

GAMESMARKT

Making and Selling Games in GSA

2025

#469/470

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Unionisation Game Devs Push for Organisation

Europe Market Data, Insights and Opinions

Highlights The Best Upcoming Games



Anno 117: Pax Romana

Shape the Roman Empire

Ubisoft Mainz Redefines the Premier Builder

RESIDENT EVIL

requiem



27.02.2026



gamescom

RALLE 9





**GamesMarkt-
Editor-in-chief
Stephan Steininger
remains confident
despite the current
troubles in the
games industry.**

gamescom is many things: the start of the season's business, the highlight of an indie exhibitor's year, or even the best opportunity to try out new games. For us, this year's gamescom is a fresh start!

Most of you will already have read about it in our online news. Following a management buyout, my two colleagues, Marcel Kleffmann and Pascal Wagner, whom you know well, and myself are now responsible for producing *GamesMarkt* and *gamescomDaily* on our own. For you, our readers, everything will continue as usual, including at gamescom.

Of course, we have lots of ideas on how to further develop the magazine and the brand, the online platform and other services. But for now it's gamescom! And our focus is on the most important event in the industry worldwide.

We have looked at developments in Europe's key markets, which are all following the same trend but performing differently in subtle ways. We spoke to numerous C-level representatives from various European companies who are open about the situation and the market at a time when the European games industry seems to be nothing more than a pawn between North America, Asia and the emerging players from the Middle East.

You can also read about a new survey on the job market, the development of 1SP Agency, news from Xsolla and a new business division at rcp – remote control productions. The mix of topics is rounded off with an overview of the upcoming highlights that will shape the autumn gaming business and a big story about the new Anno, probably the best-known and most successful gaming IP from Germany.

With this in mind, my partners and I hope you enjoy the magazine you are holding in your hands. As always, we are and will remain open to your suggestions, criticism, topics and proposals. Our contact details have not changed following the MBO. And to everyone who is in Cologne like us, we wish you an exciting and fun, but above all a successful gamescom.

Stephan Steininger



**"To truly compete,
Europe needs better
digital infrastructure,
harmonized regulatory
frameworks, and
stronger, more consist-
ent funding models."**

THE WHOLE STORY ON P. 48

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FINAL FANTASY
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LEGENDS: Z-A
brings more
innovations.
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GAME SCIENCE SOCIETY

This is an important step for game sciences in Germany. Representatives from research and university professors have institutionalized the discipline with the founding of the German Society for Game Sciences (Deutsche Gesellschaft für Spielwissenschaft e.V.), with Stephan Jacob and Jens Junge as chairmen.

8 PEOPLE



LOCATION FOUND

House of Games Moves Into Historic Property

In Juni the location of the House of Games Berlin was officially announced in the presence of Berlin's Governing Mayor, Kai Wegner; the Mayor and Senator for Economic Affairs, Energy, and Public Enterprises, Franziska Giffey; and approximately 200 representatives from the gaming and creative technology industries. The House of Games Berlin is moving into the historic Berlin property "LUX" (Rotherstr. 10, 10245 Berlin).



GERMANDEV DAYS

Over 1,100 Participants and Happy Award Winner

The organisers are satisfied with GermanDevDays 2025. Over 1,100 participants attended the event, which had its own Steam Event Page and a main feature on the German Steam page for the first time. The GDD Indie Awards, worth 10,000 euros, were presented by Assemble boss and GDD organiser Stefan Marcinek and devcom boss Stephan Reichart. This year's multiple award winner was Mindlock – The Apartment. The picture shows all winners and nominees.

SUCCESSFUL PREMIERE

Industry Will Set Sail Again in 2026 with Portside Game Assembly

Gamecity Hamburg has drawn a positive conclusion after the first Portside Game Assembly and announced a follow-up event, including the date. At the side events, the 100 selected studio managers met another 200 contacts from the industry.

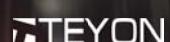




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INSIGHTS

ESBD Publishes Its First Industry Report

The E-Sport-Bund Deutschland (ESBD) has published its first industry report, produced in collaboration with PwC Deutschland and the Hochschule für angewandtes Management. Entitled 'The E-Sport Report 2025', the report highlights the market and the potential of the German esports industry.



FRANKFURT BUSINESS GAMES HUB

Frankfurt and Game Hessen Open Games Hub in Start-up Centre

The financial hub of Frankfurt is getting a central location for game founders. In addition to office space, the young companies will also receive support from experts and networking opportunities at events organised there by the regional division of game. The concept from the Wirtschaftsförderung Frankfurt (Frankfurt Economic Development Agency), the City of Frankfurt and the industry provides support from the team at the Kompass Centre for Start-ups and the local games industry.



RISING

PHIL ROGERS IS THE NEW STRONG MAN AT THE HEAD OF EMBRACER.



DESCENDING

MATT FIROR HANDS OVER ZENIMAX ONLINE STUDIOS DURING THE RECENT LAYOFFS AT MICROSOFT.



GERMAN DEVELOPER STUDIO

Maschinen-Mensch to Cease Operations

Maschinen-Mensch is yet another award-winning German studio to close its doors. Although the Berlin-based company hopes to make a comeback, it is initially focusing on supporting its team in their search for new opportunities. "We are incredibly proud of our team for realizing this grand vision. However, like many of our peers, we are struggling with the current economic environment in the games industry and have been unsuccessful in securing follow-up projects", the website says.



PC



FATA PECUM

RELEASE DATE
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XSOLLA

Why Gamescom 2025 Marks a Pivotal Moment for Game Developers And Why Xsolla's Return Matters

G

amescom 2025, taking place August 18 - 22 in Cologne, Germany, isn't just a spectacle of upcoming releases and flashy trailers, it's where the honest conversations about the future of gaming are happening. Behind the booths and the scenes, the stakes have never been higher for developers navigating platform changes, regulatory shifts, and monetization challenges. That's why Xsolla's return to Games-

com and Devcom matters not just for the tech it's showcasing, but for the ideas it's championing on stage.

From Platform to Thought Leader

Xsolla has long been known as a powerful backend partner for developers, offering solutions to support monetization and global publishing. But this year, the company is stepping even more decisively into a leadership role by hosting a series of expert-led panels and workshops throughout

Devcom and Gamescom. These sessions aren't just side events, they're central to the most urgent questions facing developers today.

Xsolla's panels cover everything from Direct-to-Consumer (D2C) strategies to international payment behaviors, mobile policy changes, contract negotiation for indies, and beyond. It's not just about pitching products, it's about giving developers and publishers of all sizes the frameworks they need to adapt, compete, and grow.

Unlocking the Power of Direct-to-Consumer

One of the most pressing topics of 2025 is D2C. The regulatory landscape, shaped by the European Union's Digital Markets Act and U.S. court rulings, is now allowing developers to explore alternative payment methods and user acquisition flows outside the traditional app stores.

Xsolla is seizing this moment with sessions like 'If you don't mind platform fees, why bother with D2C?' and 'Breaking the wall: How platform rule shifts are reshaping D2C'. These panels don't just explore the why, they get into the how, showing attendees how to build more robust LiveOps, create personalized offers, and unlock greater lifetime value by owning the customer relationship.

Policy, Payments, and Player Behavior

Xsolla isn't shying away from the complicated stuff either. Sessions like 'Building a Borderless Gaming Ecosystem' dive into how regulation is reshaping monetization and what developers can do to stay compliant and competitive. From Europe to the UAE, the conversations are shifting from reactive to proactive, and Xsolla is guiding that shift.

Additionally, panels like 'User Journeys at Checkout: A Payment Behavior Deep Dive' explore the subtle but crucial topic of how payment preferences vary by region and player demographic. This isn't just theory. Xsolla is backing it with real-world data and examples of how empowering developers with the right monetization strategies can directly drive revenue and retention.

Equipping Indies for Smarter Publishing

Another standout moment will be the 'Surviving the Publishing Gauntlet Contract Redlining for Indies' work-

shop. Co-hosted with Deviant Legal, this hands-on session helps smaller studios navigate the often intimidating world of publishing agreements. It's the kind of practical, often-overlooked content that can make or break an indie's long-term viability and exactly the kind of value Xsolla is bringing to the show floor.

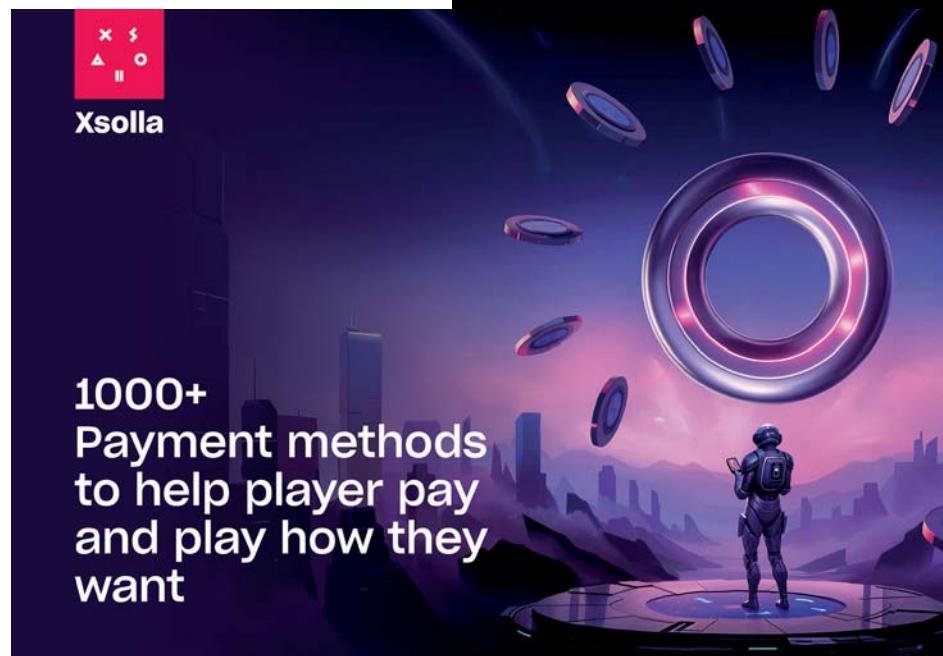
Beyond the Game: Empowering Developers as Entrepreneurs

Xsolla's perspective is clear: developers shouldn't just be game creators, they should be global entrepreneurs. That theme comes through in the 'Beyond the Game: Turning Devs into Global Entrepreneurs' panel, which dives into how region-specific strategies, cross-platform releases, and creative business models can help developers build something sustainable beyond launch day.

Must-Visit Booth and a Must-Hear Voice

While many will visit Xsolla's booth (Hall 2.2, A030) to see the latest tools in action, including the upgraded Web Shop, Publishing Suite, and Pay Station, the real value might just be what's happening in the conference halls. Xsolla is no longer content with being behind the scenes; it's stepping into the spotlight, leading the conversation on what the next era of game development looks like.

Gamescom 2025 is a turning point. And if you're a developer or publisher trying to understand what's next, whether it's in monetization, policy, payments, or publishing, the Xsolla panels should be your first stop. This year, the most brilliant move isn't just attending Gamescom, but also listening to the people who are changing how the game is played.





FAMILY BUSINESS

Christophe Derennes and Charlie Guilemot Lead the New Ubisoft Subsidiary

In March Ubisoft announced that it would spin off its three top brands – Assassin's Creed, Far Cry and Tom Clancy's Rainbow Six – to form a new subsidiary. The individuals who will be heading up this new subsidiary have now been confirmed. Christophe Derennes, since 35 years at Ubisoft, and Charlie Guilemot will be the co-CEOs.

UNKNOWN TROUBLE

Krafton Appoints Steve Papoutsis as CEO of Unknown Worlds

Krafton has announced a change at the top of Unknown Worlds, which is working on *Subnautica 2*. Steve Papoutsis, previously CEO of Striking Distance Studios, is replacing the previous leadership trio of Ted Gill, Charlie Cleveland and Max McGuire, with immediate effect. Following the change, a dispute arose, some of which was public, and found its way into court. The outcome is open.



SCHOLAR PEOPLE

Johanna Pirker Joins TU Munich

Johanna Pirker, professor of Computer Science in Graz and director of the GameLabGraz is moving back to Munich: From the first of July, Pirker has been appointed full Professor for N-Dimensional User Experience at Technical



University Munich. She will continue to play a part in Austria's university scene as she is still professor at Graz University of Technology.

In & Out



Streamer and former Godot Foundation Community Manager Nathalie Galla is augmenting ByteRockers' Games' communications team: The expert from Munich is the indie publishers new Community Manager.



André Hecker is joining Rocky Oceans Communications, the marketing and communications agency founded by Dirk Gärtner and Claudia Kühl in 2024, with immediate effect as Senior PR Manager.



Plaion has a new Head of Marketing for Germany, Switzerland and Austria: Joshua Hammann, who was previously Head of Marketing, has been promoted to Director of Marketing GSA.



Franz Peter Mann is new Head of gamescom LAN, effective from 1 September 2025. Mann will work closely with Ta-KeTV and MYI in his new role, leading both the operational execution and strategic development of the event.

Manager. Kaeding will primarily be responsible for expanding the agency's portfolio with a focus on indie and AA studios.



Role swap at astragon Entertainment. Daniella Wallau, previously Head of Public Relations, is stepping down to spend more time with her family and swapping positions with Yvonne Lukanowski, previously Senior Public Relations Manager.



MSM.digital strengthened its team at the beginning of June with the appointment of Niklas Kaeding as Senior Account

magazine

What is it like to work in the gaming industry? This question is more than justified in times when even established studios are facing waves of layoffs. Answers to this question can be found in the new Interview with Verdi, about unionising in gaming. But the production house rcp has also asked itself this question and found its own answer with rcp blend.

PAGE 34

Ubisoft Mainz reveals how to work successfully on an IP for many years in an interview.

PAGE 16

PAGE 26



UBISOFT MAINZ

The Studio Behind Anno Celebrates 30 Years of Innovation

Anno 1995 **saw the founding of** Related Designs, **which became part of** Ubisoft **over ten years ago.** **To date, the studio has released** six games **in the main Anno series, and three of the four founders still work for the company today.** **We spoke to** Thomas Pottkämper, **co-founder and studio manager, about the company's impressive history.**



30 YEARS OF BUSINESS (from left to right) Thomas Pottkämper, Studio Manager at Ubisoft Mainz; Manuel Reinher, Creative Director of *Anno 117: Pax Romana*; Alexander Schweitzer, Minister President of Rhineland-Palatinate; Yves Guillemot, CEO and Co-Founder of Ubisoft; Benedikt Grindel, Zone Managing Director at Ubisoft

CREDIT UBISOFT MAINZ

GamesMarkt: First of all, congratulations to Ubisoft Mainz (formerly Related Designs) on reaching 30 years of business. Very few companies in this industry manage to achieve this milestone. Could you have imagined back then just how big and important the company would become?

Thomas Pottkämper: It all started with four friends in their mid-twenties being passionate about creating video games. Compared to today, the market for computer and video games was much smaller and there weren't many development studios around, especially in Germany. When we started working on our first small games, we saw it more as a good extra income to finance our studies. None of us would ever have guessed that decades later, we would celebrate our 30th anniversary and that *Anno* would be loved by millions of fans around the globe.

What are you most proud of in the company's long history? Is there something special you can pick out?

The release of *Anno 1701* marked a special milestone for us. Although our studio had already been active for a few years, it wasn't until we stood on stage at the German Developer Award to accept multiple honors that I fully grasped the potential of what we were building.

I experienced a similar sense of breakthrough with *Anno 1800*. On release day, we gathered in front of the screens at the studio and watched in real time as player numbers soared—not just in Germany, but across the globe, including the United States and even China.

But what continues to make me proud is that so many of our employees have remained loyal to us over such a long period of time. From our humble beginnings, we have built up an outstanding international team in which veterans from the past work hand in hand with newcomers.

How exactly did Related Designs manage to develop new games in the *Anno* franchise? What came together to make this possible?

In the beginning, we worked mostly on smaller advertising games, before moving on to more elaborate projects. However, we were particularly taken with 3D real-time strategy games, such as *America: No Peace Beyond the Line* and *Castle Strike*, with which we celebrated our first major successes. Said expertise was also the key in bringing the *Anno* brand to Mainz. The predecessors of the series were originally developed in 2D by the Austrian developer Max Design, but as the third part of the series was to be developed in 3D, the publisher at the time, Sunflowers, needed a studio with the appropriate technical know-how. The rest is history.

How important is the *Anno* franchise for the studio? After all, the monumental nature aka "Monumentalität" of *Anno 1701*, a term that was used very frequently during the game's presentation, marked the beginning of an unprecedented success story...

The *Anno* series has always been an integral part of our studio's identity, rooted in our origins in the strategy genre. For each successive game in the series, we've consistently stayed true to our guiding principle: advancing step by step into the future, nurturing our talent, deepening our technical expertise, and keeping a sharp focus on the quality of our games.

Anno 117: Pax Romana continues this tradition. Building on the strengths of *Anno 1800*, we're taking the series further with everything we've learned since. I strongly believe that our strong focus on the series and the exceptional team we build around it is the reason for our ongoing success.

Ubisoft acquired Related Designs in 2013. How did that come about, →

→ and what are your reflections on the last twelve years?

The huge international success of *Anno 1701* in 2006 did not go unnoticed by Ubisoft and marked the beginning of a successful partnership for us and in 2007, Ubisoft took over the German Publisher Sunflowers which included a 30% share in Related Designs. After the next two major Anno titles, 1404 and 2070, the Mainz studio was finally fully integrated into Ubisoft in 2013. First as Ubisoft Blue Byte – Studio Mainz and later Ubisoft Mainz.

Did this takeover lay the foundations for the studio's continued existence?

The acquisition by Ubisoft made us benefit from the infrastructure of a global network of development studios but also provided us with the resources to invest in the growth of the studio and the Anno franchise, for which we are the lead studio. But it also enabled us to have dedicated teams working collaboratively with lead studios of other big Ubisoft brands, such as *Rainbow Six Siege*, or contribute to the development of internal tech solutions for the company. This gives us not only stability but provides us with a lot of experience and attracts further talent to the studio.

Could you estimate how many people work at Ubisoft Mainz? It doesn't have to be exact; just give a rough idea of the size. How many people

"Contributing to major Ubisoft brands is highly valuable to us, as it serves as a strong incentive for international talent to join us in Mainz, and we greatly benefit from the exchange of technology and knowledge across projects."

are working on *Anno 117: Pax Romana*, for example?

Around 170 employees from over 25 nations work at Ubisoft Mainz. While about 100 of them work on the Anno brand, we have also around 50 developers working on other major Ubisoft brands and technology solutions. Additional team members support operational departments such as IT and Human Resources.

Ubisoft Mainz works not only on the Anno franchise, but also on other



**THOMAS
POTTKÄMPER**
Co-founder and
Studio Manager
at Ubisoft Mainz



Ubisoft games. Could you tell us a little about what you are working on, and how the team is involved in global development processes?

Contributing to major Ubisoft brands is highly valuable to us, as it serves as a strong incentive for international talent to join us in Mainz, and we greatly benefit from the exchange of technology and knowledge across projects. For instance, we have a dedicated team working on different areas for *Rainbow Six Siege X*. Our second major co-development team is contributing to significant features for *Beyond Good and Evil 2* – though I can't share any details about that just yet.

Ubisoft Mainz is a major employer in the region. Which aspects are particularly important to Ubisoft Mainz as an employer?

Ubisoft provides the big-picture but here in the Ubisoft Mainz studio, we bring our local flavor to the mix, while still being part of the global team. Creating great games can only happen

RELATED DESIGNS, NOW UBISOFT MAINZ,

started out by developing advertising games for products such as toothpaste (ARO AND ELMI FIGHT THE BACTERIA GANG) and sweets (TOFFIFEET FANTASY FOREST) before making a name for itself in the early 2000s with real-time strategy games such as AMERICA, NO MAN'S LAND and CASTLE STRIKE. Since the release of *ANNO 1701*, the third instalment of the popular city-building strategy series, all subsequent instalments have been developed in Mainz. The latest game in the franchise, *ANNO 1800*, was released in 2019 and has since attracted more than six million players worldwide. *ANNO 117: PAX ROMANA* is scheduled for release on 13 November 2025.

**ESTABLISHED**

in January 1995
as Related
Designs

3 OF THE 4

founders still
work there

UBISOFT

acquired Sunflowers and their
30% stake in
Related Designs
in 2007

UBISOFT

completely took
over the studio
in April 2013

OPERATING

since June 2014
as Ubisoft Mainz
and part of
Ubisoft Blue
Byte

if people feel supported and included. Our team is international, and that mix of backgrounds and perspectives shapes how we work on our diverse portfolio of projects and range of audiences.

We're working to be more inclusive, cut down on our environmental impact, and stay connected with educational institutions or the local industry. These aren't just top-down initiatives either; people here take the lead through local employee initiatives, whether it's through our PRIDE group, mentoring programs like "Develop at Ubisoft", "Girl's Day" or local support groups.

With our long-lasting history as a game developer, we see it as part of our responsibility to give something back to our industry but also to the region.

How would you assess the local gaming industry in Mainz and the surrounding area? What role does Ubisoft Mainz play in all this?

We believe that those social initiatives mentioned are essential for strengthening the local games industry. Our studio has been around for 30 years now, and we've seen the games industry evolve a lot over time. Established players like Kalypso Media, Crytek, and Keen Games have been part of the landscape for years, but we've also seen a rise in new studios founded by graduates from game design programs in the Rhein-Main region. Public initiatives like Game-Up RLP are doing great work helping these newcomers connect with the broader business community, and we bring in our expertise to help grow the local gaming landscape.

What further support for the German games industry would you like to see from politicians in Germany, both locally in Rhineland-Palatinate and at a federal level?

The announcement of the federal budget plan is a real relief for our industry. The German games sector →

Reaching a 30th company anniversary is a remarkable milestone, especially in such a fast-paced sector as the games industry. However, Ubisoft Mainz still has big plans for the future...

→ has had a rough ride for years, first dealing with a lack of competitive funding, then struggling with an unreliable process. Now, things finally are turning around, and we see a level playing field at the federal level. Five years ago, Rhineland-Palatinate launched its first media fund. When it comes to games, it's still early days, though parliament did double the budget last year, which is a great step forward. What we need to see is a good combination of federal and state funds working together, serv-

ing the specific requests of established and new studios. Locally, we must remember that we're part of an ecosystem. Rhineland-Palatinate is home to five universities offering game-related programs, which are great for bringing fresh talent into the field. But the big question is: where do these students end up? Do they stay in the games industry? Do they stay in Germany, or even in the region? Together with policy makers and public institutions we need to

~170

EMPLOYEES

from over 25 nations work at Ubisoft Mainz

about

100

OF THEM

work on the Anno brand

around

50

DEVELOPERS

working on other major Ubisoft brands and technology solutions



Ubisoft Mainz's Six Anno Games



**Anno
1701**
(2006)



**Anno
1404**
(2009)



**Anno
2070**
(2011)



BACK IN TIME Concept images for *Anno 1701* (left) and Thomas Pottkämper in front of a CRT monitor

build up a strong value chain, from vocational training, studies, research, entrepreneurship and funding, so we can support high-quality game development and publishing right here.

For Anno, the future lies in the past (Ancient Rome). But where do you see Ubisoft Mainz in the future? For example, what will the company be like on its 40th anniversary?

Considering that *Anno 1800* was the biggest and most successful installment of the series to date, which has continued to provide our fans with content for five years after its release, we naturally see our future in the *Anno* series. With *Anno 117: Pax Romana*, our goal is not only to build on the success of *Anno 1800* but also to reach a more international audience and expand the brand beyond video

games into other forms of media. As example there will be a fictional podcast-series "Der Römische Traum – Eine Anno Story" created by SWR. Looking ahead, we want to continue our collaboration with other projects in the global Ubisoft network, but I could also envision taking the lead on another Ubisoft brand in the future.

MARCEL KLEFFMANN

CREDIT UBISOFT MAINZ



**Anno
2205**
(2015)



**Anno
1800**
(2019)



**Anno
117**
(2025)

INTERVIEW

Putting Smiles on Peoples Faces

Just a few weeks after its record-breaking launch, Nintendo is bringing the Switch 2 to gamescom, where it is likely to top this year's Christmas wish lists. However, Nintendo is not focusing on sales in Cologne, according to Dr Bernd Fakesch, Nintendo's General Manager for GSA.

GamesMarkt: The Switch 2 has been on the market for a good ten weeks now. How did the launch go, Mr Fakesch, in GSA, but also in Europe and worldwide in general?

Dr. Bernd Fakesch: Within the first four days of its launch on 5 June, more than 3.5 million players worldwide bought a Nintendo Switch 2. This makes it the fastest-selling Nintendo hardware ever. By 30 June, just over three weeks after its market launch, it had sold 5.8 million units and almost 8.7 million games. This very positive result is also reflected in the figures for Germany, Austria and Switzerland, which significantly exceeded our forecasts. We are very happy and grateful to see Nintendo Switch 2 being embraced by so many players.

You have been with Nintendo since March 2004, responsible for the German market, and since 2014 for GSA. Do you remember your first handheld launch – that must have been the NDS – and how has the launch of new hardware changed since then?

That's right, the first hardware launch I was involved in was the Nintendo DS, which was released in Europe in March 2005. The most fundamental difference from back then is that the system was launched in the US and Japan a few months earlier, in November and December 2004. This was standard practice in the industry at

the time, but it made it impossible to synchronise launch activities worldwide. A globally unified release, on the other hand, allows you to build up excitement from the initial announcement to the market launch. This excitement is reflected externally in the corresponding communication beats also internally, because it brings teams closer together across departments and countries in one joint effort.

It is also exciting to observe how there are many different types of players nowadays, and how target groups became more diversified since the launch of the Nintendo DS and later the Wii. Touchscreens and motion control allowed for completely new games and mechanics, which appealed to new target groups including girls, young women, families and adults. That way, the player audience steadily expanded in different directions, which was, and still is, very exciting to see. The Nintendo DS and Wii were so successful in this regard that new systems still have to measure themselves against these two devices today.

How important is it for Nintendo Germany that the Switch 2 is not only playable at gamescom in Cologne, but can also be purchased in stores in the city?

Basically, it is always our goal to ensure that the Nintendo Switch 2 is

constantly available in stores. The primary purpose of gamescom for us, however, is not to bolster sales but rather to give fans the opportunity to try out Nintendo Switch 2. To this end, they will be able to choose from games such as *Mario Kart 8*, *Donkey Kong Bananza*, *Pokémon Legends: Z-A – Nintendo Switch 2 Edition* and *Metroid Prime 4: Beyond – Nintendo Switch 2 Edition*.

Even though there is always a special focus on the launch phase, the success of a console/handheld is not decided on Day 1. How do you view the upcoming Christmas season?

The first Christmas season after the launch of a console is always particularly exciting. This one will be no exception. However, the successful launch of Nintendo Switch 2 and the diverse selection of games available to players allows us to look at the Christmas season with promising expectations.

