to know more about the plans other national organisations are having before making a final decision about the Dutch booth.

- **Poland**
 - **The impact of the outbreak on the Polish games industry**
 - All gaming events have been postponed to autumn.
 - Most of the studios are working remotely and trying to adjust to the situation

- **How PGA is supporting the local industry**
 - Poland has been one of the biggest beneficiaries of EU emergency funding package (through ESF and ERDF instruments), but its main focus is on the health sector. The Polish government has launched 50 billion euros of support for the economy. The draft bill has been published today and focus on: delaying statutory payments and microloans
 - However, the general consensus is that is not enough and PGA is working to push extra actions.
 - PGA underlines that also eGovernment services and the use of electronic signatures should be promoted.
- **Gamescom**
 - Many studios are unsure if they are going to join Gamescom or GDC, as they are close together
- **Romania**
 - **The impact of the outbreak on the Romanian games industry**
 - What we are seeing is that it much harder for indies to reach the same efficiency of production remotely, for bigger is easier. This is leading to postponing of releases.
 - A number of studios are doing game development as a service. As events are cancelled from where they get their clients, it is extra stress for them.
 - **How RGDA is supporting the local industry**
 - RGDA is informing game developers about all initiatives the government is taking to support companies.
 - RGDA is thinking about wider Romanian games community as well: e.g. sharing Romanian multiplayer codes, promoting educational and family games.
 - RGDA is considering donating to hospitals and people in need, but there is not logistics to do that.
 - RGDA is looking for any digital meeting or opportunity to replace face-to-face business meetings.
 - **Gamescom**
 - RGDA lost money on the trade mission to GDC. Therefore, RGDA is reluctant to take any extra financial risk this year.
- **Slovakia:**
 - **The impact of the outbreak on the Romanian games industry**
 - The same as in other countries, everyone is remote-working.
 - **Gamescom**
 - SGDA has had major problems with trade missions, as government has asked to return funding for trade missions although it was already spent on non-refundable prebookings. SGDA was planning to have a booth in

Gamescom, but might not be able to take the risk.

- **Spain:**
 - **For more information please visit:**
<http://www.dev.org.es/en/noticias-a-eventos/notas-de-prensa-dev/504-el-impacto-de-la-crisis-de-covid-19-en-el-negocio-de-la-industria-de-desarrollo-de-videojuegos>

- **Sweden:**
 - **The impact of the outbreak on the Swedish games industry**
 - Swedish games industry already has some cases of the virus infection, but everyone seems to be getting better.
 - Most studios are working from home.
 - **How Dataspelbranchen is supporting the local industry**
 - Dataspelbranchen has decided to take a more reactive and proactive approach to the crisis.
 - The Swedish government has built an economical package for industries and Dataspelbranchen has contributed to that. Sharing best practices from other countries is important in helping associations to do that.
 - **The status of the Nordic Game Conference**
 - At the moment, the meeting restrictions are more relaxed in Sweden than in other countries. The situation of the Nordic game depends on whether or not it is allowed to be organised in May. In any case, the May edition will be more targeted for local people, who are able to travel at that point. The full event is moved to November.
 - **For more information please visit:**
 - <https://dataspelsbranschen.se/nyheter/2020/3/17/med-anledning-av-covid-19>

- **The UK:**
 - **For more information please visit:**
 - <https://tiga.org/news/the-chancellor-of-the-exchequer-has-announced-a-330-billion-range-of-economic-support-measures-in-response-to-coronavirus>
 - <https://tiga.org/news/prime-ministers-statement-on-covid-19-16-march-2020>
 - <https://tiga.org/news/tiga-tables-ten-proposals-to-enable-the-video-games-industry-to-cope-with-coronavirus>

2. What EGDF should do next

1. The current EGDF documents and actions on COVID19 are available here

- EGDF paper on industry best practices to counter the limit the spread of the virus:
https://docs.google.com/document/d/11t7dqJ3Nzs0DkFMm7LN5zKaBsjTZpiDSkNVml_SvIHk/edit?usp=sharing
- EGDF paper on COVID19 emergency support measures:
https://docs.google.com/document/d/1-nE2w3erRDQ_dU5lt0ln4jfaOlvSlsVQ8ZBNtjmpuas/edit?usp=sharing
- A draft list of (delayed) games industry events in 2020
<https://docs.google.com/spreadsheets/d/1NO5nRz3yYVZFgl9iOKgTFXmWSIKtlfEaYMXsMK9OezE/edit?usp=sharing>
- Sharing online resources for game developers:
<https://www.facebook.com/europeangamedevelopers/photos/a.557560047650853/3588217524585075/?type=3&theater>
- #covid19 Slack channel for COVID19 related topics in EGDF Slack

2. In order to help game developer studios to save their deal flows while the travel restrictions are in place

- **Helping companies to pool resources:** EGDF should set up a google sheet on sharing resources like developers from other studios. There is a commercial tool being launched helping companies to share resources. However, it is a start-up with commercial interest.
- **Organising a Meet-to-Match event:** How EGDF can be a platform for those studios that need investment and those that can invest? The key is to identify the right investors, who can act quickly. EGDF should map the possibility to organise its own meet-to-match event
 - EGDF can easily reach the studios, but the key question is how it can get investors and publishers to join? EGDF has a network to reach the right people.
 - There should be some limitations for participating companies: perhaps a 50€ registration fee or some kind of application.
 - The discussion on the event continues in EGDF Slack
- **Access to online events and resources:**
 - **Face-to-face events:** Both SGDA and EGDF have prepared lists of events. RGDA volunteered to combine them. The list should be editable for all
 - **A list of digital events**
 - RGDA is going to start keeping the list up to date
 - Other associations are asked to share events in EGDF facebook page

In order to help associations relaunch trade missions

- **Gamescom**
 - Nobody knows 100% sure what will happen with Gamescom, as some international travel restrictions might be still in place or there might be some restrictions for events in Germany.
 - As one-third of the costs come from the booth building and it will be very difficult to get money back, a trade mission to Gamescom will be a risk for all associations.
 - Furthermore, those EGDF members associations that rely on public funding might not always be able to get their expenses covered by the public funding if events are cancelled.
 - EGDF has to be able to advise small studios and associations on the risk levels involved.
 - In particular, the associations would need to know how flexible Gamescom will be with refunds.

Next steps:

- **Meet-to-match event:** : With help from Neogames and RCP, EGDF will map the possibility to organise a dedicated online event for matching game developer studios with investors and publishers.
- **Gamescom:** With help from GAME, EGDF will organise a joint call with Gamescom representative and trade associations that are currently considering organising or cancelling their trade mission to Gamescom
- **List of games industry events:** With help from RGDA, EGDF memo (created with help from RCP) about dates and times of key industry events will be combined with a with SGDA memo on the same issue:
- **List of games digital events:** With help from RGD EGDF will make a list of online events. Other associations will contribute by sharing the information on events on EGDF Facebook page.
- **Google sheet helping companies to pool resources:** With help from RCP, EGDF will experiment with a google sheet on sharing resources between studios.