And, of course, we are supporting both Nintendo Switch 2 and each of our games with integrated marketing campaigns that provide our various target groups with ample touchpoints among their preferred types of media. These measures are complemented by OOH placements, such as currently at gamescom in Cologne: fans arriving by train are greeted by eye-catching placements of *Pokémon*



Legends: Z-A at the central station and at the Köln Messe/Deutz station.

In recent years, the focus has often been on the duel between PlayStation and Xbox. Nintendo has not been impressed by this and has instead always gone its own way. What makes the Nintendo way, the philosophy that distinguishes Nintendo as a company, but also Nintendo's games, so unique?

Nintendo's continuing mission is to put smiles on the faces of everyone it touches with unique entertainment experiences. So, at the beginning of any new development, the question is always whether an idea can achieve this goal.

In addition, Nintendo always valued playing together. Most of us have probably experienced this ourselves

DR. BERND FAKESCH
is General Manager GSA at Nintendo and has been with the Japanese company since 2003. This makes him one of the longest-serving top managers in the GSA gaming market

with friends or family, for example in heated races in Mario Kart or immersive tennis matches in the living room. What used to be limited to physical gatherings is now possible over long distances thanks to Game-Chat. With this new feature on Nintendo Switch 2, players can spend time together and play games via voice and video chat, almost as if they were in the same room.

The launch of the Switch 2 is being supported by more third-party companies than any Nintendo console launch in a long time. How do you view this support, and how important is it for the long-term success of third parties to understand that the Nintendo target audience may tick a little differently than the audience of other platforms?

The support of our partners is crucial to the success of the Nintendo Switch 2, because the more diverse the selection of games, the more attractive a system becomes for players. This is particularly relevant when you're targeting such diverse audiences as we do. We are therefore very happy and grateful for the wide range of distinct gaming experiences.

Thanks to this support, players were able to already choose between 15 different games from third-party studios right at the system's launch. Dozens more titles have already been announced for the near future. What's more, Nintendo Switch 2 can play compatible physical and digital games released on Nintendo Switch. That's over 15,000 games from our partners to date.

STEPHAN STEININGER

JANETTE LIPINSKI

Entering the Industry Felt Like Crashing a LAN Party

For Janette Lipinski, games have always been more than a hobby. They've been a constant presence in her life. Today, she channels her passion for the medium into leading project teams and shaping production at one of Germany's largest gaming companies.

"I've always said that what matters most is doing something that brings you joy. If you love what you do, it shows, and it makes a difference, not just for you, but for everyone around."

J

anette Lipinski didn't plan on a career in the games industry, it just happened to be where curiosity and opportunity met. What started as a part-time role during school turned into a long-term professional path. Her first experience came as a beta tester while finishing her exams. Rather than returning to her original plan of academic study, she chose to deepen her hands-on experience and pursue further training in project management and leadership. "I realized I already knew what I wanted to do," Lipinski explains. Now, with nearly two decades of experience behind her, she leads the project management team at Gameforge, one of Germany's established online game publishers. She's been with the company for over 15 years, having started as a producer and worked her way up through various roles. Throughout that time, she not only guided major projects but also helped shape the internal workflows that define how the company produces and refines its games. "Gameforge gave me the space to grow, both professionally and personally," she reflects. "There was always room to take initiative and learn." Her development into a leadership position wasn't accidental. She actively pursued certifications in project management and later branched into areas like self-leadership and team dynamics. This approach re-

flects her personality. "When something new comes my way, I dive into it. I learn independently, figure it out by doing. That's how I've always worked, whether in my career or in my hobbies." A few years ago, she decided to reconnect with music, a passion from her youth. Rather than take lessons or follow a set curriculum, she bought an electric piano and taught herself, playing whatever brought her joy. It's a metaphor for her career as well: self-directed, instinctive, and rooted in curiosity. Still, entering the industry wasn't without its challenges. In her early days at a small developer, Lipinski recalls walking into the team's workspace to find an entire group mid-match in a *Mario Kart* tournament — her first experience of game development felt like stepping into a LAN party. "They were all playing. I had just walked into the room, and it was like: what am I interrupting?" That kind of culture — male-dominated, informally structured, and tightly bonded — was typical of the time. She also remembers her time as the only woman in her *Counter-Strike* clan and later as a *World of Warcraft* player, raiding three times a week. "For a long time, being the only woman was normal for me, whether in the games I played or the teams I worked with." That has changed significantly. "Over the last 25 years, more and more women have entered both the player base and the industry itself, even in spaces that used to be considered very male-dominated," she notes. "It re-



SHORT PROFILE

Janette Lipinski is a longtime games industry professional with a background that spans QA, production, and project management. She discovered her passion for gaming early, starting as a beta tester during school, and quickly found her place in development teams where she combined organizational thinking with creative energy. After working in testing and game design at smaller studios, she joined Gameforge, where she has grown into a leadership role over the past 15 years. Today, she leads the project management team, shaping production workflows and supporting teams across a range of browser and client games. Still a gamer at heart, Janette now enjoys sharing her love of games with her two young children.

minds me a lot of how things have evolved in other areas, like sports. You see more balance now." At Gameforge, around 35% of employees are women which is still an unusually high figure in the industry. Lipinski points out that women in leadership positions are a natural part of the company culture today, not an exception. Still, the wider industry has work to do. Issues like salary transparency, work-life balance, and outdated perceptions of job instability remain real barriers, especially for people considering the field later in life or after starting a family. Lipinski stresses the importance of offering flexible working conditions, part-time models, and remote opportunities. As a team lead, she is passionate about cultivating environments where people can do what they enjoy. "You can tell when someone is doing something they're passionate about. It changes how they show up, and it has a real impact on the success of the team." She brings this belief into her own management style, emphasizing trust, autonomy, and collaboration. "Leading my team rarely feels like work. I love seeing them grow, solve problems in their own way,

and contribute something meaningful." Outside of work, she still plays games, though not with the same intensity as in her earlier raiding days. With two young children at home, she now leans toward more flexible single-player titles or casual simulations. "I don't have the time to commit to big multiplayer experiences anymore. But I still love games. They're just part of who I am." That belief, grounded in years of practical experience and a clear understanding of the industry's realities, has guided her decisions more than any diploma ever could. Looking to the future, Lipinski hopes to continue developing her leadership while mentoring others. She's interested in contributing more to conversations around women in games, flexible career paths, and how work and life can coexist without constant conflict. For her, the games industry remains a unique space — creative, fast-moving, and, when done right, deeply human. "It's not perfect. But it's full of people who care, who support each other, and who are in it for the right reasons. That's why I stayed. And that's what I hope we keep building on."

MARCEL KLEFFMANN



DEV BARISTA
Frederik Hammes
heads rcp blend

RCP BLEND

An Offer Studios Shouldn't Refuse

Production house rcp is responding to the fundamental changes currently taking place in game development with a new business approach. rcp is positioning itself and the studios belonging to the company family as external developers.

R

cp, which stands for remote control productions, is an institution in German game development. The company was founded in 2005 by Hendrik Lesser and is undoubtedly one of the oldest and most established game development companies in Germany. However, rcp is not actually a developer itself. rcp describes

itself as a production house. Lesser and his core team at rcp take care of the business side and strategic development so that the creative minds, the game developers, can concentrate fully on what they do best and love doing most: developing games.

But even though rcp is not a traditional developer, Lesser and rcp have built up an international network of diverse and highly talented studios through acquisitions, co-foundings, partnerships and investments.

The rcp family, as the Munich-based company likes to call its network, includes studios such as Chimera Entertainment, stillalive, Rockodile, Redox Interactive and FRAG (For Rock and Games). They are responsible for games such as *Songs of Silence*, *Bus Bound*, *Garden Life*, *Shadow and Bones Destinies* and *Angry Birds Evolution*. In addition, the studi-

os have realized dozens of ports for other studios and publishers and provided support for productions.

It is precisely this experience that Frederik Hammes will now bring to bear in new business ventures. Frederik joined rcp in February 2025. He came from Travian Games, where he held a leading position as COO and Managing Director for many years. At rcp, he holds the position of Studio Partner. But now, at gamescom, rcp is introducing a new sub-brand – rcp blend – that he will be responsible for developing.

"rcp blend is our approach to a fundamental shift in the gaming ecosystem. On the initial level, it is a brand that offers our wide array of expertise and development power to help realize projects around the globe", Frederik Hammes explains. "rcp is a family with 15 associated development studios. Among those are experts for many of the most complex challenges companies out there are facing. And they are experts because they have successfully mastered them many times before."

At least on the surface, the offer that rcp is making to other studios with its new sub-brand is not new. For many years, rcp has been supporting other teams in the realization of projects, thereby utilizing its development resources at times when capacity is available. However, as Frederik said, rcp believes that there is currently a permanent fundamental change in the development of games.

That is why rcp blend is not just about work for hire, even if offering services as part of a game development project is exactly what it is. "You can say the spark that set it off now was the origin story of 'Expedition 33'. Which was not made by 33 people, but by a small studio that developed, shared and guarded their creative vision with a team of 300 externals, that would go on to help them realize this vision," Frederik says.

In fact, many in the industry are convinced that the studios of the future will consist of a small core team that will carry out the majority of de-

velopment work with external partners. Or as it Frederik describes in an interview mit GamesMarkt: "The monolithic structures of the past that give way to massive hiring and firing sprees have to be and are being replaced by modular systems that cater better to everyone involved. The stigma of 'Outsourcing is like the Temu of the digital world' was finally laid to rest by Sandfall Interactive for all to see. Already 86% of all award-winning games from 2024 have used external development."

However, implementation is not just about outsourcing simple workloads. Instead, external forces must be closely integrated into the product vision. This requires not only manpower, but also experience. rcp blend therefore wants to ensure that the right experts or teams are integrated into a project right from the start. Since rcp blend primarily relies on its own network, which it has built up over the years, it knows the respective qualities of the individual studios.

"The number one decision criterion for external development is quality, not price. Which comes down to trust – am I sure this person is able to pull this off, do I know their strengths and weaknesses, do I know I have a team that is used to working together? We do," Frederik says. Looking at rcp and the way it works, one could almost say that rcp blend is its perfect counterpart. The idea of a core team that realizes a project vision with lean in-house structures and various external partners is basically nothing more than a production house. In other words: in addition to production and business support, rcp blend now also offers the corresponding development support as a service.

At least in theory, the two-pillar approach of production support and development support carries the risk of blocking resources for your own projects by acting as an external partner for the business. But Frederik has a solution for that too. "We are seg-

menting our studios into two categories, which are different but equally important to our ecosystem: contributors and creators. Contributor studios are experts at efficiently executing visions. As the saying goes, ideas are cheap, the magic lies in the execution. We want to help others realize the game they want to make, not the game their amount of resources allows them to make. People want to build games, not big companies and then games," he says. "Our creator studios have the grit to face every

"rcp blend is our approach to a fundamental shift in the gaming ecosystem"

scrutiny imaginable, which automatically happens when you put yourself out there. They are not in it for the security that comes with a steady project inflow, but are willing to put everything on the line to create their visions."

And if there are ever bottlenecks, a project requires resources in a different time zone, or other reasons arise, then it is also possible to look outside the family. After all, the rcp network includes not only family members but also lots of friends and partners.

STEPHAN STEININGER





INTERVIEW

Client Goals meet Global Expertise

Founded in April 2023, 1SP Agency turned two this year and expanded again in August 2025 with the acquisition of FIJAK. We sat down with Co-Founder and Co-CEO Torsten Oppermann to talk about the journey so far and plans for the future.

GamesMarkt: Let's start by taking a look back to the founding moment: what specific market gap did you see that convinced you to start 1SP Agency, and what was the first proof point that told you the thesis was right?

Torsten Oppermann: We saw a clear gap in the market for a partner that could truly merge social media, public relations, influencer marketing, retail activation, and experiential campaigns into one cohesive strategy – especially for gaming, consumer elec-

tronics, and tech. Many agencies specialized in one area, but very few could unify brand voice and community engagement across all touchpoints.

Our first proof point came when we delivered a campaign that combined PR outreach to tier-one gaming media with creator-driven social activations, all supported by in-store retail experiences. The result: a trend-

ing hashtag, dozens of media features, and a 30% uplift in foot traffic. That was when we knew the approach worked.

Back in 2020, at the height of the COVID pandemic, my Co-Founder Markus Oeller predicted that client-level decisions would increasingly shift to the international stage, while local budget and campaign management would decline. That foresight inspired our vision: to create Europe's largest agency for gaming, consumer electronics, and technology.

From day one, we structured 1SP Agency around three core segments: Awareness, Sales, and Tech. These are never siloed – they connect seamlessly within every campaign. For example, we might launch awareness through PR, social media, and creator campaigns, then drive sales with immersive retail showrooms and trained brand ambassadors at the point of sale and finally enhance the tech layer with online store optimization (such as Amazon) and modern AR/VR solutions.

What were the top three key challenges you've come across in the last years – and how did you solve them? Our first hurdle was finding the right Private Equity partner to bring our Buy-and-Build strategy to life. We succeeded and today, BPE is an exceptional partner driving this journey with us.

Secondly, we needed to create an M&A and integration playbook to ensure we select the right agencies to join our family and integrate them thoughtfully. As Markus and I often say: we integrate, we don't assimilate.

Another important step was convincing our banking partner of our vision – and why it made sense to finance our inorganic growth through acquisitions. We were fortunate to find exactly the right partner in Sparkasse Bremen, who believed in our strategy from the start. We wanted them to see that we're not "just another" finance-driven agency group, but one with a razor-sharp focus on

gaming, consumer electronics, and technology. Our team is made up of highly specialized, passionate individuals – the very reason we're called 1SP Agency.

Which services and capabilities are currently most in demand when working with publishers or developers?

Right now, publishers and developers are looking for partners who can deliver truly integrated awareness campaigns – campaigns that connect multiple touchpoints along the customer journey, from PR and social media to creator-driven content. Authentic creator marketing is in high demand because it genuinely moves the needle when it comes to engagement and brand loyalty. And increasingly, we're also developing solutions that help transform retail spaces into experience centers, places where

players can connect with brands in memorable, immersive ways.

How has games marketing changed in the last 5 to 10 years from your perspective – and how has 1SP Agency adapted?

Over the past decade, consumer behaviour in gaming has evolved significantly, and the industry has responded with an ever-growing variety of products to meet different gaming needs. From AAA single-player blockbusters to games-as-a-service, from mobile titles to VR experiences: each audience requires its own tailored set of marketing tools. At 1SP Agency, we've adapted by keeping one guiding principle at the heart of everything we do: start with the consumer. We always ask, "Who is the

audience, and how do we reach them?" Every campaign is built from that foundation.

1SP Agency right now consists of 8 units that remain to have their own brand and individual market approach. The latest addition to the family being FIJAK. How do you make sure all agencies can also work together as one and come together for bigger client projects?

For us, everything starts with the client's objective – and our job is to deliver on that, regardless of which agency within the group is involved. In practice, our campaigns almost always span multiple units. In the past 12 months alone, more than 70% of our clients have worked with at least two or three of our agencies across different regions. We are, in essence, a house of brands, all connected under the 1SP roof. This structure →

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"At 1SP Agency, we've adapted by keeping one guiding principle at the heart of everything we do: start with the consumer."

→ enables each unit to work closely together while preserving its own brand identity and market approach. We encourage collaboration through shared processes, cross-agency project teams, and a culture that values the unique strengths each unit brings to the table. That way, our clients benefit from both the deep specialization of each brand and the collective power of the entire group.

You often mention the word "family" when talking about 1SP Agency. It's obviously a big goal to create such an atmosphere within an organization and it's easier said than done. What does the word family mean to you personally and what does it mean in the context of 1SP? What makes it feel like a family?

For me, family means sharing core values, looking out for one another, and trusting each other's expertise – without telling people how to do their job. That's exactly how we approach our agencies within 1SP. We partner with them for their specific know-how, offer advice when it's

asked for, but never dictate. Our role is to help each unit perform at its best, so together we can deliver outstanding results for our clients.

We are an "ideas first, hierarchy last" agency. In a good family, people feel encouraged to speak their minds, challenge each other when they disagree, and at the same time make compromises for the greater good. Collaboration only works when egos are kept in check – because egos can destroy culture in any company, and especially in creative agencies.

Looking back at your starting point as an agency entrepreneur: Was there a moment when you knew: "Now is the time to start my own agency"?

Hahaha. To be honest, I don't think there's ever a "perfect" moment to start the entrepreneurial journey – which also means it's always the right time to start one. When my former partner, Reza Abdolali, and I founded my first agency, Indigo Pearl, in 2001, it was just five days after 9/11. The world felt upside down. At the time, I

had a big corporate role at Hasbro in London and Frankfurt, traveling constantly and moving a lot of needles – but something was missing. That feeling was my true starting point.

Looking back, it was invaluable to start the journey together. Reza and I complemented each other's strengths and perspectives, which helped us navigate challenges and grow the agency for many years.

Looking back, which encounters or projects have had the biggest impact on you personally?

Over my 25 years as an agency entrepreneur, I've been fortunate to work on some of the biggest game launches in history. Looking back, one that stands out personally is Anno 1503 – one of our very first AAA launches, almost 23 years ago. We went all in, convincing Adi Boiko, the founder of Sunflowers, on a bold plan to truly make an impact in the market. From PR and launch events to celebrity campaigns, even creating a board game with Settlers of Catan author Klaus Teuber and publishing a book, we pulled out all the stops. He was hard to convince, but we believed in ourselves and our ideas. In the end, so did he – and the rest is history. And of course, it was a fantastic game.

Another milestone was being part of the birth of an entirely new category: virtual reality. As a tech geek, launching the Oculus Rift in Europe with PR, social, and retail campaigns was incredibly exciting. It was also during that time that I met Markus Oeller, which set in motion the MSM. digital journey in 2018, before we evolved into 1SP in 2023.

Which gaming moments – whether personal or professional – are truly unforgettable for you?

My first unforgettable gaming moment was getting an Atari VCS with Pitfall and soon after, my first Atari 400 computer. I still remember my best friend and I playing for more than 24 hours straight without sleep. Those moments sparked a passion that never left me.

1SP IN A NUTSHELL

1SP Agency is an innovator in the global marketing of gaming, consumer electronics and technology, delivering impactful campaigns, crucial support services and ground-breaking technology to drive sales and build brand loyalty for clients.

- MSM.digital: PR, communications, AR/XR, and retail marketing
- FLZR: Retail promotion
- INSIGHT: Influencer and content creator
- Studio CO2: Full-service creative studio
- Renaissance PR: Award-winning video game PR
- New Fluence: Leading influencer marketing agency
- Promopers: Sales promotion, communication, marketing, events
- FIJAK: Design, production, logistics and retail activation

Professionally, launching Sonic during my time at SEGA in the 90's was another defining highlight. That's also when I met Steve Cross, who was then Creative Director at SEGA in London and today runs Studio CO2, our creative studio in the UK. It's amazing how moments like that can shape both your career and lifelong professional relationships.

Which qualities are essential for someone who wants to start their own agency in the gaming and marketing industry?

I'm not a big fan of giving advice, but for me, it has always been about following my passion. I love the industry I work in, the clients we work with, and the campaigns we create – and I genuinely wouldn't trade places with anyone in the world. I'm grateful every day to be able to do what I do.

I've also learned that you need a little bit of luck along the way, but just as importantly, you have to recognize it and seize it the moment it comes your way.

How do you stay relevant in such a fast-moving industry?

I like to say – and Markus shares this view – that we see ourselves as the coaches, not the players, to use a football analogy. We may not be the best players anymore, but we know where to place the best talent and how to enable them to perform at their best. That's our job and it's a big part of how the company stays relevant.

On a personal level, being a passionate geek makes it almost effort-

less for me to keep up with our fast-moving world. I genuinely enjoy staying on top of trends, technologies, and innovations, and that curiosity naturally keeps me connected to where the industry is heading.

Finally, paint us a picture of 1SP Agency in the next 5 years – what are your goals for the future?

Let's take it even further – our "Big Hairy Audacious Goal" for 2035 is to build a global powerhouse of specialized agencies with strong footprints in Europe, Asia, and the US. We want to bring together the best talent, the most innovative thinking, and the sharpest expertise in gaming, consumer electronics, and technology – all under the 1SP roof. That's the vision we're working towards every single day.

STEPHAN STEININGER



TORSTEN OPPERMANN

Torsten Oppermann (55) is the Co-founder and Co-CEO of 1SP Agency. 1SP Agency is his second successful buy-and-build venture, following the PIA Group, which he helped scale.

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100% REMOTE The name Active Fungus Studios was actually generated by a name generator, but it fits surprisingly well, as the studio is decentralised, just like fungi. The team is spread all across Germany. There are 15 people on the payroll, and 25 in total including freelancers and interns

ACTIVE FUNGUS STUDIOS

Turning a Difficult Situation Into the Best

From Indie to AAA — Every issue, we portray one studio from the German-speaking development scene.
This time: Active Fungus Studios from Munich.

"It for sure did not make us rich. But it opened a lot of doors for us. Everyone kept telling us the project is too big. And that might be true."

JAKOB BRAUN, CEO, CREATIVE DIRECTOR & PRODUCER

A

ctive Fungus Studios (AFS) came about out of desperation. CEO Jakob Braun recalls: "I had studied sociology and had been working as a music producer and musician after that. Then Covid hit and I had nothing to do. I had been tampering with the Unreal Engine already, so I decided instead of burying my head in the sand it was the right time to start something new." He put his knowledge of creative processes to good use in the development of games, in terms of both the creative and technical aspects. "So I talked to other people whose jobs were affected by Covid and we started AFS." Julia Bencker, who is responsible for Audio and Communications, still knows exactly how the initial recruitment processes worked. "He's also really good at recruiting people for all of his ideas. He got me into AFS while we were recording vocals for my first EP by casually shouting across the room: 'You play video games, right? Wanna make one? I could use someone for story-writing'. I shouted back: 'Sure, let's do it'. And that was that." That's how it started. Six months later, in March 2020, they had their first meeting with a programmer. Two weeks after that, the world went into lockdown and they suddenly found themselves with a team of around 20 people eager and motivated to create their first game.

Their goal is not only to entertain, but also to educate. "We're convinced that our history influences our present. The Inspector Schmidt series focuses on the 19th century – an incredibly fascinating time for Germany. Many of the social movements that are very relevant today formed back then, from women's rights to the emergence of nation states," Bencker says and believes that detective games encourage critical thinking. "A skill that is dearly needed in times where populism and fake news are on the rise." *A Bavarian Tale: Inspector Schmidt*, set in rural Bavaria in 1866, was inspired by Ludwig Thoma's "Der Wittiberg". "We added the detective element so players can discover what happened as a neutral observer – and hopefully get away with their lives when they look too closely," Bencker explains. However, they are delighted with the success of their debut title, which was released in February 2023 and won the "Best Story" award at the 2024 GermanDevDays. "It for sure did not make us rich. But it opened a lot of doors for us. Everyone kept telling us the

project is too big. And that might be true. But tackling such a big game as our first project allowed us to learn so many things that we can improve on in the upcoming projects," Braun says. Even while the second Inspector Schmidt game, *The Ebbing*, was still in development, the team had already started work on their next project: *Medieval Frontiers*, published by PlayWay and GameHunters. Braun: "I think it is very important for us to diversify the kind of games we are making. Story games are a very niche market. And a lot of the people on the team love survival and building games. So we are very happy that we got the chance to work on *Medieval Frontiers*, which caters to our interests and might attract a little larger audience than story games tend to do. These titles allow us to reuse technologies and knowhow we have developed while working on very different projects with a diverse core audience." They are really happy with Munich as a location for the games industry, and they praise the funding provided by the FFF, the highly committed teams at Games Bavaria and GG Bavaria. "You can feel that there's a very engaged digital minister, Dr. Fabian Mehring, giving everything to lift Bavaria as a games hotspot in Europe. We and the other studios in Bavaria are directly benefiting from it," emphasises Bencker. Braun elaborates on the role funding plays for the studio: "For AFS the funding by FFF and Nordmedia were crucial for us to grow to the team- and project-size we are at right now. Government funding is very important for the German games industry. We are way behind the industries in other countries and without the funding I don't see a realistic chance of closing that gap." He also emphasises the importance of reliable funding, which enables long-term planning and execution of strategies.

MARCEL KLEFFMANN



SHORT PROFILE

Active Fungus Studios GmbH

Westendstrasse 19, Rückgebäude 80339 München

activefungus-studios.de

info@activefungus-studios.de

Foundation: 2020

Number of employees: 15

Own IP Projects so far:

A BAVARIAN TALE

THE EBBING

MEDIEVAL FRONTIERS

INSPECTOR SCHMIDT – THE EBBING In the second adventure, Inspector Schmidt is sent to the far north. In this detective RPG, players must unravel the web of intrigue, lies and secrets surrounding a mysterious death



UNION INTERVIEW

Game Dev Roundtable @ ver.di: A Growing Push for Unionisation

At devcom 2024, the German game Dev unionisation effort has revealed itself to the world. We talked to German Services Union ver.di Secretary Matthias Grzegorczyk and two unionised devs about the first year, pushback from companies and their own experiences in organising works councils.

Editor's Note: We have anonymised both interview partners to protect them from possible repercussions.

GamesMarkt: It has been exactly one year since the kick-off of the ver.di Game Devs Roundtable. What has happened since then?

Committee Member: Unfortunately, what has happened is that at least 20,000 people in the games industry worldwide have lost their jobs since then. That is the negative aspect. At the same time, more and more games workers have actually joined forces. The network we have built has grown. Many have become active in standing up for their rights. Since the kick-off at devcom 2024, ten more works councils have been established in German game dev companies, as far as we know. In this respect, we are on the right track and it shows that there is a turning point. People are saying, "Enough is enough, we won't let ourselves be trampled on anymore."

And did many people approach you after the launch?

Matthias: Last August, we didn't have a single works council in our roundtable. Of course, we talked about it and considered how to go about it, and people had already made preparations. Works council elections require a certain democratic process before the election meeting can take place, so we prepared that.

The first election took place in September, and there have now been ten in all of Germany. We have actually elected more works councils overall, but two of the companies no longer exist. This is a great success, and the roundtable has also encouraged several interested parties to set up a works council in their company in the first place.

Committee Member: It's mostly word of mouth. We have people who like to talk to others in public and tell them about the Round Table on stages, but a lot of it is about finding people you can trust. Because we know exactly how difficult the situation is. So we

talk to people first before we bring them into the Round Table, because it has to be done in a spirit of trust. The information about who is actually talking to each other and who is organizing is very important and potentially dangerous for the employees, so we keep it secret. And despite these precautions, new people are constantly joining. Many of them are in the process of founding a works council, others have never dealt with works councils before, but feel that they are always on the verge of being laid off and want to organize. People are looking for a place to exchange ideas and get advice. Because many don't even know what a works council is or what it does. And that's intentional on the part of companies. "Security by obscurity," but security for the companies against the organization of the workers. We provide information to counter this. And we can also point out when something clearly violates labor law, refer people to free legal advice, and so on. Because we see an attack by many companies on fundamental rights and think it is important to launch a counterattack that stands up for the employees. Only in this way can we survive and change the status quo.

Such a statement is also directed against the prevailing conditions in the industry. Have you encountered resistance from employers?

Matthias: Yes, there was real opposition from a few companies. In one company, it took us months from the first election meeting, which had already been in preparation for even longer. That is, gathering people, talking to them, approaching people so that the necessary majorities could be organized to win the first election meeting, all this had already been going on for several months. When it became public that we wanted to hold an election meeting, individual people were singled out and pressured. At the election meeting, falsehoods were

spread, for example, that ver.di was not allowed to participate. To put it bluntly, that is simply illegal. Shortly after the election meeting, there were layoffs, and a whole bunch of people were let go. Among them were some from the preparatory committee for the works council election.

This meant, of course, proceeding with caution and care so as not to put more people at risk. In the end, it took almost exactly six months for the election to be held. By law, the deadline for the election process is six to ten weeks. We had to go to court to demand that the employer release the information, because once the election committee is in place, the employer is obliged to provide all the information it needs to determine who is eligible to vote and who is not. We won, and this court ruling was spectacular. It had quite an impact on ver.di, because the court ruled that the election committee should receive all the information it needs, including information about freelancers and anyone else who has anything to do with the company. That helped a lot. And now the relevant team has conducted the election.

So yes, in isolated cases we have seen a lot of resistance from employers. But we haven't noticed any concerted organized counteraction as such from several employers or even from the association.

Works Councillor: The game association itself published a statement immediately after gamescom 2024. As far as we are aware, there has been no further reaction to this. I think it's a case of wait and see, but that's just my speculation. Maybe they will make another announcement this year.

How did the process of establishing a works council work in your company? What steps did you have to go through?

Works Councillor: It went quite smoothly for us. When I started at the company, I heard that there already were plans to set one up. A works council was already in place at a →



MATTHIAS GRZEGORCZYK
Union Secretary
IT, ver.di

→ sister company, people knew the process. The establishment process was very slow at first, but at some point, more and more of us noticed that the parent company was making decisions that the workers didn't like at all. So we knew we had to push through with the establishment of the works council. At first, we just talked to people and gathered goodwill, but then we simply set a date. And it worked. It was important that we brought the people who had already signaled their approval long before back into a meeting when things became concrete. We also brought someone from ver.di back in. Thankfully, the process went smoothly after announcing our request for a worker's council.

So there was a specific cause in your company that prompted you to go ahead with setting up a works council?

Works Councillor: The impetus was the general state of the industry. More and more jobs were being cut everywhere. Ultimately, it wasn't layoffs that prompted us to step up our efforts to form a works council, but rather a different policy that we didn't like. But the fear of layoffs was always there, of course, because we had no protection against them if the company wanted to get rid of us.

Committee Member: We don't have a works council yet, but we've been working on it for a long time. So I can tell you about many obstacles. The first one was that shortly after we contacted a lot of people, there were two major waves of layoffs in quick succession. This affected almost half of the company and, unfortunately, many of those who were already convinced. Afterwards, I had hoped that this experience would spark something in people, but in fact, the opposite was true. Many were shocked, afraid of further layoffs, and didn't want to deal with it anymore,

or were already looking for jobs elsewhere anyway.

When the mood improved after a while and I started talking to people again, I noticed that many people believed that their relatively good status in the company would be jeopardized by a works council. This was especially prevalent with people who had been with the company for a long time. They had a lot of trust in the management, despite the huge wave of layoffs shortly before. They were very indifferent towards us. In this context, we also noticed that there were people who actively spoke out against unions and works councils because they believed that this would make the situation worse for employees. I don't know where this attitude comes from. You quickly realize that you shouldn't talk about your plans in detail with these people because you have to be afraid of being ratted out and then facing sudden dismissal.

An additional problem with the organization is that we have many remote employees from abroad who are hired through an external company. They are the ones who usually think the works council is a very good idea and would like to have one, but they

don't have voting rights and are not allowed to be on the works council itself. That's why nothing has happened yet. The important thing is that people have to be willing to do it. You also need people who want to be on the works council itself and do this work. Currently, there are two of us in our company who would be willing to do this. In addition, the industry is very international and many employees only speak English, but as a works council member, you are often confronted with German law and German politics, which are not easy to understand. Expats from other countries in particular have had many bad experiences with the foreign office and don't dare to wade through even more German bureaucracy. And when your visa is tied to your employment contract, you naturally fear getting into a dispute with your employer, who has you in their power.

That's an interesting specific case. What are you doing at the moment then? How are you preparing for a situation in which a works council might still be established?

Committee Member: We are keeping the offer open, continuing to offer discussions, and also keeping the channel open to ver.di, who are always willing to come to the company for a Q&A if desired. If it comes to that, it would be time to get down to business, i.e., elect a new election committee and set the election in motion. The difficult part is the preliminary work of motivating people, finding out who can be trusted, and breaking down prejudices.

And what experiences did you have when approaching people about this issue?

Works Councillor: It was naturally a challenge for me, as I was new to the company and didn't know most of the people. My contacts in the company, on the other hand, were all already part of the movement. There was little contact between departments, so how do you start? I paid attention to who was complaining. People like to

"In isolated cases we've seen a lot of resistance from employers. But we haven't noticed any concerted organized counteraction as such from employers or the association."



ONE YEAR AGO At devcom 2024, the organisers at ver.di (pictured) and the Game Dev Round Table made their organisation official

complain. We found a way in by addressing people's problems. That was easier with people who came from other industries where works councils were much better known and more common than in gaming. The hardest part was convincing people who had just started their first job in the gaming industry. They often felt very happy and grateful to the company. People who had been with the company for a long time also expressed fear that their familiar status quo would collapse. Ultimately, however, the general state of the gaming industry helped us, as so much around us was falling apart. This made many people realize that problems could arise very quickly for us too, even if everything seemed to be going well at the moment. It's not enough to get along well with the CEO. He can't always stand up for the people at the company, even if he wants to, and he also has to nod through things that the parent company imposes on him.

Matthias, with all these problems motivating people, is there a best approach that ver.di can offer based on

its many years of union work?

Matthias: If that were the case, the games industry as a whole would probably be doing better in general. Of course, we see similar problems in other industries. But when we started our efforts in the games industry, we noticed a huge advantage among game developers: People talk to each other, not just within their own companies, but across companies and professions. At the beginning, we at ver.di knew very little about the gaming industry. When a few game developers finally approached us and we made our processes available to them to set up an initial meeting, more than a dozen people from several companies showed up. This happened without any involvement from ver.di channels, just through the game developers themselves. And they immediately organized a monthly meeting.

From an organizing perspective, it was fantastic. We can only provide people with our structures and information. The social structure needed to form a works council with colleagues must be built by the workers themselves. And in the case of the game developers, this was already largely in place. There were already

structures of trust present. These are structures that we at ver.di cannot build for people; we only give them the tools, legal knowledge, and best practices from other cases, information on risk avoidance, but they have to apply it themselves. And among the game developers, many very quickly took matters into their own hands and organized themselves. In some cases, this resulted in processes so efficient that we took them back to our organizing meetings at ver.di and which we now pass on ourselves when people in other industries approach us.

If you want to set up a works council and have no connection to trade unions, what can you get from ver.di to help you get started?

Matthias: There are already some English-language resources at ver.di that you can use for guidance, for example at tech.verdi.de. There you will also find email addresses you can contact. When it comes to the gaming industry, it will probably go through me first, so I will contact the person and ask around at the round table →

→ whether there are already any connections with the company. The idea is to expand this association carefully, to help and protect each other. The more of us there are, the less employers or industry associations can put obstacles in the way of individual members.

Otherwise, I can only recommend: Come to events where the round table is present and provides information. Especially at devcom. We'll be there. If that's not possible, contact ver.di, whether locally or nationwide. There are contact options in English everywhere, and they will refer you further. And otherwise: Ask someone you trust. Union work is personal work. Talk to people you know can give you tips. Most of them will be happy to do so. Otherwise, there will soon be a website for the ver.di Game Dev Round Table.

There are other unions that represent programmers. So why should people in the gaming industry specifically turn to ver.di?

Matthias: Because we've been running the Game Dev Round Table for a little over two years now. Because the structure is there, because the people are there who are familiar with the work culture and socialization in the industry, who you may already know personally. That makes getting started much easier than if you don't know anyone and there are no structures in place. We've also received feedback that other unions lack these basic resources for game devs. The fact that the Game Dev Round Table uses channels that are normal for the industry, such as Discord, is a big advantage in itself.

WHAT IS A WORKS COUNCIL?

In Germany, unions work differently than in some other countries. Trade unions are established and everyone can join the union for their trade at any time. In companies, workers can organise into a so-called "Betriebsrat" (Works Council), which supports workers in the case of recruiting negotiations, layoff compensation and overall conflicts with the employer. Companies of a certain size are legally obliged to support the establishment and election of a Works Council if the workers wish to organise.

Committee Member: I can confirm that. So why ver.di as a game developer? Because we already have the resources. We have the group. We have people and we have momentum. I think that's the most important thing. When choosing a union, I have to ask myself the following questions: Who are they? What do they have to offer? How many members do they have? Is there someone who is responsible for me? With ver.di, this is clear thanks to the preparatory work that has been done.

We already have a large number of people who are active and help everyone who joins.

Last but not least: What are the Round Table's plans for the future? What are you working on?

Works Councillor: We have a lot of plans to make it easier to get in touch with us. It's an open secret that we exist. And we are working to make it easy to reach us from anywhere. And we will continue to do everything we can to keep the topic of union membership and works council formation in Germany and internationally in the spotlight. For example, with appearances such as a panel some of our members are hosting at devcom 2025. Events like devcom also support us and approve of what we do. That's why there is a panel there about our experiences in forming works councils, where people can get information and get in touch with us. And the more demand and visibility there is for the topic, the more opportunities we have to

point out what exists in other industries, for example, that we don't yet have. In the long term, we would of course like to talk about collective bargaining agreements and encourage game developers to demand everything that makes their work safer and better paid. Of course, this won't happen overnight.

Election committee: Yes, we are also planning for the long term. It is not enough to just claim a piece of the pie once. For workers, it is most effective to build structures that will then regularly and permanently ensure that they receive their fair share. That is what we want to do: establish and normalize. If everyone has a works council, it's simply strange if there isn't one somewhere else. That's where we need to get to. And to do that, we need to reach out to many more people, establish more works councils, which will then work with us to achieve even more than we already do.

We are a global industry. We come from all over the world, and there are trade unions and labor law organizations in every country. So it is also important to network internationally with a long-term perspective. This is also a topic for the future for us: networking in Europe in particular, informing and mobilizing people who work in Germany but may live in France or Italy. We are already in contact with other countries and want to expand this network significantly. So if people are already looking for help outside Germany and don't know who to turn to in their country, they are welcome to contact us. We can help and refer them to the right people. Another good contact is the global trade union UNI Global Union and its senior organizer for the tech & games sector, Karri Lybeck, who was already on site at devcom 2024 together with ver.di and has a good network.

PASCAL WAGNER

markets

2023 was a strong year for the games industry. Record figures were achieved in the five key European markets. While 2024 was more of a transitional year, not all of Europe's five largest markets experienced a decline, as the market report reveals.

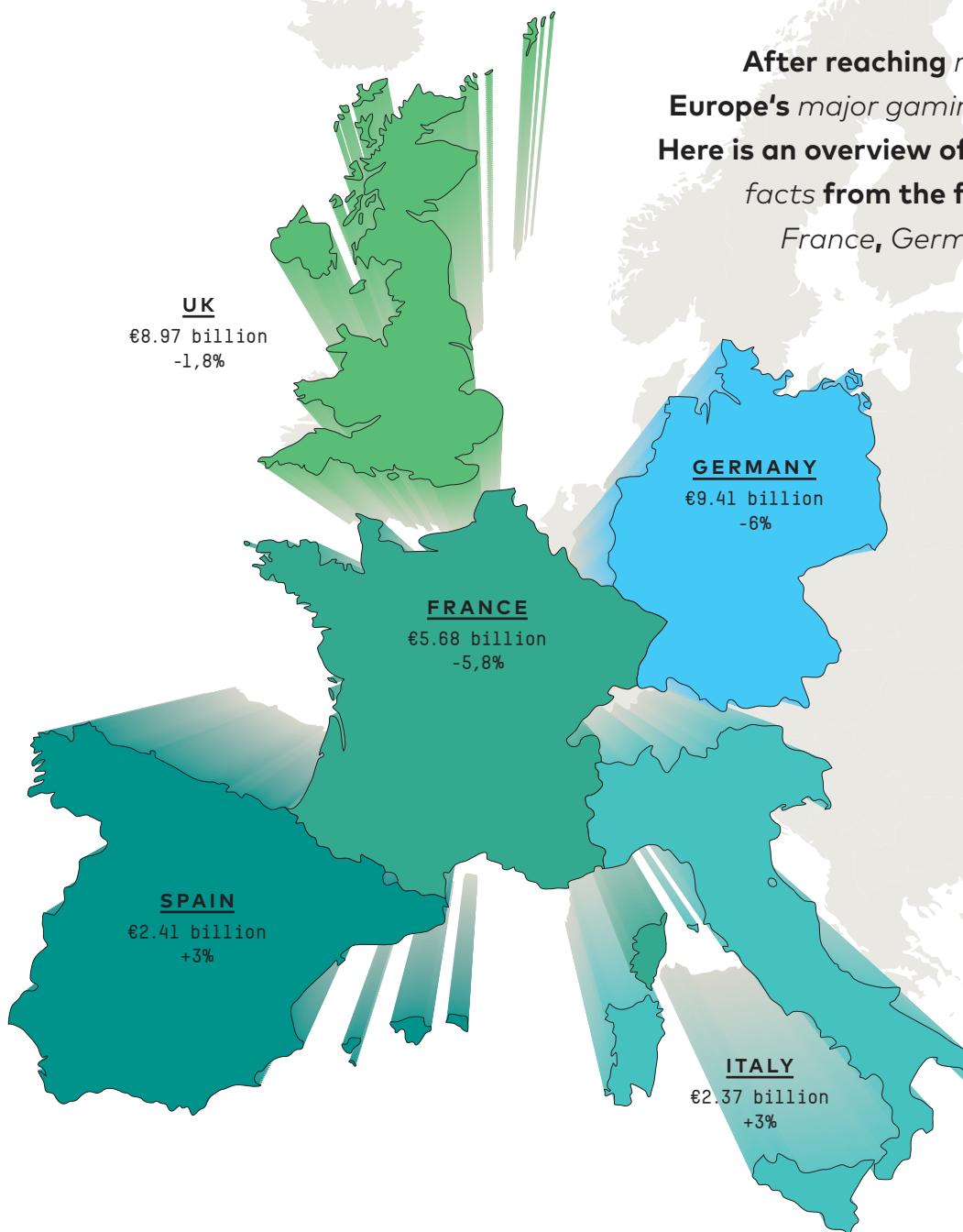
In this context, it is interesting to hear the views of executives from European games companies on the current challenges. There are also compelling insights into the labour market and how European game workers are faring.

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How did the European Key Markets Perform in 2024?



After reaching record highs in 2023, how did Europe's major gaming markets perform in 2024? Here is an overview of the key figures, insights and facts from the five main European markets: France, Germany, Italy, Spain and the UK.

FRANCE

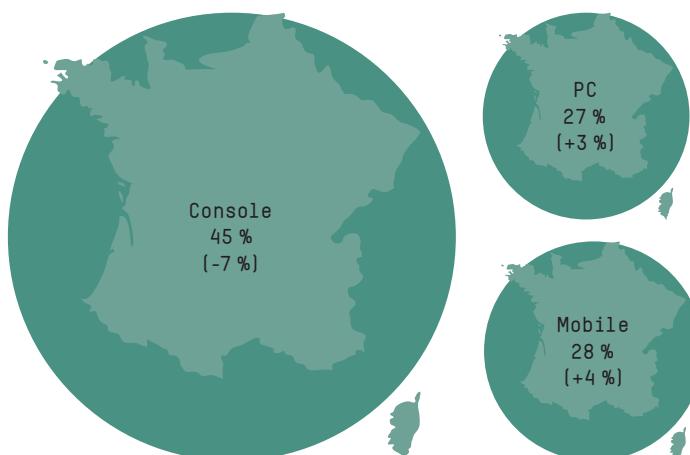
The third-largest games market in Europe, France, saw sales decline by 5.8% to €5.68 billion compared to 2023 (€6.02 billion). However, this remains the second-best result the market has ever recorded. Incidentally, the 2023 results were largely due to a catch-up effect in console sales after a period of scarcity. The market data was published by the French video game association Syndicat des Éditeurs de Logiciels de Loisirs (SELL) and is based on figures from GSD, GameTrack, SensorTower and IDC. The market is therefore stable and solid in 2024, exceeding the €5.5 billion mark for the fifth consecutive year and representing a 14% increase compared to 2019, the year before the Covid pandemic. Between 2019 and 2024, the market volume increased by around €700 million, marking a significant rise in percentage terms.

In his statement, SELL President James Rebours said: "So 2024 was a year of transition in terms of both hardware life-cycle and software line-up, following a year of atypical hyper-growth. Although down year-on-year (-5.8%), video games still

posted the 2nd best performance in their history, at €5.677 billion. This figure highlights the structural strengths of our industry, strong and constant consumer demand, the diversity of our ecosystems, and our ability to renew our hardware and software offer through innovation. These prospects should not blind us to the economic difficulties faced by a number of French and international structures, nor the difficult human and social situation faced by many employees in the industry, but they do allow us to look to the future with a degree of optimism".

The decline is primarily driven by the console segment, which contributed €2.55 billion to the total market in 2024 – a drop of 18.9%. Sales declined across all three console market segments: software (€1.53 billion; -12%), hardware (€692 million; -35%), and accessories (€328 million; -4%). The French data also highlights the ongoing shift from physical to digital distribution within this segment. Revenue is now split 60:40 in favour of digital.

The console market accounts for around 45% of the total video game market in France. Mobile gaming accounts for 28% of the market, representing just under €1.64 billion – an increase of 8.2% compared to 2023. As expected, the sector is still dominated by free-to-play titles, generating €1.58 billion (+8%). Paid mobile games generated only €11 million in



MARKET SHARES OF CONSOLE, PC AND MOBILE IN FRANCE IN 2024 AND CHANGE COMPARED TO 2023

revenue (-15%), while social and browser games generated €13 million (+71%). The PC segment accounts for 27% of the total French games market and grew by 9.1% to reach €1.52 billion. Of this, €488 million was spent on software (-3%), €755 million on hardware (+12%), and €276 million (+27%) on accessories. Monitors were the most popular accessory, generating €201 million (+26%).

A total of 38.3 million people in France play video games, accounting for 70% of the population. 75% of these players engage in this leisure activity at least once a week. →

Top 5 PC Games in France

POSITION	GAME	REVENUE IN € (SOLD UNITS)
1	Call of Duty: Black Ops 6	13,491,299 (163,172)
2	EA Sports FC 25	5,976,460 (90,286)
3	Helldivers 2	4,103,992 (124,557)
4	Call of Duty: Modern Warfare III	3,357,041 (57,132)
5	Dragon Ball: Sparking! Zero	2,269,694 (not specified)

SOURCE SELL DATA FROM GSD PANELS AT END 2024

Top 5 Console Games Across All Consoles in France

POSITION	GAME	REVENUE IN € (SOLD UNITS)
1	EA Sports FC 25	44,545,056 (736,691)
2	Call of Duty: Black Ops 6	30,047,733 (454,571)
3	Super Mario Party Jamboree	14,686,929 (309,015)
4	Mario Kart 8 Deluxe	13,093,165 (271,918)
5	Dragon Ball: Sparking! Zero	11,563,272 (166,237)

SOURCE SELL DATA FROM GSD PANELS AT END 2024. EXCLUDING BUNDLES

Top 5 Free Mobile Games in France – Revenue

POSITION	GAME	REVENUE IN €
1	Monopoly Go!	104,261,040
2	Coin Master	103,151,880
3	Brawl Stars	64,331,280
4	Royal Match	43,257,240
5	Candy Crush Saga	41,038,920

SOURCE SELL, SENSOR TOWER AT THE END OF 2024. ESTIMATED DATA, IOS AND GOOGLE PLAY COMBINED

SOURCE SELL

→ These figures are based on a Médiamétrie study conducted for SELL – an online study of 4,005 people representative of the French population. According to SELL, men make up 51% of all players, while women make up 49%. While video games remain a favourite digital pastime among young people – with 95% of 10- to 17-year-olds playing – they are also enjoyed by all generations: the average age of gamers is 37, and 66% of adults play. Notably, 43% of people over the age of 65 play video games. 52% of French people who regularly play video games (i.e. at least once a week) play an average of 7 hours and 17 minutes per week. The study found that 54% of regular players are male (with an average age of 36), while 46% are female (with an average age of 39).

According to the 2022 European Video Games Industry Insight Report, there were 577 game developer studios and 344 game development service providers in France in 2022, with more than 15,000 people working for game developer studios and publishers. Unfortunately, no more recent figures are currently available.

GERMANY

Instead of reaching the €10 billion mark, which the market narrowly missed in 2023 with revenues of €9.97 billion, sales fell by 6% in 2024 to €9.41 billion. This marks a pause in the growth of the German market, given that sales have grown by around 50% since 2019 alone, with all market segments rising by at least a mid-double-digit percentage.

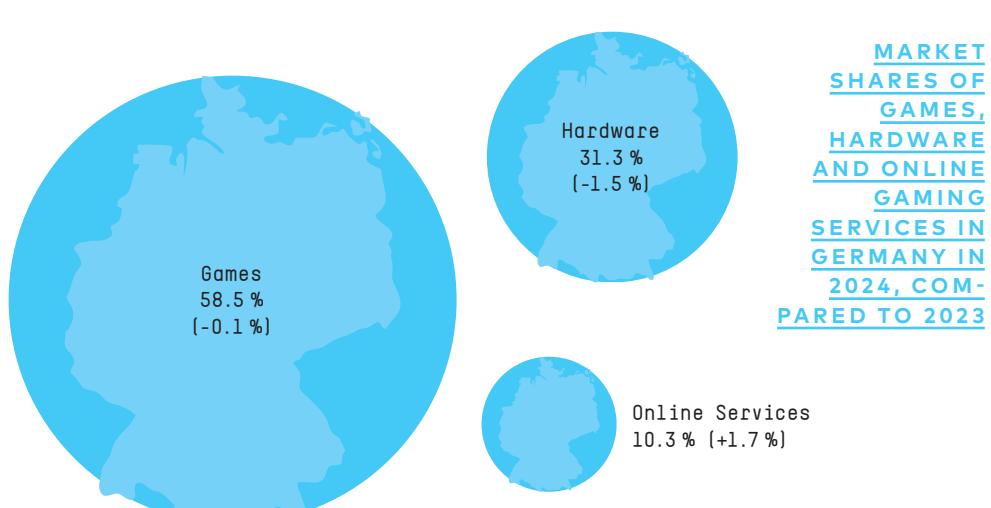
In 2024, both of the largest market segments performed negatively. Sales of hardware dropped by 10% to €2.94 billion. Meanwhile, sales of games dropped by 6% to €5.50 billion. The only positive development was in online gaming services, including subscription services offered by console manufacturers. Here, sales increased by 12% to €965 million. This market data was published by game, the Ger-



man Games Industry Association, and is based on statistics compiled by YouGov Shopper, Nielsen IQ, and data.ai (a Sensor Tower company).

"After years of frequently strong growth, the German games market took a breather in 2024. This was due in part to the fact that there were fewer game hits last year and that the demand for game consoles has normalised again. The greatest growth is

seen in online game services like cloud gaming – which underscores the perpetual dynamics and innovative strength of the games industry. In combination with new game consoles and blockbuster titles that have already been announced, this promises renewed overall growth in the near future," says game managing director Felix Falk. During the press conference, game also emphasised that last





FARMING AT HOME In Germany, Giants Software's *Farming Simulator 25* took fourth place, just ahead of Nintendo's *Super Mario Party Jamboree*

year's decline in consumer spending should not be exaggerated.

Taking a closer look at the different market segments reveals that sales of physical and digital games declined. In 2024, German consumers spent €921 million on games, which was 17% less than the previous year. However, spending on in-game purchases also fell, albeit by a comparatively small 3%.

The decline in hardware spending is mainly due to the console sector. This experienced an extraordinary boom in 2023, once delivery problems for new consoles had finally been resolved. As pent-up demand was met in 2023, the market returned to normal levels in 2024. Overall, Germans spent €807 million on stationary and handheld consoles (-26%). Sales of gaming accessories such as gamepads, steering wheels and VR equipment rose by 5% year on year, reaching €391 million. Revenue also declined in the PC segment, but only slightly. €540 million was spent on gaming PCs (desktop, handheld, laptop) (-1%), while PC gaming accessories, which include input devices, monitors, graphics cards and VR headsets, declined by 4% to €1,210 million.

Around 37.5 million people in Germany play computer and video

games, accounting for 59% of the population aged 6 to 69. The number of gamers has grown by around 9% since 2020. For the first time, the average age of German gamers has risen to 39.5. In the previous year, this figure was 38.2. Overall, 8 out of 10 gamers in Germany (79%) are over 18. In terms of gender diversity, the ratio has remained balanced in recent years, with around 48% of gamers in Germany being women and 52% being men. This data comes from a survey conducted by YouGov on behalf of the game association.

Following years of growth, the number of companies and employees in the German games industry declined in 2025. According to data from games-map.de in cooperation with Goldmedia, the number of companies in Germany that develop and/or publish games dropped by 4% in the last year to reach 910. Of these, 454 work exclusively in game development and 52 exclusively as publishers. The remaining 404 companies are active in both game development and publishing. The number of employees at games companies in Germany has also declined over the past year. While game developers and publishers employed 12,408 people in 2024, this figure has fallen to 12,134 – a decline of 2%.

ITALY

Unlike the markets in France and Germany, the Italian gaming market grew in 2024. This data was provided by IIDEA (Italian Interactive Digital Entertainment Association), the Italian video games industry trade association, based on figures from Games Sales Data, GameTrack, Ipsos and data.ai. Almost €2.4 billion in revenue was generated in Italy from games and hardware. This represents an increase of around 3%, which is the highest figure reported to date.

"Our annual report for 2024 clearly shows how video games have become one of the most popular forms of entertainment for Italians, with an industry that continues to grow and innovate even at the national level," said Thalita Malagò, General Manager of IIDEA. "Looking to the future, our sector is asking Italian policymakers to recognise video games as a sector with specific needs and characteristics. This recognition is crucial in order to unleash the growth potential that is still untapped and to make a decisive contribution to a more sustainable development of the country and its digital and technological transition."

In 2024, the software segment achieved the strongest performance, growing by 11% compared to the previous year to reach €1.8 billion, representing 77% of the total turnover. "The application segments are growing, reaching 903 million euros (+16%) and the digital segment with 715 million euros (+20%)," says IIDEA. The latter includes digitally distributed games and DLCs for PCs and consoles. "Physical data is down compared to 2023 (-24%). However, if we compare the value generated by the purchase of video games in digital format (362 million euros) and in physical format (201 million euros), we can see that the purchase of packaged video games is still important for Italians," IIDEA continues. The top five most popular games in Italy in 2024 are *EA Sports FC 25*, *EA Sports FC 24*, *Grand Theft Auto V*, *Hogwarts Leg-* →



#1 IN EUROPE
The bestselling game in 2024 in all five key markets was EA Sports FC 25, and Italy is no exception

→ *acy, and Dragon Ball: Sparking! Zero*. If only games released that year are considered, the EA Sports football game remains in first place, ahead of *Dragon Ball: Sparking! Zero*, *Call of Duty: Black Ops 6*, *F1 24* and *Helldivers 2*. Specific sales or revenue figures were not disclosed.

Turnover in the hardware segment decreased by 18% to €548 million. Consoles accounted for 70.6% of this figure, with accessories accounting for the remaining 29.4%. This puts Italy in line with international trends, as demand for consoles surged across Europe in 2023 following the resolution of delivery issues caused by the pandemic and semiconductor shortage. However, the market calmed down considerably again in 2024. According to the association, the observed decline is "normal" and will not

affect the positive forecast for 2025, which is driven by the release of highly anticipated games and the launch of Nintendo Switch 2.

"(...) The video game sector in Italy, which is competing for an increasingly central position in the international context, is developing along the lines of creativity and innovation, which, when combined, give life to a form of cultural expression capable of involving a heterogeneous public and transmitting knowledge. In fact, it is a sector capable of going beyond the boundaries of mere entertainment, considering, for example, the use in museums or schools. The Ministry of Culture pays great attention to the development of excellent video games in our country and promotes policies to support and promote them. Lastly, in terms of recent meas-

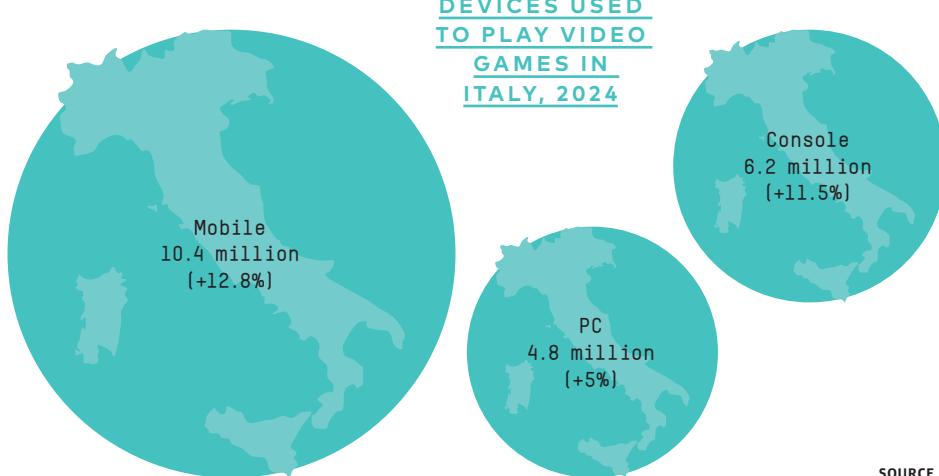
ures, the 12 million euro tax credit for the sector provided for in the 2025 Cinema Fund distribution decree has been confirmed again this year," said Senator Lucia Borgonzoni, Undersecretary of State at the Ministry of Culture.

One in three Italians between the ages of 6 and 64 plays video games, making up 14 million gamers in total (+8%). 59% of gamers are male and 41% are female. This growth is primarily driven by women, with an increase of 14% compared to 2023, compared to an increase of 3% among men. 68% of gamers play video games at least once a week. In the fourth quarter of 2024, the average Italian gamer played for 7.5 hours per week.

There are now more than 200 active games companies in Italy, compared to just 48 in 2012. Of these, 75% have more than six employees. The workforce is young, with 80% under the age of 36 and a strong concentration in the 25-35 age group. Women represent 23% of the workforce. "An evolving sector offering concrete opportunities for young people and showing signs of openness in terms of gender inclusion," IIDEA wrote.

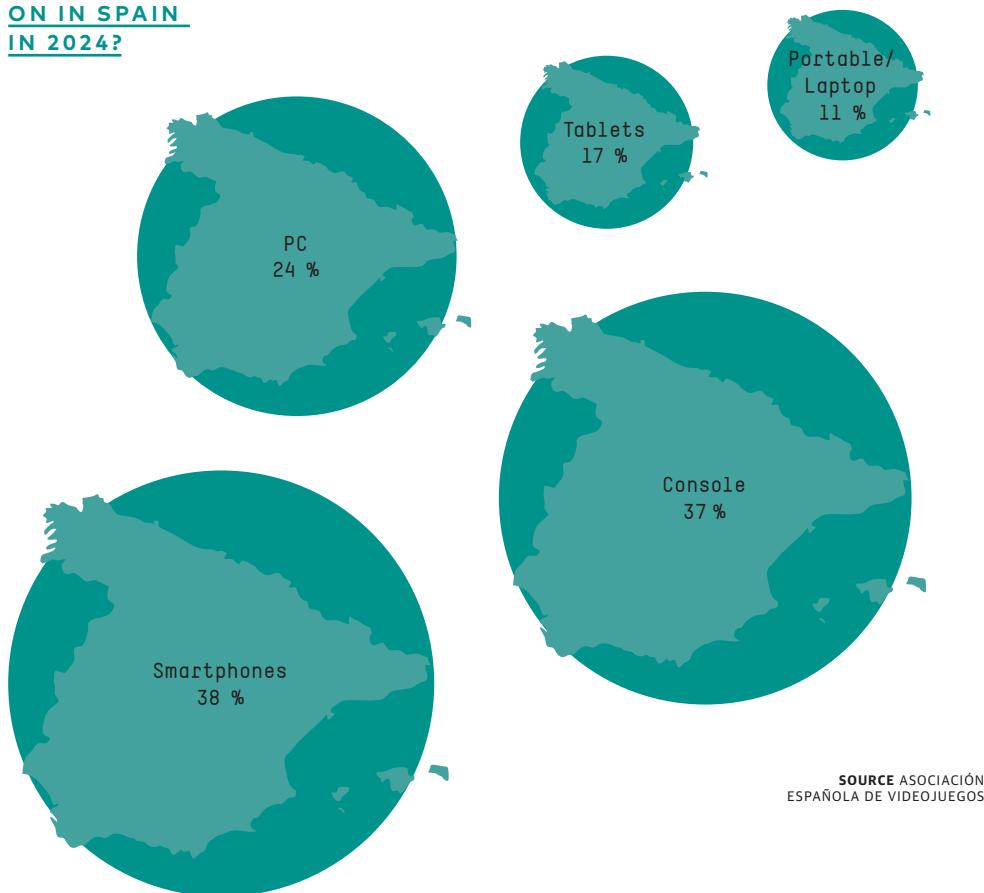
SPAIN

As in Italy, the Spanish video games market grew to €2.41 billion in 2024 (+2.95%). According to data from the Spanish video game association AEVI (Asociación Española de Videojuegos), based on figures from GameTrack and GSD, the overall market increased despite a decline in hardware sales, as was observed in other major markets. "This increase is slower than in previous years, but the figures show that the industry is becoming more established and reaching a wider range of ages. For the first time in 2024, the number of female players (50.4%) exceeded that of male players," says José María Moreno, director general of AEVI. He also describes 2024 as a year of transition for the local indus-



SOURCE IIDEA

**WHAT ARE THE
PLATFORMS
PEOPLE PLAYED
ON IN SPAIN
IN 2024?**



**Spain 2024:
Annual Video Games Charts**

POSITION GAME

1	EA Sports FC 25
2	EA Sports FC 24
3	Grand Theft Auto V
4	Hogwarts Legacy
5	Red Dead Redemption 2

**Spain 2024:
Annual Video Games Charts
(That Launched 2024)**

POSITION GAME

1	EA Sports FC 25
2	Super Mario Jamboree
3	Dragon Ball: Sparking! Zero
4	The Legend of Zelda: Echoes of Wisdom
5	Call of Duty: Black Ops 6

try. "It was a time of transformation for our production model, during which we saw some major development studios close their doors and some new projects emerge with great force," he said. He emphasises that the video games sector is global, so they need harmonised regulation at a European level and a tax ecosystem similar to that of neighbouring countries in order to compete on equal terms. Politicians are also satisfied with the development. "In this regard, the Ministry of Culture is committed to making its data and forecasts a reality and is constantly making progress. Proof of this commitment can be seen in the support lines for the video game sector and other forms of digital creation, which celebrated their fourth edition in 2025 with a total budget of €5 million financed by EU Next Generation funds. These funds have supported the development of 35 video games in addition to the 288 projects that have already benefited from previous editions," said Pilar Alegría, Minister of Education, Vocational Training and Sport.

Of the total revenue, €850 million came from physical sales (-18.1%) and €1.558 million from digital sales (+19.75%). Physical sales broke down as follows: hardware (€361 million), software (€334 million) and accessories (€155 million). According to AEVI, just over 900,000 consoles were sold in Spain in 2024, which is 18.8% less than the previous year. These generated sales of €361 million, almost €100 million less than in 2023. Digital sales include subscription and multiplayer services (€102 million), online platforms (€867 million) and apps (€589 million). A total of 5,435,439 games were sold, which is a noticeable drop from the 6.5 million sold last year. Only 45,000 of these were PC games, according to the report. Console games therefore account for the lion's share.

The yearbook also reveals an interesting development in player profiles (Gametrack study data). The number of players in Spain increased from 20.05 million in the previ- →

→ ous year to 22.1 million (+10.2%). For the first time, the proportion of female players exceeded that of male players, albeit by a small margin (50.45% to 49.55%).

On average, people play for 8.2 hours per week. Men play for an average of 9.72 hours, whereas women play for an average of 6.54 hours. On average, men play for longer than women, particularly on consoles and PCs. According to AEVI's comparative figures for Europe, Germany has the longest weekly playing time at 11.53 hours, followed by the UK at 11.08 hours. Spain ranks third with 8.2 hours, ahead of France (7.62 hours) and Italy (6.58 hours).

The video games industry in Spain employs 17,000 people and has an economic impact of €3.577 billion. It accounts for 14.3% of Spain's publishing sector, 9.6% of its audiovisual production sector (including film, video, television and music), 3.8% of its programming and data processing sector, and 3.2% of its telecommunications sector.

UNITED KINGDOM

After Germany, the United Kingdom is the second largest market in Europe – and it also saw a decline in 2024. Data collected by UKIE, the trade body for the UK's games and interactive entertainment industry, shows that UK consumers spent £7.6 billion on video games in 2024, which is a 1.8% decrease on the previous year. This equates to approximately €8.97 billion (exchange rate at the time of data publication: 1 GBP = 1.18 EUR).

Of the total spend of €8.97 billion, €6.04 billion was spent on games software (+0.6%), €2.47 billion on games hardware (-5.1%), and €452 million on games culture (-13%). The latter category includes toys, merchandise, magazines, soundtracks, events, and so on.

Sales of physical boxes in the games software segment declined particularly sharply to €378 million (-34%). The other three sectors per-

formed positively. Digital console sales amounted to €2.874 billion (+3.5%), ahead of mobile sales, which totalled €2.027 billion (+8.1%), and digital PC sales, which totalled €760 million (-1.8%). James McWhirter, senior analyst at Omdia, commented: "High-value blockbuster first- and third-party game releases took a breather in 2024, impacting spend on full-game content despite the volume of games holding steady thanks to a number of lower-value hits punching above their weight. As the installed base of new-gen consoles reaches a critical mass, spend on DLC continued its growth path. Unlike full-game content, subscriptions pricing has been more responsive to inflationary pressures, and these price rises are driving spend growth despite audiences reach saturation."

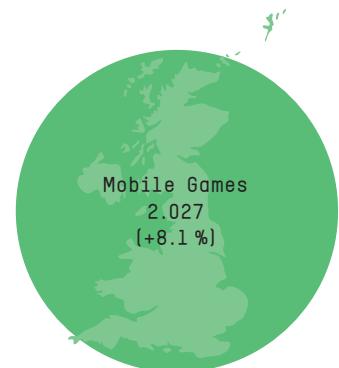
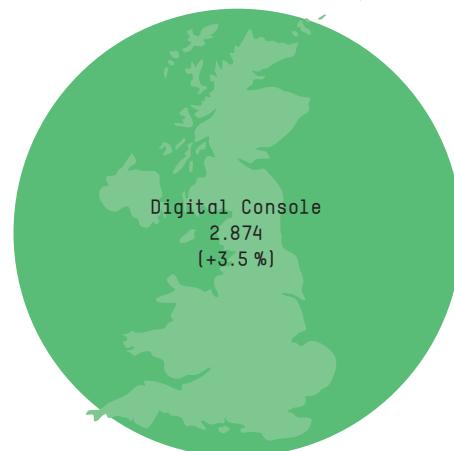
With one exception, the hardware segment experienced growth across the board. As in all other regions, console sales in the UK declined, falling to €850 million (-24%). All other segments performed well: PCs with €840 million (+6%), console game accessories with €544 million (+14%) and VR with €240 million (+7%). Dorian Bloch, Senior Client Insight Di-

LONG TAIL
Despite being released in 2023, *Hogwarts Legacy* still managed to reach third place in the UK annual charts, selling around 877,000 units



The European key gaming markets are France, Germany, Italy, Spain and the UK. In 2024 the markets in France, Germany and the UK declined, those in Italy and Spain grew.

SHARE OF GAMES SOFTWARE 2024 IN THE UK IN MILLIONS OF EUROS



SOURCE UKIE OMDIA GFK



FOOTBALL & SHOOTER The best-selling video game in the United Kingdom in 2024 was EA Sports FC 25, with sales of around 2.12 million copies. Call of Duty: Black Ops 6 came second, with sales of approximately 1.13 million (digital and physical combined)



rector at NielsenIQ, also attributes the decline in console sales to the age of the consoles on the market: the PS5 and Xbox Series X|S were launched in 2020, and the Switch in 2017. "For the Console Gaming Accessories market there was double-digit growth overall, and this sector includes an extremely wide variety of products but is fuelled by 2 major contributors, Controllers & Headsets. For the PC Gaming HW sector we saw single-digit growth across the entire PC Gaming ecosystem (Gaming PC's, Gaming Monitors, Gaming Graphics Cards, Headsets, Mice, Keyboards) – in 2024 the 2 major contributors to growth were Gaming PC's and Gaming Monitors," said Dorian Bloch. In the VR segment, PC-focused devices took the lead in 2024, alongside the Meta Quest 3 and 3S.

UK games studios support over 73,000 jobs and contribute £6 billion to the GVA each year. However, UK developers are under increasing pressure from countries that offer better incentives, easier access to funding, and greater access to talent. Nick Poole OBE, CEO of Ukie: "The UK games industry is a global success story, but we can't take that success for granted. With smart reforms, we can unlock £529 million GVA, create 6,000 skilled jobs, and supercharge the UK's digital economy. But if we

delay, we risk losing that prize to competitors overseas. Now is the time to press start on growth. The UK has the talent, the stories, and the studios. What we need now is bold support to match our ambition. If the government is serious about backing digital growth, then backing games is the place to start."

Interrupted Record Hunt

Almost all key markets described 2024 as a transitional period following the peak in 2022/23. However, it remains to be seen how things will develop in 2025. In the hardware sector, the launch of the Nintendo Switch 2 in June 2025 is expected to have a positive impact, with six million units already sold worldwide in just seven weeks. In terms of games, Nintendo has a number of highlights planned for the end of the year. Microsoft's line-up looks similarly strong, while Sony Interactive Entertainment's first-party line-up announced so far could be improved, apart from *Ghost of Yotei*. The postponement of *Grand Theft Auto VI* from 2025 to 26 May 2026 naturally leaves a gap in potential sales of AAA titles, but there is no shortage of strong choices, ranging from *Battlefield 6* to *Pokémon Legends Z-A* and *Borderlands 4*. Nevertheless, numer-

ous blockbusters have already been released, including *Assassin's Creed Shadows*, *Kingdom Come: Deliverance II*, *The Elder Scrolls IV: Oblivion Remastered*, *Split Fiction*, *Elden Ring: Nightreign*, *Monster Hunter Wilds* and *Mario Kart World*. While there is a good chance of market recovery, the macroeconomic challenges and global political uncertainties should not be ignored.

MARCEL KLEFFMANN

DATA SOURCES

FRANCE SELL (Bilan Du Marché Français 2024), GameTrack, GSD, IDC, data.ai

GERMANY game - the German Games Industry Association (German games market takes a breather in 2024, following years of growth), YouGov Shopper, Nielsen IQ, data.ai, gamesmap, Goldmedia

ITALY IIDEA (Essential Facts About Video Games in Italy 2024), GameTrack, GSD, data.ai, Ipsos

SPAIN AEVI (La Industria Del Videojuego En España Anuario 2024), GameTrack, GSD

UK Ukie (Ukie urges Government to back UK Games Industry or miss out on £500m opportunity), Omdia, NielsenIQ/GfK Entertainment, Circana, Nielsen, ABC / ERA Yearbook 2024, Sparkers, ISFE, GfK Entertainment

EUROPEAN INSIGHTS

What is the Perception of Europe as a Games Location Among Leaders of Games Companies?

The European games market is large, varied and important, but how does its competitiveness compare to that of the USA or Asia? And how do executives rate Europe's position in the global market? We spoke to several industry leaders to find out.

GamesMarkt: What is your opinion of the current state of the European games market?

Geoffroy Sardin: The European games market is currently in a dynamic and promising phase. As a sales market, it is one of the most lucrative globally, with major territories like Germany, the UK, France, and the Nordics showing strong consumer demand across all platforms, from consoles to mobile. European players are diverse, engaged, and increasingly interested in indie and culturally rich games, making it an exciting territory for both AA and independent studios, which is the positioning of the pullup entertainment entities and studios.

As a production hub, Europe boasts a wealth of creative talent, high-quality technical education, and supportive public initiatives (especially in countries like France, Germany, and Poland). However, the ecosystem remains fragmented, with each country developing its own framework and incentives. This can make cross-border collaboration more complex than in more centralized regions like the U.S.

That said, Europe continues to produce globally acclaimed games and studios. With increasing investment and a maturing infrastructure, it's becoming a more attractive base



GEOFFROY SARDIN
Chief Executive Officer of Pullup Entertainment, formerly Focus Entertainment (France)

not only for local developers but also for international partnerships and co-productions.

Is Europe able to compete with the other major markets, particularly North America and Asia?

Yes, but with certain caveats. Europe absolutely has the creative and technical talent to compete with North America and Asia. The region has produced some of the most iconic titles and franchises in gaming history. European studios are often praised for their innovation, strong narrative design, and artistic identity. However, when it comes to scale, funding, and marketing power, Europe still lags slightly behind. North America, particularly the U.S., benefits from massive venture capital presence and consolidated publishing power. Asia, on the other hand, leads in mobile gaming and has huge domestic markets that support aggressive scaling.

To fully compete, Europe needs more pan-European coordination, greater access to growth capital, and stronger visibility on the international stage. But creatively and technically, Europe is already on par.

How would you describe Pullup Entertainment's position in the European market, in terms of the opportunities and challenges it faces?

Pullup Entertainment is deeply embedded in the European creative ecosystem. Our presence is entirely European, with over 600 team members across our group entities: our flagship publisher Focus Entertainment Publishing based in France, and studios located in the UK (Dovetail Games), Germany (Deck13), France (Carpool Studio, 12/10ème, Leikir Studio, Dotemu), and the Netherlands (BlackMill Studio). The recent very positive reception from Press & players of *Ninja Gaiden: Ragebound* - published by Dotemu and crafted by the talented team at Spain's The Game Kitchen - perfectly illustrates the strength and creativity at the heart of European game development, and our ability to produce distinctive games with global resonance.

We see Europe not just as a market, but as a platform for innovation, collaboration, and cultural expression. Our philosophy is to connect creativity with community - delivering games that are distinctive, emotionally engaging, and deeply rooted in European storytelling, while still speaking to a global audience.

We benefit from many opportunities: access to world-class creative talent across the continent, a growing appetite for original IP among European players, and robust public support systems, including production grants and co-production schemes.

We're also encouraged by a growing willingness among European publishers and distributors to take risks on fresh voices – a trend that aligns perfectly with our identity.



ELENA GRIGORIAN

Chief Executive Officer of My.Games (the Netherlands)

"The primary risks are slow mobilization and the possibility of becoming overly dependent on American companies looking to reduce costs without compromising quality."

GamesMarkt: What is your opinion of the current state of the European games market?

Elena Grigorian: The current European games market is complex and challenging. Companies are facing significant pressures from product innovation, increasing competition, and evolving regulatory frameworks. There are both positive and negative aspects, but ultimately, the companies that succeed will be those capable of adapting and responding effectively. It's a crucial lesson for the entire market to manage resources wisely and strategically.

Is Europe able to compete with the other major markets, particularly North America and Asia?

In my opinion, Europe has strong potential to successfully compete. The region boasts extensive development experience, reasonably moderate team costs, and significant governmental support – all critical ingredients for future success. The primary risks are slow mobilization and the possibility of becoming overly dependent on American companies looking to reduce costs without compromising quality.

How would you describe MyGames' position in the European market, in terms of the opportunities and challenges it faces?

As a company, My.Games is well-diversified and confident in its future. We've made several challenging decisions to build a solid foundation for sustained growth, and we believe these actions will prove worthwhile. Recently, we have become more focused and increasingly open to collaborations with external partners. →

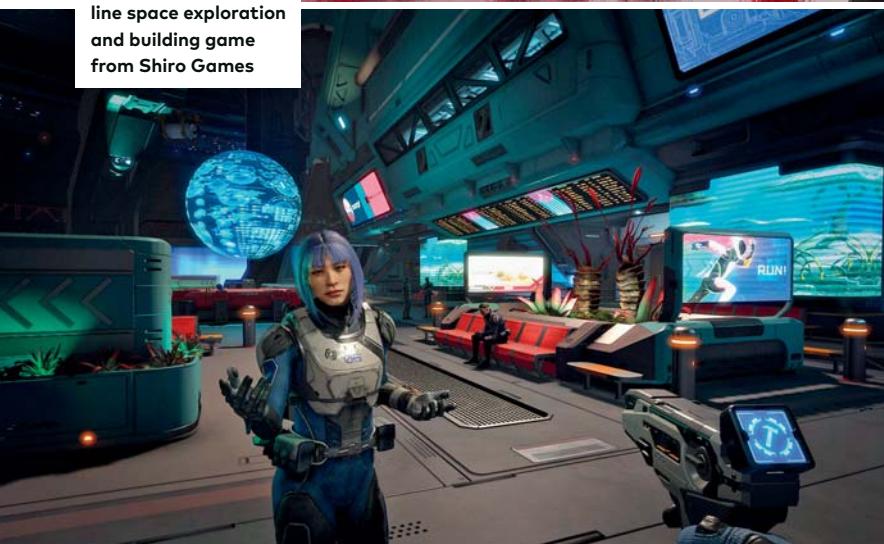


HUGE HIT Last year, Focus Entertainment scored a blockbuster with *Warhammer 40,000: Space Marine 2*. The game sold over seven million copies in under a year. *Ninja Gaiden: Ragebound* was just released recently





HIGH AMBITIONS
SpaceCraft is an online space exploration and building game from Shiro Games



→ **GamesMarkt: What is your opinion of the current state of the European games market?**

Nicolas Cannasse: What we can see at our level is a focus of the players on bigger games than on smaller indie titles. Our core games such as Northgard or Wartales are not affected as they have already proven themselves and our next games Farever and SpaceCraft are “big enough” to retain the players attention. But this can affect a lot of smaller studios and publishers focusing on more niche games. While there’s still the possibility for single-dev or small team releasing a hit, it’s a though market.

Producing games inside the EU is still a good trade-off, with a great pool of talents, quality of life and innovation.

Is Europe able to compete with the other major markets, particularly North America and Asia?

Definitely, the level of salaries have exploded in North America which makes the EU competitive for investments into new games that can be sold globally.

How would you describe Shiro Games' position in the European market, in terms of the opportunities and challenges it faces?

Our focus on PC games is paying off, with our reputation in the strategy and rpg genres allowing us to address players that want quality and long term support for this kind of games. We’re really excited about our next games and are looking forward to presenting them at gamescom on our business booth Hall 03.2 | Stand B050g – C051g.



DR. ANIKA THUN

CEO of Kalypso Media Group GmbH (Germany)

“To truly compete, Europe needs better digital infrastructure, harmonized regulatory frameworks, and stronger, more consistent funding models.”

GamesMarkt: What is your opinion of the current state of the European games market?

Dr. Anika Thun: Europe remains a key global sales market, home to highly engaged and passionate audiences. However, its role as a production hub varies greatly by region. Eastern Europe is increasingly attractive, thanks to a combination of cost-efficient operating environments and exceptional talent base, while countries like France and Germany rely on sustained government funding to remain competitive. Europe also benefits from a strong talent pool and robust educational support in game development. That said, Europe still faces structural challenges such as limited access to funding, a lack of international competitiveness, and fragmentation across individual markets.



NICOLAS CANNASSE

Chief Executive Officer of Shiro Games (France)

Is Europe able to compete with the other major markets, particularly North America and Asia?

Europe doesn’t see the same level of investment or infrastructure as North America or Asia. Markets like China have injected vast capital into their games industries and are rapidly ad-

vancing in both development speed and technology, especially when it Comes to AI. While Europe continues to debate regulations, other regions are already executing and innovating. The U.S. does have its drawbacks – particularly the high costs of AAA production – but it still maintains a technological edge.

We're also seeing a current weakness in Western markets, with layoffs and underperforming sales. Despite that, European studios have started to make a global mark – though not yet on the same scale. To truly compete, Europe needs better digital infrastructure, harmonized regulatory frameworks, and stronger, more consistent funding models.

How would you describe Kalypso Media's position in the European market, in terms of the opportunities and challenges it faces?

We strongly believe in Germany as a hub for high-quality game development. "Made in Germany" still stands for reliability, quality, and technical excellence. Kalypso Media has carved out a global position with its strong focus on strategy and simulation titles – a niche that resonates with dedicated fanbases around the world. With an established global publishing network and a growing international community, we're well-positioned to continue expanding.

Kalypso Media is focused on agility, nurturing talent, and pursuing strategic growth. One of our main challenges remains the difficult regulatory environment in Germany, which continues to hamper competitiveness on a global scale. Looking ahead, we aim to discover new opportunities and tap into emerging global markets to continue scaling the Kalypso brand. Our commitment to sustainable growth, strong IPs, and international reach remains unchanged – no matter the external challenges.



OLIVER HEINS

Co-Founder and Chief Product Officer at Aonic (UK)

GamesMarkt: What is your opinion of the current state of the European games market?

Olliver Heins: We all know that people in Europe and around the world still love playing games. Steam is breaking its own records for concurrent users frequently. The sales are just divided between more games, which leads to a highly competitive market, with gamers hunting discounts and the best value for money.

Meanwhile, price increases across the board on consoles, console games and accessories have not helped this predicament.

As a production location, Europe is fantastic. Most of the top-performing mobile games are developed in Eu-

rope – yes, in some cases they are owned by US companies, but produced in Europe. In PC and console, games like *Kingdom Come: Deliverance II*, *Split Fiction*, the *Batman Arkham* series and many more prove what European developers are capable of.

Is Europe able to compete with the other major markets, particularly North America and Asia?

Europe's development costs are lower than in the US, while facing a challenge from markets like China, India and Taiwan. But mostly, I think Europe is in a good spot in terms of balancing cost and quality of production.



→ China is a really interesting market, with some huge games which are only really successful domestically. But they have also now shown that they can build games for the global market – the standout example being *Black Myth: Wukong*, a fantastically executed game that looked brilliant. We can expect to see more examples of this.

Europeans, generally, wouldn't build AAA games of the scale and cost of their US counterparts, with budgets exceeding \$100 million. But that's not to say that European studios do not have the pedigree to create amazing AAA-quality titles – just look at the output of Remedy.

When you have smaller budgets, you need to think differently. This is why Europe is really good when it comes to indies. Just take *Enshrouded*, an amazing product from Keen Games, that certainly did not have the budget of a game like *Baldur's Gate 3*, but has been hugely successful on its own terms.

So Europe, North America and Asia all have our strengths and weaknesses – and we all have our place in the market.

How would you describe Aonic's position in the European market, in terms of the opportunities and challenges it faces?

Aonic is a diverse group; so we have not one game, but multiple games. We have not one studio, but multiple studios, across multiple locations in Europe and North America. This gives us the ability to react a bit more. We can slow down on one game and pace up on another, if we see a shift in the market that shows this is the right choice. If a game needs more time, or some other changes, it's not a reason to panic like it might be for a smaller team.

At the same time, we know we have a lot to prove. We want Aonic and Megabit to be known for some of the best games around, which takes a lot of time and work. Our mission is to do everything we can to get there, step by step.



MICHAEL METZGER

Managing Partner at Drake Star (US/GER)

"Europe offers a deep pool of highly skilled talent at generally lower costs than North America, supported by tax incentives and development grants in the UK, several Nordic countries, and to a lesser degree in Germany."

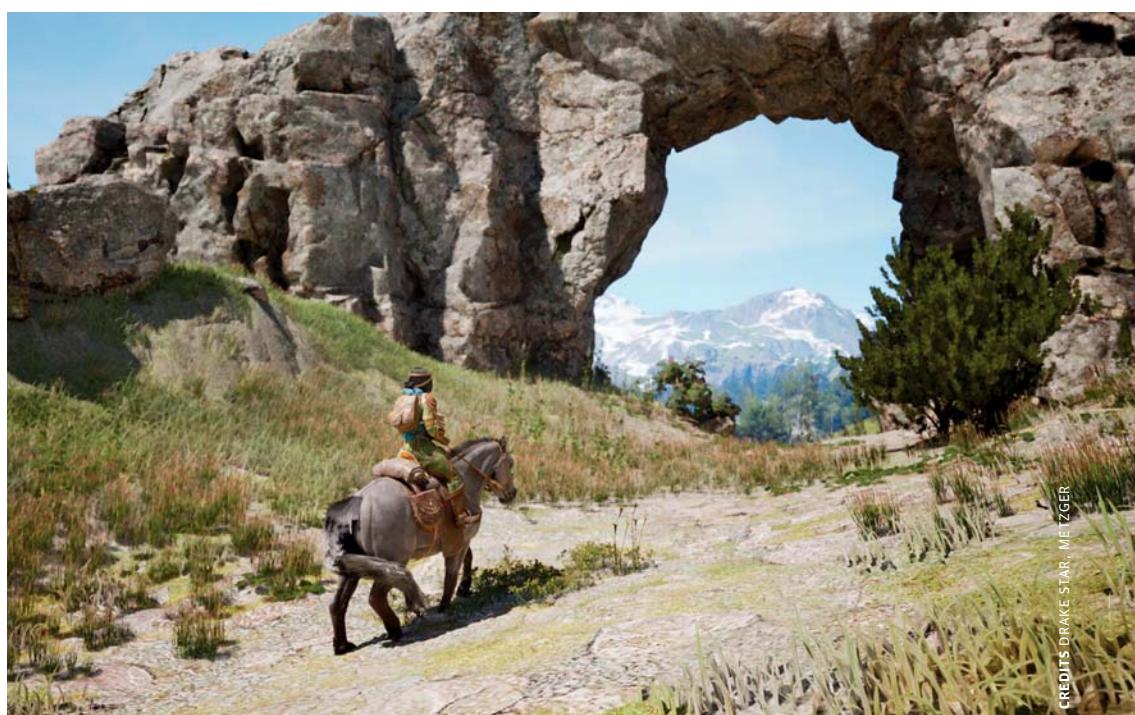
GamesMarkt: What is your opinion of the current state of the European games market?

Michael Metzger: Many of the world's leading gaming companies are headquartered in Europe, and the region will remain a key hub for game development. Finland's Supercell is widely regarded as one of the most admired mobile game developers globally, while France's Voodoo has innovated the mobile games market. Poland's CD Projekt Red is Europe's most valuable publicly listed gaming company, known for its highly successful PC and console titles. Several top European developer brands, including Ubisoft, Embracer, and Stillfront, have faced challenges post Covid, although there is optimism for a recovery in the medium term. Europe offers a deep pool of highly skilled talent at generally lower costs than North America, sup-

ported by tax incentives and development grants in the UK, several Nordic countries, and to a lesser degree in Germany. As one of the world's largest gaming markets, Europe sees Germany, the UK, and France generating the highest revenues in the region. With a large and dedicated player base, spending is expected to continue increasing in the years ahead.

Is Europe able to compete with the other major markets, particularly North America and Asia?

Europe is well positioned to continue producing highly successful titles across all gaming platforms in the years ahead, supported by its highly skilled talent base and decades of development expertise. However, we expect studios in Asia, particularly in China, to keep expanding their global presence and increasing their share in



Western markets. China offers a deep pool of skilled developers with very strong work ethics at a fraction of Western labor costs. The number of Chinese mobile games that entered the top 100 grossing titles over the past year is remarkable.

Looking ahead, it is likely we will see many more high-performing PC and console games from China, building on the success of *Black Myth: Wukong*.



MARCEL VAN DER STEEN

Commercial Director at Mindscape (the Netherlands)

GamesMarkt: What is your opinion of the current state of the European games market?

Marcel van der Steen: I believe that Europe still offers a strong basis for development and innovation. Europe's creative studios are an unique strength and there is a lot of talent available, a solid foundation for global reach. From a sales perspective it remains competitive. However, consumer attention is becoming increasingly

difficult to capture, so you need to do more and be creative to truly stand out.

Is Europe able to compete with the other major markets, particularly North America and Asia?

Yes, Europe is more than capable of competing. Asia may dominate the mobile gaming markets, while North America leads in terms of scale and marketing power. Europe's strength in creativity, reflected in narrative games and other genre-defying ideas, gives it a competitive advantage. For the game we are currently developing, *Windstorm: The Legend of Khiimori*, we're working with German development partner Aesir Interactive.

Together we will soon launch this unique game in Early Access on PC via Steam and Epic Games Store, so collaboration between European partners makes perfect sense.

How would you describe Mindscape's position in the European market, in terms of the opportunities and challenges it faces?

Mandscape has expanded its business year over year, even in an industry where many mid-sized publishers are scaling back. We attribute this to our release portfolio, our global reach and our people strategy in which we have a mix of experienced professionals and young creative talent, especially in the areas of digital and social marketing. We keep our structure agile and try to react quickly to changing market demands. That flexibility is a key competitive advantage, even when operating from Europe. Being situated in Europe doesn't limit us.

However, it does require consciousness, a "get things done mentality" and flexibility. As long as Europe can continue to adapt, I am still optimistic that it can maintain its position as a major force in the world of games. →



ON HORSEBACK *Windstorm: The Legend of Khiimori*, developed by Aesir Interactive and NightinGames, is scheduled for release in Q3 2025





CHRISTIAN MORIZ

Managing Director/
VP Publishing Services bei
Plaion (Germany, Austria)

→ **GamesMarkt: What is your opinion of the current state of the European games market?**

Christian Moriz: Plaion is a truly global company, with business and staff around the globe, including offices in eg. the US, Hong Kong and Australia. However, the vast majority of our more than 1,800 employees, including all of our game studios, are based here in Europe. We believe in Europe as a production location for fantastic games with global appeal, as well as in the passion and dedication of European players.

Is Europe able to compete with the other major markets, particularly

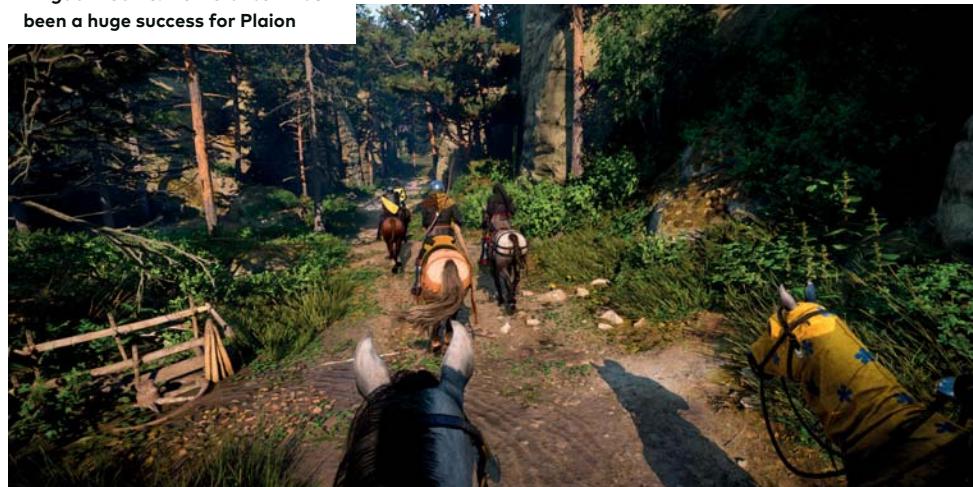
North America and Asia?

The Kingdom Come: Deliverance franchise is steeped in the culture and history of the Czech Republic, featuring real historic locations and people. Yet, our biggest markets for KCD2 this year have been North America and predominantly Chinese-speaking countries, even ahead of strong European markets like Germany, the UK and France. According to CzechTourism, KCD2 is even responsible for an increase in tourism. European game talent has much to offer the world, and we have only just scratched the surface.

How would you describe Plaion's position in the European market, in terms of the opportunities and challenges it faces?



MEDIEVAL RPG With over three million copies sold (and counting), *Kingdom Come: Deliverance II* has been a huge success for Plaion



Plaion is home to outstanding and passionate storytellers, creators, artists, and innovators. Talent with a strong, global vision. We believe people will always gravitate towards

authentic, high-quality gaming experiences, and the standout success of KCD2 has proven that we are perfectly positioned to deliver just that.

CHRIS MEREDITH

SVP Business Development – EMEA at Xsolla (UK)

"Still, if you're looking for bold ideas, skilled developers, and culturally rich games - Europe's one of the best places in the world."



GamesMarkt: What is your opinion of the current state of the European games market?

Chris Meredith: The European games market right now is in a pretty dynamic place, both as a development hub and a consumer market. On the production side, Europe has a strong mix of established studios and a thriving indie scene, especially in places like Poland, France, the Nordics, and the United Kingdom. That said, the fragmented nature of Europe – different languages, legal systems, and funding structures – can make it harder to scale across borders compared to, say, the United States.

On the sales side, Europe remains one of the top global regions, with Germany, the UK, and France being key markets. PC gaming is particularly strong here, mobile remains healthy, and console sales are stable, although growth has slowed a bit. The diversity in player preferences across countries can be both a challenge and an opportunity, depending on how well publishers localize and market their games. Overall, it's still a critical region for both production and sales, though navigating it takes some finesse.

Is Europe able to compete with the other major markets, particularly North America and Asia?

Europe can absolutely compete with North America and Asia, but how it competes really depends on the segment we're talking about. For example, when it comes to creativity and

innovation, especially in the indie scene, Europe is one of the strongest regions in the world. You've got places like Berlin, Stockholm, Paris, and Warsaw pumping out really creative, high-quality indie titles that punch way above their weight. The diversity of cultures and perspectives across Europe gives it a unique edge that's hard to replicate.

On the AAA front, Europe's doing pretty well too – studios have shown that Europe can produce global hits. But the scale still isn't quite as massive as what you see from the U.S. or Japan in terms of budget or IP recognition.

Now, when you look at market size and spending, Europe is a strong sales market, but it's more fragmented. You've got 30+ countries with different languages, rating systems, and consumer habits. Compare that to the U.S. or China, where you can scale faster within a single ecosystem – that's a challenge for Europe.

In Asia, countries like China, South Korea, and Japan dominate in mobile and online games, especially in monetization. In fact, according to the Q2 2025 edition of The Xsolla Report: The State of Play, China leads the charge when it comes to mobile game IAP revenue, generating \$25bn in 2024, followed by Japan (\$16bn) and South Korea (\$6bn). However, Europe does hold the largest number of mobile app downloads with 16.9b downloads. The region also has one of the broadest user bases, anticipated to reach 235.5 million people by 2029.

Still, if you're looking for bold ideas, skilled developers, and culturally

rich games – Europe's one of the best places in the world.

How would you describe Xsolla's position in the European market, in terms of the opportunities and challenges it faces?

At Xsolla, we see Europe as one of the most exciting and strategically important markets in the world right now. It's a region full of incredibly talented developers – from indie studios to mid-sized publishers – and they're building some of the most creative, globally resonant games out there.

What makes Europe unique, though, is also what makes it complex. You're dealing with multiple currencies, languages, regulations, and payment preferences. That fragmentation can be overwhelming for developers who just want to focus on building great games – not on managing cross-border payments or worrying about VAT compliance in 27 countries.

Our mission at Xsolla is to simplify the business of gaming, and in Europe, that means helping developers break through those regional barriers. Whether it's launching their own web shop, integrating 1000+ local payment methods, or staying fully GDPR and tax compliant – we handle that infrastructure so studios can scale faster and smarter.

We've also seen a real shift in mindset – especially in Europe – toward direct-to-consumer strategies. More studios want to own their audience, build branded experiences, and keep more of their revenue. We're empowering that with solutions like Xsolla Web Shop – giving European devs more control and flexibility.

So, in short: Europe is a priority for Xsolla – not just as a market, but as a creative engine for the industry. We're committed to being the partner that helps European developers grow, monetize, and succeed on their own terms.

MARCEL KLEFFMANN



EUROPE-WIDE SURVEY

EU Game Workers Struggle Hard – But Emerging European Countries Catch Up

The recent Game Workers Survey by Values Value and InGame Job paints a clear picture of game workers' perception in the EU and other European countries. While EU workers suffer, developing markets find strong chances in the current economic climate.

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his report presents the results of a targeted survey conducted in the European video games industry.

This initiative was a collaboration between Values Value and InGame Job, with the aim of uncovering key insights regarding trends in wages, job satisfaction, and career growth.

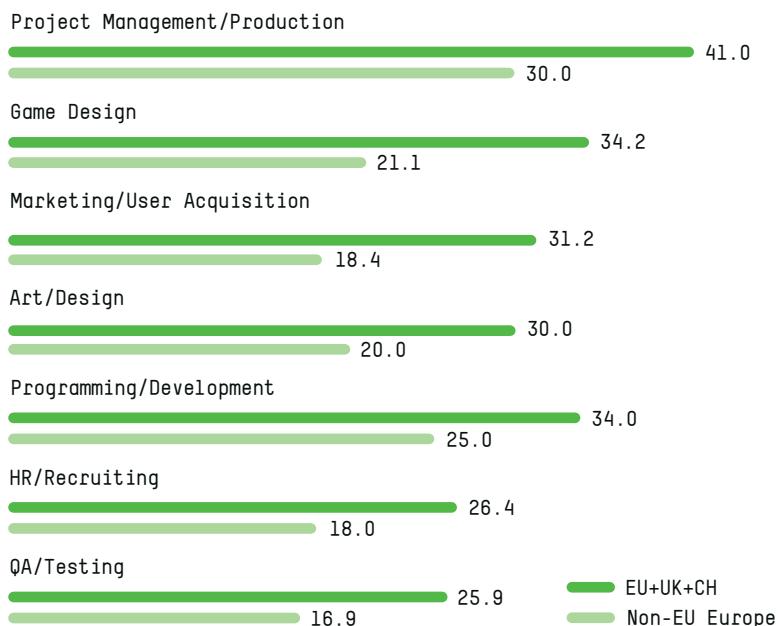
The research was conducted anonymously from March to June 2025. A total of 1,650 respondents from 85 countries worldwide participated in the study. The data was cleansed of invalid and anomalous salary responses. Only the European region was analysed in order to represent valid data, leaving 1,252 valid responses in two collections: EU+UK+Switzerland with 709 respondents and Non-EU with 543 answers.

Salaries of Mid-Level Game Workers Have Crashed

Unsurprisingly, salaries play a large role in the survey, especially in the context of massive layoffs in recent years and the flood of available workers on the job markets. Some general observations about salary data can be made, among them that EU salaries are in general much higher than the Non-EU salaries of the same work field. The survey however does not ask about cost of living and spending power, so these data points in themselves are not remarkable. What the survey shows however becomes significant by contrasting it with the data from 2024: Median salaries of some positions have dropped considerably in the EU. At Mid-level, Project Management and Production positions have dropped from a median salary of 45,300 euros in 2024 to 41,000 euros in 2025. Programmers salaries dropped from 47,000 euros to 34,000 euros, marking an especially drastic fall. The same is the case in HR and administration, where the 36,960 euros median of 2024

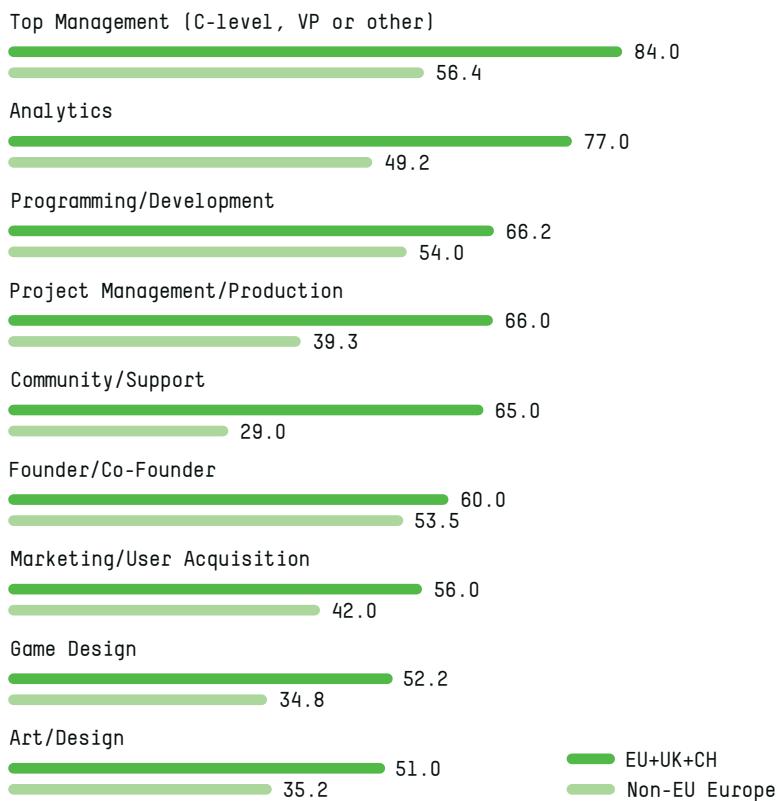
Median Salary of Middle Level Positions, 2025

(EU+UK+CH vs Non-EU Europe in 1,000 euros)



Median Salary of Senior Level Positions, 2025

(EU+UK+CH vs Non-EU Europe in 1,000 euros)



dropped to a 26,400 euros median in 2025. Outside the EU, Project Management and HR have seen a slight raise in median salary, while Developer salaries have gone down as well, but not by as large a margin as in EU.

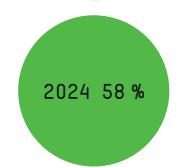
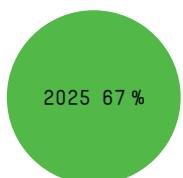
Remarkably, this generally precarious results cannot be reproduced in the Senior level data; almost all median salaries have kept stable here. This may be because while a lot of Senior level positions are known to have been made redundant in the last year, those that have kept their job on a Senior level also kept their salary, with not a lot of losses, but also a weaker position to negotiate raises.

Often considered part of salaries as well are the perks of a job, financial and otherwise. The most common perks in 2025 are still paid sick leave, annual bonuses, and paid parenting leave. However, their availability has declined compared to 2024: Paid sick leave is now only offered on 41 per cent of positions in the EU and 44 per cent outside the EU, down from 46 per cent in both regions last year. Annual bonuses dropped sharply to 27 per cent in the EU and 18 per cent in non-EU countries, from previously 46 per cent and 29 per cent respectively. Paid parenting leave is even lower in the EU, with 19 per cent down from 21 per cent, while non-EU countries saw a very slight raise in coverage from nine to 11 per cent.

2025 VS 2024 EUROPE, DIVERSITY & INCLUSION SPECIALIZED EMPLOYEES



No, and
nobody in
the team
is respon-
sible
for it



Already Low Satisfaction

Drops Further

No, but the
diversity and
inclusion
function in
the company is
spread across
the team.



This year's results show a decline in salary satisfaction across most seniority levels compared to 2024: Juniors: rated it 1.9 out of 5 in the 2025 survey, down from 2.2 in 2024. Mid-level rated it 2.7 out of 5 vs. 2.9 in 2024, Seniors 3.4 out of 5 vs. 3.6 in 2024. The results show that stability of satisfaction goes up the higher the position sits in the hierarchy, since Seniors have stayed relatively stable to their 2024 satisfaction. Even more so, Top-Level Managers have rated their satisfaction 3.8 out of 5, a slight →

→ growth from 3.7 in 2024. The satisfaction decline is most visible in this contrast among entry-level and mid-level specialists, many of whom faced salary freezes, reduced bonuses, or slower career progression in the past year, and top-level managers who according to the data have not suffered setbacks in their career. This highlights an ongoing imbalance in compensation dynamics.

Gender Pay Gap Remains, Expectations Pessimistic

The gender pay gap in game development persists despite growing attention to inclusivity. Women remain underrepresented, especially in leadership and high-paying technical roles. These structural imbalances, along with lingering stereotypes,

contribute to lower average salaries for women across the industry. Part of these imbalances in actual salaries are also strong differences in salary expectations between men and women when taking a new job or a promotion. These expectation gaps are pretty much uniformly slanted towards higher expectations from men, with two significant outliers: In HR and Recruiting, women expect 17 per cent more salary than their male counterparts. In Game Design, women expect five per cent more than men. These are not representative of all fields however. The biggest expectation gaps exist in Community Management and Support: men expect 42 per cent more than women here. Female Programmers expect 25 per cent less money than men, while in Project Management it is 20 per cent. Even Top-Level positions appear to dis-

criminate: Female Managers aim 28 per cent lower than men.

Diversity: an Afterthought?



TANJA LOKTIONOVA

Founder,
Values Value &
InGame Job

"The report helps to challenge myths. Take crunch, for example. Yes, it exists. But in reality, many people choose game development fully aware of what comes with it. And intense overtime doesn't happen as often as some think. The "toxic" label the industry often gets – it's more complex than it seems. We're also diving deeper into issues like gender pay gaps this time. Not just documenting the problem, but raising awareness – so the industry can become fairer, more honest, and more sustainable for everyone."

Speaking of gendered issues, the survey also asked if companies employed experts for Diversity & Inclusion or at least took efforts to spread expertise throughout the team. The answer is an overwhelming no: 67 per cent of EU participants and 58 per cent of non-EU participants shared that there is no spokesperson for Diversity issues in their team and no effort to spread responsibility for these important issues in the team. Only 14 per cent of EU participants and 17 per cent in non-EU said they have a dedicated DEI expert on staff.

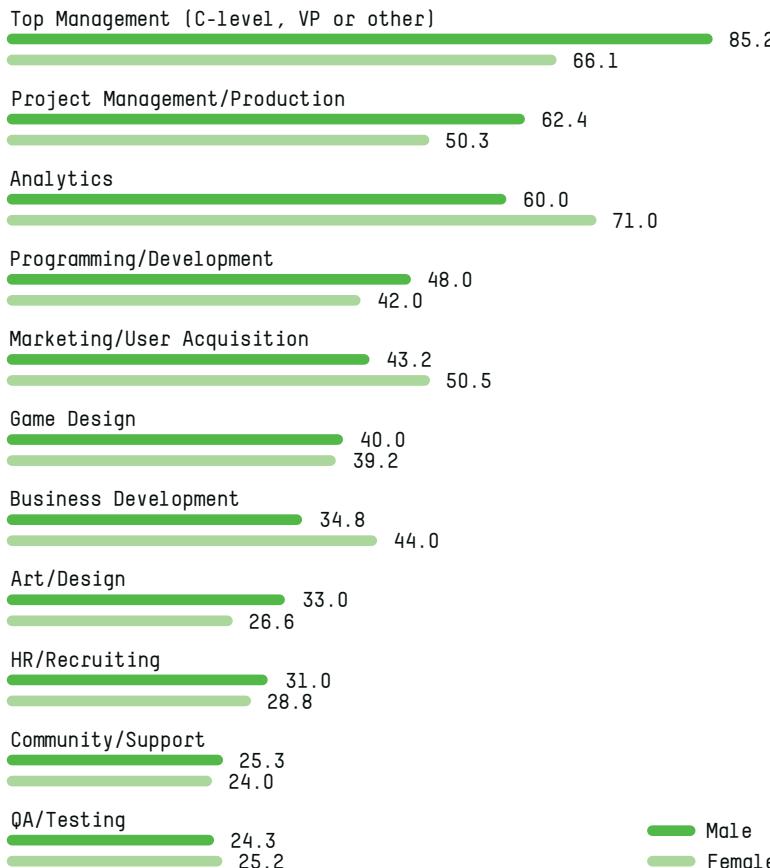
Layoffs: Full-Time Remains More Stable outside EU

The rate of unwanted unemployment is higher in the EU than outside, with about 11,35 per cent in EU states and only about nine per cent in Non-EU countries. The survey also produced clear results on which level of experience was hit the hardest with layoffs in the recent twelve months: 31 per cent of Senior participants were laid off, in contrast to 23 per cent of Mid-Level and 27 per cent of Juniors. And while about 46 per cent of laid off workers found a new job in under three months, more than 29 per cent of people also said they were looking for more than six months or even more than a year.

Unwanted Overtime Still Common, Non-EU Leads in Remote Working

In terms of their working situations, the survey shows that game working is a highly decentralised field of employment. 53 per cent of EU participants work from their home office, while an incredible 79 per cent of Non-EU participants do the same –

Median Salaries by Men and Women, 2025 (Europe in 1.000 euros)





KATYA SABIROVA

CEO and Co-Founder, InGame Job

"In recent years, our industry has gone through a great deal of stress. That's affected how people feel, how confident they are, and how they make career decisions. We're privileged to be able to track these changes over time, comparing year-over-year trends and digging deeper into what's really happening in the market."

possibly giving a hint of the strong support studio structures emerging in lower-cost-of-living countries. There are also more full-time employees in Non-EU European countries, with 69,26 per cent in contrast to around 65 per cent in the EU.

How about crunch, then? Overtime seems to be a common occurrence indeed, with about a third of all HR workers, Developers and Artists claiming they work overtime at least once a week and Game Designers, Project Managers and Marketers not being too far behind with 27 to 29 per cent of them regularly working overtime. The outliers are the Top-level Managers that say they work overtime 45 per cent of all weeks, making overtime a normalized part of management.

Of those people working overtime, a quarter says they are forced to do it and would rather not, while about 42.5 per cent say they feel fine if they think it makes sense for the product.

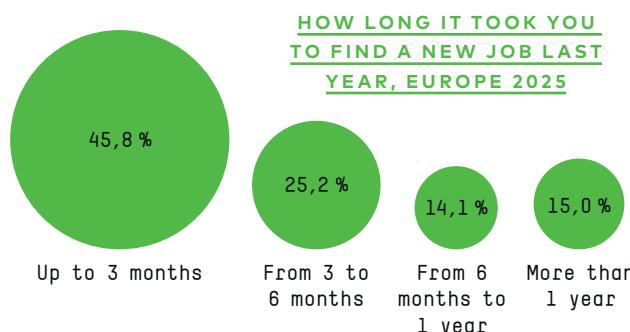
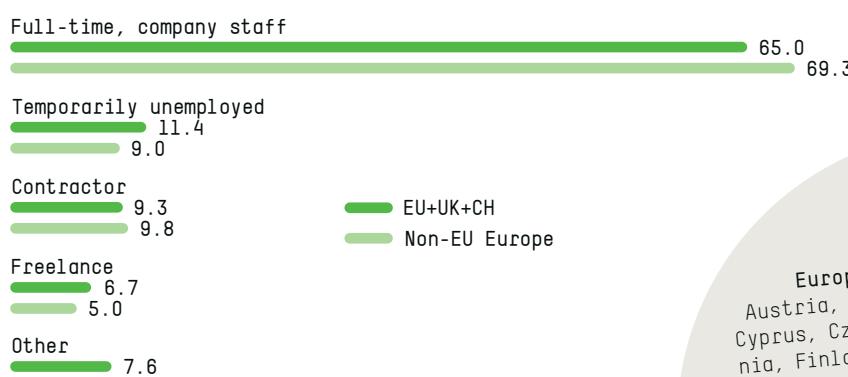
Between Crunch and layoffs, it appears there is a lot of pressure on game workers in Europe still. But

there are other issues that weigh down employees and tempt them to quit or otherwise impair their working capacity. Strongest among them is the risk of professional burnout, starkly related to crunch: 59 per cent in EU and 63 per cent outside EU say they suffer or suffered from it. Unprofessional management takes a close second place with 57 per cent in the EU and 45 per cent outside. This is a roughly stable note from last year on both issues: In 2024, 56 per cent of workers over the whole sample said they had suffered burnout while 48 per cent claimed they have to work under incompetent oder unprofessional management. The current lack of job security appears to hit the EU states much harder than non-EU countries however: 39 per cent of EU participants say the fear impedes their work life, while only 18 per cent fear for their jobs outside the EU. This, again, might give a hint on the emerging of support game studios and own-IP productions especially in Eastern European countries.

Summary

Within the current European Worker Survey, Values Value and InGame Job have confirmed several results that concur with a lot of the current perceived realities in the game industry. Job insecurities remain an especially high risk on workers welfare and mental health in wealthier countries where cost of living is high and companies are looking to trim their overhead. And while the survey this year unfortunately did not ask for gender-discriminatory issues in detail like it did last year, the negligence of Diversity and Inclusion becomes clear with how few companies even keep it in mind when hiring for their teams. The silver lining of the survey results is how it depicts the non-EU countries reaching up to the established production states more and more, and how this drive offer stability for non-EU participants in a time when established game studios have to cut their employment base to survive or even have to close down entirely. **PASCAL WAGNER**

Europe vs Europe by Employment Type, 2025 (EU+UK+CH vs Non-EU Europe in %)



PARTICIPANT COUNTRIES

Europe (EU+UK+Switzerland): Austria, Belgium, Bulgaria, Croatia, Cyprus, Czech Republic, Denmark, Estonia, Finland, France, Germany, Greece, Hungary, Ireland, Italy, Latvia, Lithuania, Malta, Netherlands, Poland, Portugal, Romania, Slovakia, Slovenia, Spain, Sweden, Switzerland, United Kingdom.

Sample Size: 709 people

Europe (Non-EU): Armenia, Belarus, Georgia, Moldova, Bosnia and Herzegovina, Montenegro, North Macedonia, Serbia, Ukraine.

Sample Size: 543 people

YOU CAN FIND THE FULL REPORT ON

[https://
ingamejob.com/](https://ingamejob.com/)

[https://
valuesvalue.com/](https://valuesvalue.com/)



Everspace 2



NUMBER MAGIC

The Steam CCU Top Performers From GSA

Plaion's *Kingdom Come: Deliverance II*, released in **February 2025**, has certainly made its mark. Its position at the top of the table for German, Austrian and Swiss games on Steam, based on CCU values since 2021, is impressive confirmation of this.

K

Kingdom Come: Deliverance II, developed by Czech Republic-based Warhorse Studios and published

by Plaion, has had more concurrent users than any other game from Germany, Austria or Switzerland on Steam since 2021. It is followed by *Enshrouded* from Keen Games, which is still in Early Access and is scheduled for 1.0 release in 2026. *Farming Simulator 25*, developed and pub-

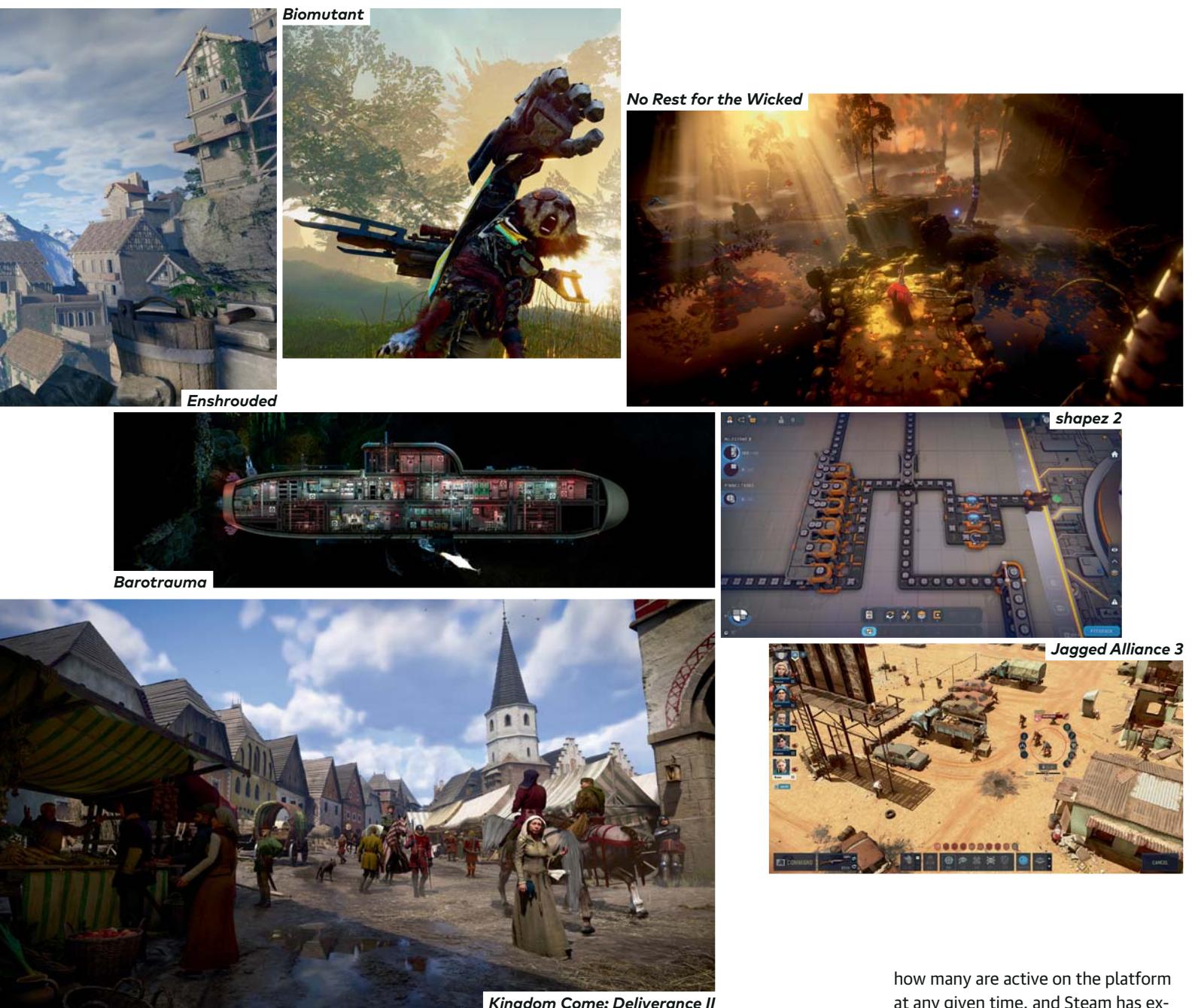
lished by Swiss company Giants Software, has also seen a significant increase in peak concurrent users compared to *Farming Simulator 22*.

The two clicker games *Banana* and *Bongo Cat* are not included in the list. At least one member of the team behind *Banana* is reportedly from Germany. The game had a peak CCU of 917,272 in June 2024. *Bongo Cat*, developed by Marcel Zurawka/Irox Games in Munich, reached a peak CCU of 194,508 on 4 May 2025. In both free-to-play games, players collect points by clicking or pressing keys,

using their playing time to collect rare/legendary items, which they can then sell on the Steam marketplace.

CCU: Only One Figure, but it's an Important One

When estimating the sales performance of a game, the peak number of concurrent users active on a platform at the same time (CCU), in this case on Steam, is generally an important indicator, but not the only one. While many games reach their maximum



CCU during the Early Access or regular launch, this peak only indicates success for a short period of time (usually two weeks) and often says nothing about long-term success. Therefore, CCU peaks are more indicative of trends or hype, and are an easily understandable and comparable metric for quickly measuring success. However, it is only one indicator of overall performance, which of course depends on the type of game, length of play, initial price, and business model. Some games achieve great success with comparatively low or moderate

but stable CCUs. Conversely, live service titles or games with regular updates achieve higher CCU peaks with each update – *BeamNG.drive* from Bremen-based BeamNG, for example, shows that this is not only true for free-to-play titles. However, CCUs do not provide information on how many new players are gained, how long they are retained for, how they rate the game or how much revenue they generate, especially since, in this case, data is only available from one platform (Steam). Of course, the number of potential players also depends on

how many are active on the platform at any given time, and Steam has experienced significant growth in recent years. In January 2021, the maximum number of concurrent Steam users was 25,425,816, of whom 'only' 7,413,419 were playing games. By March 2025, the record month to date, this figure had risen to 41,239,880 users, 13,194,690 of whom were playing games.

And Before 2021?

Looking beyond the specified time-frame, the PvPvE extraction shooter *Hunt: Showdown* (2019) from Crytek, with 60,124 CCU, and the MMORPG *Albion Online* (2017) from Sandbox Interactive, with 27,227 CCU, are →

THE TOP 87 GAMES FROM GSA ON STEAM

RANKED BY PEAK CCU AND RELEASED IN OR AFTER 2021

PL.	CCU PEAK	GAME	DEVELOPER	PUBLISHER	RELEASE
1	256,206	KINGDOM COME: DELIVERANCE II	🇨🇿 Warhorse Studios	🇩🇪 Deep Silver (Plaion)	04.02.2025
2	160,405	ENSHROUDED ¹⁾	🇩🇪 Keen Games	🇩🇪 Keen Games	24.01.2024
3	135,970	FARMING SIMULATOR 25 ⁴⁾	🇨🇭 Giants Software	🇨🇭 Giants Software	12.11.2024
4	105,636	FARMING SIMULATOR 22 ⁴⁾	🇨🇭 Giants Software	🇨🇭 Giants Software	22.11.2021
5	77,938	PAYDAY 3 ⁸⁾	🇸🇪 Starbreeze Studios	🇩🇪 Deep Silver (Plaion)	21.09.2023
6	55,048	BIOMUTANT	🇸🇪 Experiment 101	🇩🇪 THQ Nordic	25.05.2021
7	40,854	THE CYCLE: FRONTIER ^{1) 5) 6)}	🇩🇪 Yager	🇩🇪 Yager	08.02.2022
8	36,276	NO REST FOR THE WICKED ¹⁾	🇨🇳 Moon Studios	🇨🇳 Moon Studios	18.04.2024
9	31,057	MEDIEVAL DYNASTY ²⁾	🇨🇳 Render Cube	🇩🇪 Toplitz Productions	23.09.2021
10	27,099	TITAN QUEST II ¹⁾	🇩🇪 Grimlore Games	🇩🇪 THQ Nordic	01.08.2025
11	26,061	HALLS OF TORMENT ²⁾	🇩🇪 Chasing Carrots	🇩🇪 Chasing Carrots	24.05.2023
12	25,366	JAGGED ALLIANCE 3	🇹🇼 Haemimont Games	🇩🇪 THQ Nordic	14.07.2023
13	19,655	BAROTRAUMA ²⁾	🇫🇮 FakieFish, Undertow Games	🇩🇪 Daedalic Entertainment	13.03.2023
14	18,806	SHAPEZ 2 ¹⁾	🇩🇪 tobspr Games	🇩🇪 tobspr Games	15.08.2024
15	17,365	CONSTRUCTION SIMULATOR	🇩🇪 weltenbauer.	🇩🇪 astragon Entertainment	20.09.2022
16	13,905	9 KINGS ¹⁾	🇧🇷 Sad Socket	🇺🇸 Hooded Horse/Instinct3	23.05.2025
17	12,094	DEAD ISLAND 2 ⁷⁾	🇬🇧 Dambuster Studios	🇩🇪 Deep Silver (Plaion)	22.04.2024
18	9,880	WAY OF THE HUNTER	🇸lovakia Nine Rock Games	🇩🇪 THQ Nordic	16.08.2022
19	9,765	EXPEDITIONS: ROME	🇩🇰 Logic Artists	🇩🇪 THQ Nordic	20.01.2022
20	9,760	EVERSPACE 2 ²⁾	🇩🇪 Rockfish Games	🇩🇪 Rockfish Games	06.04.2023
21	9,161	SENGOKU DYNASTY ¹⁾	🇨🇳 Superkami	🇩🇪 Toplitz Productions	10.08.2023
22	8,233	ELEX 2	🇩🇪 Piranha Bytes	🇩🇪 THQ Nordic	01.03.2022
23	7,433	UNDISPUTED ³⁾	🇬🇧 Steel City Interactive	🇩🇪 Deep Silver (Plaion)	08.10.2024
24	7,101	DORFROMANTIK ²⁾	🇩🇪 Toukana Interactive	🇩🇪 Toukana Interactive	28.04.2022
25	6,899	MEGALOOT	🇩🇪 axilirate	🇩🇪 Instinct3	30.08.2024
26	6,883	DOME KEEPER	🇩🇪 Bippinbits	🇸🇪 Raw Fury	27.09.2022
26	6,723	THRONEFALL ²⁾	🇩🇪 Grizzly Games	🇩🇪 Grizzly Games	02.08.2023
27	6,685	SOUTH PARK: SNOW DAY!	🇺🇸 Question	🇩🇪 THQ Nordic	26.03.2024
28	6,478	PIONEERS OF PAGONIA ¹⁾	🇩🇪 Envision Entertainment	🇩🇪 Envision Entertainment	13.12.2023
29	6,426	ENDZONE – A WORLD APART ²⁾	🇩🇪 Gentlymad Studios	🇩🇪 Assemble Entertainment	18.03.2021
30	6,061	KNIGHTS OF HONOR II: SOVEREIGN	🇹🇼 Black Sea Games	🇩🇪 THQ Nordic	06.12.2022
31	5,935	KING'S BOUNTY II	🇨🇳 Fulgrum Games	🇩🇪 Prime Matter (Plaion)	24.08.2021
32	5,786	THE WANDERING VILLAGE ²⁾	🇨🇭 Stray Fawn Studio	🇨🇭 Stray Fawn Publishing	17.07.2025
33	5,664	LAST TRAIN HOME	🇨🇿 Ashborne Games	🇩🇪 THQ Nordic	28.11.2023
34	5,447	NORDHOLD	🇩🇪 StunForge	🇨🇾🇩🇪 HypeTrain, StunForge	25.03.2025
44	4,748	TINY BOOKSHOP	🇩🇪 neoludic games	🇺🇸 Skystone Games	07.08.2025
35	4,498	DUNGEONS 4	🇩🇪 Realmforge	🇩🇪 Kalypso Media	09.11.2023
36	4,147	SAINTS ROW ⁷⁾	🇺🇸 Volition	🇩🇪 Deep Silver (Plaion)	24.08.2023
37	3,930	SHADOW GAMBIT: THE CURSED CREW	🇩🇪 Mimimi Games	🇺🇸 Hooded Horse (prev. Mimimi)	17.08.2023
38	3,905	WE ARE FOOTBALL	🇩🇪 Winning Streak Games	🇩🇪 THQ Nordic	10.06.2021
39	3,782	NEW CYCLE ¹⁾	🇹🇷 Core Engage	🇩🇪 Daedalic Entertainment	18.01.2024
40	3,743	ENCASED ²⁾	🇷🇺 Dark Crystal Games	🇩🇪 Prime Matter (Plaion)	07.09.2021
41	3,669	SPELLFORCE: CONQUEST OF EO	🇨🇳 Owned by Gravity	🇩🇪 THQ Nordic	03.02.2023
42	3,513	THE GUILD 3 ²⁾	🇨🇳 Purple Lamp, GolemLabs	🇩🇪 THQ Nordic	14.06.2022
43	3,330	POLICE SIMULATOR: PATROL OFFICERS ²⁾	🇩🇪 Aesir Interactive	🇩🇪 astragon Entertainment	10.11.2022

→ also worth mentioning. However, both games' CCU peaks were reached significantly later after release, in August and April 2024 respectively. *BeamNG.drive*, which is available in Early Access since 2015, achieved a

concurrent user peak of 30,649 in April 2025. *Ori and the Will of the Wisps* (2020) from Moon Studios reached a maximum of 34,807 concurrent players. This puts it ahead of *Anno 1800* (2019), which reached a

maximum of 25,302. However, the city-building simulation from Ubisoft Mainz was removed from Steam before launch and was initially only available to purchase on Ubisoft Connect and in the Epic Games Store.

PL.	CCU PEAK	GAME	DEVELOPER	PUBLISHER	RELEASE
45	3,153	WRECKFEST 2 ¹⁾	Bugbear	THQ Nordic	20.03.2025
46	3,104	RAILWAY EMPIRE 2	Gaming Minds Studios	Kalypso Media	23.05.2023
47	3,043	CURIOS EXPEDITION 2	Maschinen-Mensch	Thunderful	28.01.2021
48	2,928	DROVA - FORSAKEN KIN	Just2D	Deck13	15.10.2024
49	2,880	EMERGENCY CALL 112 - THE FIRE FIGHTING SIM. 2	Crenetic	Aerosoft	18.03.2021
50	2,870	DESTROY ALL HUMANS! 2 - REPROBED	Black Forest Games	THQ Nordic	30.08.2022
51	2,848	DIE IN THE DUNGEON ¹⁾	Atico	HypeTrain/Instinct3	21.02.2025
52	2,790	DUNGEON CLAWLER ¹⁾	Stray Fawn Studio	Stray Fawn Publishing	21.11.2024
53	2,679	ATLAS FALLEN	Deck13	Focus Entertainment	09.08.2023
54	2,629	BUS SIMULATOR 21 NEXT STOP	stillalive studios	astragon Entertainment	07.09.2021
55	2,620	DWARVES: GLORY, DEATH AND LOOT ¹⁾	ichbinhamma	Gamersky/Instinct3	17.08.2023
56	2,576	WILD WEST DYNASTY ¹⁾	Moon Punch Studio	Toplitz Productions	16.02.2023
57	2,568	DISCIPLES: LIBERATION	Frima Studio	Kalypso Media	22.10.2021
58	2,449	EMERGENCY	Sixteen Tons Entertainment	Sixteen Tons Entertainment	15.08.2023
59	2,304	NICE DAY FOR FISHING	FusionPlay	Team17	29.05.2025
60	2,296	COMMANDOS: ORIGINS	Claymore Game Studios	Kalypso Media	09.04.2025
61	2,245	SCREW DRIVERS ^{1) 5)}	Creactstudios	Headup	20.06.2024
62	2,212	CHAINED ECHOES	Matthias Linda (Umami Tiger)	Deck13	08.12.2022
63	2,210	AEW FIGHT FOREVER	Yuke's	THQ Nordic	29.06.2023
64	2,136	WARPIPS ²⁾	Skirmish Mode Games	Daedalic Entertainment	21.04.2022
65	2,039	RAILROADS ONLINE ²⁾	Stefan Kelnberger	astragon Entertainment	05.12.2024
66	2,024	ODDSPARKS: AN AUTOMATION ADVENTURE ²⁾	Massive Miniteam	HandyGames/THQ Nordic	27.05.2025
67	1,973	SUPRALAND SIX INCHES UNDER	Supra Games	Supra Games	14.01.2022
68	1,949	SPONGEBOB SCHWAMMKOPF: THE COSMIC SHAKE	Purple Lamp	THQ Nordic	31.01.2023
69	1,906	ASGARD'S FALL - VIKING SURVIVORS ¹⁾	Soulotion	Assemble Ent./Instinct3	09.04.2025
70	1,745	GOOD COMPANY ²⁾	Chasing Carrots	Chasing Carrots	24.05.2023
71	1,666	SONS OF VALHALLA	Pixel Chest	Hooded Horse	05.04.2024
72	1,660	THE BUS ¹⁾	TML-Studios	Aerosoft	25.03.2021
73	1,628	ALONE IN THE DARK	Pieces Interactive	THQ Nordic	20.03.2024
74	1,627	TERRASCAPE ²⁾	Bitfall Studios	Stray Fawn/Instinct3	17.07.2024
75	1,584	TRINE 5: A CLOCKWORK CONSPIRACY	Frozenbyte	THQ Nordic	31.08.2023
76	1,445	AMBULANCE LIFE: A PARAMEDIC SIMULATOR	Aesir Interactive	Nacon	06.02.2025
77	1,440	LET THEM TRADE	Spaceflower	ByteRockers' Games	24.07.2025
78	1,435	PARK BEYOND	Limbic	Bandai Namco	15.06.2023
79	1,430	SONGS OF SILENCE ²⁾	Chimera Entertainment	Chimera Entertainment	13.12.2024
80	1,422	WE ARE FOOTBALL 2024	Winning Streak Games	HandyGames/THQ Nordic	04.03.2024
81	1,348	LUMBERJACK'S DYNASTY ¹⁾	UMEO Studios	Toplitz Productions	25.02.2021
82	1,226	HIDDEN DEEP	Cogwheel Software	Daedalic Entertainment	22.01.2024
83	1,198	DISNEY EPIC MICKEY: REBRUSHED	Purple Lamp	THQ Nordic	24.09.2024
84	1,191	SUBWAYSIM 2	Simuverse Interactive	Aerosoft	29.04.2025
85	1,120	STICKY BUSINESS	Spellgarden Games	Assemble Entertainment	17.07.2023
86	1,116	OUTCAST - A NEW BEGINNING	Appeal Studios	THQ Nordic	15.03.2024
87	1,112	FLING TO THE FINISH	SplitSide Games	Daedalic Entertainment	18.01.2024

1) EARLY ACCESS RELEASE; 2) LEFT EARLY ACCESS; 3) CCU PEAK IN EARLY ACCESS; 4) CCU WITHOUT DATA FROM OWN LAUNCHER; 5) FREE-TO-PLAY; 6) NO LONGER AVAILABLE;

7) LAUNCHED FIRST ON THE EPIC GAMES STORE; 8) MEANWHILE, PLAION HAS SOLD THE PUBLISHING RIGHTS TO STARBUZZ;

ONLY DEVS AND PUBLISHERS FROM GERMANY, AUSTRIA AND SWITZERLAND WERE TAKEN INTO ACCOUNT; ONLY CCU PEAKS FROM STEAM, NO OTHER PLATFORMS; **DATA SOURCES** STEAM AND STEAMDB

Pre-orderers on Steam were still able to access the game and all expansions. Following a change in strategy at Ubisoft, the game was later made available for sale again, which limits the comparability in this regard. A

similar situation occurred with *Dead Island 2* and *Saints Row*, which launched as time-exclusive titles on the Epic Games Store. In the realm of building and economic simulations, *Transport Fever 2* (2019) from Urban

Games in Switzerland reached a peak of 24,308 concurrent users, while *Tropico 6* (2019) from Limbic Entertainment, Realmforge Studios, and Kalypso Media peaked at 15,294.

MARCEL KLEFFMANN

1UP ❤️❤️



3UP ❤️❤️



ENTWICKLE MIT UNS
LEBENDIGE ONLINE-SPIELWELTEN



cipsoft.com/karriere

 CIPSOFT

highlights

With more than six million players hooked, *Anno 1800* set the bar high for its successor, *Anno 117: Pax Romana*. However, Ubisoft Mainz isn't resting on its laurels. Instead, they are giving the familiar concept a fresh twist by setting it in ancient Rome. Much more futuristic is *Borderlands 4*. 2K Games' shooter-looter is set to be even bigger and more ambitious. Meanwhile, Square Enix is bringing back a popular classic with *Final Fantasy Tactics: The Ivalice Chronicles*.

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Major Release Avalanche Incoming

The high-turnover **holiday season** is fast approaching, and with it comes a flurry of new games releases spanning a wide range of genres for almost every platform. There is something for everyone...

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ven though many block-busters, indie highlights and surprises have already been released this year,

the steady stream of new games shows no sign of abating. On the following pages, we present a selection of highly anticipated releases. But there are many more hits coming out over the next months.

Sony Interactive Entertainment will release *Ghost of Yōtei* on PS5 on 2 October. Its predecessor has since surpassed 13 million sales. It will be interesting to see how Sucker Punch's game fares against *Assassin's Creed Shadows*, which is set in Japan in a similar era, only a few decades apart. Bungie's extraction FPS *Marathon*, originally scheduled for the end of September, has been postponed due to feedback following a playtest. Sony is slowly breaking down platform barriers, too – at least for multiplayer titles. From 26 August, Xbox Series X|S players will have the opportunity to spread managed democracy in *Helldivers 2*. Xbox will release *Gears of War: Reloaded* at the end of August (on PS5 as well), and *Keeper* by Lee Petty & Double Fine will be released on 17 October. In this surreal puzzle adventure, a long-forgotten lighthouse comes to life. On 29 October, Obsidian will launch the sci-fi RPG *The Outer Worlds 2*. This will be

Little Nightmares III



Battlefield 6



Jurassic World Evolution 3



*The Outer Worlds 2**Painkiller**Ghost of Yotei**Metroid Prime 4: Beyond*

Obsidian's third release of the year. Last but not least, the Ninja Gaiden action-adventure franchise will return on 21 October with *Ninja Gaiden 4*, developed by PlatinumGames, Team Ninja, and Koei Tecmo. Nintendo also has a few projects in the pipeline. *Metroid Prime 4: Beyond* and *Hyrule Warriors: Age of Imprisonment* are both scheduled for release in 2025. Electronic Arts will launch a remastered version of *Plants vs. Zombies (Replanted)* on 23 October. *Battlefield 6* is entering the fray with considerable momentum, offering players a dynamic destruction extravaganza. During the open beta weekend, over 500,000 concurrent users were active on Steam alone. This suggests that this year's *Call of Duty*, *Black Ops*

7 from Treyarch and Raven Software, has found a worthy challenger. On the subject of shooters, *Painkiller* (with co-op) is returning on 9 October. Classic survival horror awaits in *Cronos: The New Dawn*, out on 5 September from Bloober Team. Konami is also tapping into this genre with *Silent Hill 1* (25 September), which was met with considerable enthusiasm by the audience at its unveiling. Bandai Namco's *Little Nightmares 3* is scheduled for release on 10 October. *Dying Light: The Beast* (19 September) from Techland will be more closely aligned with the first instalment of the series. Large and terrifying creatures of all kinds can be found in *Jurassic World Evolution 3* on 21 October – this time with juvenile dinosaurs, too.

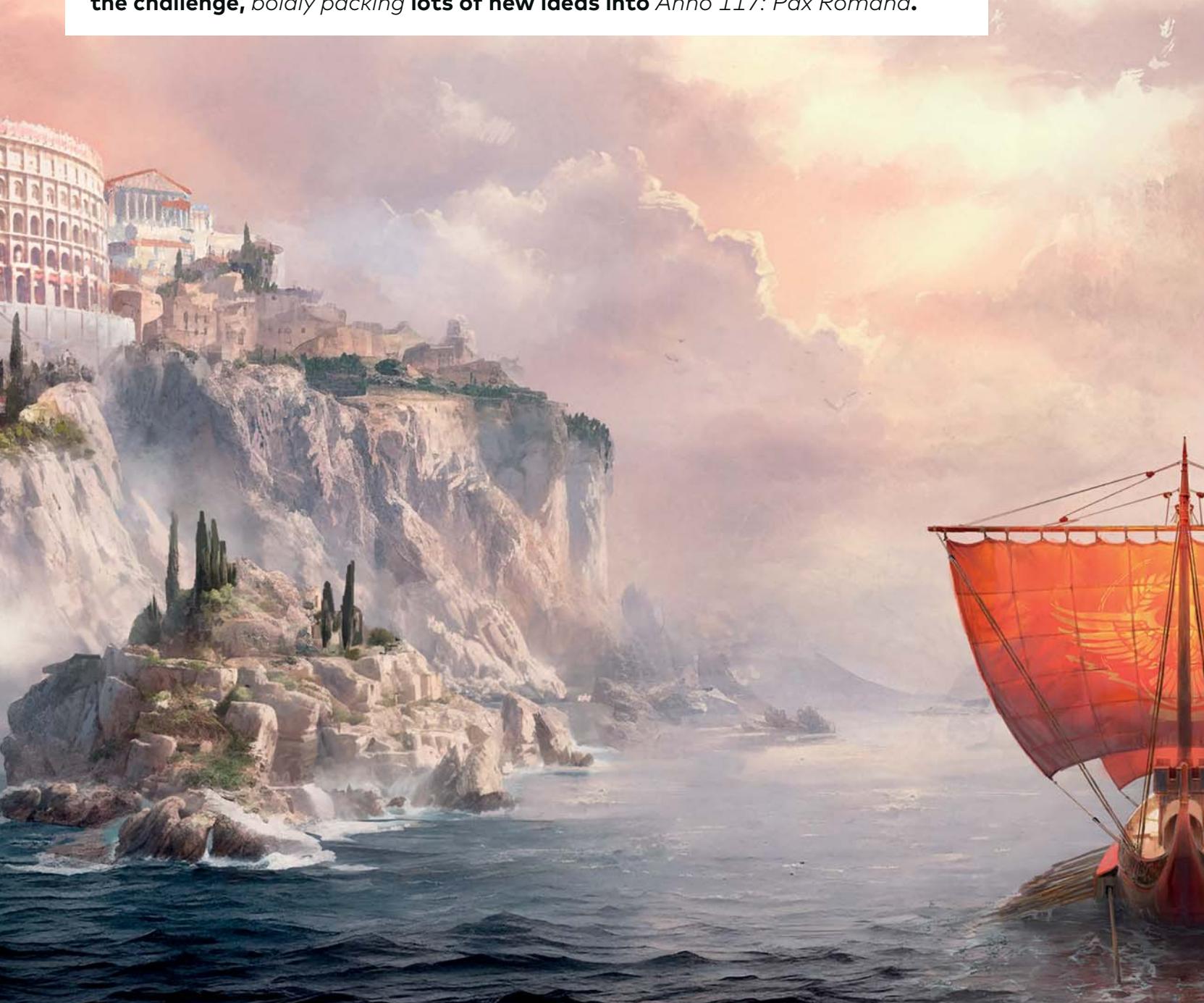
The arcade racer *Sonic Racing: CrossWorlds*, from Sega, is set to hit the starting line on 25 September. Meanwhile, astragon Entertainment and astragon Development are set to launch their ambitious ship simulation title, *Seafarer: The Ship Sim*, on 7 October in Early Access. These are just a few of the titles announced so far that will be released in the coming months. With a bit of luck, *Hollow Knight: Silksong* will finally be released this year as well. However, there are likely to be a few surprises, with some titles yet to be announced.

MARCEL KLEFFMANN

ANNO 117: PAX ROMANA

Bold Innovations and New Ideas Instead of Reskinning

Following *Anno 1800*, a new game from the long-established and highly popular **Anno** franchise is a massive undertaking. However, Ubisoft Mainz has risen to the challenge, boldly packing lots of new ideas into *Anno 117: Pax Romana*.





STARTING REGIONS There are different starting provinces: Lazio in the Roman Empire (left) or Albion in the Celtic Kingdom (right)



Anno 1800 is one of the most successful games created in Germany. The city/empire builder from Ubisoft Mainz counts over six million players and has received four season passes, each with three expansions, as well as almost 20 cosmetic DLCs. This has turned the already dense and expansive game into a veritable juggernaut – something that the developers could not have anticipated when it was released in April 2019. In March 2023, the main game even made the leap to

PS5 and Xbox Series X|S, still unusual for this genre. Building on this success, Ubisoft is approaching the next Anno game with a fresh brand design and taking the franchise back to its earliest scenario yet – far before *Anno 1404*, to the ancient world at the height of the Roman Empire. This is a scenario that has been frequently requested by players and is surprisingly rare in games. Despite this historical step backwards, Ubisoft Mainz is planning its most ambitious franchise instalment yet.

However, the core of the franchise remains unchanged. Players take on the role of governor, starting with a small settlement and gathering →

→ resources to set up production facilities. The aim is to meet the ever-growing needs of the inhabitants, allowing the settlement to advance to the next stage of civilisation and grow even bigger. As is typical of the *Anno* series, the game world consists of multiple islands and provinces that can be colonised. For the first time, players can choose between different starting provinces and rule either the Roman Empire in Latium or the Celtic Kingdom in Albion, spreading the cultural influence of the Romans or Celts – with major differences in gameplay and visuals.

Nevertheless, there are many new features that affect core systems, such as more flexible citizen needs. Unlike in *Anno 1800*, where all the needs of a population tier had to be met to progress, in *Anno 117* players only need to fulfil one need from each of several categories to advance. At the first population level (Libertus), for example, needs are categorised as food, clothing and public services. In the case of food, two goods – fish or porridge – satisfy this need, but only one is required. This means that it is no longer necessary to produce all goods or meet all needs. The higher the population level, the more categories and complex requirements are added. Although only one option per category needs to be fulfilled, fulfilling multiple needs in the same category brings additional benefits. Additionally, the new attribute and building bonus system adds depth and possibilities to the strategic layer. Attributes such as income, population, satisfaction, fire safety and health primarily increase by fulfilling the population's needs, rewarding players with positive effects such as higher tax revenues and a lower fire risk. Production buildings also receive buffs and debuffs based on their surroundings,

making city planning a strategic undertaking. Attributes affect both island and global levels and are presented clearly in a new UI bar. Overall, the developers aim to provide players with more strategic options and possibilities while making the game more accessible to newcomers, all the while continuing to offer veterans the complexity they are accustomed to.

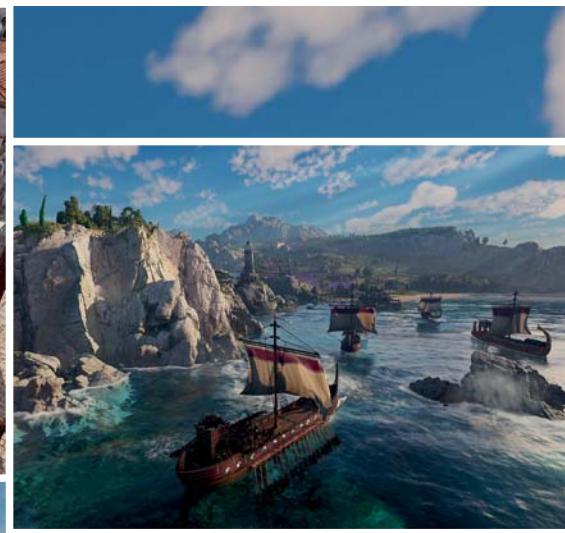
So, some significant changes have been made to the core of *Anno* – but that's not all! Ships, which are the main means of travel and transportation between islands and regions, now have a modular design. There are three types – penteconters, triremes and quinquires – that can be customised with different slots for upgrades that alter their appearance and characteristics, such as health and manoeuvrability. In terms of flexibility, the traditional rectangular building grid has been overhauled. Roads can now be built diagonally at 45-degree angles, enabling more organic city layouts. Farm fields will also adapt to the new grid. Previous *Anno* games only allowed roads to be built at 90-degree angles.

Another new feature is the Discovery Tree. Here, technologies and improvements can be researched using the "Knowledge" resource. The tree is divided into three main categories: economy, civil and military. Examples include paved roads to speed up transport, the ability to mine iron on islands where it doesn't occur naturally, and military improvements such as the "Protective Entourage", which boosts morale and strength. Players can furthermore customise their desired gameplay by focusing on the areas that are important to them. "Knowledge" is generated through certain buildings, such as the Grammaticus, and by meeting certain needs, such as providing the upper

classes with writing slates. Some technologies require specific conditions to be met, such as establishing trade routes or constructing aqueducts. Overall, there are over 150 discoveries that encourage the interconnection of various game elements and support long-term strategic decision-making. A religion mechanic is a completely new addition to the franchise. Players can build a sanctuary on their island and select a primary god whose worship will benefit the islanders. This system is based on the "Belief" attribute, which increases through public buildings and goods (e.g. wine) and, later, through shrines. The higher the devotion to a god, the stronger the associated effects, which can impact production, troop morale, shipbuilding and other areas. Initially, players can choose from four main gods (Ceres, Neptune, Minerva and Mars), whose influence can be exerted either locally, on an individual island, or globally, across all provinces. For example, a region focused on agriculture could be associated with Ceres, while a region centred on military matters could be associated with Mars. This system reflects ancient Rome's polytheistic beliefs. Deities do not appear visibly; rather, the psychological influence and motivation of the population through their beliefs is simulated.

For a long time, naval battles were the only type of combat featured in the *Anno* franchise, but in *Anno 117: Pax Romana*, land combat is making a comeback. Players can train land units that can fulfil different roles, such as infantry, ranged fighters, cavalry and artillery. Each has its own strengths and weaknesses, based on the rock-paper-scissors principle. Coordinating land and sea units is essential: ships can transport troops to enemy islands and attack land targets, →





RECORD FUNDING Ubisoft Mainz received the largest amount of funding to date from the German Federal Ministry for Economic Affairs and Climate Action for *Anno 117: Pax Romana*. At gamescom 2023, Robert Habeck, the Minister of Finance at the time, presented a symbolic cheque to Benedikt Grindel, the Managing Director of Ubisoft Blue Byte



→ and land troops can fire back at sea. Defensive structures such as palisades, walls, and defence towers can be used to protect the islands. The military is closely linked to the economy and population because all troops require resources, money and manpower for construction and maintenance. It is important to emphasise that this is only one aspect of the game, which focuses on discovery, city building and the economy. Players also have the option of focusing solely on the logistical aspects, such as weapon production and troop training, and leaving all potential battles to the AI. Peaceful players can choose to play with easier rivals or simply disable them and the pirates, making war and combat an optional choice.

As with the other games in the series, the focus is on Sandbox mode, but in *Anno 117: Pax Romana*, however, will feature a story campaign that puts players in the role of a young governor. The game will feature PvP and co-op multiplayer modes. Cross-play and cross-save features are also supported between PC and consoles.

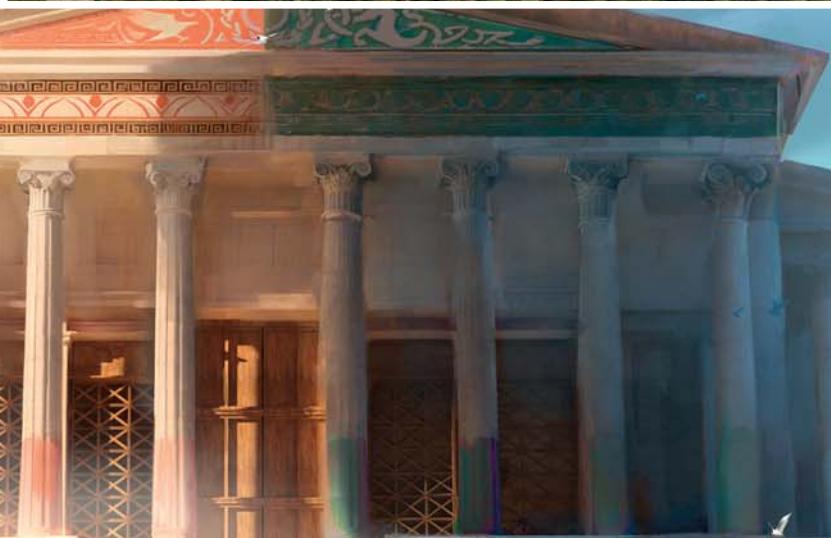
Anno 117 is set to launch on 13 November 2025. It will be available on PC (Ubisoft Store, Steam, and Epic Games Store), PS5 and Xbox Series X/S. This marks the first time in the *Anno* series that a game has been released simultaneously on PC and consoles. The game will be available in three editions: the Standard Edition for €60; the Gold Edition, which includes the Year 1 Pass and Day 1 Content (three Player Sigils, one Ship Skin and one Ornament), for €90; and the Collector's Edition, also known as the Governor's Edition, for €160. The Standard Edition will also be available in a physical box for PC and PS5. Another retail version will be available on the German market: the Tribun Edition for PC and PS5. This edition includes the main game, a steelbook case, three lithographs, and the Builder Pack. The Collector's Edition is sold exclusively by retailers and is offered only for PC (Ubisoft Connect) and PS5. This includes the Gold Edition, a steelbook, a forged *Anno* symbol, Al-

bion and Latium coins, an amphitheatre 3D puzzle, an artbook, three lithographs, a town crier's letter, and a tesserae works blueprint. The Year 1 Pass consists of three upcoming DLCs, which have only been teased with artwork so far. The first image shows a volcanic eruption (possibly related to Pompeii), a chariot race in an arena, and a settlement in a savannah landscape in front of a large pyramid. The latter hints at Egypt as a new region.

With all these new features and improvements, *Anno 117: Pax Romana* is set to be the ultimate complete package. It offers plenty of depth and choice for fans of the *Anno* series, while also being more accessible for new players without sacrificing the franchise's key elements.

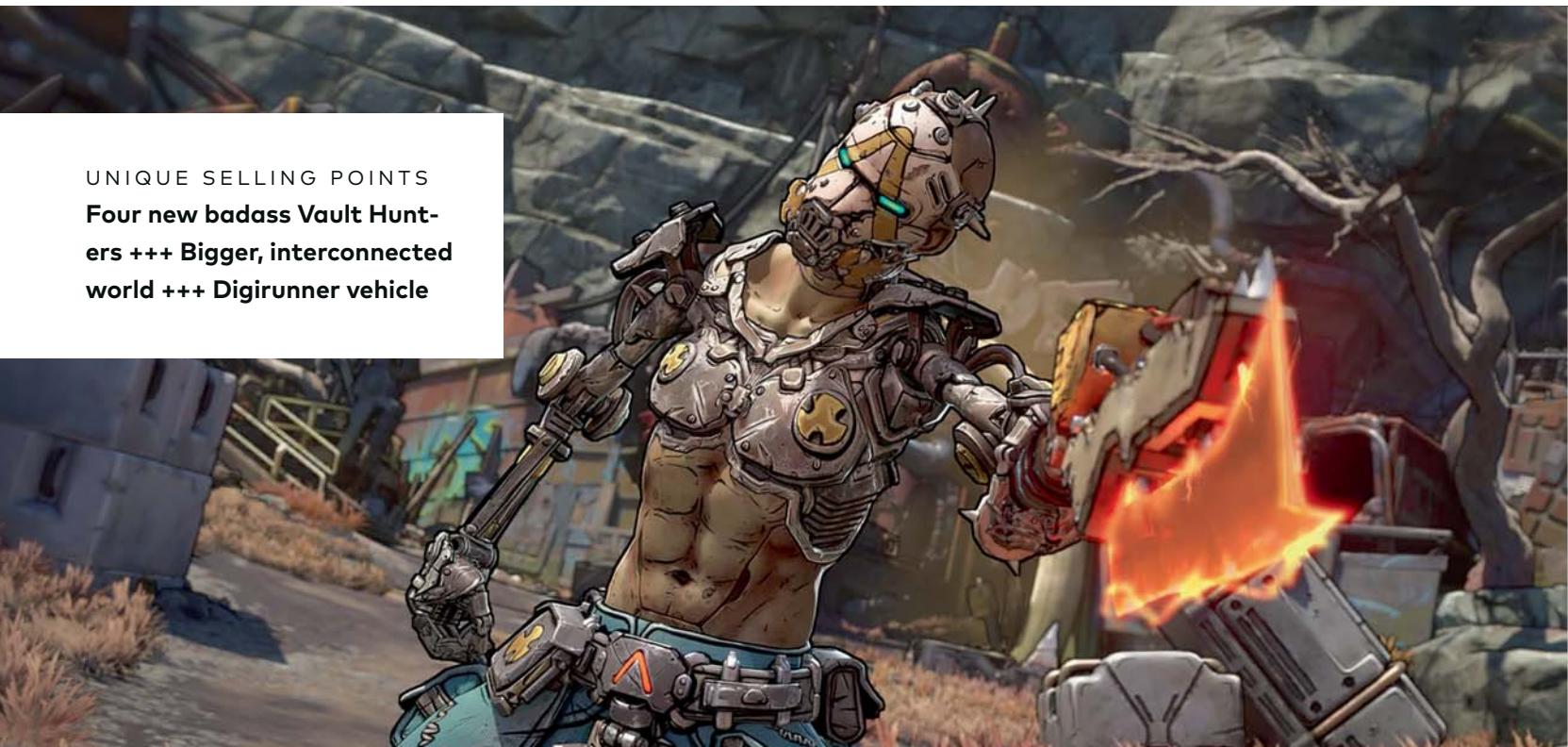
MARCEL KLEFFMANN





UNIQUE SELLING POINTS

Four new badass Vault Hunters **+++ Bigger, interconnected world** **+++ Digirunner vehicle**



SEPTEMBER

PC / PS5 / XBOX SERIES X|S

12

Borderlands 4



One of the most successful franchises from Take-Two's 2K Games label is the Borderlands shooter-looter series. To date, the franchise has sold over 94 million units. *Borderlands 2* is 2K's top-selling title, having sold over 30 million units, while *Borderlands 3* is 2K's fastest-selling title, having sold over 23 million units to date. *Borderlands 4*, developed by Gearbox Software and owned by Take-Two since mid-2024 (previously by Embracer), is also expected to achieve similar success. This time, the Vault Hunters face the oppressive Time-keeper, who controls the inhabitants of the new planet Kairos through cybernetic implants and an army of synthetic soldiers. Kairos offers a larger, seamlessly connected game world which is significantly darker and more dystopian than *Borderlands 3*. While the world is not completely open, the areas transition smoothly into one another, with dynamic weather and events providing variety. There are

four new Vault Hunters, each with the largest and most versatile skill tree in the series, allowing players to customise their playstyle. All traversal options have also been significantly expanded. New to the game is the Digirunner, an upgradeable, armed hoverbike that can be summoned. And, of course, there is an enormous variety of weapons, complemented

by new manufacturers and licensed components that can be combined and improved with mods. By the way: The Switch 2 version will be released on 3 October 2025.

MARCEL KLEFFMANN

CONCLUSION It's classic Borderlands, only bigger and a bit more serious, with more weapons.





UNIQUE SELLING POINTS
New control modes +++
Updated rosters +++ **Interesting Archetype system**

PC / PS4 / PS5 / XBOX SERIES X|S / SWITCH / SWITCH 2

EA Sports FC 26

With *EA Sports FC*, Electronic Arts had more than proven that a successful soccer game does not need the full *FIFA* license. Indeed, the continued support of a yearly cycle with *EA Sports FC 25* and now *26* show that Electronic Arts and their *EA Sports* is doing "business as usual", successfully. As such, *EA Sports FC 26* is focused on iterative additions and improvements. A new control scheme and gameplay format is now included and can be changed depending on preferences and the situation: Authentic Gameplay is more fitted for career mode and other singleplayer experiences, while Competitive Gameplay is aimed at multiplayer modes like Ultimate Team with its better reaction times and more streamlined player behaviour. Speaking of singleplayer, the management mode has also received some updates, with so called live challenges putting certain skills of team managers to the test. Those are reminiscent of real situations

from soccer history and can range from quick challenges to career-spanning targets. Individual player customisation has also received an upgrade: Players can now be outfitted with Archetypes, skill sets picked from soccer stars. These can be leveled and customised to make individual players. Otherwise, *EA Sports FC* stays *EA Sports FC*. An updated roster

of clubs and players as well as another iteration of the Ultimate Team multiplayer mode are almost self-evident, and probably the reason most players buy the *26* edition.

PASCAL WAGNER

CONCLUSION *FC* players know what they get with a new *EA* soccer game, and they gladly take it.



SEPTEMBER

26



AAA

ORDER TIP

UNIQUE SELLING POINTS

- Horror soulslike +++
- Experienced world-builders
- +++ Oppressive ambience



SEPTEMBER

PC / PS5 / XBOX SERIES X|S

04

Hell is Us



If you thought the soulslike genre of games had reached the deepest diabolical reaches of dystopian game world, along comes *Hell is Us*. The third person action-adventure from Rogue Factor and Nacon shows its reverence to the genre classics in its melee gameplay, but the setting that mixes in postapocalyptic human military and science-fiction monsters evokes its own unique atmosphere of terror. The game world's level design, described as semi-open world, is therefore more akin to the *Dark Souls* titles than the truly open world *Elden Ring*. An advantage if done right, seeing as the intersected routes and places of those titles are hailed as their biggest strength today.

And indeed, apart from the impressive monster design and oppressive ambience, the game world is the center factor of Nacon's marketing efforts for *Hell is Us*. With almost no navigational tools, the player is still supposed to find their way to the

next goal and the secrets along the way. Building levels so clever that a player's curiosity and instinct are enough to find their fun and the way back is a highly underrated skill and one many games struggle with, even great ones like *Clair Obscur: Expedition 33* recently. However, Rogue Factor have plenty of practice building compelling game worlds, albeit from

different perspectives, in their Warhammer tactical RPGs *Necromunda: Underhive Wars* and *Mordheim: City of the Damned*. We'll see if these skills are transferable.

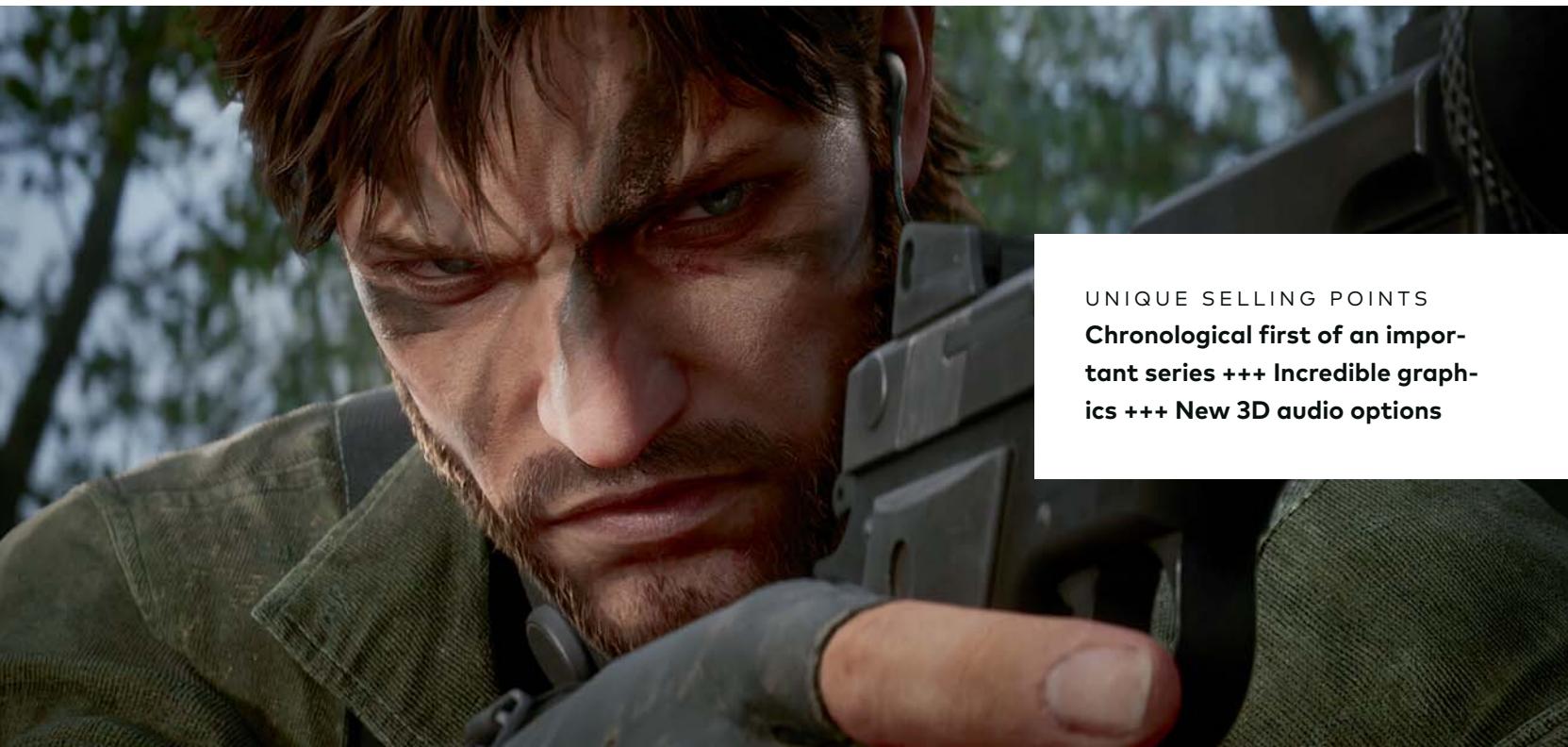
PASCAL WAGNER

CONCLUSION An enormously compelling setting brings fresh wind into a well-served genre.



AA

ORDER TIP



PC / PS5 / XBOX SERIES X/S

AUGUST

Metal Gear Solid Delta: Snake Eater

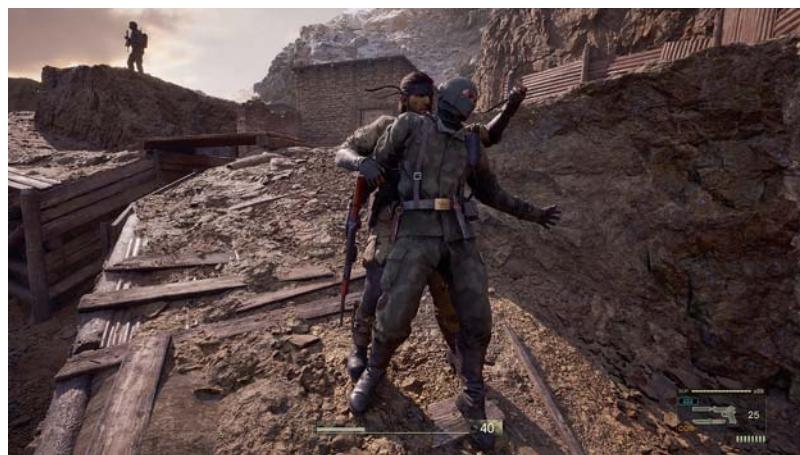
Over the last years, Konami has slowly inched its way back from concentrating on their pachinko business to releasing video games. Starting out with several classic game collection, the publisher also brought back the first *Metal Gear* and *Metal Gear Solid* titles in its *Master Collection Volume One*. Before the second issue of this Collection hits shelves – a date has not yet been revealed – and we therefore see the remaster of the original *Metal Gear Solid: Snake Eater*, Konami is bringing a full-on remake of the game that stands at the very front of the series chronological order. And while it is developed in-house, probably with a lot of former *Metal Gear Solid* series developers still on board, *Metal Gear Solid* and Konami cannot be said in the same sentence without mentioning that Hideo Kojima is of course not involved in this remake after his falling out with the publisher in the aftermath of *Metal Gear Solid V*.

The biggest selling point of *Delta* is without doubt its graphic fidelity, along with full 3D audio that is positioned to enhance the stealth gameplay of Naked Snake's original journey quite a bit. And with the last full *Metal Gear Solid* title being almost ten years in the past, multiplayer only *Metal Gear Survive* not counted, the remake serves as a welcome throw-

back into the high-profile games that *Metal Gear Solid* once were. And a nice introduction for new players, before an inevitable new game is announced in the future.

PASCAL WAGNER

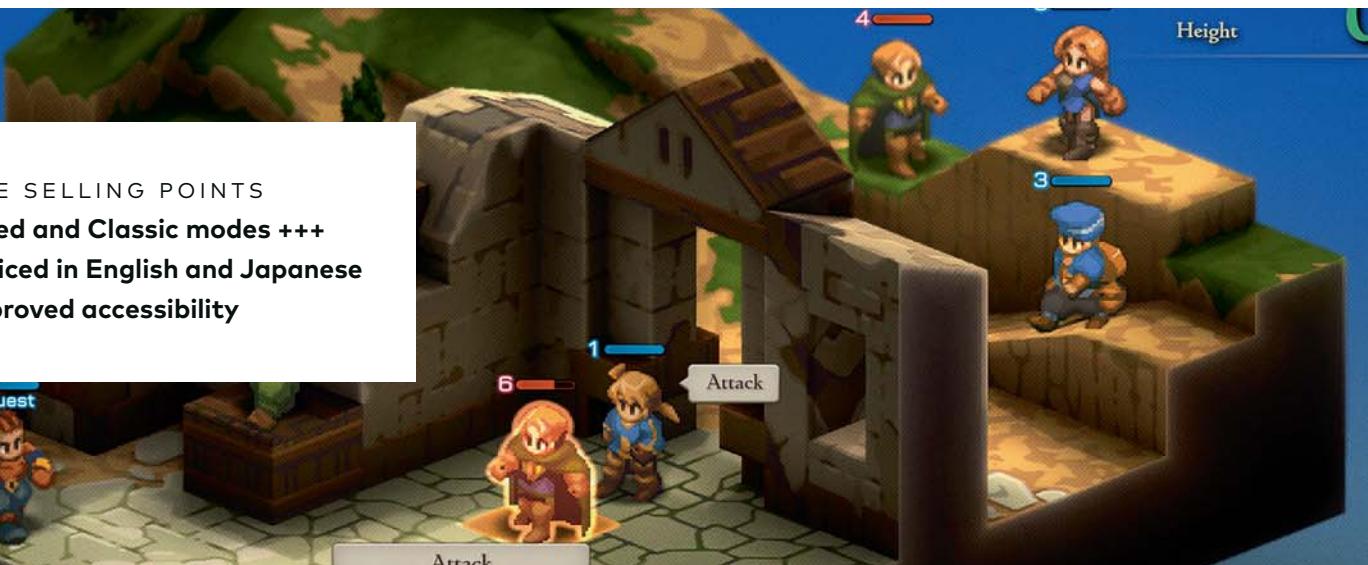
CONCLUSION I give my life, not for honor, but for you – and the graphics of this remake.



28



ORDER TIP



UNIQUE SELLING POINTS

- Enhanced and Classic modes +++
- Fully voiced in English and Japanese
- +++ Improved accessibility



SEPTEMBER

PC / PS4 / PS5 / SWITCH / SWITCH 2 / XBOX SERIES X|S

30

Final Fantasy Tactics – The Ivalice Chronicles



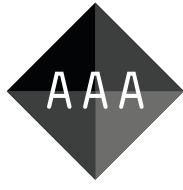
Square Enix is bringing back a classic that has been eagerly awaited by countless fans of strategy RPGs, with the release of *Final Fantasy Tactics – The Ivalice Chronicles*. The game features challenging, strategic, turn-based tactical battles combined with an in-depth character progression system offering over 20 jobs and more than 300 combinable character skills. Victory hinges on terrain, character traits and individual customisations. *The Ivalice Chronicles* offers Enhanced and Classic modes. In Enhanced Mode, the script has been reworked, with fully voiced English and Japanese dialogue. Additional dialogue has been added between characters. The user interface has been modernised, and the visuals have been improved. Accessibility is increased by new features such as turn order indicators at the touch of

a button, a tactical overview of the battlefield, fast-forward options for battles, automatic saving during combat and customisable difficulty levels. Classic Mode recreates the original 1997 version of *Final Fantasy Tactics*, including the familiar *War of the Lions*

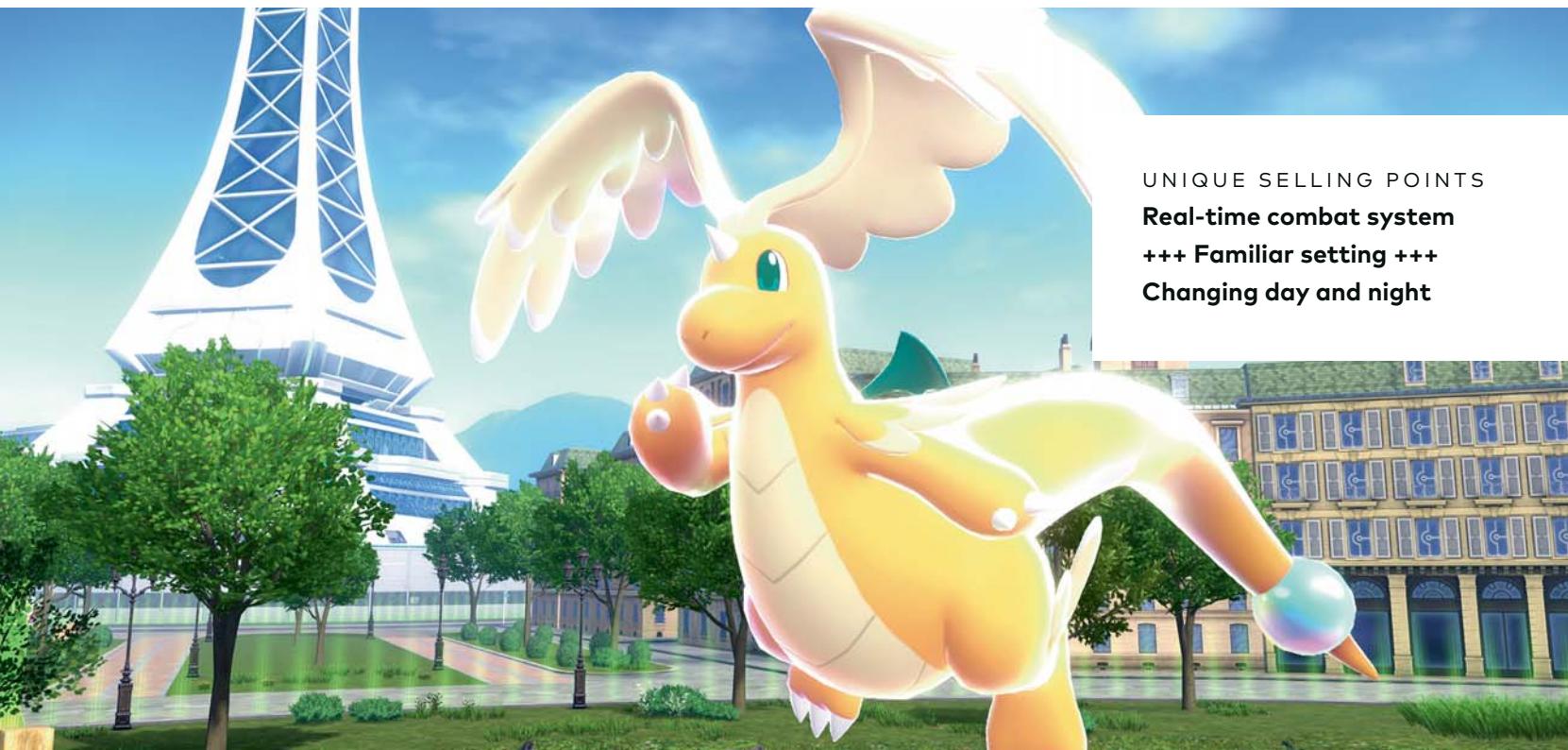
(2007) translation but without the additional content of the PSP version.

MARCEL KLEFFMANN

CONCLUSION Eagerly awaited and expanded revival of a much-loved classic.



ORDER TIP



UNIQUE SELLING POINTS

Real-time combat system

+++ Familiar setting +++

Changing day and night

SWITCH / SWITCH 2

OCTOBER

Pokémon Legends Z-A

Slowly but surely, more modern game mechanics are finding their way into the Pokémon franchise, albeit perhaps not in the main series. Instead, they are initially being introduced in the sub-series Legends. In the new game, *Pokémon Legends Z-A*, an RPG story unfolds in a single city with action elements and real-time battles. During battles, Trainers and their Pokémon move around in real-time, and Pokémon unleash their moves at their Trainer's command. Players must consider precise timing when swapping Pokémon or using moves, bearing in mind that moves have different ranges, areas of effect and activation times. Mega Evolution also plays an important role.

At the start, players choose one of three partner Pokémon: Chikorita, Tepig or Totodile. They then explore Illumina City together, a place that fans of the *Pokémon X & Y* games will already be familiar with. During the day, Trainers can explore wild zones

to catch and train Pokémon in preparation for upcoming fights. When night falls, a battle zone with red borders appears somewhere within the city. Trainers compete in these zones from dusk until dawn as part of the Z-A Royale, a competition in which participants start at Rank Z and battle their way to Rank A. When a battle zone becomes active, timing

and strategy are crucial, as landing a surprise attack can provide a significant advantage, and sometimes it is necessary to avoid higher-ranked opponents, at least initially.

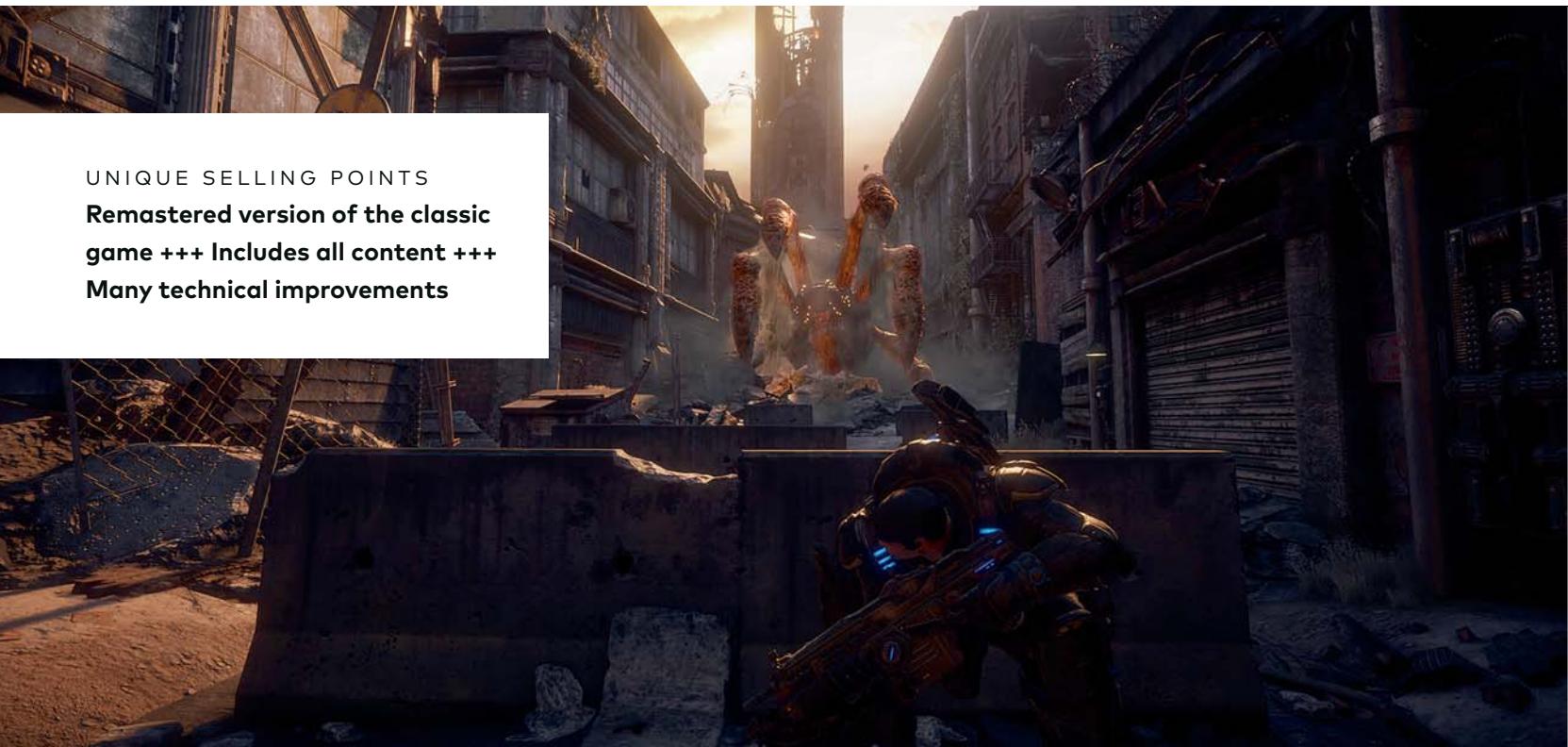
MARCEL KLEFFMANN

CONCLUSION *Pokémon Legends Z-A* is ready to take the franchise to new heights.



AAA

ORDER TIP



UNIQUE SELLING POINTS

Remastered version of the classic game **+++ Includes all content +++**
Many technical improvements

AUGUST

PC / PS5 / XBOX SERIES X|S

26

Gears of War: Reloaded



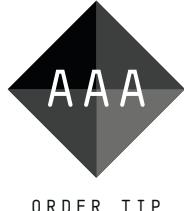
Next year, the Gears of War franchise will celebrate its 20th anniversary, which coincides with the likely release of *Gears of War: E-Day*, set fourteen years before the first instalment of the series. This is probably why the original game is being re-released. *Gears of War: Reloaded* is a remastered and natively optimised version of the classic game, available on more platforms than ever before – and it's even available straight away for PlayStation 5 and, of course, as part of Xbox Game Pass and Xbox Cloud Gaming. Developed by The Coalition in partnership with Sumo Digital and Disbelief, it includes all the content from *Gears of War: Ultimate Edition*. Players will have instant access to all post-launch downloadable content, including the bonus campaign act, all multiplayer maps and modes, and a full roster of classic characters and cosmetics that can be unlocked through progression. The campaign supports two-player co-op

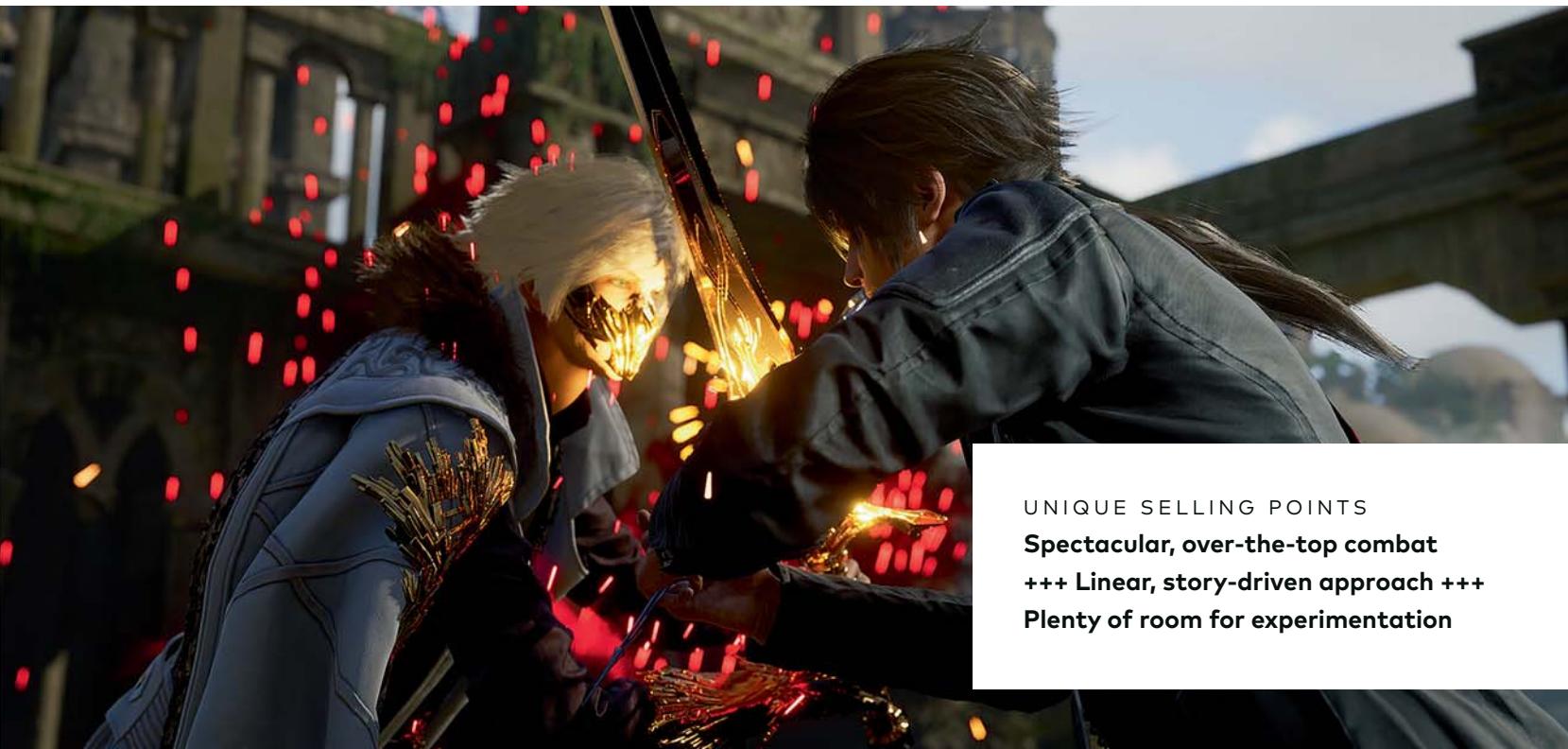
(split-screen or online) and versus multiplayer allows up to eight players with cross-play and cross-progression. *Gears of War: Reloaded* features 4K assets, remastered textures, lighting, shadows and reflections, ultrawide support, HDR and Dolby Vision, 7.1 surround sound and a variable refresh rate, as well as 60 FPS in the campaign mode with no loading

screens and 120 FPS in multiplayer mode. While newcomers can opt for a modern, streamlined control layout, veterans may prefer to relive the classic feel they are used to.

MARCEL KLEFFMANN

CONCLUSION Complete and improved edition of the classic on more platforms than ever before.





PC / PS5

AUGUST

Lost Soul Aside

Hailing from China, Yang Bing spent a considerable amount of time working on the prototype of his game, *Lost Soul Aside*, which received a lot of positive feedback online. He subsequently received financial backing from Sony Interactive Entertainment's Shanghai branch and was recruited into the company's China Hero Project (2017), a programme designed to identify and fund promising Chinese developers. Bing founded the Ultizer0 Games studio in Shanghai to develop the prototype into a full-scale action role-playing game, and in 2022, Sony Interactive Entertainment was announced as its publisher. The game centres on Kaser's journey to rescue his sister, Louisa, from otherworldly enemies. It features a fast-paced, dynamic combat system with spectacular combos, interchangeable weapons and special abilities. Players can improve their abilities via a skill tree and customise weapons. There is plenty to experiment with. They can

customise loadouts, chain synergistic combos, and strategise with Arena, Kaser's dragon-like companion. His abilities aren't just supportive; when used wisely, they can turn the tide of tough battles. Although the game is story-driven and linear, it takes place in large environments that blend fantasy and sci-fi and can be explored freely. According to the development

team, inspiration was taken from Final Fantasy, Devil May Cry and Ninja Gaiden, which is evident in the combat style and world design.

MARCEL KLEFFMANN

CONCLUSION *Lost Soul Aside* boasts spectacular battles set against equally spectacular scenery.



29



ORDER TIP



DATES

Game City Vienna

From **10 to 12 October**, Austria's biggest games convention is back in Vienna. Occupying the iconic city hall, consumers can play the newest games in the ballroom and shop for merchandise at the plaza. The entry is free. For the professional games crowd, Game City is home to Austria's most important academic games conference, the Future and Reality of Gaming (FROG).

Further dates:

5–9 September Berlin. IFA. The world's largest consumer and electronics show. ▶ ifa-berlin.com

25–28 September Tokyo. Tokyo Game Show. The leading Japanese trade fair for the domestic video game market, which of course also has global appeal. ▶ expo.nikkeibp.co.jp

27–28 September Zurich. Zurich Pop Con. Switzerland's biggest festival in autumn for fans of pop culture. ▶ zurichpopcon.ch

3–5 October Bern. HeroFest. HeroFest is the convention for nerd culture in Switzerland. ▶ herofest.ch

7–8 October Helsinki. Pocket Gamer Connects. International conference series since 2014. ▶ pgconnects.com

10–12 October Hamburg. Polaris. A mix of gaming, anime, manga and Asian pop culture. ▶ polaris-con.de

16–19 October Bangkok. gamescom asia. Debut for the first gamescom asia x Thailand Game Show. ▶ gamescom.asia

17–19 October San Diego. TwitchCon. The Twitch community meetup for fans, content creators and business partners. ▶ twitchcon.com/san-diego-2025

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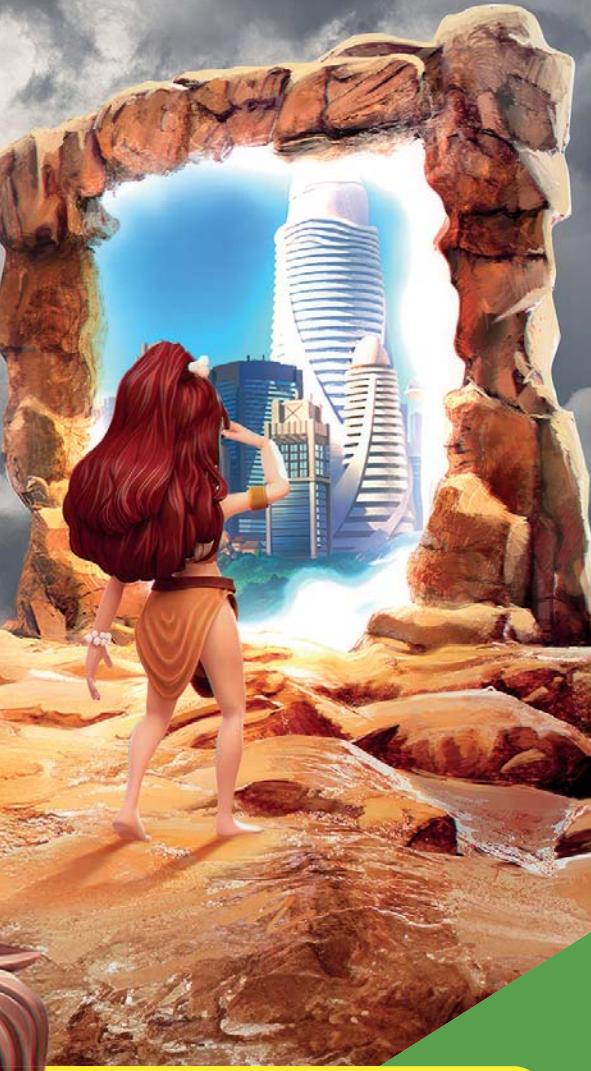
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des Gesetzes über die Presse vom 8. Oktober 1949, Bayern:
Alleinige Gesellschafter der Steininger, Wagner, Kleffmann
GbR, München sind Director of Operations
Stephan Walter Steininger wohnhaft in München,
Chief Relationship Officer Pascal Marc Wagner wohnhaft in
München und Chief Content Officer Marcel Kleffmann
wohnhaft in Friedrichshafen. München.
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